



รายงานวิจัยฉบับสมบูรณ์

ASEAN Tourism Image Positioning: The Case Study of
Singapore

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Walaiporn Rewtrakunphaiboon, Ph.D.

EXECUTIVE SUMMARY

Tourism is one of ASEAN's most important and dynamic industries. The number of tourist arrivals in ASEAN has grown rapidly from 20 millions in 1991 to 51 millions in 2005. Since tourists become more experienced and the tourism industry itself has been highly competitive, international tourism therefore presents various opportunities and challenges to the region. The research problem of this study concerns ways to help ASEAN tourist destinations to position image to the changing needs and demand of tourists. This strategy will help increasing the number of tourist arrivals to the region by attracting both new tourists and repeat tourists. This study focuses particularly on Singapore tourism as part of several studies for image positioning for all ASEAN country members. The study has three main research objectives. First, it aims to examine the current tourism policies and strategies of Singapore tourism. Second, it aims to analyze Singapore's tourism situation in terms of strengths, weaknesses, opportunities and threats. Third, it intends to recommend a new tourism theme and tourist attractions for Singapore tourism.

This study used both secondary data and primary data. Sources of secondary data were from tourism statistics, tourism reports and tourism websites. Data were used for analysing Singapore policies and strategies. For primary data, the study employed a focus-group interview with participants representing Singapore Tourism Board (STB) and National Association of Travel Agents of Singapore (NATAS) to discuss on SWOT analysis, a new theme and recommended tourist attractions.

The results show that Singapore Tourism Board (STB) has been setting up many important policies and strategies such as strategic tourism units, branding strategies and collaboration with industrial partners which truly drive Singapore to become a premiere tourist destination for all market segments. The strengths of Singapore tourism are excellent flight connections, high standard infrastructure, high quality meeting

facilities, multi-cultural society, cosmopolitan and tourist friendly destination, good brand image, world class arts and culture, strong industry partnerships and excellent tourist information. Opportunities for Singapore include food paradise of Asia, MICE centre of the world, healthcare service hub of Asia, education hub of Asia, aviation hub of Asia. The weaknesses are limited number of tourist attractions, high cost of living, service quality, lack of exoticness and small country. The threats are competition on MICE, competition on aviation hub, newly developed destinations and tourist attractions are being copied. The results provide a new theme for promoting Singapore as “Uniquely Singapore: Asia in the palm of your hand”. There are four sub-themes that flow with the theme. These are cultural tourism, nature-based tourism, leisure tourism and heritage tourism. These sub-themes include activities that can provide tourists with opportunities to experience Asia instantly by visiting different areas of multi-races so as to see their culture, ways of lives, festivals, arts and food. Visitors can also experience the history of Singapore as well as South East Asia. Fifteen must-see tourist attractions in Singapore are wildlife safaris, Orchard road, Sentosa, Chinatown, Little India, Arab Street, Esplanade, National Heritage Board Museums, Newton Hawker centre, Bugis village, Riverfronts, national parks, Marina bay, Vivo city and Singapore discovery museum.

The study reveals that Singapore has been a very successful tourist destination in ASEAN in terms of its supportive policies and creative marketing strategies. Tourism industry will still be a big source of Singapore's income for number of years. To maintain the long-lasting tourism income, Singapore should be aware that there are threats from emerging destinations which have more variety and exoticness in terms of tourist attractions. To compete with these new emerging destinations, it is therefore time for Singapore to start focusing on its strengths and opportunities and repositioning itself to the changing tourists' needs and demands.

ABSTRACT

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International tourism is the world's largest export earner and an important factor in the balance payments of countries around the world. In 2005, over half of the total number of international tourist arrivals (441.5 millions) and over half of the total amount of international tourism receipts (US\$348.2 billion) were mainly shared among European countries. The research problem of this study concerns ways to help ASEAN countries compete for market share with those European countries. One of the possible ways is to position image of ASEAN destinations to the changing needs and demand of tourists. This study focuses particularly on Singapore tourism as part of several studies for image positioning for all ASEAN country members. It analyzed Singapore tourism in terms of its plan and strategies as well as strengths, weaknesses, opportunities and threats. The study also recommend a theme and tourist attractions for positioning Singapore tourism.

This study used both secondary data and primary data. For primary data, the study employed a focus-group interview with participants from two key tourism organizations; Singapore Tourism Board (STB) and National Association of Travel Agents Singapore (NATAS). The results reveal that Singapore has a very clear aim to be the leading tourism destination in MICE, leisure and healthcare segments. This can be achievable through its strategic tourism units, branding strategies and strong support and incentives to the industrial partners. It was found that Singapore has many strengths and opportunities to become a leading tourism destination. However, its main weaknesses are the lack of exoticness and the service quality. The recommended theme for Singapore tourism would best emphasize its uniqueness of being multi-

cultural destination being “Uniquely Singapore: Asia in the palm of your hand”: Fifteen attractions are recommended under the above theme. These attractions have four underlying sub-themes of cultural tourism, nature-based tourism, leisure tourism and heritage tourism. The report ends with a conclusion and recommendation for future research.

Keywords: image, positioning, ASEAN tourism, Singapore tourism

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CHAPTER 1

INTRODUCTION

This chapter is divided into seven parts. It describes research problem, followed by research objectives, research questions, research framework, outcome, practical implications and ends with a conclusion.

1.1 Research Problem

International tourism is the world's largest export earner and an important factor in the balance payments of countries around the world. For many destinations, tourism is an important part of the economy. Due to its significance, the tourism industry has become highly competitive with the development of an increasing number of available holiday destinations. UNWTO's Tourism 2020 Vision forecasts that international tourist arrivals are expected to reach nearly 1.6 billion by the year 2020. Of these worldwide arrivals in 2020, 1.2 billion will be intraregional and 378 million will be long-haul travelers. The total tourist arrivals by region show that by 2020, the top three receiving regions will be Europe (717 million tourists), East Asia and Pacific (397 million tourists) and Americas (282 million tourists).

In 2005, international tourism arrivals achieved 806 million and international tourism receipts amounted to US\$680 billion (UNWTO, 2006). Table 1.1 shows international tourist arrivals and international receipts.

Table 1.1
International tourist arrivals and international receipts for 2005

	International tourist arrivals (million)	Market share (%)	International tourism receipts (US\$ billion)	Share (%)
World	806	100	680	100
Europe	441.5	54.8	348.2	51.2
Asia and Pacific	155.4	19.3	138.6	20.4
Americas	133.5	16.6	144.6	21.2
Africa	36.7	4.6	21.5	3.2
Middle East	39.1	4.8	27.6	4.0

Source: World Tourism Organization (UNWTO)

It can be seen from Table 1.1 that over half of the total number of international tourist arrivals (441.5 millions) and over half of the total amount of international tourism receipts (US\$348.2 billion) was mainly shared among European countries. These countries including France, Spain, Italy, United Kingdom, Germany, Turkey and Austria are among top ten tourist destinations. Asia and Pacific is second to Europe and has only 20.4% of the market share. China is the only country in Asia and Pacific in the top ten tourist destinations. It is ranked fourth in tourist arrivals and sixth in international tourism receipts (UNWTO, 2006)

Tourism is one of ASEAN's most important and dynamic industries. Its importance have been well recognized by all ASEAN member countries since it provides employment and business opportunities for a wide section of the community including small and medium scale enterprises and people in outlying areas. Travel and tourism stimulates enormous investments in new infrastructure, most of which helps to improve the living conditions of local residents as well as tourists (WTO, 2004).

Tourism in ASEAN has been growing rapidly. The number of tourist arrivals was 20 million in 1991 while there was a magnitude increase to 51 million in 2005 (ASEAN, 2006a). It is projected that the number of international tourist arrivals will continue to rise. Table 1.2 illustrates the number of tourist arrivals to ASEAN for the year 2005

(ASEAN, 2006b) and Table 1.3 presents top ten generating countries to ASEAN destinations for the year 2005 (ASEAN, 2006c).

Table 1.2
Tourist Arrivals to ASEAN for 2005 (in thousands)

Country	Total	Intra-ASEAN	Extra-ASEAN
Brunei Darussalam	127.1	76.2	51.0
Cambodia	1,421.6	219.6	1,202.0
Indonesia	5,002.1	2,038.3	2,963.8
Lao, PDR	1,095.3	794.0	301.3
Malaysia	16,431.1	12,984.6	3,446.4
Myanmar	660.2	51.7	608.5
The Philippines	2,623.1	179.4	2,443.7
Singapore	8,942.4	3,341.4	5,601.0
Thailand	11,516.9	3,099.6	8,417.4
Vietnam	3,467.8	469.8	2,998.2
ASEAN	51,287.6	23,254.3	28,003.3

Source: ASEAN Tourism Database

Table 1.3
Top Ten Generating Countries to ASEAN for 2005

Country of origin	Number of tourist arrivals (thousands)	Share (%)
ASEAN	23,254.3	45.3
European Union	5,238.3	10.2
Japan	3,650.4	7.1
China	3,007.0	5.9
Republic of Korea	2,645.3	5.2
USA	2,306.4	4.5
Australia	2,033.6	4.0
Taiwan	1,605.2	3.1
India	1,240.3	2.4
Hong Kong, SAR	1,022.4	2.0
Top ten countries	46,003.2	89.7
Rest of the world	5,284.4	10.3
Total	51,287.6	100.0

Source: ASEAN Tourism Database

It can be observed from Table 1.2 that the top three tourist destinations in ASEAN in terms of number of international tourist arrivals are Malaysia followed by Thailand and Singapore. These countries have been well developed as tourist destinations in terms of infrastructure, services and facilities. Table 1.3 can further explain that almost half of the international tourist arrivals to ASEAN is from the intra-region (45.3%), followed by European Union (10.2%) and Japan (7.1%). Besides the top ten generating countries, there is a small percentage of tourist arrivals from the rest of the world (10.3%).

Although ASEAN has been well performed in terms of international tourist arrivals but there are a few weaknesses that need to be considered. First, the market intelligence is still lacking. This information is very important for formulating marketing plan and strategies for the destinations. Second, most ASEAN destinations do not present a clear destination image to the market. Much effort has been put on advertising all the tourist attractions that the destinations have. Moreover, many ASEAN destinations try to present similar products to tourists such as beaches, mountains and natural parks. This doesn't reveal the uniqueness of each destination. Product positioning is therefore necessary to be implemented. Third, existing cooperation among ASEAN members is still not yet strong. National tourism performance priorities have been major concerns and thus override the regional benefits. Such cooperation would help to attract more visitors to the region and thus to each ASEAN member.

Due to the fact that tourists become more experienced and the tourism industry itself has been highly competitive, international tourism therefore presents various opportunities and challenges to the region. It is now time for ASEAN to move on from current business paradigms and start thinking out-of-the-box (ASEAN, 2005). Such a shift in thinking will benefit ASEAN tourism businesses and the region's economic well-being as a whole. Therefore, ASEAN countries should strongly determine to broaden cooperation towards ASEAN integration in the field of tourism to ensure that ASEAN continues to be one of the fastest growing tourism regions in the world.

Having reviewed the significance of tourism to the economy of the world and ASEAN as well as the weaknesses of ASEAN tourism, the research problem of this study concerns ways to help ASEAN tourist destinations compete for market share with those European countries. One of the possible ways is to position image of ASEAN destinations to the changing needs and demand of tourists. This strategy will help increasing the number of tourist arrivals to the region by attracting both new tourists and repeat tourists. This study focuses particularly on Singapore tourism as part of several studies for image positioning for all ASEAN country members.

1.2 Research Objectives

To answer the above three research questions, there are three objectives to this study:

- To examine current tourism policies and strategies of Singapore tourism
- To analyse present tourism situation of Singapore in terms of its strengths, weaknesses, opportunities and threats
- To recommend a new theme and tourist attractions for Singapore tourism

1.3 Research Questions

To position image of Singapore, there are three research questions for this study:

- What are current tourism policies and strategies of Singapore tourism?
- What are strengths, weaknesses, opportunities and threats of Singapore tourism?
- What should be a new theme and tourist attractions for Singapore tourism?

1.4 Research Framework

Following research questions and research objectives, the research framework covers three following areas:

1.4.1 Singapore Tourism Plans and Strategies

- Singapore tourism plans
- Singapore strategic tourism units
- Singapore tourism branding strategies
- Industry assistance
- Industry development

1.4.2 SWOT Analysis of Singapore Tourism

- Strengths
- Weaknesses
- Opportunities
- Threats

1.4.3 Recommended Theme and Attractions

After a thorough study on Singapore tourism plan and strategies and SWOT analysis, a new theme and attractions for the theme can be recommended through the discussion with the experts who directly involve in the planning and marketing of Singapore tourism.

1.5 Outcome

This study contributes in several ways for tourism destination planning and marketing for Singapore tourism. The contributions of this study are listed as follows:

- It reveals strengths and weaknesses of Singapore tourism's policies and strategies.
- It pinpoints Singapore tourism's advantages and challenges.
- It presents a new image positioning for promoting the new theme as well as the tourist attractions for Singapore tourism.

1.6 Practical Implications

This study thoroughly analyses the current tourism situation of Singapore and suggests a new image positioning for promoting Singapore tourism. The findings are therefore very useful for Singapore Tourism Board to employ suggested strategies to promote their tourism. Furthermore, it will be useful for ASEAN countries to learn from Singapore in terms of its strengths, weaknesses, opportunities and threats. Then, they can develop the uniqueness of their tourism products to compete with other tourist destinations.

1.7 Conclusion

This chapter suggests that ASEAN has been well performed in terms of international tourist arrivals but most ASEAN destinations do not present a clear destination image to the market and many destinations still lack of product positioning. Therefore, the research problem for this study is how to position image of Singapore as part of ASEAN member countries to attract the changing demands and needs of tourists. There are three research questions in the study related to Singapore tourism in terms of policies and strategies, SWOT and a new theme of Singapore tourism. This chapter also discusses outcome and practical implications of the study. The next chapter will provide an overview picture related to Singapore tourism.

CHAPTER 2

LITERATURE REVIEW

This chapter reviews the literature related to Singapore tourism and is divided into nine sections. These sections include history of Singapore, Singapore today, Singapore tourism situation, Singapore Tourism Board, Singapore tourism plan, Singapore strategic tourism units, Singapore tourism branding strategies, industry assistance and industry development.

2.1 History of Singapore

The earliest known mention of Singapore was a 3rd century Chinese account which described Singapore as "Pu-luo-chung" ("island at the end of a peninsula"). Little is known about the island's history at that time but this matter-of-fact description belies Singapore's colourful past.

By the 14th century, Singapore had become part of the mighty Sri Vijayan empire and was known as Temasek ("Sea Town"). Located at the natural meeting point of sea routes at the tip of the Malay Peninsula, Singapore had long known visits from a wide variety of sea craft, from Chinese junks, Indian vessels, Arab dhows and Portuguese battleships to Buginese schooners. During the 14th century, this small but strategically-placed island had earned a new name - "Singa Pura" ("Lion City"). According to legend, a visiting Sri Vijayan prince saw an animal he mistook for a lion and Singapore's modern day name was born.

The British provided the next notable chapter in the Singapore story. During the 18th century, they saw the need for a strategic "halfway house" to refit, feed and protect the fleet of their growing empire, as well as to forestall any advances by the Dutch in the region. It was against this political backdrop that Sir Stamford Raffles established Singapore as a trading station. The policy of free trade attracted merchants from all over Asia and from as far afield as the US and the Middle East. By 1824, just five years after

the founding of modern Singapore, the population had grown from a mere 150 to 10,000.

In 1832, Singapore became the centre of government for the Straits Settlements of Penang, Malacca and Singapore. The opening of the Suez Canal in 1869 and the advent of telegraph and steamship increased Singapore's importance as a centre for the expanding trade between East and West.

Singapore had been the site of military action in the 14th century when it became embroiled in the struggle for the Malay Peninsula between Siam (now Thailand), and the Java-based Majapahit Empire. Five centuries later, it was again the scene of significant fighting during World War II. Singapore was considered an impregnable fortress, but the Japanese overran the island in 1942. After the war, Singapore became a Crown Colony. The growth of nationalism led to self-government in 1959 and on 9 August 1965, Singapore became an independent republic (Singapore Tourism Board, n.d.).

2.2 Singapore Today

Singapore is made up of not just one island but a main island with 63 surrounding islets. The main island has a total land area of 682 square km. However, its compact size belies its economic growth. In just 150 years, Singapore has grown into a thriving centre of commerce and industry. The nation has increased its manufacturing base.

Singapore is the busiest port in the world with over 600 shipping lines sending super tankers, container ships and passenger liners to share the busy waters with coastal fishing vessels and wooden lighters.

One of the world's major oil refining and distribution centres, Singapore is a major supplier of electronic components and a leader in shipbuilding and repairing. It

has also become one of the most important financial centres of Asia, with more than 130 banks. Business dealings are facilitated by Singapore's superb communications network which links the nation to the rest of the world via satellite, 24-hour telephone systems.

Singapore's strategic location, excellent facilities, fascinating cultural contrasts and tourist attractions contribute to its success as a leading destination for both business and pleasure (Singapore Tourism Board, n.d.).

2.2.1 Demographic and Geographical Information

Singapore's strategic position has helped it grow into a major centre for trade, communications and tourism. Its geographical location is 136.8 km north of the equator, between latitudes 103 degrees 38' E and 104 degrees 06' E. It is linked to Malaysia by two causeway bridges, and the key islands of the Riau archipelago of Indonesia are just a quick ferry trip away. Thailand and the Philippines are a short plane journey away. Singapore, with an airport served by more than 69 airlines, is very much the gateway to Southeast Asia (Singapore Tourism Board, n.d.).

2.2.2 Climate

The island is warm and humid all year round, with only slight variations between the average maximum of 31 degrees Celcius and minimum of 23 degrees Celcius. This makes it ideal for those who enjoy sunbathing, swimming, sailing and other water sports. But for those who do not enjoy the tropical climate, Singapore is sheltered from the worst effects of the sun with air-conditioning in almost all of its shops, hotels, office buildings and restaurants. Rain falls throughout the year, with more consistent rain coming during the monsoon season from November to January.

2.2.3 People

Unity in diversity is the philosophy of this cosmopolitan city. Although geography has played a part in the success of Singapore, its mainstay is its people. Lacking natural resources, Singapore's strength is its hardworking, adaptable and resilient population. Singapore's population of 4.35 million comprises 77% Chinese, 14% Malays, 8% Indians and 1% Eurasians and people of other descent. The original inhabitants were Malay fishermen, but after the arrival of Sir Stamford Raffles and the establishment of a British trading post, Singapore became a magnet for migrants and merchants. Seeking a better life for themselves and their families, they came from the southern provinces of China, Indonesia, India, Pakistan, Ceylon and the Middle East. Though inter-marriages have taken place over the years, each racial group within Singapore has retained its own cultural identity while developing as an integral part of Singapore community.

2.2.4 Language

There are four official languages in Singapore. These are Malay, Mandarin, Tamil and English. English is the language of business and administration, and is widely spoken and understood. Most Singaporeans are bilingual, and speak their mother tongue as well as English. Malay is the national language.

2.2.5 Religion

With its ethnic mix also comes its diverse set of religions. Singapore's skyline boasts the distinctive minarets of mosques, spires of gothic cathedrals, intricate figurines of Hindu temple gods and distinctive roof architecture of Chinese temples. The main religions are Islam, Taoism, Buddhism, Christianity, Hinduism, Sikhism and Judaism.

2.3 Singapore Tourism Situation

In 2006, Singapore welcomed 9.7 million visitors, registering a growth of 9% over 2005. This is the highest annual visitor arrivals recorded for Singapore tourism sector outperforming the 2006 annual target of 9.45 million visitors. Indonesia, China, Australia, India and Malaysia were Singapore's top five visitor generating markets in 2006. These markets accounted for 51% of the total visitors in 2006. The total tourism receipts in 2006 has exceeded S\$12 billion target set for 2006 by 2.9%. The record-breaking number of arrivals can be attributed to several factors. The year 2005 witnessed several MICE events which generate high visitor arrivals. In addition, the entrance of low cost carriers (LCCs) has spurred regional travel through increased air capacity and lower airfares (Singapore Tourism Board, 2007).

This section is divided into six parts to provide a brief picture of Singapore tourism situation. These parts are total expenditure of visitors, average length of stay, popular tourist attractions, popular shopping items, source of information and satisfaction of services provided. It should be noted that these data are all based on 2004 statistics report (Singapore Tourism Board, 2005).

2.3.1 Total Expenditure of Visitors

In 2004, the breakdown of total expenditure of visitors by major expenditure items show that shopping expenditure constituted half (50%) of the total expenditure of visitors while expenditure on accommodation and food beverage accounted for 22% and 14% respectively.

2.3.2 Average Length of Stay

The average length of stay of international tourist in Singapore is 3.20 days in 2004. This figure is an increase of 0.6% over the year 2003.

2.3.3 Popular Tourist Attractions

Among the paid tourist attractions, Sentosa remained the most favourite ticketed attraction (32%) among visitors followed by Singapore Cable Car (18%) and Night Safari (12%). Top visitorship to Sentosa were from China, India, the Philippines and South Korea. For free access attractions, Orchard Road remained the most popular (67%), followed by Chinatown (44%) and Little India (31%).

2.3.4 Popular Shopping Items

The most popular shopping items among the visitors during 2004 are fashion and accessories (35%) followed by edibles (22%), electronic goods (17%) and cosmetics and perfumes (16%). Apparel was especially popular among visitors from the Philippines, Indonesia and New Zealand. Edibles were the most popular shopping items among the visitors from Asia, particularly Indonesia, Hong Kong, South Korea and Japan. Electronic goods were the most popular among visitors from India.

2.3.5 Source of Information

Over one-third of the visitors (39%) sought pre-arrival information from the internet. This is a common practice among visitors from France (73%), Canada (58%) and Taiwan (55%). Travel agents and tour operators were used as source of information for 30% of the visitors.

2.3.6 Satisfaction with Services Provided

Following a consistent trend for several years, airport services/facilities received a high average score of 4.7 out of a maximum of 5 by 97% of all visitors. Healthcare and medical service was rated as 4.6 while immigration clearance and public transport were rated as 4.5.

2.4 Singapore Tourism Board

The Singapore Tourism Board (STB) is an economic development agency for Singapore's tourism. The mission of the Board is to develop and champion tourism, so as to build the sector into a key driver of economic growth for Singapore. With its strategic tourism units covering the key purposes of visit by tourists, the STB works towards revitalising traditional segments ranging from sightseeing and attractions to business travel, as well as actively tap into emerging segments such as healthcare and education services. STB's goal is to create exciting and innovative experiences for our visitors, in close partnership with the trade industry, thus etching forever in visitors' minds an image of Singapore as a unique and compelling destination.

The Singapore Tourist Promotion Board was first established in 1964 with the mandate to promote Singapore as a tourist destination. The thinking of the government then was that an organization was needed to coordinate the efforts of hotels, airlines and travel agents in promoting the overall image of the destination.

Through the 1960s and 1970s, the Board actively encouraged investment in infrastructural development such as the building of hotels and tourist attractions like the Jurong Bird Park and the resort island of Sentosa. In the 1970s, the Board marketed the city as a venue for conventions and organized events to draw visitors. The 1980s heralded the implementation of a S\$1 billion Tourism Product Development Plan, which called for the saving of our historic districts, such as Chinatown, Little India, Arab Street and our colonial hub, and the rejuvenation of the Singapore River.

A collaborative effort undertaken by the Board and the local tourism industry resulted in the launch of a national tourism master plan, Tourism 21: Vision of A Tourism Capital, in July 1996. The Singapore Tourism Board has an extensive network of offices spanning the globe. Currently, there are 22 Regional Offices and 2 Marketing Representatives spread over eight regions. These regional offices work together with in-market industry partners to promote Singapore to our overseas consumers, facilitate

tourism companies in investment plans and business alliances, monitor competitive activities and support the development of bi-/multi-lateral agreements (Singapore Tourism Board, n.d.). The organization chart of STB is shown in Appendix 1.

2.5 Singapore Tourism Plan

By 2015, Singapore aims to be a destination of choice, a powerful tourism hub attracting visitors, business and talents across the world. There are three key areas of focus (Singapore Tourism Board, n.d.):

1. Strengthening Singapore's position as a Leading Convention & Exhibition City in Asia with a strong and dynamic environment
2. Developing Singapore as a leading Asian leisure destination by providing an enriching experience that is Uniquely Singapore
3. Establishing Singapore as a the Services Centre of Asia – a place where visitors come to enjoy high-end quality such as healthcare and education services

Singapore Tourism Board's targets for 2015 are given in Table 2.1:

Table 2.1
2015 targets

Indicator	2005	2015
Tourism receipts (S\$ billion)	10.8	30
Visitor arrivals (million)	8.94	17

Source: Singapore Tourism Board

As part of the Government's commitment to grow the tourism sector, a S\$2 billion Tourism Development Fund (TDF) has been set up to support initiatives in these four areas:

- Infrastructure Development: developing critical infrastructure to support tourism growth

- Capability Development: enhancing the capability of Singapore-based travel and tourism players as well as attracting world-class travel and tourism businesses and organizations to set up in Singapore

- Anchoring Iconic / Major Events: attracting iconic or mega events that will highlight Singapore as a premier destination for leisure, business and services customer segments

- Product Development: developing strategic tourism products

2.6 Singapore Strategic Tourism Units

Singapore Tourism Board (STB) has set up eight key strategic tourism units to support the tourism industry on specific areas to increase the number of tourists from different market segments (Singapore Tourism Board, n.d.). These strategic tourism units are listed as follows:

2.6.1 BTMICE Division

The BTMICE division is responsible for developing and attracting business events, creating exceptional experiences for Business & MICE visitors and establishing a vibrant Business & MICE environment with strong industry players, robust alliances and world class infrastructure.

2.6.2 Education Service Division

The Education Service division is responsible for positioning Singapore as a premier education hub in the region. It will work with the educational institutions and related service providers to cultivate strong industry alliance and to raise awareness of the quality and diversity of programs available in Singapore. It will coordinate and spearhead the overall brand building and overseas marketing of Singapore Education.

2.6.3 Healthcare Services Division

The Healthcare Services division is responsible for developing Singapore as Asia's premier healthcare service hub for international patients. This unit develops and promotes Singapore's medical services and enhances patients' and accompanying persons' experience in Singapore.

2.6.4 Food & Beverage Division

The Food & Beverage division is responsible for establishing Singapore as an irresistible food and vibrant nightlife destination offering a wide variety of local fare, international cuisines, dining experiences and nightspot entertainment.

2.6.5 Lifestyle & Events Division

The Lifestyle & Events division is responsible for making Singapore as the Events Capital of Asia by transforming the city-state into a centre for the world's best events in the arts, entertainment, festivals and sports sectors.

2.6.6 Sightseeing and Cruise Division

The Sightseeing and Cruise division is responsible for product development, packaging, distribution, marketing support, communications, investment promotion and industry development. The scope also covers promoting other ancillary activities and infrastructure like retail, F&B, accommodation, tour guiding and related services that are consumed together with the sightseeing experience.

2.6.7 Tourism Shopping Division

The Tourism Shopping division is responsible for establishing Singapore as the shopping capital of Asia. This division creates the ultimate tourism shopping experience,

offering the greatest variety and latest styles, the most engaging concepts and finest quality products.

2.6.8 Leisure Management Division

The Leisure management division aims to position the leisure group for sustained long-term growth through the adoption of appropriate and effective product development strategies, and optimal resource allocation as well as leads in integrative marketing activities to maximise yield from current product offerings through more targeted marketing and branding efforts.

2.7 Singapore Tourism Branding Strategies

The Uniquely Singapore brand was successfully launched in March 2004 in Singapore, followed by the launch in Berlin at the ITB trade show on 12 March, and subsequently in the various key markets. 'Uniquely Singapore' has been well received globally, evident from the steady increase in brand awareness and recall among our identified target segments. The Singapore Tourism Board will continue to develop unique propositions for tourists to visit Singapore that will be enriching and personal to the individual visitor to Singapore.

Uniquely Singapore - Unique is the word that STB believes that best captures Singapore as a dynamic city rich in contrast and colour where there is a harmonious blend of culture, cuisine, arts and architecture. It portrays Singapore that it is the country located in the heart of fascinating Southeast Asia and continues to embrace tradition and modernity with a bridge between the East and the West for centuries. It also conveys the message that Singapore is a city full of exciting events offering countless unique, memorable experiences waiting to be discovered.

The destination brand maps out the strategy to effectively communicate the brand essence and brand promise of Singapore to all key stake-holders, local and overseas, and potential travellers to Singapore. Internationally, it works with the Board's

Regional offices as impactful advertising campaigns and invite high-profile international media to increase the visibility of the destination. It also communicates this through the use of various media and distribution channels such as advertising, brochures, collaterals, videos, photography and online initiatives.

The destination brand remains consistently applied to the visitor and awareness of the destination brand continues to be reinforced. While the primary audience is the traveller, the brand awareness among Singaporeans and residents is also important. This includes a comprehensive domestic tourism programme, strategic outdoor advertising and communications platforms such as signage and display panels in immigration checkpoints, airports and districts with high tourist traffic. The overall objective is to achieve strong brand recognition among travelers and position Singapore as a premier travel destination around the world (Singapore Tourism Board, n.d.).

To convey the consistent 'Uniquely Singapore' brand awareness among tourists, STB has set various programs for tourists visiting Singapore. These programs are as follows:

- Uniquely Charming : for those visitors who wish to discover the ethnic, cultural and historical heritage of Singapore.
- Uniquely Eventful: for those visitors who wish to experience shows, sports, festivals and performances from Singapore's event calendar which is full of events throughout the year.
- Uniquely Refreshing: for those visitors who wish to get away from the urban life and refresh with the well-preserved greenery of this island.
- Uniquely Rejuvenating: for those visitors who wish to relax, pamper and rejuvenate at Singapore's spas ranging from modern spa treatments to traditional form of treatments.
- Uniquely Addictive: for those visitors who wish to relax through retail therapy with a vast mega shopping malls full of international labels.

- Uniquely Tantalising: for those visitors who wish to explore the variety of international cuisines and dining outlets ranging from food streets, hawker centers to chic cafes and elegant restaurants.

- Uniquely Relaxing: for those visitors who wish to have adventures and romantic escapes on the high seas with the luxury cruise.

- Uniquely Rewarding: for those visitors who wish to attend the meetings and conferences with array of recreational and leisure experiences.

- Uniquely Inspiring: for those visitors who wish to study in Singapore with the atmosphere of the combination of the East and the West.

- Uniquely Assuring: for those visitors who wish to have medical services in a country which offers world-class healthcare system.

2.8 Industry Assistance

The STB, in embracing its mission to develop and champion tourism, has adopted a more comprehensive and holistic approach to building the tourism sector into a key driver of economic growth for Singapore. Beyond the traditional role of promoting the destination, the STB also plans, regulates and facilitates the development of the tourism industry. This is to ensure the sustainable and long-term growth of the sector, and an increase in the sector's contribution to the Singapore economy.

STB's collaboration with other public agencies and the private sector is vital for the sector's success. As such, the STB supports, incentivises and catalyses the private sector to take the lead in investing for sector growth. The areas of facilitation include investment promotion, product and industry development, financial grants and tax incentives. There are three major areas that STB provide the assistance to the industry so as to encourage companies to develop new ideas and market Singapore as a premier tourism destination. These include the financial grants, tax incentives and other schemes (Singapore Tourism Board, n.d.).

2.8.1 Financial Grants

The Tourism Development Assistance Scheme (TDAS) is a financial assistance programme which aims to:

- Incentivise companies to develop new and innovative world-class tourism products so as to enhance Singapore's tourism product offerings and supporting services
- Develop the event management sector's capabilities through the staging of world-class events so as to significantly raise the profile of Singapore
- Encourage the creation of new, innovative and exciting tours and tour packages to enhance the Singapore branding
- Encourage companies to upgrade their business processes and functions so as to realise greater revenue, cost efficiencies or skills
- Upgrade the industry through assisting associations to engage approved Professional Conference Organisers to organise international association meetings;
- Encourage collaboration among different tourism entities to bring about synergy through collective efforts.

2.8.2 Tax Incentives

In terms of tax incentives, the STB offers Double Tax Deduction for Inbound Tourism Promotion and Double Tax Deduction for Local Trade Exhibitions, which are aimed at encouraging companies to market Singapore as a destination at overseas trade fairs and missions as well as to expand their markets by participating in international trade-oriented exhibitions held in Singapore. This scheme aims to encourage Singapore tourism companies to promote the provision of services for inbound tourism to Singapore through participation in STB-supported overseas trade fairs / missions.

Also recently announced are the Investment Allowance Scheme For Flagship Concepts, which aims to encourage new investments in flagship concepts stores in the

retail, food and beverage and entertainment sectors, and the Concessionary Tax Rate For Approved Mega Events, which aims to encourage event organisers to bring in stage mega events.

2.8.3 Other Schemes

The Film in Singapore! Scheme (FSS) aims to facilitate international film-makers and broadcasters in the shooting, production and post-production of quality movies and television programmes in Singapore.

The Training Industry Professionals in Tourism (TIP-iT) is an incentive scheme which aims to support strategic companies in their manpower development through the acquisition and application of specialized skills / new capabilities that would directly contribute to achieving Tourism 2015 objectives.

To make it easier for organizers to stage or expand their business event in Singapore, the Singapore Exhibition & Convention Bureau (SECB) is a group of the Singapore Tourism Board, offers customised support to business event organisers, corporations and associations under the BE in Singapore incentive scheme.

2.9 Industry Development

Industry development covers the facilitation of private and public sector initiatives for sustainable growth, well-being and vibrancy of the sectors. The division also markets the concepts and products to visitors so as to enhance Singapore's appeal as an attractive and compelling tourism destination. There are two divisions for the industry development: the Resource Development Division and the Travel & Hospitality Business Division.

2.9.1 Resource Development

This division supports the growth of a vibrant tourism industry through the efficient use of appropriate resources encompassing Manpower, Legislation and Technology by

- Formulating strategies and implementing plans to develop the capability, quality and quantity of tourism manpower
- Driving and/or facilitating the development of "hard" and "soft" infrastructure to support the strategic tourism units and tourism growth. Hard infrastructure refers to land issues while soft infrastructure pertains to visa issues.
- Guiding and/or facilitating the creation of an enabling, pro-enterprise legislative framework for the tourism sector
- Promoting the development and adoption of technologies that will enhance the competitiveness of the tourism industry and tourism partners

2.9.2 Travel and Hospitality Business

This division drives and manages industry development, investment promotion and marketing initiatives for the hospitality and travel services sectors. In the process, the division collaborates with strategic tourism units to ensure that the accommodation and travel services' needs of their target markets and segments are met.

2.10 Conclusion

This chapter provides an overview of Singapore in terms of its history, tourism situation, tourism board, tourism plan, strategic tourism units, branding strategies, industry assistance and industry development. This chapter reveals that Singapore has aggressively promoted tourism in many different ways to increase number of tourist arrivals, develop new tourism products, create unique image of Singapore from the rest of ASEAN countries. STB has played an unconventional role of national tourist office by providing full support to related businesses that can bring tourists to the country.

CHAPTER 3

METHODOLOGY

This chapter is divided into four sections. These sections are research design, research process, sample and data collection method.

3.1 Research Design

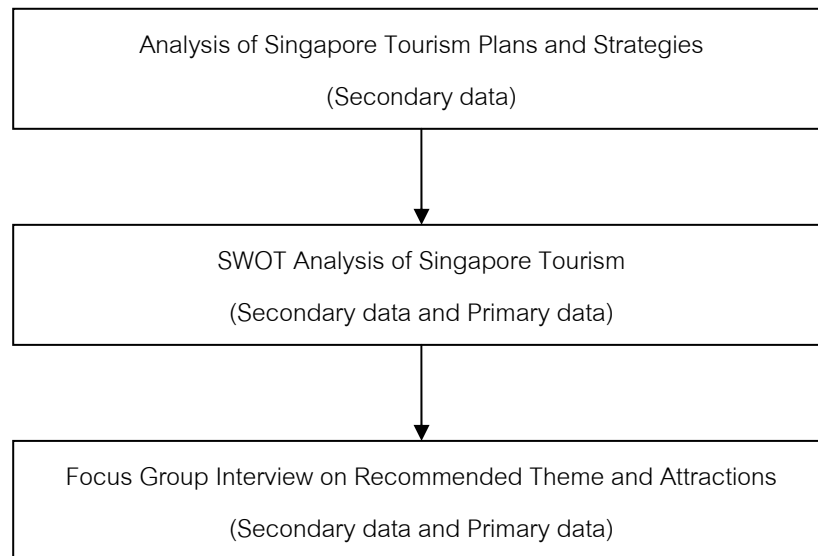
This study focuses on Singapore tourism situation and the image positioning of Singapore tourism. It used both secondary data and primary data. The secondary data analysis was first conducted for the researcher to have a clear picture of three important aspects. The first aspect is to pinpoint why Singapore is one of the leading tourist destinations in ASEAN by examining Singapore tourism plan and strategies. The second aspect is to have a clear picture of Singapore tourism situation by analyzing its strengths, weaknesses, opportunities and threats. Sources of secondary data are tourism statistics, tourism reports, tourism websites and tourism news.

For primary data, the study employed a focus-group interview with representatives from major tourist organizations to have their views on the SWOT analysis based on the secondary data analysis prepared by the researcher. Furthermore, the focus group interview was also used to discover the recommended theme and tourist attractions for Singapore tourism for image positioning.

3.2 Research Process

Following the research design, the research process of this study is divided into three major steps as shown in Figure 3.1.

Figure 3.1
Research Process



3.3 Sample

Due to the focus of the study, the sample size for the focus group includes only three participants; one from Singapore Tourism Board (STB) and National Association of Travel Agents Singapore (NATAS). They are representing the tourism organizations which directly involve in Singapore tourism planning and marketing strategies. The researcher approached both STB and NATAS for providing representatives for the interview. Two representatives from Brand Development Division and International Relations Division of Singapore Tourism Board (STB) as well as a chief executive officer from National Association of Travel Agents Singapore (NATAS) agreed to participate in the study.

3.4 Data Collection Method

All participants were clearly informed about the objectives of the study in advance. Prior the interview, they were also informed that two topics would be discussed during the interview; SWOT analysis and recommended theme and attractions for Singapore tourism. The focus group interview was conducted on 11

December 2006 from 2 pm to 4.30 pm. at NATAS office, Singapore. The focus group interview was recorded and carefully analyzed.

There were two methods used in the study. For conducting the SWOT analysis, the researcher first prepared the analysis based on the review from secondary database. The analysis was sent to the participants one week before the interview for comments. At the beginning of the interview, the researcher first introduced herself and objectives of the study. Then, the researcher introduced each participant to one another. During the interview, the analysis was used as a topic for discussions starting from strengths, weaknesses, opportunities to weaknesses. Participants were asked to feel free to comment on the analysis. The researcher's role was a moderator of the focus group interview.

For the second part on recommended theme and attractions, the participants were asked to propose a few themes for Singapore and select the best one that represents Singapore tourism. Then, they were asked to propose 15 tourist attractions that should be promoted. Finally, they were asked to discuss and agreed upon the 15 tourist attractions in order of their importance.

3.5 Conclusion

This chapter explains the research design of the study which incorporated both secondary data and primary data. The study employed SWOT analysis and focus group interview which includes participants from Singapore tourist organizations. The findings of the study will be shown in the next chapter.

CHAPTER 4

RESULTS AND DISCUSSIONS

The results of the study are divided into three parts to answer the three research questions. The first part presents analysis of the Singapore tourism policies and strategies. The second part presents SWOT analysis on Singapore as a tourist destination which includes strengths, weaknesses, opportunities and threats. The third part presents recommended theme and attractions for Singapore tourism.

4.1 Research Question 1: What are current tourism policies and strategies of Singapore tourism?

Having reviewed Singapore tourism plan and strategies of Singapore tourism in Chapter 2, it can be seen that Singapore Tourism Board (STB) has been setting up many important policies and strategies which truly drive Singapore to become a premiere tourist destination for all market segments. STB works beyond the role of traditional national tourist organization (NTO) which normally deals mostly with marketing and promotion of the destination. It has taken many initiatives in providing supports for the industry such as financial grants, tax incentives and human resource development. The followings are several observations from reviewing Singapore tourism plan, policies and strategies.

First, Singapore tourism plan conveys a very clear message that it would target at being the leading tourism destination in three major segments by 2015; MICE, leisure and healthcare. These are the three most important market segments in the tourism industry. Singapore has positioned itself very well since these segments are its key strengths. It is observed that the emphasis of the plan and strategies lie heavily on developing infrastructure and new tourism product development to attract tourists as well as bringing in major business events to Singapore for MICE segment. There should be more attention on the tourist satisfaction and service quality.

Second, it is observed that Singapore Tourism Board has set up very strong strategic tourism units to develop the product for each market segment. This is a very efficient way to boost the number of tourist arrivals and to develop new products for each market segment.

Third, Singapore tourism has implemented very clear and consistent branding strategies to both international visitors and locals. Singapore tourism under the brand of 'Uniquely Singapore' has been consistently used throughout the promoting campaigns to create brand awareness and build brand recognition. Singapore is very well-performed in its marketing strategies.

Finally, it appears that STB is the key driver of Singapore tourism industry. STB has taken the initiatives from the traditional NTO in providing strong support and incentive to catalyze private sectors in develop new ideas and to market Singapore as a tourism destination. Such strong collaboration and alliance with the industrial partners would make Singapore as a leading tourist destination not only in ASEAN but also in Asia and Pacific region.

4.2 Research Question 2: What are strengths, weaknesses, opportunities and threats of Singapore tourism?

This section is divided into four parts including strengths, weaknesses, opportunities and threats. It includes the researcher's analysis and additional comments from the participants.

4.2.1 Strengths

From the literature review and the discussion with participants, it appears that there are ten strengths of Singapore tourism which are listed as follows:

- Excellent flight connections

Singapore is situated in the heart of South-east Asia with proximity to many Asian cities. It is geographically well placed for flight connections to almost 180 cities around the world. Furthermore, there are several emerging low-cost airlines such as ValueAir, Tiger Airways and Jetstar Asia that help boosting the number of tourists to Singapore.

- High standard infrastructure

Singapore has excellent airport facilities, well-connected transportation network, high standard accommodation and telecommunication technologies.

- High quality meeting facilities

Singapore has an advantage of having excellent range of convention centres, exhibition halls and meeting venues such as Suntec Singapore International Convention & Exhibition Centre and Singapore Expo. The destination has also been awarded as the world's second top convention city and Asia's top convention city (International Congress & Convention Association – ICCA)

- Multi-cultural society

Singapore is a melting pot of several races such as Chinese, Malay, Indian and Eurasian which attracts many tourists to experience different cultures in one single destination. Examples of the heritage attractions are Chinatown, Geylang Serai, Little India and Arab Street.

- Cosmopolitan and tourist-friendly destination

Singapore is well-known for its modern lifestyle and has a variety of world-class shopping centres and nightlife entertainment. Also, most of Singaporeans speak English that makes the tourists feel at ease to travel around the destination.

- Good Brand Image

Singapore's big advantage over other ASEAN countries is being a very clean, tidy and safe tourist destination. This has been very appealing for international tourists and business travelers.

- World class arts and culture

Singapore attracts many world class arts and cultural events to the destination. This has in fact drawn a number of tourists to the destination all year round.

- Strong industry partnerships

There are many programs in which the industry have worked together to help promoting Singapore which this provides the convenience for the tourists and attracts MICE organizers.

- Providing excellent tourist information

There is a very good website of Singapore Tourism Board in providing overseas tourists for advance travel information in various languages. Furthermore, it has provided excellent signage for tourists and excellent tourist information centres.

- Strong educational system with English-speaking environment

Singapore can be promoted for children from other ASEAN countries who want to improve their English proficiencies for primary and secondary school levels. Furthermore, Singapore has been successful for attracting famous western universities for postgraduate degrees and short professional courses.

4.2.2 Weaknesses

From the literature review and the discussion with participants, it appears that there are six weaknesses of Singapore tourism which are listed as follows:

- Tourist attractions

Comparing to other ASEAN destinations, Singapore still has a limited variety of tourist attractions. Some attractions available in Singapore such as theme park, zoo and botanical garden can be found elsewhere. Also, there is a limited number of cultural and historical places. More investments for the development of attractions are needed.

- Cost of living

Being a cosmopolitan city, travelling in Singapore is more expensive than travelling in other ASEAN destinations. Such high price reflects upon the price of hotel, transportation and food. This is a major factor that discourages tourists for long stay.

- Service Quality

To match with the development of infrastructure, there is a room for improvement in terms of customer service in many aspects such as dining, shopping and sightseeing. This will enable Singapore to compete with other ASEAN destinations that have high reputation of hospitality and customer service.

- Regulated tourist destination

Being highly regarded as a clean and tidy country, it makes tourists feel uncomfortable to follow the rules at the destination while they are on holiday.

- Small country

Being a small country with high land cost, Singapore thus has a limited number of tourist attractions. Furthermore, labour cost is also very high with a limited number of staff working for hospitality and tourism industry.

- Lack of exoticness

Singapore has put a lot of efforts on the development of infrastructure and technologies. Singapore therefore becomes as developed as the western world and thus has lost the exoticness of being Asian destination.

4.2.3 Opportunities

From the literature review and the discussion with participants, it appears that there are ten opportunities of Singapore tourism which are listed as follows:

- Food Paradise of Asia

Singapore is internationally recognized as a food paradise of Asia. Its diverse dining alternatives are key draws for both leisure and business travellers.

- MICE Centre of the world

Singapore offers excellent range of convention centers and convention halls with high quality accommodation. Moreover, it is geographically well-placed for air traffic between Europe, Asia and Australia with magnitude number of flight connections. As a country that most people can speak fluent English and has business-friendly environment, Singapore definitely has an advantage of being promoted as a MICE centre of the world.

- Healthcare service hub of Asia

Currently, there are 200,000 non-citizens spend 450 million dollars a year on health in Singapore. Singapore can use this opportunity to focus on this particular market to increase the number of tourists who aim for healthcare service and their families. This could extend to spa and natural healing treatments.

- Short-break holiday for all

With the development of the two integrated resorts, Singapore is not a stand alone casino but it can become a multiple world class attractions including shops, restaurants, shows and convention centres that cater for different kinds of tourists such as friends, families and business people.

- Aviation hub of Asia

With complete facilities of the airport and a large number of flight connections to other cities of the world, Singapore can be promoted as a transit lounge of the world by offering benefits for transit passengers to spend time to explore Singapore for a short period of time.

- Fusion and cosmopolitan lifestyle destination

With its modern facilities and western way of lifestyle while located in Asia, Singapore can be promoted as a fusion and cosmopolitan lifestyle destination to attract Asian tourists to explore the country that offer all activities and entertainment that provides the best of the western world and rich culture of Asia by only travelling within a short distance.

- Education hub of Asia

With its advantage of being an English-speaking environment, Singapore can attract famous western universities to provide degrees and short courses for students. This will help increase the number of tourists for educational tourism segment and the expenditure of tourists.

- Joint marketing with other Asian destinations

Singapore can twin itself with other destination such as Cambodia, Vietnam, Myanmar to attract long-haul visitors who want to visit these destinations for both flights and accommodation.

- City of events

Singapore can attract world class special events and entertainments to Asia. The advantage of events is that they can provide the opportunities for new experience to visit Singapore.

- Benefiting from the growth of ASEAN tourism

Singapore can benefit from the growing number of ASEAN tourists since high percentage of tourists are from intra-region.

4.2.4 Threats

From the literature review and the discussion with participants, it appears that there are four threats of Singapore tourism which are listed as follows:

- Tourist attractions are being copied

Many destinations are investing in new tourism products to attract visitors. Some of Singapore's successful attractions such as night safari and underwater world are also available for tourists in many cities. Some destinations even come up with bigger projects such as Hong Kong Disneyland.

- Competition on MICE

Many destinations are catching up with Singapore in terms of infrastructure and meeting facilities in order to be a leading convention city. These destinations are highly competitive since they have lower cost of living.

- Newly developed destinations

Emerging developing tourist destinations offering greater variety of activities will soon take the market share from Singapore. They are more attractive and exotic than Singapore since Singapore has become very westernized and many attractions and activities are no longer exciting for repeat visitors or long-haul visitors from Europe, North America or Australia.

- Being replaced as a aviation hub

There are other destinations that are developing themselves as aviation hub with modern airport facilities such as Bangkok and Dubai.

4.3 Research Question 3: What should be a new theme and tourist attractions for Singapore tourism?

This section is divided into two parts which include recommended theme and attractions. The results are mainly from the opinions of the participants.

4.3.1 Recommended Theme

The participants emphasize the strength of Singapore of being a melting pot of multi-races in Asia and this actually makes Singapore become unique in diversity. They also stress on the consistent brand awareness of Singapore tourism as 'Uniquely Singapore'. Therefore, the recommended theme for Singapore tourism for this study is as follows:

"Uniquely Singapore: Asia in the palm of your hand"

4.3.2 Recommended Attractions

All participants agreed that the following fifteen recommended attractions should be promoted under the above recommended theme. These fifteen attractions are listed in order of importance as follows:

- Wildlife Safaris: Night Safari, Singapore Zoo, Jurong Bird Park
- Orchard Road
- Sentosa
- Chinatown
- Little India
- Arab Street
- Esplanade
- National Heritage Board Museums: Civic district, National Museum of Singapore, Asian Civilisation Museum, Singapore Arts Museum
- Newton Hawker Centre
- Bugis Village

- Riverfronts: Clarke Quay, Boat Quay
- National Parks: Botanical Gardens, National Orchid Gardens, Bukit Timah Nature Reserves
- Marina Bay
- Vivo city
- Singapore Discovery Centre

Under the theme of “Uniquely Singapore: Asia in the palm of your hand”, the results of recommended attractions reveal that there appears to be four underlying sub-themes to position Singapore tourism. These four sub-themes are as follows:

- Sub-theme 1: Cultural tourism

This sub-theme includes three major tourist attractions that show the diversity of races and cultures in Singapore; Chinatown, Little India, Arab Street. This sub-theme actually makes Singapore become ‘Instant Asia’ since visitors can see Chinese culture, Indian culture and Malay culture within one country.

- Sub-theme 2: Nature-based tourism

This sub-theme includes six major tourist attractions that have well-reserved national parks and wildlife. These attractions are Night Safari, Singapore Zoo, Jurong Bird Park, Botanical Gardens, National Orchid Gardens, Bukit Timah Nature Reserves

- Sub-theme 3: Leisure tourism

This sub-theme includes shopping, cuisines and entertainment. For this sub-theme, Singapore is outstanding in having the best of the east and the west in terms of mega malls and designer boutiques, international food from street foods to luxury restaurants, bars and café as well as world renowned performances. The major tourist attractions for shopping are Orchard Road, Marina Bay, Vivo city and Bugis Village while key tourist attractions for international cuisine and nightlife are Clarke Quay and Boat Quay. For entertainment, recommended attractions are Esplanade, Sentosa and Singapore Discovery Centre.

- Sub-theme 4: Heritage tourism

This sub-theme includes the history and arts of Singapore and South East Asia. This also shows Peranakan culture which is unique in this part of the world with the mixture of Malay culture with Chinese influences. These attractions are National Museum of Singapore, Asian Civilisation Museum and Singapore Arts Museum

4.4 Conclusion

This chapter discusses the results of the findings related to the three research questions. Singapore Tourism Board (STB) has been setting up many important policies and strategies such as strategic tourism units, branding strategies and collaboration with industrial partners which truly drive Singapore to become a premiere tourist destination for all market segments. It also outlines strengths, weaknesses, opportunities and threats. The results provide a new theme for promoting Singapore as “Uniquely Singapore: Asia in the palm of your hand” together with four sub-themes. It further recommends fifteen must-see tourist attractions in Singapore.

CHAPTER 5

CONCLUSION

This chapter is divided into five sections: Singapore tourism policies and strategies, SWOT analysis, recommended theme and attraction, limitations of the study and recommendations for future research.

5.1 Singapore Tourism Policies and Strategies

Singapore Tourism Board (STB) has a very clear aim of being the leading tourism destination in three specific market segments; MICE, leisure and healthcare. To achieve an aim, it can be seen that much efforts are on branding the destination by creating brand awareness and brand recognition among locals and visitors. Furthermore, there are a lot of emphases on infrastructure development as well new product development through STB's industry support and incentive programs. These factors in fact drive Singapore to become a very successful destination in terms of the number of tourist arrivals.

Although Singapore has been well-performed in infrastructure development and marketing strategies, there are several comments that need to be addresses for its plan and strategies. First, STB should not only consider an increase in the number of tourist arrivals but should also consider ways to increase the length of stay. There should be more attractions and activities that keep the tourists for longer periods. Second, the number of repeat visitors should also be taken into account. This segment is very important and will help maintaining the number of tourist arrivals to Singapore. Third, more investment should not only focus on the infrastructure development alone but it should also concentrate on the development of manpower, service quality and tourist satisfaction which are indeed considered as the weaknesses of Singapore tourism. Fourth, there should be more investment on natural resources and heritage sites as these attractions are still very limited in Singapore. This issue should be seriously

considered since man-made attractions and shopping malls that Singapore has at present can easily be copied by other destinations.

5.2 SWOT Analysis

Although being a small country, Singapore is regarded as one of the top three tourist destinations in ASEAN. It possesses many strengths as a well-developed tourist destination in many aspects such as flight connections, high standard infrastructure, high quality meeting facilities, multicultural society, cosmopolitan and tourist friendly destination, strong brand image, strong industry partnerships, excellence in providing tourist information and English-speaking environment. It can be seen that Singapore has many advantages over other ASEAN destinations regarding the tourism infrastructure, tourism environment and marketing strategies.

In terms of its weaknesses, Singapore should pay more attention to the human touch which affect on the tourist impression and satisfaction of the destination. This mainly concerns the service quality. These human elements are in fact very powerful in drawing the repeat tourists to the destination. It will also enable Singapore to compete with other destinations that have reputation of hospitality and customer service. Being well-known as a clean country, Singapore has to pay the price of being highly regulated destination which is not friendly to tourists. Tourists should be clearly informed of dos and don't in Singapore and some rules should not apply to tourists.

Major threats for Singapore tourism would be new emerging new destinations. These destinations can compete Singapore with new modern facilities and variety of exotic attractions. Regardless of the weaknesses and threats as mentioned, there are many opportunities for Singapore to start focusing on its strengths and reputation to develop tourism products that can attract more visitors to the destination. These opportunities are being food paradise of Asia, MICE centre of the world, healthcare service hub of Asia, short break holiday for all, aviation hub of Asia, fusion and cosmopolitan lifestyle destination, education hub of Asia and city of events.

It can be seen that Singapore tourism is a highly-developed tourism destination which has many strengths and opportunities to become the leading destination in ASEAN and possibly in Asia and Pacific region. By taking its weaknesses and threats into account as well as positioning itself with the right image, Singapore will be very successful in tourism market.

5.3 Theme and Recommended Attractions

For the theme of Singapore tourism, the uniqueness of Singapore is being a country of multi-culture or the melting pot of Asian culture. It is well-known of its diversity. Therefore, the theme of “Uniquely Singapore - Asia in the palm of your hand” is the most appropriate one to describe the country as a tourism destination. There are four sub-themes that flow with the theme. These are cultural tourism, nature-based tourism, leisure tourism and heritage tourism. These sub-themes include activities that can provide tourists with opportunities to experience Asia instantly by visiting different areas of multi-races so as to see their culture, ways of lives, festivals, arts and food. Visitors can also experience the history of Singapore as well as South East Asia.

5.4 Limitations of the Study

There are two major limitations for this study. First, this study has faced the difficulties of having the co-operation from Singapore tourist organizations. The researcher had to introduce herself and the objectives of the study to the organizations which some of them are not aware of the studies on image positioning for ASEAN destinations. Therefore, this study can only include few representatives from key tourism organizations including STB and NATAS whom the researcher made direct contacts and they agreed to join the study.

Due to the budget limitation, the second limitation is that this study can only include the opinions of the supply side, tourism organizations. It does not have enough budget for surveying opinions from the demand side, tourists.

5.5 Recommendation for Future Research

There are a few recommendations for future research. First, it is recommended that more representatives from other tourism organizations should be included in future research. Also, there should be more representatives from various departments of STB. Second, further research should also include the opinions of the demand side. There should be a questionnaire survey on the tourists for their opinions regarding their needs and satisfaction so that the future tourism plan and strategies can meet up with the expectation of the tourists. Third, there should be a stronger co-operation among ASEAN country members to facilitate the data collection of the study.

5.6 Conclusion

Having reviewed Singapore's strengths and opportunities, it can be seen that Singapore has been a very successful tourist destination in ASEAN. Tourism industry will still be a big source of Singapore's income for number of years. To maintain the long-lasting tourism income, Singapore should be aware that there are threats from new emerging developing countries which have variety and exoticness in terms of tourist attractions. Furthermore, these destinations are not as expensive as Singapore and they can develop modern facilities and copy the types of tourist attractions that Singapore has. To compete with these new emerging destinations, it is therefore time for Singapore to start focusing on its strengths and opportunities and repositioning itself to the changing tourists' needs and demands.

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APPENDICES

APPENDIX 1
RESEARCH ARTICLE

ASEAN IMAGE POSITIONING: THE CASE STUDY OF SINGAPORE

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ABSTRACT

International tourism is the world's largest export earner and an important factor in the balance payments of countries around the world. In 2005, over half of the total number of international tourist arrivals (441.5 millions) and over half of the total amount of international tourism receipts (US\$348.2 billion) were mainly shared among European countries. Since tourism is also significant for the rest of the world, the research problem of this study concerns ways to help ASEAN tourist destinations compete for market share with those European countries. One of the possible ways is to position their image to the changing needs and demand of tourists. This strategy will help attracting new tourists as well as repeat tourists to the destinations. This study focuses on Singapore as part of several studies for image positioning project for ASEAN country members. It analyzed Singapore tourism in terms of its strengths, weaknesses, opportunities and threats. The study also recommend a theme and tourist attractions for positioning Singapore tourism.

This study used both secondary data and primary data. For the primary data, a focus-group interview was conducted with participants from two key tourism organizations; Singapore Tourism Board (STB) and National Association of Travel Agents Singapore (NATAS). The results reveal that Singapore is a highly developed tourist destination in ASEAN. It possesses much strength over other ASEAN destinations regarding tourism environment, facilities and marketing strategies. However, Singapore's weakness is service quality which affect on the tourist impression and satisfaction of the destination. Major threats for Singapore tourism would be new emerging destinations with exotic attractions and low price. Regardless of weaknesses

and threats, there are various opportunities for Singapore to further develop their products to increase the number of tourist arrivals to the destination. The recommended theme for Singapore tourism would be best to emphasize its uniqueness of being a multi-cultural destination as “Uniquely Singapore: Asia in the palm of your hand”: Fifteen attractions are recommended under the above theme. These attractions have four underlying sub-themes of cultural tourism, nature-based tourism, leisure tourism and heritage tourism.

The paper begins with an overview picture of the world tourism, ASEAN tourism and Singapore tourism accordingly. Then, it continues with the sections on method, results, discussion of the findings, limitations of the study and ends with conclusion and recommendation for future research.

Keywords: image, positioning, Singapore tourism, ASEAN tourism

INTRODUCTION

International tourism is the world's largest export earner and an important factor in the balance payments of many countries. For many destinations, tourism is an important part of the economy. Due to its significance, the tourism industry has become highly competitive with the development of an increasing number of available holiday destinations. In 2005, international tourism arrivals achieved 806 million and international tourism receipts amounted to US\$680 billion (UNWTO, 2006). Table 1 shows international tourist arrivals and international receipts.

Table 1
International Tourist Arrivals and International Receipts for 2005

	International tourist arrivals (million)	Market share (%)	International tourism receipts (US\$ billion)	Share (%)
World	806	100	680	100
Europe	441.5	54.8	348.2	51.2
Asia and Pacific	155.4	19.3	138.6	20.4
Americas	133.5	16.6	144.6	21.2
Africa	36.7	4.6	21.5	3.2
Middle East	39.1	4.8	27.6	4.0

Source: World Tourism Organization (UNWTO)

It can be seen from Table 1 that over half of the total number of international tourist arrivals (441.5 millions) and over half of the total amount of international tourism receipts (US\$348.2 billion) was mainly shared among European countries. These countries including France, Spain, Italy, United Kingdom, Germany, Turkey and Austria are among top ten tourist destinations (UNWTO, 2006).

ASEAN Tourism

Tourism is one of ASEAN's most important and dynamic industries. It provides employment and business opportunities for a wide section of the community including small and medium scale enterprises and people in outlying areas. Travel and tourism stimulates enormous investments in new infrastructure, most of which helps to improve the living conditions of local residents as well as tourists (UNWTO, 2004).

Tourism in ASEAN has been growing rapidly. The number of tourist arrivals was 20 million in 1991 while there was a magnitude increase to 51 million in 2005 (ASEAN, 2006a). It is projected that the flow of number of international tourist arrivals will continue to rise. Table 2 illustrates the number of tourist arrivals to ASEAN for the year

2005 (ASEAN, 2006b) and Table 3 presents top ten generating countries to ASEAN destinations for the year 2005 (ASEAN, 2006c).

Table 2
Tourist Arrivals to ASEAN for 2005 (in thousands)

Country	Total	Intra-ASEAN	Extra-ASEAN
Brunei Darussalam	127.1	76.2	51.0
Cambodia	1,421.6	219.6	1,202.0
Indonesia	5,002.1	2,038.3	2,963.8
Lao, PDR	1,095.3	794.0	301.3
Malaysia	16,431.1	12,984.6	3,446.4
Myanmar	660.2	51.7	608.5
The Philippines	2,623.1	179.4	2,443.7
Singapore	8,942.4	3,341.4	5,601.0
Thailand	11,516.9	3,099.6	8,417.4
Vietnam	3,467.8	469.8	2,998.2
ASEAN	51,287.6	23,254.3	28,003.3

Source: ASEAN Tourism Database

Table 3
Top Ten Generating Countries to ASEAN for 2005

Country of origin	Number of tourist arrivals (thousands)	Share (%)
ASEAN	23,254.3	45.3
European Union	5,238.3	10.2
Japan	3,650.4	7.1
China	3,007.0	5.9
Republic of Korea	2,645.3	5.2
USA	2,306.4	4.5
Australia	2,033.6	4.0
Taiwan	1,605.2	3.1
India	1,240.3	2.4
Hong Kong, SAR	1,022.4	2.0
Top ten countries	46,003.2	89.7
Rest of the world	5,284.4	10.3
Total	51,287.6	100.0

Source: ASEAN Tourism Database

It can be observed from Table 2 that the top three tourist destinations in ASEAN in terms of number of international tourist arrivals are Malaysia followed by Thailand and Singapore. These countries have been well developed as tourist destinations in terms of infrastructure, services and facilities. Table 3 can further explain that almost half of the international tourist arrivals to ASEAN is from the intra-region (45.3%), followed by European Union (10.2%) and Japan (7.1%). Besides the top ten generating countries, there is a small percentage of tourist arrivals from the rest of the world (10.3%).

Since tourists become more experienced and the tourism industry itself has been highly competitive, international tourism therefore presents various opportunities and challenges to the region. It is now time for ASEAN to move on from current business paradigms and start thinking out-of-the-box (ASEAN, 2005). Such a shift in thinking will benefit ASEAN tourism businesses and the region's economic well-being as a whole. Therefore, ASEAN countries should strongly determine to broaden cooperation towards ASEAN integration in the field of tourism to ensure that ASEAN continues to be one of the fastest growing tourism regions in the world.

Singapore Tourism Situation

In 2006, Singapore welcomed 9.7 million visitors, registering a growth of 9% over 2005. This is the highest annual visitor arrivals recorded for Singapore tourism sector outperforming the 2006 annual target of 9.45 million visitors. Indonesia, China, Australia, India and Malaysia were Singapore's top five visitor generating markets in 2006. These markets accounted for 51% of the total visitors in 2006. The total tourism receipts in 2006 has exceeded S\$12 billion target set for 2006 by 2.9%. The record-breaking number of arrivals can be attributed to several factors. The year 2006 witnessed several MICE events which generate high visitor arrivals. In addition, the entrance of low cost carriers (LCCs) has spurred regional travel through increased air capacity and lower airfares (Singapore Tourism Board, 2007).

Total expenditure of visitors

In 2004, the breakdown of total expenditure of visitors (TEV) by major expenditure items show that shopping expenditure constituted more than half (50%) of the total expenditure of visitors while expenditure on accommodation and food beverage accounted for 22% and 14% respectively (Singapore Tourism Board, 2005) .

Average Length of Stay

The average length of stay is 3.20 in 2004 increased by 0.6% over 2003.

Popular Tourist Attractions

Among the paid tourist attractions, Sentosa remained the most favorite ticketed attraction (32%) among visitors followed by Singapore Cable Car (18%) and Night Safari (12%). Top visitorship to Sentosa were from China, India, the Philippines and South Korea. For free access attractions, Orchard Road remained the most popular (67%), followed by Chinatown (44%) and Little India (31%).

Popular Shopping Items

The most popular shopping items among the visitors during 2004 are fashion and accessories (35%) followed by edibles (22%), electronic goods (17%) and cosmetics and perfumes (16%). Apparel was especially popular among visitors from the Philippines, Indonesia and New Zealand. Edibles were the most popular shopping items among the visitors from Asia, particularly Indonesia, Hong Kong, South Korea and Japan. Electronic goods were the most popular among visitors from India.

Source of Information

Over one-third of the visitors (39%) sought pre-arrival information from the internet. This is a common practice among visitors from France (73%), Canada (58%) and Taiwan (55%). Travel agents and tour operators were used as source of information for 30% of the visitors.

Satisfaction with Services Provided

Following a consistent trend for several years, airport services/facilities received a high average score of 4.7 out of a maximum of 5 by 97% of all visitors. Healthcare and medical service was rated as 4.6 while immigration clearance and public transport were rated as 4.5.

Having reviewed the tourism situation of the world and ASEAN, the research problem of this study concerns ways to help ASEAN tourist destinations compete for market share with those European countries. One of the possible ways is to position image of ASEAN destinations to the changing needs and demand of tourists. This strategy will help increasing the number of tourist arrivals to the region by attracting both new tourists and repeat tourists. This study focuses particularly on Singapore tourism as part of several studies for image positioning for all ASEAN country members. The study has two main research objectives. First, it aims to analyze Singapore's tourism situation in terms of strengths, weaknesses, opportunities and threats. Second, it intends to recommend a new tourism theme and tourist attractions for Singapore tourism.

METHOD

This study used both secondary data and primary data. Sources of secondary data were from tourism statistics, tourism reports, tourism websites and tourism text books. For primary data, the study employed a focus-group interview with three participants from Singapore Tourism Board (STB) and National Association of Travel Agents of Singapore (NATAS). All participants were clearly informed about the objectives of the study in advance. Prior the interview, they were also informed that two topics would be discussed during the interview; SWOT analysis and recommended theme and attractions for Singapore tourism. The focus group interview was conducted on 11 December 2006 from 2 pm to 4.30 pm. at NATAS office, Singapore. The focus group interview was recorded and carefully analyzed.

There were two methods used in the study. For conducting the SWOT analysis, the researcher first prepared the analysis based on the review from secondary database. The analysis was sent to the participants one week before the interview for comments. During the interview, the analysis was used as a topic for discussions starting from strengths, weaknesses, opportunities to weaknesses. Participants were asked to feel free to comment on the analysis. The researcher's role was a moderator of the focus group interview. For the second part on recommended theme and attractions, the participants were asked to propose a few themes for Singapore and select the best one that represents Singapore tourism. Then, they were asked to propose 15 tourist attractions that should be promoted. Finally, they were asked to discuss and agreed upon the 15 tourist attractions in order of their importance.

RESULTS

The results of the study are divided into two parts. The first part presents SWOT analysis which includes strengths, weaknesses, opportunities and weaknesses of Singapore tourism. The second part presents recommended theme and attractions for Singapore tourism.

1. SWOT Analysis

1.1 Strengths

There are ten strengths of Singapore tourism listed as follows:

- Excellent flight connections

Singapore is situated in the heart of South-east Asia with proximity to many Asian cities. It is geographically well placed for flight connections to almost 180 cities around the world. Furthermore, there are several emerging low-cost airlines such as ValueAir, Tiger Airways and Jetstar Asia that help boosting the number of tourists to Singapore.

- High standard infrastructure

Singapore has excellent airport facilities, well-connected transportation network, high standard accommodation and telecommunication technologies.

- High quality meeting facilities

Singapore has an advantage of having excellent range of convention centres, exhibition halls and meeting venues such as Suntec Singapore International Convention & Exhibition Centre and Singapore Expo. The destination has also been awarded as the world's second top convention city and Asia's top convention city (International Congress & Convention Association – ICCA)

- Multi-cultural society

Singapore is a melting pot of several races such as Chinese, Malay, Indian and Eurasian which attracts many tourists to experience different cultures in one single destination. Examples of the heritage attractions are Chinatown, Geylang Serai, Little India and Arab Street.

- Cosmopolitan and tourist-friendly destination

Singapore is well-known for its modern lifestyle and has a variety of world-class shopping centres and nightlife entertainment. Also, most of Singaporeans speak English that makes the tourists feel at ease to travel around the destination.

- Good Brand Image

Singapore's big advantage over other ASEAN countries is being a very clean, tidy and safe tourist destination. This has been very appealing for international tourists and business travellers.

- World class arts and culture

Singapore attracts many world class arts and cultural events to the destination. This has in fact drawn a number of tourists to the destination all year round.

- Strong industry partnerships

There are many programs in which the industry have worked together to help promoting Singapore which this provides the convenience for the tourists and attracts MICE organizers.

- Providing excellent tourist information

There is a very good website of Singapore Tourism Board in providing overseas tourists for advance travel information in various languages. Furthermore, it has provided excellent signage for tourists and excellent tourist information centres.

- Strong educational system with English-speaking environment

Singapore can be promoted for children from other ASEAN countries who want to improve their English proficiencies for primary and secondary school levels. Furthermore, Singapore has been successful for attracting famous western universities for postgraduate degrees and short professional courses.

1.2 Weaknesses

There are six weaknesses of Singapore tourism listed as follows:

- Tourist attractions

Comparing to other ASEAN destinations, Singapore still has a limited variety of tourist attractions. Some attractions available in Singapore such as theme park, zoo and botanical garden can be found elsewhere. Also, there is a limited number of cultural and historical places. More investments for the development of attractions are needed.

- Cost of living

Being a cosmopolitan city, travelling in Singapore is more expensive than travelling in other ASEAN destinations. Such high price reflects upon the price of hotel, transportation and food. This is a major factor that discourages tourists for long stay.

- Service Quality

To match with the development of infrastructure, there is a room for improvement in terms of customer service in many aspects such as dining, shopping and sightseeing. This will enable Singapore to compete with other ASEAN destinations that have high reputation of hospitality and customer service.

- Regulated tourist destination

Being highly regarded as a clean and tidy country, it makes tourists feel uncomfortable to follow the rules at the destination while they are on holiday.

- Small country

Being a small country with high land cost, Singapore thus has a limited number of tourist attractions. Furthermore, labour cost is also very high with a limited number of staff working for hospitality and tourism industry.

- Lack of exoticness

Singapore has put a lot of efforts on the development of infrastructure and technologies. Singapore therefore becomes as developed as the western world and thus has lost the exoticness of being Asian destination.

1.3 Opportunities

There are ten opportunities of Singapore tourism listed as follows:

- Food Paradise of Asia

Singapore is internationally recognized as a food paradise of Asia. Its diverse dining alternatives are key draws for both leisure and business travellers.

- MICE Centre of the world

Singapore offers excellent range of convention centers and convention halls with high quality accommodation. Moreover, it is geographically well-placed for air traffic between Europe, Asia and Australia with magnitude number of flight connections. As a

country that most people can speak fluent English and has business-friendly environment, Singapore definitely has an advantage of being promoted as a MICE centre of the world.

- Healthcare service hub of Asia

Currently, there are 200,000 non-citizens spend 450 million dollars a year on health in Singapore. Singapore can use this opportunity to focus on this particular market to increase the number of tourists who aim for healthcare service and their families. This could extend to spa and natural healing treatments.

- Short-break holiday for all

With the development of the two integrated resorts, Singapore is not a stand alone casino but it can become a multiple world class attractions including shops, restaurants, shows and convention centres that cater for different kinds of tourists such as friends, families and business people.

- Aviation hub of Asia

With complete facilities of the airport and a large number of flight connections to other cities of the world, Singapore can be promoted as a transit lounge of the world by offering benefits for transit passengers to spend time to explore Singapore for a short period of time.

- Fusion and cosmopolitan lifestyle destination

With its modern facilities and western way of lifestyle while located in Asia, Singapore can be promoted as a fusion and cosmopolitan lifestyle destination to attract Asian tourists to explore the country that offer all activities and entertainment that provides the best of the western world and rich culture of Asia by only travelling within a short distance.

- Education hub of Asia

With its advantage of being an English-speaking environment, Singapore can attract famous western universities to provide degrees and short courses for students. This will help increase the number of tourists for educational tourism segment and the expenditure of tourists.

- Joint marketing with other Asian destinations

Singapore can twin itself with other destination such as Cambodia, Vietnam, Myanmar to attract long-haul visitors who want to visit these destinations for both flights and accommodation.

- City of events

Singapore can attract world class special events and entertainments to Asia. The advantage of events is that they can provide the opportunities for new experience to visit Singapore.

- Benefiting from the growth of ASEAN tourism

Singapore can benefit from the growing number of ASEAN tourists since high percentage of tourists are from intra-region.

1.4 Threats

There are four threats of Singapore tourism listed as follows:

- Tourist attractions are being copied

Many destinations are investing in new tourism products to attract visitors. Some of Singapore's successful attractions such as night safari and underwater world are also available for tourists in many cities. Some destinations even come up with bigger projects such as Hong Kong Disneyland.

- Competition on MICE

Many destinations are catching up with Singapore in terms of infrastructure and meeting facilities in order to be a leading convention city. These destinations are highly competitive since they have lower cost of living.

- Newly developed destinations

Emerging developing tourist destinations offering greater variety of activities will soon take the market share from Singapore. They are more attractive and exotic than Singapore since Singapore has become very westernized and many attractions and activities are no longer exciting for repeat visitors or long-haul visitors from Europe, North America or Australia.

- Being replaced as a aviation hub

There are other destinations that are developing themselves as aviation hub with modern airport facilities such as Bangkok and Dubai.

2. Recommended Theme and Attractions

2.1 Recommended Theme

The participants emphasize the strength of Singapore of being a melting pot of multi-races in Asia and this actually makes Singapore become unique in diversity. They also stress on the consistent brand awareness of Singapore tourism as 'Uniquely Singapore'. Therefore, the recommended theme for Singapore tourism for this study is as follows:

Uniquely Singapore "Asia in the palm of your hand"

2.2 Recommended attractions

All participants agreed that the following fifteen recommended attractions should be promoted under the above recommended theme. These fifteen attractions are listed in order of importance as follows:

1. Wildlife Safaris: Night Safari, Singapore Zoo, Jurong Bird Park
2. Orchard Road
3. Sentosa
4. Chinatown
5. Little India
6. Arab Street
7. Esplanade
8. National Heritage Board: Civic district, National Museum of Singapore, Asian Civilisation Museum, Singapore Arts Museum
9. Newton Hawker Centre
10. Bugis Village
11. Riverfronts: Clarke Quay, Boat Quay
12. National Parks Board: Botanical Gardens, National Orchid Gardens, Bukit Timah Nature Reserves
13. Marina Bay
14. Vivo city
15. Singapore Discovery Centre

Under the theme of “Uniquely Singapore: Asia in the palm of your hand”, the results of recommended attractions reveal that there appears to be four underlying sub-themes to position Singapore tourism. These four sub-themes are as follows:

- Sub-theme 1: Cultural tourism

This sub-theme includes three major tourist attractions that show the diversity of races and cultures in Singapore; Chinatown, Little India, Arab Street. This sub-theme

actually makes Singapore become 'Instant Asia' since visitors can see Chinese culture, Indian culture and Malay culture within one country.

- Sub-theme 2: Nature-based tourism

This sub-theme includes six major tourist attractions that have well-reserved national parks and wildlife. These attractions are Night Safari, Singapore Zoo, Jurong Bird Park, Botanical Gardens, National Orchid Gardens, Bukit Timah Nature Reserves

- Sub-theme 3: Leisure tourism

This sub-theme includes shopping, cuisines and entertainment. For this sub-theme, Singapore is outstanding in having the best of the east and the west in terms of mega malls and designer boutiques, international food from street foods to luxury restaurants, bars and café as well as world renowned performances. The major tourist attractions for shopping are Orchard Road, Marina Bay, Vivo city and Bugis Village while key tourist attractions for international cuisine and nightlife are Clarke Quay and Boat Quay. For entertainment, recommended attractions are Esplanade, Sentosa and Singapore Discovery Centre.

- Sub-theme 4: Heritage tourism

This sub-theme includes the history and arts of Singapore and South East Asia. This also shows Peranakan culture which is unique in this part of the world with the mixture of Malay culture with Chinese influences. These attractions are National Museum of Singapore, Asian Civilisation Museum and Singapore Arts Museum

DISCUSSION

Although being a small country, Singapore is regarded as one of the top three tourist destinations in ASEAN. It possesses much strength as a well-developed tourist destination in many aspects such as flight connections, high standard infrastructure, high quality meeting facilities, multicultural society, cosmopolitan and tourist friendly destination, strong brand image, strong industry partnerships, excellence in providing

tourist information and English-speaking environment. It can be seen that Singapore has many advantages over other ASEAN destinations regarding the tourism infrastructure, tourism environment and marketing strategies.

In terms of its weaknesses, Singapore should pay more attention to the human touch which affect on the tourist impression and satisfaction of the destination. This mainly concerns the service quality. These human elements are in fact very powerful in drawing the repeat tourists to the destination. It will also enable Singapore to compete with other destinations that have reputation of hospitality and customer service. Being well-known as a clean country, Singapore has to pay the price of being highly regulated destination which is not friendly to tourists. Tourists should be clearly informed of dos and don't in Singapore and some rules should not apply to tourists.

Major threats for Singapore tourism would be new emerging new destinations. These destinations can compete Singapore with new modern facilities and variety of exotic attractions. Regardless of the weaknesses and threats as mentioned, there are many opportunities for Singapore to start focusing on its strengths and reputation to develop tourism products that can attract more visitors to the destination. It can be seen that Singapore tourism is a highly-developed tourism destination which has many strengths and opportunities to become the leading destination in ASEAN and possibly in Asia and Pacific region. By taking its weaknesses and threats into account as well as positioning itself with the right image, Singapore will be very successful in tourism market.

For the theme of Singapore tourism, the uniqueness of Singapore is being a country of multi-culture or the melting pot of Asian culture. It is well-known of its diversity. Therefore, the theme of "Uniquely Singapore - Asia in the palm of your hand" is the most appropriate one to describe the country as a tourism destination. There are four sub-themes that flow with the theme. These are cultural tourism, nature-based tourism, leisure tourism and heritage tourism. These sub-themes include activities that can provide tourists with opportunities to experience Asia instantly by visiting different

areas of multi-races so as to see their culture, ways of lives, festivals, arts and food. Visitors can also experience the history of Singapore as well as South East Asia.

LIMATIONS OF THE STUDY

There are two major limitations for this study. First, this study has faced the difficulties of having the co-operation from Singapore tourist organizations. The researcher had to introduce herself and the objectives of the study to the organizations which some of them are not aware of the studies on image positioning for ASEAN destinations. Therefore, this study can only include few representatives from key tourism organizations including STB and NATAS whom the researcher made direct contacts and they agreed to join the study. Due to the budget limitation, the second limitation is that this study can only include the opinions of the supply side, tourism organizations. It does not have enough budget for surveying opinions from the demand side, tourists.

CONCLUSION AND RECOMMENDATION

Having reviewed Singapore's strengths and opportunities, it can be seen that Singapore has been a very successful tourist destination in ASEAN. Tourism industry will still be a big source of Singapore's income for number of years. To maintain the long-lasting tourism income, Singapore should be aware that there are threats from new emerging developing countries which have variety and exoticness in terms of tourist attractions. Furthermore, these destinations are not as expensive as Singapore and they can develop modern facilities and copy the types of tourist attractions that Singapore has. To compete with these new emerging destinations, it is therefore time for Singapore to start focusing on its strengths and opportunities and repositioning itself to the changing tourists' needs and demands.

There are a few recommendations for future research. First, it is recommended that more representatives from other tourism organizations should be included in future

research. Also, there should be more representatives from various departments of STB. Second, further research should also include the opinions of the demand side. There should be a questionnaire survey on the tourists for their opinions regarding their needs and satisfaction so that the future tourism plan and strategies can meet up with the expectation of the tourists. Third, there should be a stronger co-operation among ASEAN country members to facilitate the data collection of the study.

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APPENDIX 2
Tour Guide Article

Singapore: A City For All

By Walaiporn Rewtrakunphaiboon

What makes Singapore so unique from other destinations is that it is a vibrant melting pot of ethnic groups, religions and cultures and it is a city of where the east bridges beautifully with the west. You can find the best of the east and the best of the west in Singapore from food, shows, clothes, nightlife and many more. Singapore is renowned for being one of the best places on earth for sampling the variety cuisines from many parts of the world. It has many fine restaurants and a wealth of street food that you can choose from. Singapore is a dynamic city that full of exciting activities ranging from theme parks, nature parks to off-shore islands, nightspots, museums and places of worship. It is truly a place for all visitors such as families, businessmen for meetings and retreats, the young and the young at heart.

Traveling around Singapore is easy and convenient with its efficient transportation system. You can either take taxis, public buses or MRT, air-conditioned trains that have stations all over the city. There are other two special buses that tourists would find very convenient. They are citybuzz that loop the city from 10 am to 10 pm daily and SIA Hop-on that offer unlimited rides for a small fare around the city and Sentosa daily between 9 am to 7.30 pm.

Recommended Attractions

To make your trip to Singapore complete, there are 15 recommended attractions that you should visit while you are in Singapore.

1. Wildlife

Singapore Zoo, Night Safari and Jurong Bird are must-visits for animal lovers. Singapore Zoo has more than 3,200 mammals, reptiles and many other species. Just next door to the zoo, Night Safari houses in 8 different zones over 40 hectares and opens its door to visitors at dusk. It will bring you close to over 900 animals of 135

exotic species. This is the first wildlife park in the world specially built for night visits. For bird lovers, you should visit Jurong Bird Park, the largest bird park in South East Asia, to get acquainted with pelicans, hornbills, flamingos, penguins and many more.



Image courtesy of the Singapore Tourism Board

2. Orchard Road

Being one of the most famous shopping streets in the world, Orchard Road is a magnet for trendy and fashionable products. Orchard Road is a shopping paradise with a sheer number of malls line up side by side. You can find almost every brand here either in the mall or in its own flagship store on this 2 kilometer shopping spree. Tanglin Mall, Wisma Astria, Ngee Ann City, Paragon Shopping Centre are just some names you must look for. These malls are filled with everything from jewelry, designer ware to home ware and electrical gadgets. If you love shopping, you will adore Orchard Road.



Image courtesy of MICA

3. Sentosa

Sentosa island is known as the isle of peace, tranquility and lush greenery. It is conveniently accessed by road, sea, cable car and the new Sentosa Express monorail. It is truly something for everyone. Sentosa is an all-in-one tourist attraction with beautiful beaches, a themed park, tropical resorts, nature park and heritage centre. There are many things to do at Sentosa. Here, you will find the Merlion, a Singapore's icon in a shape of a lion's head and the fish's body. Take a visit to the Sky Tower, one of the newest attractions on Sentosa, is the tallest air-conditioned public viewing tower. To enjoy more of great view of Singapore, you can take a lift to the Mouth Gallery Viewing Deck on Level 9 of the Merlion. Sentosa is a home of the Underwater World, one of Asia's largest oceanariums. You will have a chance to get closer to sharks and watch dolphin show at the Dolphin Lagoon. If you wish to unwind, Sentosa also has three fine beaches with wide waterfronts, clean water and soft sand. Also try Sentosa Luge racing downhill on a half go-cart and half toboggan device. Don't forget to end your evening at Café del Mar by the shoreline. There, you can watch the sunset with a glass of cocktail.



Image courtesy of MICA

4. Chinatown

Your trip would not be complete without visiting Chinatown. It is the original site where Chinese immigrants live. Visit Thian Hock Keng, the oldest Hokkien Temple as well as Sri Mariamman Temple, Singapore oldest Hindu temple, built in 1827 by one of the city's first Indian businessman. Don't forget to stop by Food Street and

the Chinese pastry shops for home-made tarts and cakes and Chinatown point for arts and craft shopping for souvenirs.



Image courtesy of MICA

5. Little India

A stroll through Little India will make you feel like walking in India. This is a colourful ethnic area. Visit Sri Veeramakaliamman temple, built in 1855. This temple is dedicated to the Hindu goddess of power, Kali. There are plenty of small shops selling saris, Bollywood music, jewelry, fresh fruit, Indian sweets, clothes and shoes. Visit Mustafa Centre, a 24-hour shopping paradise, offers everything at competitive prices. Try Indian snack at modern Indian fast food restaurants before leaving Little India.



Image courtesy of MICA

6. Arab Street

The area around Arab Street is dominated by the huge golden dome of the Sultan Mosque. When Sir Stamford Raffles founded Singapore, he divided the city

into different areas for each race. The area around the Sultan Mosque and Arab Street was given to Malay population. The Mosque, built in 1825, is the largest in Singapore. Here, you can buy some souvenirs such as traditional basket ware and sarong. Arab Street is the perfect place to try some of the best Malay food in Singapore.



Image courtesy of MICA

7. Esplanade

Affectionately called 'The Durian' by locals due to the resemblance of South East Asian tropical fruit, Esplanade is known for theatres on the bay. It has a 1,600 seat concert hall, a theatre, two studios and indoor and outdoor performance facilities. On most weekends, you can enjoy the outdoor performances at the amphitheatre on the Esplanade grounds. Even if you are not attending any event, you can still enjoy the ambience of this complex at one of its many cafes, bar and restaurants.

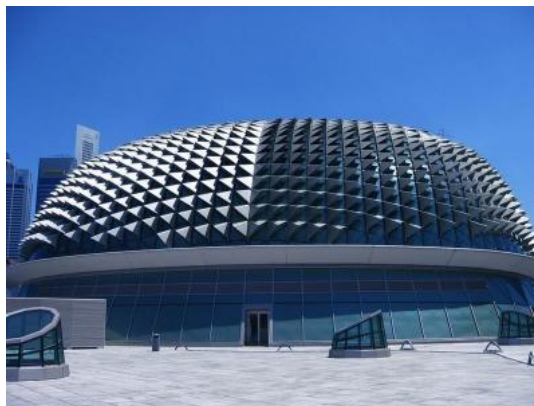


Image courtesy of <http://www.pbase.com/galleries>

8. National Heritage Board Museums

The National Heritage Board museums include three major museums: National Museum of Singapore, Asian Civilisations Museum and Singapore Arts Museum. National Museum of Singapore is an iconic architecture which is beautifully decorated with stained glass and modern design. It has recently been opened with brand new exhibitions and programs. This is the biggest museum in Singapore with a rich history dated back to 1887. Asian Civilisations Museum is a must-see while you are in Singapore. The building itself is considered one of the finest buildings in Asia. There are two locations for the Museum. The Empress Place branch covers forces that have shaped Asia while the Armenian Street branch focuses on Peranakan culture, which is unique in this part of the world for its mix of Malay and Chinese influences. Singapore Arts Museum is located in the building that once was St Joseph's Catholic boys' school. It contains over 4,000 art works in its 14 galleries. This is a must-visit for art enthusiasts. It is a home to modern and contemporary art from Singapore and South East Asia.



Image courtesy of universes-in-universe

9. Newton Hawker Centre

The most prevalent form of eating places in Singapore are traditional hawker centres, where small stalls that specialize in specific dishes sell their food at reasonable price. Hawker centres are places for visitors to learn about unique local dishes. Newton Hawker Centre is one of the best hawker centres in Singapore. You will find the best of local delights such as oyster omelet, popiah, barbequed chicken wings and barbequed stingray. The best time to stop by Newton would be for

dinner and supper. It is open from 7.00 p.m. onwards and is just opposite Newton MRT station.



Image courtesy of MICA

10. Bugis Village

Bugis, situated near the City Hall area, gives the visitors a taste of street market life. The market stays open into the night where you can find all sorts of souvenirs. Bugis Street houses hundred of stalls selling everything from CDs to clothes and accessories. This is a place for the young and trendy looking for a good bargain. Across the road, there is Bugis Junction where small carts line an indoor air-conditioned street mall. This place houses about 180 specialty shops.



Image courtesy of www.virtualtourist.com

11. Riverfronts

By the Singapore river, you can choose from various eating outlets, pubs, bars, clubs and cabaret. Boat Quay and Clarke Quay are now branded as a 24-hour entertainment zone. For dining, these two places house various bars and

restaurants which you can find food from all over the world including Thai, Italian, Chinese, Indonesian, Japanese, western and Mexican cuisines. Clarke Quay is Singapore's best nightlife area which can compete with similar waterfront venues around the world.



Image courtesy of MICA

12. National Parks

Just a short walk from Orchard Road, Singapore Botanic Gardens is a beautiful 52-hectare park, and is the only park in the world that is open from 5 am to midnight everyday. You should look for Ginger Garden and Evolution Garden. There is an exclusive French restaurant by the greens. Another must visit is National Orchid Garden, a showcase of Singapore's national flower in a myriad of species. Bukit Timah Nature Reserve is a place for hikers that offers sighting of more than 840 species of flora and fauna. Located only 12 km from the city, it is Singapore highest point at 164m above sea level. It is one of the few places where you can see how the island once looked before the development. For the more adventurous few, the Tree Top Walk at MacRitchie Reservoir is an eye-opener. The 250m long suspension bridge will give you a bird's eye view of the lush jungle that remains intact in Singapore.



Image courtesy of MICA

13. Marina Bay

Marina Bay has mega malls and designer boutiques. All the malls are linked, making it a true shopping experience. Starting from Raffles City Shopping City Centre, you can walk through CityLink Mall which leads to Marina Square, Suntec City Mall and Millenia Walk. Marina Square and Suntec City Mall are mega malls with shops offering from fashion and jewelry to watches and chocolate. Suntec City is home to the 'World's Largest Fountain'. Take a walk around the Fountain of Wealth, a *feng shui* masterpiece that signifies achievement and prosperity. If you wish to buy high-end products, you can choose from specialty stores in Millenia Walk and Raffles City. You should also visit CHIJMES (pronounced as chimes), a restored national heritage that once was a Catholic girls' school. It is now a charming plaza filled with retails and premiere wine and dining destinations.



Image courtesy of MICA

14. Vivo City

Vivo city is Singapore's largest multi-experiential retail and lifestyle destination which has just been recently opened in December 2006. It is located very near to Harbourfront MRT station. It offers a vibrant and diverse mix of retail, food and beverage and entertainment outlets. Large recreation zones called 'Sky Park' are for kids to have fun at the rooftop pool while mummy and daddy can take a short break. Vivo City will provide you a great shopping experience in Singapore!



Image courtesy of www.virtualtourist.com

15. Singapore Discovery Centre

It is the leading 'edutainment' attraction in Singapore that celebrates the Singapore experience. Visit iWERKS theatre for watching giant screen showing 2D and 3D movie that provide you exciting sensory cinematic experience. Also, drop by the shooting gallery to try computerized simulated shooting range offers scenarios to challenge your reflexes, hand-eye coordination and shooting capabilities.



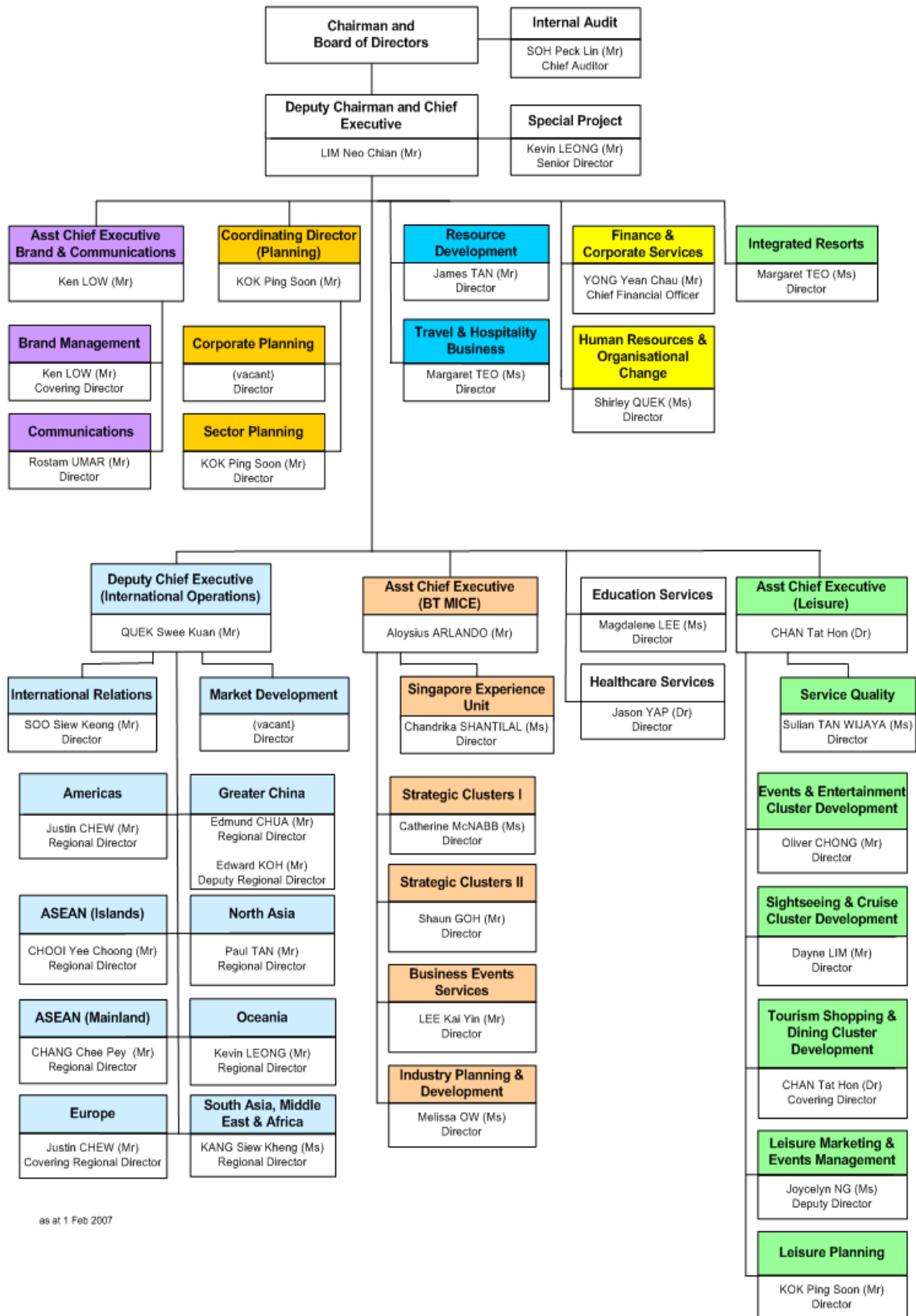
Image courtesy of Singapore Tourism Board

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APPENDIX 3

Singapore Tourism Board Organization Chart



APPENDIX 4

Photographs of the Focus Group Interview



