

AMERICAN UNIVERSITY OF BEIRUT

BRANDING DUBAI:
GLOBAL PERCEPTIONS OF A 21st CENTURY EMIRATE

by
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AN ABSTRACT OF THE THESIS

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Brand equity has become as necessary for locations as it is for companies. Foreign direct investment (FDI), tourism and export revenues, and access to foreign markets can be heavily impacted by the ability to be known and esteemed. During the previous two decades, global media have increasingly covered Dubai as the emirate has sought to build a globally resonant brand image out of an unknown location in the context of often negative regional associations.

The following paper explores Dubai's global image in Singapore, New York, and London as projected by media and perceived by audiences. The study investigates Dubai in newspaper headlines for each city, surveying professionals in each city to compare their impressions with those headlines and explore the various communications channels that influence these impressions.

Results indicate that Dubai has experienced substantial growth in global media coverage during the past two decades. Among the surveyed professionals, news media and personal acquaintances were the most common Dubai information sources, with each city's professionals varying in the importance placed on these and other sources. Finally, participants identified most strongly with luxury tourism destination images, though favorability toward this image differed considerably both within and among cities.

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It has spectacular beaches but is not Australia; it is one of the world's most secure destinations but is not Singapore; it has opulent city hotels and superb beachside resorts but is neither Jakarta nor Bali. It has world class shopping but is not Hong Kong. WELCOME TO THE DESERT'S MOST EXCITING CITY. Welcome to Dubai. (Dubai Tourism, n.d.)

World leaders have been branding their nations for centuries (Govers & Go, 2009; Olins, 2004). However, the potential to reap broad economic benefit from branding global locations is a fairly recent academic topic. It began when Simon Anholt coined the term "nation-brands" little more than a decade ago (1998), and then rebranded his idea under the term competitive identity (2007). While other terms, such as location brand, have also appeared along the way, place brand is the expression that is currently most rooted. This is perhaps owing to Anholt's establishment of the journal *Place Branding* in November 2004. Renamed as *Place Branding and Public Diplomacy* in October 2006, the journal defines the field as "the practice of applying brand strategy and other marketing techniques and disciplines to the economic, social, political and cultural development of cities, regions and countries" (Palgrave Macmillan, n.d.).

Though new, the place branding field is informed in part by destination image studies, which began almost three decades prior (Pike, 2002). However, destination image's focus is less broad than that of place branding. While destination emphasizes tourism marketing, the concept of place includes the more expansive market range of "tourism, trade, talent (education and employment opportunities) and treasury (investment opportunities)" (Govers & Go, 2009). Destination image's second term, image, is defined as beliefs, ideas, or impressions, and is also more limited than brand or branding (Hunt, 1971). While encompassing image, brand/branding in its fully

nuanced understanding entails a wide range of activities and issues such as vision, strategic planning, ethics, communications, stakeholders, and coordination (Anholt, 2008; Anholt, 2005).

Most recently, Anholt (2007) has suggested the term competitive identity be substituted for place branding. Competitive identity focuses on the place's unique value proposition that distinguishes one location from its competitors. This shift intended to distance the field from marketers who have encouraged poor countries to advertise when they should rather focus limited resources on substantive development policies (Anholt, 2008; Anholt, 2009). In other words, competitive identity emphasizes the development of offerings worth talking about over merely talking about offerings.

Once development policies are developed, the resulting implementation must then be accompanied by media worthy, symbolic actions (Anholt, 2008). As Anholt observed (2009), "places get their brands from public opinion, not from marketers or governments." However, while media coverage of symbolic actions may help bring about place brand perceptions, it cannot be assumed that the image projected will be the same as the image received (Avraham & Ketter, 2008). Indeed, multiple communication channels impact individual perceptions, including word of mouth and personal experience (Govers, Go, & Kumar, 2007).

In addition to the place's competitive identity efforts, projections may include issues that society may not prefer be projected or that are largely beyond the place's control (Hall, 2004). Crime, negative political coverage, natural disasters, and regional violence may provide such unwanted images. While the occasional negative association may quickly diminish, sustained negative coverage can greatly impact places' ability to effectively build their desired image (Morgan & Pritchard, 2004).

A final factor is that while brands may be global, associated images are not necessarily universal (Kotler & Gertner, 2004). The population of one country may perceive the location as a tourist destination, while another population may be more aware of business or investment potential. Thus, projections of corporate corruption may have little effect on the former group, while substantially impacting the latter. Depending on projection channels, projected images, and type of relationship, each country is likely to maintain unique ideas and associations, requiring place brander awareness of location-based, stakeholder-specific opportunities and threats.

As a result of these competing factors' influence on place branding, Aholt (2002) encouraged researchers to explore both the projected and perceived image in different locations. The following case study examined perceptions of Dubai's media-negotiated competitive identity. It looked at Dubai's value proposition offerings as covered by news media, seeking to understand the resulting public opinion in three diverse, global cities. As a recently emerging Middle East place brand, Dubai's experience can serve as a helpful reference for other newly emerging locations seeking to overcome negative and outdated regional associations while building a globally recognized and respected name.

Voted the capital of the Middle East in 2007 by the British newspaper, The Independent, the emirate of Dubai made a superlative entrance to the 21st century (Macneil, 2007). The luxury capital of tourism, major event sponsor, architectural giant, and regional business, media and shipping hub, Dubai has become a world contender and media magnate in many arenas. Along with these achievements has come less desirable attention as well. Labor disputes, sex scandals, terrorism concerns, and real estate busts have also grabbed headlines as Dubai builds its global image.

Located in a region stereotypically viewed as backward, unstable, and isolated (Goodman, 1991), Dubai has built a diverse, global economy without the substantial hydrocarbon resource wealth possessed by its neighbors. As it has built its modern economy, Dubai has utilized the 21st century communication tools necessary to explain this sought-after identity and attract FDI, multinational corporations, and tourists, as well as to gain investment access to foreign markets (Dubai Interact, 2007).

Even while the events of September 11th, 2001 negatively impacted Middle East tourism, Dubai has become one of the fastest-growing tourist destinations in the world, while earning some of the highest global hotel occupancy rates (Beirman, 2003; Department of Tourism and Commerce Marketing [DTCM], 2003; DTCM, 2005). This is particularly noteworthy considering Dubai's location in the very peninsula from which the 20 Saudi and Emirati September 11th hijackers came. Such regional affiliations appear to have had little to no impact on Dubai's ability to project a modern image and attract business and leisure tourists from all corners of the globe.

Due to Dubai's fast and recent rise, few scholarly works have yet assessed Dubai's brand management and competitive identity formation efforts (Bagaeen, 2007; Balakrishnan, 2008; Cooper & Momani, 2009; Lee & Jain, 2009a, 2009b; Walters, 2006). Only one pair of researchers has looked in detail into the brand management efforts, while including Dubai's globally projected and perceived image (Go & Govers, 2009).

Adding to the effort, the following study addresses Dubai's competing global media images through the lens of audience reception in New York, London, and Singapore. It first explored the volume and variety of Dubai's global media coverage, Dubai's projected image, investigating Dubai's recent rise to media prominence. No

published study has yet described Dubai's global media growth, an understanding of which may prove useful to other emerging places. This study provided intriguing yet cursory findings which beg further exploration.

Looking at a sample group of professionals in three global cities, the research subsequently assessed the variety of participants' Dubai information sources. As a newly emerging place brand, the 2009 data offered a timely update to Govers, Go, and Kumar's (2007) data collected in 2004. The findings provide additional insights into the role of various information sources, which is helpful for decision makers in determining budget allocations.

Finally, the study asked whether a sample of competitive identity media projections matched audiences' perceived image of Dubai, including image favorability. While many destination image studies have looked at perceived image, few have examined projected image (Pike, 2002). In contrast, the limited amount of Dubai research has favored projection and identity analysis, assuming a de facto correlation with perceived image. However, this study assumed that gaps exist between brand reality and perceptions among various target audiences (Olins, 2004). These findings then provided the information necessary to describe the strengths, weaknesses, opportunities, and threats to Dubai's competitive identity.

In conclusion, this study's combination of projection and perception sought to increase both the inclusive and comprehensive nature of ongoing Dubai place brand research (Morgan, Pritchard, & Pride, 2004). This integrated, media-based approach merits further place brand research attention, both in assessing perceptions and in investigating the relationship between projection and perception. As public relations and marketing practitioners are increasingly asked to quantify the results of their

communications and marketing campaigns, this approach may directly benefit the place brand.

Literature Review

This chapter will describe the use of projection and perception in place branding research. It will explore the few case studies that have attempted to jointly address projection and perception, while additionally introducing the place brand indices for these two aspects of image. Dubai specific case studies and index rankings will follow, describing the competitive identity, projected image, and perceived image findings and research approaches to date. Finally, the research questions for the current study will be presented.

Research in Projection and Perception

Although research has been heavily focused on perceived image, recent articles have attempted to combine projection and perception to better understand actors, processes, and implications. The study will present four image case studies related to Spain, Tibet, Rwanda, and Finland, and one more broadly assessing place image formation. Dubai-specific research will appear in a later section. All five studies examined tourism-oriented destination image, each investigating different image formation agents while comparing the projected image to that held by tourists to the locations.

Recognizing a literature gap in relating projected and perceived image, Andreu, Bigné, and Cooper (2000) compared tourism strategy with potential tourists' perceptions in order to identify improved marketing efforts. After reviewing Spain's tourism communication strategies, the authors compared them with the interview responses of 120 visitors to the UK's Spanish Tourism Office. The authors identified message coordination deficiencies in the 1980s and improvement in the 1990s, including alignment of promotional spending with tourists' preferred communication

channels. Regarding perception, the authors found that British tourists held a generally positive image of Spain. However, 71% of the participants were returning tourists, which more likely indicates that those who return generally had positive experiences. While the authors asserted a critical relationship between projection and perception, the study did little to tie the two together, focusing on projection strategy rather than actual projected image or perceptions of the strategy and projected image.

Also focused on developing effective marketing strategy, the second case study sought to discover and compare tourist and tour operator images of Rwanda (Grosspietsch, 2006). Forty-two tour operators from multiple countries and 508 foreign tourists completed surveys assessing 15 location attributes. The study found that tourists generally possessed a better image of Rwanda than did the tour operators. Though tour operators function as location projection agents, the research did not examine tour operator projections, but rather their perceptions. While the research provided practical insights for tourism development in Rwanda, it did not match the projected and perceived images of the location and once again pointed to the need to further clarify what constitutes image projection research.

The third study aimed to describe and analyze a country's destination branding process (Saraniemi, 2009). The author described Finland's branding efforts, brand projection, and brand perception through qualitative data analysis of internal documents and interviews, British press articles, and interviews of a randomly sampled cross-section of European nationals. The study resulted in three primary findings. First, Finland struggled to communicate internal stakeholders' multiple competing identities. Second, tourism board-sponsored journalists independently and positively communicated three themes that revolved around a core identity of being cold. Third,

interviewees negatively perceived coldness and held three primary views of Finland. Though the author analyzed 50 news articles, 285 photos, and 1992 interviews, the qualitative data covered less than two pages with very little description. The rare quantified description included odd assertions, such as Finland being relatively unknown because 6% of participants had no image or because 20% had no desire to visit. Thus, while the study made an important attempt to combine the elements of branding strategy, media projection, and general perceptions, it lacked effective analysis and display of results.

Moving away from marketing and into media effects theory, Mercille (2005) investigated popular media's effect on destination image. Utilizing Hall's (1980) theory of encoding and decoding, the research examined tourism projections and perceptions of Tibet. The author compared 397 first-time visitors' exposure to two films, a magazine, and a guidebook, to their impressions of Tibet. First conducting content analysis of the four sources, the study then compared their image projections to the images held by the tourists both before and after arrival. Mercille argued that these four sources provided either a strong or a negotiated influence on tourists' perceptions, depending on socio-cultural background. However, respondent media familiarity varied from 10-43% per source, and Mercille identified neither how many were unfamiliar with these sources nor their familiarity with other sources. Additionally, the author described pre-arrival perception data, while omitting the collected post-arrival and socio-cultural perception data, calling into question whether the data justified the described results.

Exploring media effects to assess marketing budgets, Govers et al. (2007) investigated tourism promotion's impact on destination image. The authors utilized Gartner's (1994) framework to analyze 1,100 global participants' perceptions of seven

locations and the perceptions' origins. They discovered that covert and autonomous agents (i.e. – news and popular media) play a primary role in image formation, followed by organic agents (i.e. – personal, friend, and relative experience). Lower Internet and overt agent (i.e. – advertising) findings called into question their relative importance in advertising budgets and marketing theories. However, while less prominent than other sources in the overall image formation process, use of the Internet may indicate those actively searching for information. Rather than indicating less importance, its presence may confirm its value as an easily accessible tool at the information search stage of decision making (Peter & Donnelly, 2007). Additionally, because advertising is often targeted at specific market segments, it cannot be assumed to have been less important unless advertising was targeted at the survey participants, whether geographically or demographically.

While these five studies each noted a lack of and need for projection-perception studies, only Govers et al. (2007) operationalized the concept in a clear and compelling manner. Projection-side challenges included falsely equating marketing strategies and tourism provider perceptions with actual projection (Andreu et al., 2000; Grosspietsch, 2006), focusing on limited information sources without adequately establishing their impact (Mercille, 2005), and providing findings without the data to substantiate them (Saraniemi, 2009). As a result, these studies tended to better cover perception than projection, while being nearly exclusively focused on tourism.

Place Brand Indices

Academic researchers have not been alone in assessing place brand images. The following section will briefly introduce three market indices that have ranked place brand projection and perception – the Nation Brand Perception Index (NBPI), the

Country Brand Index (CBI), and the Nation and City Brand Indices. Methodology, strengths, and limitations will be briefly covered.

The newest index, the NBPI (East West Communications, n.d.) has provided a relative quarterly media ranking of 200 countries and territories since April, 2008. The index has ranked places' volume and favorability of coverage in 38 newspapers, magazines, and television news broadcasts. While named a perception index, the NBPI actually ranks projection, being the only index to do so. Limited to English language media, including translations, the index appears to give an unbalanced weighting to US and UK media sources, raising concerns over the extent to which results represent global projections.

Truly covering perception, the annual CBI (Futurebrand, 2009a) has ranked countries across a number of business and leisure tourism categories since 2005. In 2009, the index ranked 45 nations across 30 categories, including a mixture of expert opinion, business and leisure traveler surveys, and secondary data. The global experts and travelers have varied and increased since the start of the study, with travelers coming from the top nine outbound tourism markets. While early versions focused almost exclusively on traditional tourism identities, recent editions have included the broader scope of place brand categories.

While the CBI has emphasized tourism, Anholt's Nation Brand Index (NBI) (GfK Roper Public Affairs & Media, n.d.) has ranked six broad-based competitive identity categories since 2005. Surveying over 20 thousand participants in 20 countries, the NBI ranks 50 nations according to categories of tourism, governance, culture & heritage, exports, people, and immigration & investment (Appendix A). A City Brand Index provides similar analysis for 50 cities, while assessing slightly different categories

(Appendix B). Participants have not been limited to travelers; results have not been weighted by expert opinion and statistical data; and the 20 responding countries have included both developed and developing countries. In terms of reporting, the Nation and City Brand Indices have provided two types of rankings - a cumulative, global ranking, and rankings provided by each of the 20 participating countries. This approach demonstrates that while it is possible to identify global trends, images are still fundamentally local (Kotler & Gertner, 2004; Olins, 2004).

While these three indices may appear redundant based on name, each has provided distinctly useful approaches to place image. As the most recent entrant, the NBPI appears to have problematic methodological constraints, not to mention the misnomer of being a perception index. Of the two actual perception indices, the CBI's topical rankings have provided a ground-level view of destination image, complimenting the NBI's broader birds-eye view of competitive identity-focused place image. All three indices' Dubai rankings will be noted at the end of the following section.

Brand Dubai

The above literature review illustrated some of the complexity and challenge in assessing projected and perceived place image. With over 200 countries and thousands of cities, an abundance of research will be required to test and apply the concepts to individual locations. This section will examine the research and rankings of Brand Dubai to date, looking at the three areas of competitive identity, projected image, and perceived image.

Competitive identity.

The World Economic Forum (2009) has identified the United Arab Emirates (UAE) as the only Arab country to have reached the most advanced of the five economic development stages, largely due to Dubai's highly diversified economy. The following five articles explored the various aspects of Dubai's competitive identity that have contributed towards this achievement, while also addressing potential threats to Dubai's preferred brand image. While strategy includes more than brand identity, and other elements were often central to these studies, the review will focus on the most pertinent elements to this study - brand identity and image.

Investigating the changing and developing urban landscape of the Gulf, Bagaeeen (2007) described what he deemed Dubai's "super-fast" urbanism. Combining secondary sources and field work, the study ascribed Dubai's foreign investment, global publicity, and tourism growth to its foreign property ownership policies. Bagaeeen identified the city as a type of environmentally and economically unsustainable urban Disneyland with globally, "instantly recognizable" architecture. While Bagaeeen built a strong argument for Dubai's super-fast urbanism, the author confused identity with image by asserting that Dubai's architecture is recognizable beyond the local population, property stakeholders, and a locally substantial but globally narrow band of tourists.

In the second study, Balakrishnan (2008) examined Dubai as a model for successful destination branding. While identifying multiple Dubai brand identities, the author used secondary data to describe and explain the centrality of shopping and luxury in attracting a broad range of European, Arab, and Asian tourists. Like the previous study, Balakrishnan used Dubai's brand identity and image synonymously, implying

that branding strategy is the same as brand awareness and image, while neglecting to establish global audiences' awareness of either the Dubai brand or its offerings.

Investigating a broader array of Dubai's competitive identity, Lee and Jain (2009a) examined marketing demographics and offerings utilizing interviews and secondary data. Social liberalism and tolerance, architecture, tourism, business hospitality, and education were among the key drivers appealing to a predominantly young, Asian male target demographic. The article contained numerous inconsistencies and inaccuracies in describing the brand identity, its promotion, and its prominence, however. Like the previous authors, this study neither quantified nor delimited Dubai's global reputation.

In their second article, Lee and Jain (2009b) examined threats to Dubai's brand image through focus groups and interviews with Dubai visitors and expatriates, as well as general international travelers. The authors identified pricing, infrastructure, and privacy as the top three threats to tourism, FDI, and expatriate recruitment and retention. Unfortunately, the authors did not clarify whether they identified these threats through the interviews, or merely used the interviews to substantiate threats that they determined through other means. While using interview quotations to support the assertions, they also failed to state the preponderance of these views among interviewees.

The most comprehensive of the five studies, the final paper examined Dubai as an example of post-Cold War, city-state and region development (Govers & Go, 2009). Using a wide array of secondary sources, the authors dispelled myths and described the growth and tension in developing Dubai's modern economy while maintaining its heritage. Noting the city's status as a center for innovation and technology, the study explained that Dubai's expat-driven, rapidly expanding economy originated from

foreign investment, trade, and tourism, not oil. Rather than being merely a “sea-sun-sand” destination, the authors described Dubai as a global hub for multiple business sectors, creating a strong de facto place brand through sports, shopping, transportation, and natural asset projects. In addition to perceived success stories, potential brand threats included real estate bubbles, socio-cultural issues, and environmental costs that may result in damaging negative media coverage.

Whether narrowly or broadly focused, all five studies generally agreed on Dubai as an FDI and expat driven, modern, luxury tourism destination with assets including shopping, architecture, global business, sports, and nature. Appealing to a global, largely Asian audience, threats included concerns regarding economic and environmental stability, as well as the tension between cultural heritage and accommodating social policies. Most authors repeatedly described Dubai’s identity and global image as one in the same, what Govers & Go (2009) referred to as Dubai’s de facto place brand. The following two sections will indicate what published findings to date have revealed about this public image.

Projected image.

Three studies have examined Dubai’s projected image, in addition to the NBPI described above. The following section will describe Dubai’s Internet depictions, local and global media coverage, and bottom up approaches to re-branding (Cooper & Momani, 2009; Govers & Go, 2005; Walters, 2006).

Examining the only projection of destination identity for marketing purposes, Govers and Go (2005) conducted online photo and descriptive text content analysis across twenty web sites. The hundreds of images and nearly ten thousand words revealed an incoherent tension in Dubai’s projected image, as public entities’ cultural

identity projections contrasted with the private sector's commerce portrayals. Overall, image projection leaned considerably towards consumption rather than experience, which could result in potential tourist misperception of the experience and, subsequently, misrepresentation to others.

Delivered one year later to the 10th International Public Relations Research Conference, Walters (2006) provided a narrative description of Dubai's image projection efforts. Locally and regionally, the author noted a hyperbolic, superlative cheerleading nature in Internet and local English-language media coverage of Dubai that ignored threats such as overstretched infrastructure and inflationary pressures. As a working paper, Walter's methodology, data presentation, analysis, and discussion were both brief and vague, yet the findings matched those suggested in other Dubai competitive identity literature.

Investigating the person to person relationship-building approach to image re-branding, Cooper and Momani (2009) examined the Gulf's global network engagement initiatives (e.g. – global conferences, symposiums, etc...). Dubai Ports World's US market entry failure challenged the perceived effectiveness of these national-oriented, political elite-centered events. As a result, Dubai had broadened its public relations efforts to court more favorable public opinion. While the authors focused on congressional lobbying efforts, the current thesis will explore efforts aimed at the general public.

Exploring news media projection, the NBPI's UAE country rankings also provided insight into Dubai, which has served as the nation's primary headline grabber. For the six quarters between April 2008 and September 2009, the UAE ranked from 3rd to 17th globally, shifting dramatically to 194th in the final quarter of 2009. The present

study will examine projections from three of the same newspapers used to attain these results.

The above review of Dubai projections research indicated a tendency toward uncoordinated, mistakenly targeted, pollyannaish images. These projections, which have come under recent threat, largely portrayed Dubai as a modern, investment-friendly, consumption-driven tourism destination and global business investor. The next, final subsection will describe Dubai's perceived image to date.

Perceived image.

The least studied of the three topic areas, perceived image has received the attention of only one academic study (Govers, Go, & Kumar, 2007). The following section will describe this study, in addition to Dubai's index rankings.

Investigating tourism promotions' role in destination image formation, Govers et al. (2007) utilized a discursive approach and neural network content analysis to assess perceived images and their origins. The 598 highly educated and mobile global survey respondents most frequently identified television, previous travel, and friends as Dubai information sources, with no source cited by over one-fourth of participants. Many respondents had difficulty describing Dubai, while common images included stereotypical, negative regional descriptions. Dubai-specific images highlighted "a modern wealthy city providing luxurious facilities as a sea, sun and sand destination that combines leisure with extensive shopping facilities" (p. 251). A revealing and innovative approach, the study did not quantify the occurrence of those who struggled to provide Dubai-specific descriptions. Due to the 2004 data set, the current study should provide a timely update.

Turning to Dubai's index rankings, the CBI consistently ranked the UAE as one of the world's top three rising stars (FutureBrand, 2005; FutureBrand, 2006; FutureBrand, 2007; FutureBrand, 2008; FutureBrand, 2009b). During those five years, the CBI granted Dubai 23 top ten recognitions, including both shopping and conventions for four out of five years. Dubai also received number one in lodgings for both 2007 and 2008, while attracting top-10 status for nine out of 30 categories in 2008.

The NBI provided a noticeably different UAE assessment among its more broadly targeted evaluators and categories. In 2008, the UAE ranked 44th out of the 50 assessed nations (GfK Roper Public Affairs & Media). In its best area, immigration and investment, it ranked 29th. Assessed by country, Americans ranked the UAE within the bottom 10 for all six categories in 2008 and 2009 (Nation Brand Index, 2008; Nation Brand Index, 2009). UK participants viewed UAE governance, immigration & investment, and exports more favorably, while having similarly low perceptions of Dubai tourism, people, and culture & heritage (Table 1).

Table 1

UAE NBI Ranks by Country (2008 and 2009)^a

Category	UK		USA	
	2009	2008	2009	2008
Immigration & Investment	24	22	46	43
Governance	38	33	45	42
People	47	46	47	47
Culture & Heritage	49	46	49	48
Exports	31	26	46	43
Tourism	47	46	48	49

^a Source www.simonanholt.com

These rankings were in sharp contrast to Dubai's City Brand rankings in Table 2 (City Brand Index, n.d.). This difference may reflect two factors. The first is that Dubai has possessed a more powerful place brand than the UAE. Indeed, Dubai's prominence has resulted in its mention as a country rather than a city by both academics and journalists (Govers & Go, 2009; Lee & Jain, 2009a; Taylor, 2010). The second possibility may be that US unfamiliarity with the UAE resulted in stereotypical, negative associations with the term Arab, while the less obviously Arab city brand has allowed Dubai to avoid negative national political associations (Anholt, 2007, p. 59).

Table 2

Dubai City Brand Index Ranks by Country^{a, b}

Category	UK	USA
Presence	15	30
Place	7	29
Prerequisite	36	40
People	32	40
Pulse	33	46
Potential	32	40

^aSource www.simonanholt.com. ^bn.d.

According to the above study and indices, the perceived image of Dubai varied widely based on location, audience, and identity category. While Dubai may be a global brand, it did not appear to be equally known or regarded by region. Additionally, while experts and highly experienced travelers ranked Dubai tourism quite highly, the general public appeared to be much less aware of or favorable towards its offerings.

In summary, apart from Govers and Go (2009), published material on Brand Dubai has lacked hard data or analysis and focused excessively on local brand identity,

projection, and image, presuming a parallel with global perception. In addition, the heavy index emphasis on North American and EU populations neglected Asia's importance in the Dubai market, whether for tourism, investment, or immigration. With the above research's goals, findings, and limitations in mind, the current study will seek to add an additional, updated layer to the analysis of global projections and perceptions of Dubai's competitive identity.

Research Questions

Dubai's recent, fast-paced development as a global brand with diverse current and potential stakeholders has compelled an understanding of how the brand is both projected and perceived. Seeking to integrate these factors into one study, this thesis will investigate:

RQ1: How do global media portray Dubai?

RQ1a: What is the historical volume of global media coverage by location?

RQ1b: What identities are projected in recent global media coverage?

RQ1c: Does recent global media coverage of identities vary by location?

RQ1d: What are the recently projected image qualities in global media?

RQ2: How do potential stakeholders' learn about Dubai?

RQ2a: What are potential stakeholders' information sources?

RQ2b: What are potential stakeholders' information sources according to Gartner's framework?

RQ2c: What are potential stakeholders' top information sources according to Gartner's framework?

RQ2d: Do potential stakeholders' information sources vary by location?

RQ2e: Do potential stakeholders' top information sources according to Gartner's framework vary by location?

RQ3: How do potential stakeholders perceive Dubai's global media portrayals?

RQ3a: Is global media portrayal consistent with potential stakeholders' impressions?

RQ3b: Do locations vary in perceived consistency of global media portrayals?

RQ3c: Are potential stakeholders favorable towards global media portrayals?

RQ3d: Does potential stakeholders' favorability towards global media portrayals vary by location?

RQ4: How do potential stakeholders' perceive Dubai's competitive identity?

RQ4a: How do potential stakeholders view Dubai's tourism identities?

RQ4b: How do potential stakeholders view Dubai's business identities?

RQ4c: How do potential stakeholders view Dubai's socio-cultural identities?

Methods

General Perspective

To address the research questions, this Dubai case study utilized multimethod quantitative research, including headline analysis and questionnaires. This multimethod approach aimed for more accurate analysis than the single factor analysis typically employed by destination image researchers (Prebensen, 2007). Focused on potential stakeholders, it utilized a specific target population (i.e. – subpopulation), in three target contexts (Anholt, 2002; Schensul, LeCompte, Trotter II, Cromley, & Singer, 1999). In a two-step process, the research first employed quantitative analysis of newspaper headlines in these contexts, followed by survey data collection among a sample of the target population (Brunt, 1998; Saraniemi, 2009). While place image surveys have been common, this dynamic projection-perception model fills an important methodological gap (Pike, 2002; Rindell, 2007). The following sections include an overall description of context, followed by methodology descriptions for each step.

Context

The study took place in three global cities of importance to Dubai – New York, London, and Singapore. Each city has been an important yet distinct global stakeholder due to their varying roles as model, trade partner, ally, powerful nation, and talent pool (Anholt, 2006). As the cities' three newspapers of record, The New York Times, The Times, and The Straits Times provided headline content. The study examined Dubai headlines published in these three papers from 1992 through 2009. In addition, professionals within the cities served as the potential stakeholder target population. The research identified this group as a potential stakeholder population due to Dubai's competitive identity as a luxury business and tourism destination with a substantial

white-collar, expatriate workforce. Subjects participated between May and November of 2009.

Headline Analysis

Temporal mass media portrayals powerfully impact distant locations' perceived brand images (Anholt, 2004; Avraham & Ketter, 2008; Rindell, 2007; Saraniemi, 2009). Within these media portrayals, headlines establish significance and provide optimal relevance in their target audiences' perception development, even if the audience hardly recalls the actual projection (Beasley & Danesi, 2002; Danesi, 2002; Dor, 2003). Because of headlines' key role, this study examined both the historical growth and projected image of Dubai in the headlines for the three target locations. This section will describe the methods used in pursuit of research question one.

Methodology.

The author utilized Lexis-Nexis Academic to identify Dubai headlines in each city's newspaper, revealing both the total headline volume and the headline text. The author then recorded results using Microsoft Excel.

Procedures.

Lexis-Nexis contained articles for all three papers dating back to 1992. For the historical component, a headline search indicated the volume of each newspaper's Dubai headlines from 1992 to 2009. The author then read each headline and recorded each year's total after removing duplicate headlines. For the projected image portion, the study identified Dubai headlines for each paper for the 12-month period of February 24th, 2008 to February 23rd, 2009. The author read each headline, removed duplicates, and pasted the headlines in an Excel document.

Coding and Analysis.

The coding and analysis also consisted of two parts. For the historical search, the author divided the time period into six 3-year time frames (1992-1994, 1995-1997, 1998-2000, 2001-2003, 2004-2006, 2007-2009) in order to examine and compare the growth of Dubai in the headlines for each of the three cities. For the 12-month period, coding identified and grouped headlines according to the following six NBI categories: Immigration & investment, people, culture & heritage, governance, exports, and tourism (Appendix A). Some headlines possessed clear overlaps between two categories. For example, “Dubai sets awful precedent by barring Israeli tennis player” deals with both governance and sports (culture & heritage). In such cases, the study coded based on emphasis; governance in the cited example.

In addition, the author coded quality of headline coverage based on semantic connotations in relation to Dubai. A solely positive or negative message received a positive or negative coding, while coded neutral when key terms were neutral. Messages that included both positive and negative terms also earned neutral coding, no matter the perceived weighting. The resulting data was reduced to percentages or totals, displayed in tables, and described in relation to its research question and sub-questions.

Surveys

As the most commonly used method of place image inquiry, a survey of potential stakeholders offered examination of research questions two and three (Brunt, 1998). The following section will describe the subjects, their selection, and the survey they completed, including its components, coding, and analysis.

The Questionnaire.

The survey component used self-administered questionnaire which was analyzed using two software programs, SPSS 16 and Microsoft Excel. The questionnaire contained five sections, including personal background, Dubai information sources, and three headline exercises (Appendix C). These sections contained a total of 72 questions made up of 67 closed-ended and five open-ended items. The personal background section inquired regarding gender, age, citizenship, and international travel frequency and destination (13 items). Utilizing options that fit within Gartner's (1994) communication channel categories described above, the second section included 20 items, asking participants to identify their sources of information on Dubai, including an open "other" option.

The final three sections utilized 12 headlines generated from the 12-month, 2008-2009 period described in the previous section. Four headlines represented each newspaper, including two to three headlines per NBI category. Additionally, the study aimed to include a range of neutral, positive, and negative headlines. Each of the three exercises used the same 12 headlines, arranged in random order each time.

In order to provide context for headlines isolated from their newspaper section (e.g. – sports, travel, etc...), the author adjusted six of the original headlines (Appendix D). For example, one sports section article was titled "Dubai Firm Buys Auction House." Because the headline lacked its sport section context and could be interpreted as another type of auction house, the study provided context by adding the word "racehorse" (i.e. – "Dubai Firm Buys Racehorse Auction House"). Among the six adjusted headlines, three included a text insertion, two a deletion, and one a substitution.

The first exercise examined whether media projections matched audience perceptions. It asked participants to identify whether the headline content's consistency matched their overall impression of Dubai by circling either consistent or inconsistent (12 items). Exercise two assessed the degree to which projections reflect audience perception. This exercise instructed respondents to comparatively rank headlines on a scale of one to 12 according to how similar the headline was to their image of Dubai, using each rank only once (12 items). Finally, contributors indicated whether the headline projection rendered favorable or unfavorable impressions of Dubai, including a "no impression" option (12 items). This data provided insight into the Dubai brand's possible strengths, weaknesses, threats, and opportunities among potential stakeholders.

The study employed SPSS 16 for survey data entry and analysis, while using Excel for coding the five open questions, recoding the survey's second headline exercise, and generating combined or sub-set variables from the original SPSS data.

Subjects.

The study used purposive sampling of London, New York, and Singapore professionals, identifying this group's importance as prospective Dubai brand stakeholders (Warwick, 1975). The study defined professionals as doctors, bankers, lawyers, consultants, professors, engineers and business people. As a target sample, this group's intentionally narrow and geographically specific target fit well with Dubai's luxury business and pleasure tourism and immigration profile (Schensul, LeCompte, Trotter II, Cromley, & Singer, 1999; Watters & Biernacki, 1989, p. 430). While the results are not generalizable to the population at large, they can be generalizable to the target population. In other words, while target samples are not random, they should not be confused with convenience samples. A description of the subjects will follow, with

the process of identifying this target group described in the subsequent procedure section (see Appendix E for tables).

Overall, 121 professionals participated in the study, including 56 participants from 14 Toastmasters International clubs and 65 participants identified through the author's LinkedIn network. Toastmasters clubs included businesses in consulting, finance, and banking, while LinkedIn contacts consisted primarily of doctors, bankers, professors, business persons, and engineers. Four of the surveys from one Toastmasters club did not make the final results, due to concerns of participant collaboration. In total, the author utilized 117 surveys from Singapore (44), New York (40), and London (33).

Of the 117 accepted survey participants, 38% (44) were male, 48% (56) female, and 15% (17) declined to answer. Seventy percent of the professionals were aged 40 or younger, while 27% fell between the ages of 41 and 60 (Table 3). Expatriates totaled forty-three participants (37%). All but three of the participants had been abroad since 1999. Since 2004, 92% had travelled abroad at least once for vacation and 47% had done so at least six times. Fifty-six percent had taken an international business trip since 2004, while 18% had visited Dubai since 1999.

Table 3

Participant Ages^a

Age	Frequency
18-30	39% (46)
31-40	31% (36)
41-50	15% (18)
51-60	12% (14)
Over 60	2% (2)
No answer	1% (1)

^a n = 117

Forty-four subjects participated in Singapore. This group contained the highest percentage of males (43%), was the oldest (39% over 40), and had the largest percentage of expatriates (52%). The Singapore residents also traveled internationally the most frequently for business, with 25% doing so at least 10 times since 2004. Additionally, 95% had travelled internationally for vacation since 2004. Since 1999, 14% had been to Dubai. Forty participants completed the survey in New York. These New York professionals included the most females (58%), were the youngest (78% under 40), and had the most nationals (80%). These participants experienced both the least and the least frequent international travel, whether for business or leisure, with only 8% having visited Dubai. The 33 London surveys identified a group of professionals in between, but demographically closer to Singapore than New York respondents. Their travel to Dubai provided an outstanding exception, with 36% having visited the emirate.

Procedures.

Utilized for hard-to-reach populations, this research generated its target sample through the four-step process of (1) initial identification of locations of importance to Dubai's branding efforts, (2) mapping of promising candidate locations, (3) development of an initial recruitment plan for each site; and (4) ongoing revision of a recruitment plan for each site (Watters & Biernacki, 1989, p. 430). A description of this process will follow.

As noted above, each city held distinct importance to Dubai for its varied role as model, trade partner, ally, powerful nation, and/or talent pool (Anholt, 2006). While professionals existed in a variety of locations within each city, the author focused on locations with a high presence of globally oriented professionals, such as Manhattan in New York and London's Canary Wharf. Because of its vision and broad professional makeup, the author initially contacted Rotary International in the specified locations, but no clubs accepted participation.

Revising the recruitment plan, the author contacted 52 corporate-based and professional clubs within Toastmasters International via email and phone beginning May, 2009. Twenty Toastmasters clubs agreed to participate and 14 clubs returned 56 completed surveys. Utilizing chain referral sampling, the author additionally requested referrals among his LinkedIn network during the same period (Biernacki & Waldorf, 1981). Nine LinkedIn contacts provided access to 14 connections that yielded 65 participants.

The LinkedIn contacts and clubs received surveys through email, returning them either by email or post. The author instructed the recipients to distribute the surveys among their club members or professional acquaintances via email or during a club

meeting, providing the above definition of professional to the LinkedIn contacts. The author explained to survey administrators that personal experience with Dubai was not required, as the study intended to assess participant exposure and impressions. These contacts then distributed, collected and submitted their participant results via email or post. The first completed survey arrived on May 29th, 2009. Due to extensive media coverage of Dubai's economic troubles beginning on November 26th, data collection ceased on November 21st.

Coding and Analysis.

Data coding and analysis primarily consisted of directly inputting survey responses into SPSS 16.0 software and running a variety of frequency and cross-tabulation inquiries, in addition to a Cramer's V correlation test. For the five open-ended questions, the author used Excel to identify categories and transfer the results to SPSS values. The study also used Excel to generate combined or sub-set variables from the original SPSS data, subsequently reintegrating them into SPSS as additional variables.

For the first open question, the study coded citizenship responses into four groups, either as citizens (USA, UK, Singapore), or as other. The other category applied to all expatriates, regardless of country of origin. For the second open question, respondents identified "other" Dubai information sources. The author recorded these responses in Excel. In the final three open questions, participants identified their top three Dubai information sources. In some cases, participants identified new "other" items which they had not included in the "other" category for the second open question. In such cases, the author back coded the response into the second open question. Of the

26 back-coded responses, “Internet” (13) occurred sufficiently to justify its own category. The additional six responses fell into a generic “other” category.

While coding was generally straightforward for the closed questions, responses to headline exercise two required some treatment, as 25 participants (21%) did not follow the instruction to use each rank only once. This percentage represented 20% of Singapore participants, 18% of New York participants, and 27% of London participants. In such cases, the author established a consistent pattern of ranking duplicates in descending order to represent all 12 ranks, as illustrated in Table 4.

Table 4

*Sample Coding Method Utilized
for Duplicate Rankings*

Response Rank	Coded Rank
5	4
3	2
3	3
1	1
6	5
6	6

Analysis covered overall survey results, as well as findings for individual cities and comparison between cities. This section of analysis dealt with two topics: Participants’ Dubai information sources and their perceived image of Dubai. The study reported information sources both individually and grouped according to Gartner’s framework of covert (i.e. – sponsored media), autonomous (i.e. – independent media), organic (i.e. – personal, friend, and relative experience), and overt (i.e. – advertising) agents (1994). The author expressed the volume of these individual and grouped responses using percentages displayed in tables, comparing the categories against one

another, and also comparing the cities one to another. The study describes statistically significant comparisons between cities ($p \leq .05$) as significant, while presenting comparisons viewed as noteworthy but lacking statistical significance without the term significant.

The study examined perceived image through individual and combined examination of the three headline response exercises. These exercises measured participants' views of headline consistency compared with their general impressions, relative consistency among the headlines, and favorability towards individual headlines. The author rendered these responses as percentages of volume and relative rankings. To best present the data, the ranked consistency responses in exercise two were banded together in sets of four. In addition, the study calculated variation between cities to understand the impact of location on perception. The study considered variation noteworthy when greater than 15%.

While the above demonstrated responses to headline content, the study also aimed to understand perceptions of Dubai's competitive identity. Utilizing the twelve sample headlines and combining the three exercise responses, the study evaluated perceptions first by subtracting the unfavorable percentage from the favorable percentage response in exercise three for each headline. It then multiplied the result by the corresponding consistency percentage from exercise one. This process has been represented by the equation $\{SUM = (\%Favorable - \%Unfavorable) * \%Consistent\}$. The study displayed the results as a percentage of favorability, side by side with the corresponding relative rank from exercise two. Finally, the author analyzed the results by grouping the headlines into tourism, business, and socio-cultural identities. Utilizing NBI categories, the study grouped tourism and culture & heritage categories together as

“tourism” identities. Similarly, exports and immigration & investment fit together under the broader business umbrella, while governance and people made up the socio-cultural category.

Limitations

The current investigation has not intended generalization to global, national, or even local populations, as evidenced by the specific target sample population of professionals. This is not seen as problematic, as the study purposively sampled this specific audience due to its identification as potential Dubai stakeholders. As noted above, data collection offered several challenges. First, the six-month collection period was lengthy. However, Dubai media mentions during the period remained consistent until November 26th, at which point collection had already ceased. Second, the author excluded four surveys from the analysis due to apparent collaboration, with the total sample limited to 117 participants. Finally, 25 survey participants (21%) did not follow the instructions for exercise two. This may have resulted from a narrow awareness of brand Dubai’s competitive identity, which would be consistent with previous findings (Govers & Go, 2009; Govers, et al., 2007).

Results

Dubai's Global Media Portrayal

Addressing RQ1, "How do global media portray Dubai?" the research investigated volume, category, and quality of coverage in The Straits Times (Singapore), The Times (London), and The New York Times (New York) from 1992-2009. Measuring frequency of Dubai in the headlines, the study identified substantial growth of Dubai's media coverage across newspapers during the past two decades. The Times' volume was highest, substantially higher than either of the other two papers. In recent coverage, five of the six Anholt NBI identity categories revealed fairly evenly distributed identity portrayals, with variation by location. Examining the headlines' language, the quality of media portrayal was generally neutral, with negative images outweighing positive ones in both The Times and New York Times, with the reverse true in The Straits Times.

Historical volume of coverage by location.

Exploration of Dubai's media coverage during the last two decades demonstrated Dubai's identity as a relatively young place brand that has grown considerably. Table 5 illustrates this growth, dividing the volume of 18 years worth of coverage into 3-year time frames for each newspaper. Dubai received no New York Times headlines in the 1992 to 1994 period, with only three headlines in The Straits Times and 15 in The Times. By the 2007 to 2009 period, coverage had increased to 57 headlines for The Straits Times, 104 for The New York Times, and 271 for The Times.

Table 5

Headline Volume Per Newspaper (1992-2009)

Newspaper	1992-1994	1995-1997	1998-2000	2001-2003	2004-2006	2007-2009
Straits Times	3	8	4	9	49	57
New York Times	0	4	24	19	67	104
The Times	15	28	32	57	132	271

As a percentage, the volume increased most substantially in the New York Times, with the other two papers also witnessing sizeable, increased coverage. Between the 1995 to 1997 and 2007 to 2009 time frames, coverage grew between 613% (Straits Times) and 2500% (New York Times) (Table 6).

Table 6

Headline Volume Growth (1995-1997 to 2007-2009)

Newspaper	1995-1997	2007-2009	Δ
Straits Times	8	57	+613%
New York Times	4	104	+2500%
The Times	28	271	+868%

Δ indicates the change in coverage between the two periods.

Projected identities in recent coverage.

During the 12-month period from 2/24/2008-2/23/2009, Dubai received fairly evenly distributed coverage among five of the six Anholt NBI categories, with the heaviest emphasis on immigration & investment images (Appendix A). During this period, Dubai appeared in the three newspapers' headlines 113 times, accounting for The Straits Times (14), The New York Times (23), and The Times (76) (Table 7).

Table 7

Headline Volume (2/24/2008-2/23/2009)

Newspaper	Volume
Straits Times	14
New York Times	23
The Times	76
Total	113

Of these 113 headlines, The NBI category distribution ranged from 0-29% per category, with immigration and investment receiving the most coverage (29%) and the people category none (0%) (Table 8). Culture and heritage (19%), governance (19%), exports (19%), and tourism (15%) categories were each fairly evenly distributed.

Table 8

Headline Volume by NBI Category (2/24/2008-2/23/2009)

NBI Category	Volume ^a
Immigration & Investment	29% (33)
Exports	19% (21)
Culture & Heritage	19% (21)
Governance	19% (21)
Tourism	15% (17)
People	0% (0)

^a n = 113

Identity coverage variation by location.

Identity coverage by location was generally even among the five NBI categories that received coverage, with The Times offering the most balanced category coverage. The four categories of immigration & investment, governance, tourism, and people varied only from 0-10% each among the three locations (Table 9). However, exports

coverage varied extensively, garnering only 4% of New York Times headline coverage while attracting 50% for The Straits Times. In contrast, New York's culture & heritage coverage was 35% while Singapore's received 0%. While not covering the people of Dubai (0%) and most heavily emphasizing immigration & investment images (30%), the remaining London categories all commanded between 17% and 18% of the paper's coverage.

Table 9

Headline Volume by NBI Category Per Newspaper (2/24/2008-2/23/2009)

NBI Category	Newspaper		
	Straits Times ^a	New York Times ^b	The Times ^c
Immigration & Investment	29% (4)	26% (6)	30% (23)
Culture & Heritage	0% (0)	35% (8)	17% (13)
Governance	14% (2)	22% (5)	18% (14)
Exports	50% (7)	4% (1)	17% (13)
Tourism	7% (1)	13% (3)	17% (13)
People	0% (0)	0% (0)	0% (0)

^an = 14. ^bn = 23. ^cn = 76

Recently projected image qualities.

The majority of headline coverage was neutral for all three papers, while The Straits Times contained a substantial minority of positive coverage and the other two papers had a substantial minority of negative headlines (Table 10). Neutral coverage ranged between 57% and 65% of the headlines for the three papers. The New York Times had the most neutral Dubai coverage at 65%. The Straits Times had the most positive coverage (36%) and the least negative (7%), while The Times' coverage was both the most negative (38%) and the least positive (3%).

Table 10

Quality of Headline Coverage (2/24/2008-2/23/2009)

Quality	Newspaper		
	Straits Times ^a	New York Times ^b	The Times ^c
Neutral	57% (8)	65% (14)	59% (43)
Positive	36% (5)	9% (2)	3% (3)
Negative	7% (1)	26% (7)	38% (30)

^a n = 14. ^b n = 23. ^c n = 76.

All three newspapers provided primarily negative governance coverage, describing the government's treatment of various forms of fornication, as well as animal rights and relations with Israel. The Times, which published the most governance articles (12), also included the highest percentage of negative governance coverage (86%) (Table 11). The one positive exception, one Straits Times article referenced Dubai as a financial planning model, representing 50% of the paper's governance coverage. Regarding the three neutral headlines, their neutrality resulted from possessing obscure headlines, while the articles themselves contained negative content.

Table 11

Quality of Governance Coverage (2/24/2008-2/23/2009)

Quality	Newspaper		
	Straits Times ^a	New York Times ^b	The Times ^c
Neutral	0% (0)	20% (1)	14% (2)
Positive	50% (1)	0% (0)	0% (0)
Negative	50% (1)	80% (4)	86% (12)

^a n = 2. ^b n = 5. ^c n = 14.

Export coverage was primarily neutral, with all three countries posting neutral majorities, including The Times (69%), The Straits Times (86%) and The New York

Times (100%) (Table 12). Fact-driven with no emotive content, the typical export headline related to Dubai investing in one of the three cities. In the lone positive example, the headline described the Singapore firm as “drawing” the Dubai investors. The four negative UK texts (31%) identified Dubai as a threat, shunning British partnership and taking over British sport clubs.

Table 12

Quality of Exports Coverage (2/24/2008-2/23/2009)

Quality	Newspaper		
	Straits Times ^a	New York Times ^b	The Times ^c
Neutral	86% (6)	100% (1)	69% (9)
Positive	14% (1)	0% (0)	0% (0)
Negative	0% (0)	0% (0)	31% (4)

^a n = 7. ^b n = 1. ^c n = 13.

Tourism coverage was also overwhelmingly neutral. Both The Straits Times and The New York Times published 100% neutral tourism coverage, with The Times (77%) circulating all three of the positive and negative headlines (Table 13). The lone negative comment portrayed Dubai as brash, ostentatious, and noisy. The two positive pieces referenced Dubai’s “suite taste of luxury” and value offerings at a Dubai mall.

Table 13

Quality of Tourism Coverage (2/24/2008-2/23/2009)

Quality	Newspaper		
	Straits Times ^a	New York Times ^b	The Times ^c
Neutral	100% (1)	100% (3)	77% (10)
Positive	0% (0)	0% (0)	15% (2)
Negative	0% (0)	0% (0)	8% (1)

^a n = 1. ^b n = 3. ^c n = 13.

The papers provided mixed immigration & investment coverage. Straits Times coverage was largely positive (75%), focused on Dubai as a place for immigration (Table 14). The Times balanced between negative (52%) and neutral coverage (43%) of both immigration and investment topics. Similarly, The New York Times issued primarily investment-driven images that contained a mixture of negative (50%), neutral (33%) and positive (17%) messages.

Table 14

Quality of Immigration & Investment Coverage (2/24/2008-2/23/2009)

Quality	Newspaper		
	Straits Times ^a	New York Times ^b	The Times ^c
Neutral	25% (1)	33% (2)	43% (10)
Positive	75% (3)	17% (1)	4% (1)
Negative	0% (1)	50% (3)	52% (12)

^a n = 5. ^b n = 6. ^c n = 23.

Culture & heritage headlines were neutral for London (92%) and New York (88%), while Singapore had none. New York had the sole positive headline, identifying Dubai as “reaching for the clouds” (Table 15). London’s lone negative article described a planned sporting event being “shelved.”

Table 15

Quality of Culture & Heritage Coverage (2/24/2008-2/23/2009)

Quality	Newspaper		
	Straits Times ^a	New York Times ^b	The Times ^c
Neutral	0% (0)	88% (7)	92% (12)
Positive	0% (0)	13% (1)	0% (0)
Negative	0% (0)	0% (0)	8% (1)

^a n = 0. ^b n = 8. ^c n = 13.

Dubai Information Sources

The second research question asked “How do potential stakeholders’ learn about Dubai?” Participants identified all of their information sources among twenty items, in addition to signaling their most important source. The study grouped the various sources according to Gartner’s (1994) framework of covert (i.e. – sponsored media), autonomous (i.e. – independent media), organic (i.e. – personal, friend, and relative experience), and overt (i.e. – advertising) agents. Participants indicated exposure to a broad range of information sources overall, with autonomous news sources occurring most frequently. By location, respondents identified a fairly similar set of sources overall, while differing substantially regarding top sources.

Potential stakeholder information sources.

Friends, newspaper articles, and TV news were the most common participant information sources, each identified by more than half of the respondents. The participants’ two most common knowledge sources were a friend, relative, or coworker (71%), and newspaper articles (67%) (Table 16). The third most common, television news served as a source for 60% of participants. Less than half of the participants identified other individual categories as a source of information on Dubai. Guidebooks and blogs each accounted for less than 10% of respondents, with radio advertisements (5%) the least common. Eighteen percent of participants wrote Internet or Google as an open-ended response, while 13% identified a varied collection of information sources such as Work (6), TV Programs (3), Travel Brochures (2), Books (2), Formula 1 (1), and Flying with Emirates (1). The study excluded all but travel brochures from subsequent analysis due to inability to clearly code them according to Gartner’s

framework. The Gartner framework category has been listed in Table 16 next to information source for ease of back reference when examining subsequent tables.

Table 16

Knowledge Sources (All Cities)

Source	Percentage ^a	Gartner Framework Category
Friend/Relative/Coworker	71% (83)	Organic (Un)Solicited
Newspaper Article	67% (78)	Autonomous
TV News	60% (70)	Autonomous
Internet News	40% (47)	Autonomous
Newspaper Ads	40% (47)	Overt
Magazine Ads	32% (38)	Overt
Travel TV Program	31% (36)	Covert
TV Ads	30% (35)	Overt
Travel Magazine Articles	29% (34)	Covert
Magazine News	28% (33)	Autonomous
Internet Ads	23% (27)	Overt
Geography Lessons	22% (26)	Autonomous
Personal Experience	19% (22)	Organic
Internet (other)	18% (21)	N/A
Radio News	17% (20)	Autonomous
Travel Web Site	16% (19)	Covert
Movie	16% (19)	Autonomous
Other	13% (15)	N/A
Guide Book	9% (11)	Autonomous
Blog	8% (9)	Autonomous
Radio Ads	4% (5)	Overt

^a n = 117

Information sources according to Gartner's framework.

Autonomous news (85%) became the most common Dubai information source with source responses combined according to Gartner's framework, followed by Organic (un)solicited sources (71%) (Table 17). Overt sources had reached 58% of participants, while covert and autonomous (other) sources reached 49% and 40%, respectively. Organic sources (19%) were the least common.

Table 17

Knowledge Sources by Gartner Framework (All Cities)

Gartner Framework Category	Percentage ^a
Autonomous (News)	85% (89)
Organic (Un)Solicited	71% (83)
Overt	58% (61)
Covert	49% (51)
Autonomous (Other)	40% (42)
Organic	19% (22)

Responses combined from Table 15

^a n = 117

Information source variation by location.

New York professionals cited autonomous news the most, while London respondents did so with organic (un)solicited, and Singaporean participants were the most familiar with overt sources. Although The Times had more than three times The New York Times' number of Dubai headlines and over five times those of The Straits Times, 92% of New York participants identified news as a source, while only 82% of London professionals did so (Table 18). Occurrences of organic and organic (un)solicited sources were statistically significant, with London professionals citing both more frequently than participants in the other two cities. The starkest significant

difference between locations occurred, however, in the overt category of advertising, with the New York responses (25%) contrasting dramatically with those of London (67%) and Singapore (77%).

Table 18

Knowledge Sources by Gartner Framework (by City)

Gartner Framework Category	Singapore ^a	New York ^b	London ^c
Autonomous (News)	79% (35)	92% (37)	82% (27)
Organic (Un)Solicited	59% (26)	70% (28)	88% (29)
Overt	77% (34)	25% (10)	67% (22)
Covert	48% (21)	43% (17)	58% (19)
Autonomous (Other)	43% (19)	42% (17)	33% (11)
Organic	14% (6)	8% (3)	39% (13)

^a n = 44. ^b n = 40. ^c n = 33

New York professionals cited each news category equally or more frequently than did Singapore or London respondents (Table 19). Generally, the three groups had similar results, with one exception. Survey respondents in New York (53%) noted Internet news considerably more frequently than those in either Singapore (36%) or London (30%).

Table 19

Autonomous News Sources (by City)

Source	Singapore ^a	New York ^b	London ^c
Newspaper Article	68% (30)	70% (28)	61% (20)
TV News	57% (25)	65% (26)	58% (19)
Internet News	36% (16)	53% (21)	30% (10)
Magazine News	32% (14)	33% (13)	18% (6)
Radio News	18% (8)	18% (7)	15% (5)

^a n = 44. ^b n = 40. ^c n = 33

As noted above, only 25% of New York professionals cited overt information sources, less than half that of London (67%) and Singapore (77%) participants. However, while Singaporean participants cited the overall overt category most frequently, London respondents most frequently identified advertisements from any individual category (Table 20). In addition, of those who had an overt source, 73% of Singaporean respondents had only one or two sources, while 58% of those in London had between three and five (Table 21). In other words, while fewer London professionals were aware of ads than their Singaporean counterparts, aware Londoners tended to have more ad sources than did those in Singapore.

Table 20

Overt Sources (by City)

Sources	Singapore ^a	New York ^b	London ^c
Newspaper Ads	48% (21)	20% (8)	55% (18)
TV Ads	36% (16)	13% (5)	42% (14)
Radio Ads	5% (2)	3% (1)	6% (2)
Internet Ads	23% (10)	10% (4)	39% (13)
Magazine Ads	36% (16)	15% (6)	48% (16)

^a n = 44. ^b n = 40. ^c n = 33

Table 21

Number of Overt Sources (by City)

#	Singapore ^a	New York ^b	London ^c
1	47% (16)	45% (5)	18% (4)
2	26% (9)	18% (2)	14% (3)
3	15% (5)	18% (2)	26% (8)
4	12% (4)	9% (1)	27% (6)
5	0% (0)	9% (1)	5% (1)

^a n = 34. ^b n = 11. ^c n = 22

While information sources varied by location, overt sources correlated with organic sources independent of location. Correlating personal experience to the number of ads resulted in a Cramer's V value of .471 ($p < .001$), representing a medium association between the two variables (Table 22) (Field, 2005, p. 693). Of those who had not been to Dubai, 48% cited no exposure to ads and 26% cited exposure to one advertisement. By comparison, 60% of those who had visited Dubai cited exposure to three or more ads. Thus, London participants' tendency to have a higher amount of ad exposure is not necessarily the result of location, but rather the result of being nearly three times as likely as Singapore participants to have visited Dubai.

Table 22

Correlation of Number of Overt Sources with Organic Experience^a

# of Overt Sources	Organic Experience	
	Yes ^b	No ^c
0	18% (4)	48% (45)
1	5% (1)	26% (24)
2	18% (4)	11% (10)
3	23% (5)	11% (10)
4	32% (7)	4% (4)
5	5% (1)	1% (1)

^aCramer's V = .471, $p < .001$. ^bn = 22. ^cn = 94.

Top information source variation by location.

Identifying all information sources indicated the range of influences on Dubai brand image formation, while discovering the top source revealed the importance of sources in the process. Similar to all information sources, the three locations' top information source occurred with statistical significance but to a greater degree (Table

23). News was the most important source for both New York (67%) and Singaporean (44%) professionals, while only primary for 17% of London participants. London participants (47%) noted organic (un)solicited sources as their most important, significantly more than did Singapore (18%) and New York (19%), though it was New York's second most important source. London professionals also identified the highest percentage of organic sources (20%), while Singapore respondents dominated the overt category (21%). The remaining two categories, covert and autonomous (other), lacked importance in all three cities, cited by no more than 7% of respondents.

Table 23

Number One Knowledge Source (by City)

Gartner Framework Category	Singapore ^a	New York ^b	London ^c
Autonomous (News)	44% (17)	67% (24)	17% (5)
Organic (Un)Solicited	18% (7)	19% (7)	47% (14)
Organic	13% (5)	3% (1)	20% (6)
Overt	21% (8)	0% (0)	10% (3)
Covert	5% (2)	6% (2)	7% (2)
Autonomous (Other)	0% (0)	6% (2)	0% (0)

^a n = 39. ^b n = 36. ^c n = 30.

Perceptions of Dubai's Global Media Portrayal

The third research question inquired, "How do potential stakeholders perceive media projections of Dubai?" Respondents compared the consistency of 12 headlines to their overall Dubai impressions, in addition to the headlines' consistency relative to one another. They also noted each text's perceived favorability. Overall, the headlines matched respondent impressions of Dubai, and were similarly consistent among cities. Respondents held mixed views of headline favorability, with substantial city variation .

Consistency of portrayal with impressions.

The potential stakeholders' viewed Dubai's media portrayal as largely consistent with their impressions. The majority of participants viewed eleven out of twelve headlines as consistent (Table 24). The only inconsistent headline related to Dubai barring entrance to an Israeli, which only 30% viewed as consistent. The most consistent images depicted Brand Dubai as a modern, luxury tourism destination. Over 80% of those surveyed identified shiny new malls (82%), big is best (86%), and the rich and famous (89%) as consistent with Brand Dubai. Dubai's architectural identity was familiar to 76% of respondents. Business specific images of immigration, investment, and exports were less familiar, though still consistent with between 55% and 62% of participants.

Table 24

Volume of Perceived Headline Consistency (All Cities)

Headline	Percentage ^a
Worldly pursuits in Dubai...	89% (104)
Big is always best, in Dubai at least	86% (100)
Shiny new malls or beautiful deserts...	82% (96)
City on the Gulf: Architect Koolhaas ...	76% (89)
Dubai investment fund looks east...	62% (73)
...Dubai Plans Theme Parks	61% (71)
Dubai to lure biggest sports names	59% (69)
More local firms flock to Dubai...	58% (68)
Laid-Off Foreigners Flee...	57% (67)
Dubai Firm Buys Racehorse Auction House	55% (64)
Briton faces jail in Dubai for adultery	51% (60)
Dubai sets awful precedent by barring Israeli ...	30% (35)

^an = 117

Participants marked relative headline consistency in line with their responses to independent headline consistency. Modern, luxury tourism headlines held the most dominant images (Table 25). Between 50% and 74% of participants most closely identified with these headlines. Between 39% and 50% of participants ranked three identities as moderately consistent, including one culture & heritage and two business headlines. Participants identified the remaining five headlines as least consistent, drawing between 42% and 72% responses in the third band., once again ranking the two socio-cultural headlines as least consistent (49% and 72%), though 25% of participants still most closely identified with the image of prosecuting adulterers. In addition, while 42% viewed laid-off foreigners as least consistent, 26% saw it as most consistent.

Table 25

Volume of Perceived Relative Headline Consistency(All Cities)

Headline	Banded Percentage ^a		
	1-4	5-8	9-12
Worldly pursuits in Dubai...	74% (86)	17% (20)	9% (11)
Shiny new malls or beautiful deserts...	68% (80)	21% (25)	10% (12)
Big is always best, in Dubai at least	53% (62)	33% (39)	14% (16)
City on the Gulf: Architect Koolhaas...	50% (59)	33% (39)	16% (19)
More local firms flock to Dubai...	18% (21)	48% (56)	34% (40)
Dubai investment fund looks east ...	19% (22)	50% (58)	32% (37)
Dubai to lure biggest sports names	27% (32)	39% (45)	34% (40)
Laid-Off Foreigners Flee...	26% (30)	33% (38)	42% (49)
...Dubai Plans Theme Parks	19% (22)	38% (44)	44% (51)
Dubai Firm Buys Racehorse Auction House	15% (18)	40% (47)	44% (52)
Briton faces jail in Dubai for adultery	25% (29)	27% (31)	49% (57)
Dubai sets awful precedent by barring Israeli ...	8% (9)	21% (24)	72% (84)

^an = 117

Perceived consistency variation by location.

The professionals cited minimal city variation in consistency. Assessed by exercise one's individual headline responses, inter-city variation exceeded 15% for only four headlines, including the topics of architecture (19%), relations with Israel (19%), theme parks (21%), and sports names (38%) (Table 26). Of these images, New York participants identified most closely with all but sports names. Regarding architecture, Singaporean professionals (66%) possessed statistically significant less awareness than their New York (85%) counterparts. Both Singapore (73%) and London (70%) professionals viewed Dubai's role in sports as consistent significantly more than did New York (35%). Though not statistically significant, London participants (49% & 21%) were substantially less aware than New York (70% & 40%) regarding images of theme parks and relations with Israel.

Table 26

Variation of Headline Consistency (by City)

Headline	Singapore ^a	New York ^b	London ^c	Var
Worldly pursuits in Dubai...	91% (40)	90% (36)	85% (28)	6%
Big is always best, in Dubai at least	84% (37)	83% (33)	91% (30)	8%
Shiny new malls or beautiful deserts...	86% (38)	80% (32)	79% (26)	7%
City on the Gulf: Architect Koolhaas...	66% (29)	85% (34)	79% (26)	19%
More local firms flock to Dubai...	64% (28)	60% (24)	49% (16)	15%
Dubai investment fund looks east ...	59% (26)	68% (27)	61% (20)	9%
...Dubai Plans Theme Parks	61% (27)	70% (28)	49% (16)	21%
Dubai to lure biggest sports names	73% (32)	35% (14)	70% (23)	38%
Laid-Off Foreigners Flee...	59% (26)	50% (20)	64% (21)	14%
Dubai Firm Buys Racehorse Auction House	50% (22)	53% (21)	64% (21)	14%
Briton faces jail in Dubai for adultery	46% (20)	50% (20)	61% (20)	15%
Dubai sets awful precedent by barring Israeli ...	27% (12)	40% (16)	21% (7)	19%

Note. Var = the difference between the highest and lowest percent of the three cities' respondents.

^a n = 44. ^b n = 40. ^c n = 33.

Compared by relative consistency, substantial inter-city variation existed for a different set of four headlines. Assigning headlines an averaged relative rank, the study defined substantial variation as differing more than four points (Table 27). Mirroring the above views of Dubai's sports role, Singapore (5th) and London (5th) professionals identified a moderate relative ranking, compared to New York's (9th) low ranking. The cities' participants also differed regarding three business headlines. While Singapore (6th) and New York (6th) participants identified moderately with local businesses setting up shop in Dubai, it was one of London professionals (11th) least consistent images. Somewhat oddly, the western most New York professionals (5th) identified moderately with Dubai investment's eastward retreat, while the headline became progressively less

consistent for participants in London (8th) and Singapore (9th). Finally, London (6th) identified considerably more than Singapore (10th) and New York (11th) professionals with Dubai's racehorse investments.

Table 27

Relative Headline Consistency Ranking (by City)

Headline	Singapore	New York	London
Worldly pursuits in Dubai...	2 nd	1 st	1 st
Shiny new malls or beautiful deserts...	1 st	3 rd	2 nd
Big is always best, in Dubai at least	3 rd	4 th	3 rd
City on the Gulf: Architect Koolhaas...	4 th	2 nd	4 th
Dubai to lure biggest sports names	5 th	9 th	5 th
More local firms flock to Dubai...	6 th	6 th	11 th
Laid-Off Foreigners Flee...	8 th	7 th	7 th
Dubai investment fund looks east...	9 th	5 th	8 th
Briton faces jail in Dubai for adultery	11 th	8 th	9 th
...Dubai Plans Theme Parks	7 th	10 th	10 th
Dubai Firm Buys Racehorse Auction House	10 th	11 th	6 th
Dubai sets awful precedent by barring Israeli...	12 th	12 th	12 th

Favorability towards portrayals.

Responses were mixed fairly evenly between favorable, unfavorable, and mixed images. The majority of participants viewed three headlines favorably, three unfavorably, and had no impression for one headline, while participants held no majority view of the remaining five headlines (Table 28). The three favorable images included depictions Dubai's modern place of shopping and nature (71%), architecture (65%), and business opportunity (57%). Participants negatively perceived images of Dubai's struggling economy (70%) and social policies towards adultery (67%) and

Israelis (76%). On average, only 7% viewed these six headlines contrary to the majority opinion, while 25% had no impression.

Table 28

Favorability Towards Headlines (All Cities)^a

Headline	Favorable	Unfavorable	None
Shiny new malls or beautiful deserts...	71% (83)	14% (16)	15% (18)
City on the Gulf: Architect Koolhaas...	65% (76)	5% (6)	30% (35)
More local firms flock to Dubai...	57% (67)	9% (11)	33% (38)
Dubai to lure biggest sports names	46% (54)	10% (12)	44% (51)
Dubai investment fund looks east...	42% (49)	23% (27)	35% (41)
Big is always best, in Dubai at least	44% (52)	44% (51)	12% (14)
...Dubai Plans Theme Parks	33% (38)	33% (38)	35% (41)
Dubai Firm Buys Racehorse Auction House	34% (40)	14% (16)	52% (61)
Worldly pursuits in Dubai...	36% (42)	45% (53)	19% (22)
Briton faces jail in Dubai for adultery	7% (8)	67% (78)	27% (31)
Laid-Off Foreigners Flee...	5% (6)	70% (82)	25% (29)
Dubai sets awful precedent by barring Israeli ...	2% (2)	76% (89)	22% (26)

^a n = 117.

Participants held divided views of Dubai's two super-luxury tourism images. "Worldly pursuits" and "big is best" repelled (45% & 44%) as much as it attracted (36% & 44%), while drawing two of the smallest no impression responses (19% & 12%). The remaining four headlines drew the largest no impression responses, ranging from 35% to 52%. Though attracting the highest no impression responses (52% & 44%), participants still held generally positive views of Dubai's racehorse (34%) and sports figure (46%) involvement. Theme parks and investment fund headlines drew the most evenly mixed responses.

Favorability variation by location.

While the previous section examined patterns across headlines, this section will compare and contrast favorability towards the headlines. Nine headlines drew responses that varied more than 15% between at least two cities, while the gap between favorable and unfavorable responses often resulted from participants having no impression (Table 29).

Table 29

Favorability Towards Headlines (by City)

Headline	City ^{a, b}		
	Singapore	New York	London
Shiny new malls or beautiful arid deserts...	(77/11/12)	(69/13/18)	(64/18/18)
City on the Gulf: Architect Koolhaas...	(55/2/43)	(78/3/19)	(64/12/24)
More local firms flock to Dubai...	(59/9/32)	(63/10/27)	(49/9/42)
Dubai to lure biggest sports names	(55/11/34)	(35/13/52)	(49/6/45)
Dubai investment fund looks east...	(48/16/36)	(40/23/37)	(38/34/28)
Big is always best, in Dubai at least	(55/36/9)	(33/58/9)	(42/39/19)
...Dubai Plans Theme Parks	(36/30/34)	(38/28/34)	(21/42/37)
Dubai Firm Buys Racehorse Auction House	(27/23/53)	(30/10/60)	(49/6/45)
Worldly pursuits in Dubai...	(39/43/18)	(28/55/17)	(42/36/22)
Briton faces jail in Dubai for adultery	(11/50/39)	(3/78/19)	(6/76/18)
Laid-Off Foreigners Flee...	(7/59/34)	(5/73/22)	(3/82/15)
Dubai sets awful precedent by barring Israeli ...	(2/61/37)	(3/78/19)	(2/74/24)

^a (%Favorable/Unfavorable/No Impression) ^b n = 117.

The New York professionals responded unfavorably to both of the over the top luxury images. While 55% percent viewed Dubai's worldly pursuits unfavorably, London (36%) and Singapore (43%) professionals held a less negative view. Similarly,

58% of New York participants viewed “big is best” negatively compared to Singapore (36%) and London (39%). In both cases, Singapore’s gap went overwhelmingly to the favorable column, while London’s split evenly between favorable and no impression.

The New York participants varied greatly with Singapore on two other occasions. New York participants (78%) significantly favored the connection between Dubai and Architecture, compared with Singapore (55%). On the other hand, while both New York (78%) and London (76%) participants held highly unfavorable views of Dubai prosecuting adultery, only 50% of Singapore professionals maintained this view. This difference amounted to the largest gap for all twelve headlines. In both cases, the difference between New York and Singapore translated to higher no impression ratings for Singapore.

Regarding Dubai and business, London professionals (82%) saw Dubai’s economic problems most unfavorably, followed by those in New York (73%) and Singapore (59%). The remainder had no impression. New York participants (78%) viewed Dubai architecture favorably, while London (64%) and Singapore (55%) responded less enthusiastically. Again, those with no impression made up the difference. Finally, while the plurality of Singapore (55%) and London (49%) participants held favorable views of Dubai attracting top sports names, only 35% did so in New York, with the remainder once again having no impression.

Although the plurality of respondents did not vary notably, two additional texts varied considerably in their minority responses. Although large number in all three cities indicated no impression (45-60%) towards Dubai’s racehorse investments, they varied substantially among those who held an impression. A plurality of London participants (49%) favored the headline, in contrast with both New York (30%) and

Singapore (27%) contributors. Unfavorable responses in Singapore (23%) also varied substantially with London (6%). In contrast, London participants considerably disfavored Dubai shifting its foreign investment eastward compared to respondents in Singapore. While the plurality in all three cities favored the move, 34% of London professionals viewed it unfavorably, compared to only 16% in Singapore.

Perceptions of Dubai's Competitive Identity

The final research question asked “How do potential stakeholders perceive Dubai's competitive identity?” The study examined tourism, business, and socio-cultural identities, combining the consistency and favorability results described in the previous section. The three competitive identity categories resulted from pairing related NBI categories. Tourism included the NBI categories of tourism and culture & heritage. Business joined together exports and immigration & investment. Finally, the socio-cultural category included governance and people, though there were no people headlines to include.

Overall favorability resulted from combining favorability and consistency results as follows: $\{SUM = (\%Favorable - \%Unfavorable) * \%Consistent\}$. In cases where participants identified more unfavorable than favorable views, the resulting negative favorability will be depicted using a minus (-) symbol. These results will be displayed side by side with the headlines' relative consistency rankings.

Overall, favorability towards Dubai's identities varied, which is unsurprising given the study's intentional selection of favorable, unfavorable, and neutral headlines, as described above. While both tourism and business identities resulted in mixed responses, participants held the most favorable and strong views of Dubai's tourism identities, followed by less markedly favorable and less strong views of business ones.

While unfavorable views of governance identities matched the negative sample headlines, they were also the least strongly held identities.

Tourism identities.

Favorability of Dubai's strongest identity, tourism, varied considerably among participants. Containing the five most strongly held images, favorability ranged from -8% to 47% (Table 30). Participants most favorably identified Dubai as a modern and exotic land of shopping and natural beauty (47%) and architecture (46%); the emirate's 2nd and 4th ranked images, respectively. This contrasted sharply with participants more strongly held neutral and negative views of Dubai worldliness (-8%, 1st) and passion for bigness (0%, 3rd). Finally, these professionals held a moderately strong (5th), favorable (22%) image of Dubai as a world class sport event sponsor, much more so than their view of its planned identity as a land of theme parks (0%, 9th).

Table 30

Favorability and Strength of Tourism Identities (All Cities)

Headline	Favorability	Strength
Shiny new malls or beautiful arid deserts...	47%	2 nd
City on the Gulf: Architect Koolhaas...	46%	4 th
Dubai to lure biggest sports names	21%	5 th
...Dubai Plans Theme Parks	0%	9 th
Big is always best, in Dubai at least	0%	3 rd
Worldly pursuits in Dubai...	-8%	1 st

Business identities.

Business perceptions, whether in exports, investments, or immigration, were also generally positive, though less strong than tourism images. Three of the four business identities occupied the middle range of strength, while ranging from -37% to

28% in favorability (Table 31). Regarding the local business environment, participants favorably viewed Dubai as a place for new business opportunities (28%, 7th) while possessing a negative and similarly strong view of its faltering economy (-37%, 8th). Respondents held moderately favorable views of Dubai as a capital exporter (12%, 6th), but were more familiar with the concept in general than with its specific identity as a global racehorse broker (11%, 11th).

Table 31

Favorability and Strength of Business Identities (All Cities)

Headline	Favorability	Strength
More local firms flock to Dubai...	28%	7 th
Dubai investment fund looks east...	12%	6 th
Dubai Firm Buys Racehorse Auction House	11%	11 th
Laid-Off Foreigners Flee...	-37%	8 th

Socio-cultural identities.

Respondents viewed Dubai's governance of socio-cultural issues negatively. However, these brand identities included two of the least strongly held impressions. Viewed less unfavorably than Dubai's economic struggles, participants negatively perceived social policies regarding adultery (-33%) and Israelis (-22%) (Table 32). The Israeli issue was the least strong of Dubai's identities (12th), while the potentially more broadly relevant issue of adultery ranked 10th.

Table 32

Favorability and Strength of Socio-cultural Identities (All Cities)

Headline	Favorability	Strength
Dubai sets awful precedent by barring Israeli...	-22%	12 th
Briton faces jail in Dubai for adultery	-31%	10 th

Discussion

The final chapter reviews the study thus far, including a summarized reiteration of the problem, methodology, and results. Discussion of the findings' implications follows.

Statement of Problem and Review of Methodology

Locations have increasingly moved beyond tourism-oriented destination marketing in search of broad economic benefits from successful place branding. Dubai has extensively attempted such branding efforts during the past two decades. Six studies have assessed Dubai's branding efforts by investigating strategy (Bagaen, 2007; Balakrishnan, 2008; Cooper & Momani, 2009; Govers & Go, 2009; Lee & Jain, 2009a, 2009b; Walters, 2006). Many of these papers addressed Dubai's globally projected and perceived image as well, though all but one were anecdotal. The one exception, Go and Govers collected survey data on Dubai information sources and global perceptions in 2004, in addition to analyzing Internet image projections and secondary data on strategy.

Recognizing Dubai's increasing global prominence, this case study sought to identify potential overlap between media projections, information sources, and brand perceptions among strategically located potential stakeholders. As a targeted sample, the study incorporated newspapers and professionals in London, Singapore, and New York.

Investigating 18 years of newspaper projection in The Straits Times (Singapore), The New York Times, and The Times (London), the study first sought to understand the growth of the Dubai brand and its recently projected identities. The research then investigated which information sources shaped global professionals' perceptions of

Dubai. Finally, the professionals responded to recent headlines, indicating their perceptions of Dubai's competitive identity.

These typically mid-career professionals represented the globalized nature of the three cities. Forty-seven percent had vacationed internationally at least six times in the previous five years, 56% had traveled internationally for business in the same period, and 37% were expatriates.

In addition to gathering background information on age, citizenship, and travel habits, the survey included a question on Dubai information sources and three newspaper headline response exercises. The information source question contained 20 choices, 19 closed-ended and one open-ended, in addition to participants identifying their primary information sources. Among the 12 headlines, four headlines represented each newspaper, including a mixture of business, tourism, and socio-cultural topics with favorable, neutral, and unfavorable titles.

Summary of Results

The following section will describe the findings for each of the four research questions. First, media coverage in the three cities will be addressed, followed by an explanation of participants' information sources. The study will then describe participant responses to the twelve headlines, concluding with a summary of Dubai's perceived competitive identity.

Dubai media coverage grew substantially for all three of the examined newspapers, increasing between 613% and 2500% from 1995 to 2009, with between 57 and 271 headlines allotted to Dubai coverage from 2007 to 2009. Among recent headlines, nearly half addressed business identities, while almost one-third went to tourism identities, and the remaining one-fifth dealt with socio-cultural identities, with

notably absent coverage of Dubai's people. Compared by city, The Times maintained the most evenly distributed topic coverage. The New York Times heavily covered culture & heritage and neglected exports, while The Straits Times did the reverse. Overall, all three newspapers neutrally covered Dubai for the majority of headlines. However, in governance, exports, and immigration & investment categories, The Straits Times published a substantial minority of positive headlines, in contrast with a substantial negative minority for the other two papers.

Over two-thirds of participants identified newspaper coverage as one of their three most common ways of learning about Dubai, along with TV news, and someone they knew. Grouped by related sources, news (85%) was the most common information source. Source exposure varied by city. New York and Singapore participants identified news sources the most frequently, while London participants cited someone they knew. Internet news was substantially more important for New York professionals, who noted advertisement exposure substantially less frequently than the other participants. Advertisement exposure varied in another noteworthy way, as visitors to Dubai cited substantially more advertisement exposure than those who had not visited. Identifying their most important information source, 67% of New York participants cited news, London professionals named personal experience (20%) and someone they knew (47%), and Singapore residents cited news (44%) and advertisements (21%).

Assessing newspaper coverage of Dubai, the majority of professionals held mixed favorability towards headlines, all but one of which they viewed as consistent with their image of Dubai. The most unfavorable headline, denying an Israeli a visa was also seen as highly inconsistent; though New York participants viewed it as

consistent notably more frequently than the others. Similarly, headlines of laid-off foreigners and jailed adulterers received a majority of unfavorable responses, while counted among the least consistent. A considerably smaller number of Singapore participants viewed these headlines as consistent compared to the other cities, and provided substantially more no impression responses.

Dubai's image as a place for worldly pursuits was both its strongest and second most controversial. It received high percentages of both favorable and unfavorable responses, with only London participants indicating a plurality of favorable impressions. The most controversial headline, Dubai's "big is always best" headline was highly consistent, with the lowest no impression response and evenly divided favorable and unfavorable impressions. Most Singapore and London participants viewed this headline favorably, compared to an unfavorable majority in New York. Also among the most consistent, projections of unique architecture and contrasts of modern shopping and desert beauty received the highest favorable response. However, Singapore participants registered both appreciably less familiarity and considerably higher no impressions regarding Dubai architecture.

Of the remaining five headlines, Dubai's racehorse investments attracted a majority of no impressions, with London participants being notably more aware and favorable than the other two cities. The ability to lure foreign firms and famous athletes also received large no impressions, though both received a plurality of favorable responses. New York participants noted substantially less familiarity and higher no impressions regarding athletes, while the same held true for London regarding relocating firms. The final two headlines, Dubai's theme park plans and its eastward moving investments, drew the most even distribution of favorable, unfavorable, and no

impression responses. London professionals viewed the investment change appreciably more unfavorably than their Singapore counterparts, while New York participants held substantially more favorable views of Dubai theme parks than those in London.

Overall, the study identified strong, highly favorable tourism identities for Dubai, especially involving modern and exotic images of architecture, shopping, and natural beauty. However, the more strongly held images of over the top luxury drew negative and neutral responses. Results indicated a favorable but less robust business identity. The potential stakeholders held favorable views of Dubai as place for incoming and outgoing FDI opportunity, while viewing the weak state of its expatriate employment market unfavorably. Finally, Dubai's social-cultural identities included only negative governance depictions that received highly unfavorable responses, while also being the least familiar of the identities.

Discussion of Results

Studies to date have assumed that global projections and perceptions of Dubai match Dubai's branding efforts and internal identity, creating a strong de facto place brand. Dubai's inclusion among the 50 City Brand Index countries and the UAE's coverage according to the NBPI would seem to confirm this view. However, variation between UK and USA City Brand Index perceptions indicate that Dubai's global prominence varies substantially by location. Additionally, Govers et al. (2007) noted that the global travel community often held non-specific views of Dubai that contained inaccurate regional stereotypes.

The present study attempted to describe the Dubai place brand's growth to global media prominence, as well as the type and quality of its projected images. Seeking to connect projections to perceptions, it analyzed the strength and favorability

of Dubai's identity among professionals in Singapore, New York, and London, including the sources of those perceptions.

Dubai's consistent and continued media growth indicates both the emergent and increasingly prominent nature of the Dubai brand. Although Lee and Jain (2009a, p. 236) identified Dubai's limited media coverage as a brand threat, while the NBPI ranked Dubai among the top twenty countries for most of 2008 and 2009 (East West Communications, n.d.). The current study noted robust, growing coverage in all three newspapers under examination, with news as the most cited source of information for potential stakeholders. The discrepancy between Lee and Jain's conjecture, NBPI data, and this study's findings warrants further comparison among a wider range of global cities of specific importance to Dubai.

As for type of coverage, immigration and investment headlines appeared most frequently, with a notable absence of people images. Immigration and investment was the most frequently projected image by all three newspapers. This parallels UAE NBI findings for the UK, while placing a question mark next the index's USA findings (Nation Brand Index, 2008; Nation Brand Index, 2009). One explanation may be that the Americans who took the NBI survey were less familiar with either the Dubai or UAE brands than this study's globally-oriented New York professionals. Alternatively, the Dubai brand may be substantially more prominent than the UAE brand. While both may be true, the latter may hold more weight given repeated media and scholarly references to Dubai as a nation (Go & Govers, 2009; Lee & Jain, 2009a; Taylor, 2010). Otherwise, although no previously published study on Dubai identified lack of people coverage as a brand threat, this study's findings matched journalistic reports citing this as a Gulf-wide tourism issue (Karantzavelou, 2009).

Regarding quality, all three papers covered Dubai in a neutral manner for the majority of headlines, contrasting with the hyperbolic and cheerleading local Dubai coverage described by Walters (2006). However, The Straits Times published a noteworthy minority of positive coverage compared with a large percent of negative headlines for the New York and London papers. This difference occurred almost exclusively in the business and governance-oriented categories. Although merely speculation, The Straits Times may have been less apt to cover the type of negative governance articles found elsewhere due to its nation's own relatively conservative legal environment, while its positive business coverage may result from being more often a recipient rather than provider of Dubai FDI. Another possibility may be that its relative strength compared to the other two cities created more editorial caution.

Turning to perception, a majority of participants identified a personal relation, newspaper article, or TV news as the three most prevalent information sources, while the majority also reported familiarity with at least one form of both news and advertising. Such figures represent dramatically higher response rates than those collected by Govers et al. (2007) in 2004, for whom only 24% of participants cited friends, 5% cited newspapers, and all forms of advertisement accounted for only 6%. However, it must be noted that this study's results emerged from a primarily closed-ended response activity, while the 2004 data resulted from open-ended responses. The current study's more targeted sample population may also have influenced this difference. Even so, the difference paralleled both media coverage growth between 2004 and 2009, and a 43% compound annual growth rate (CAGR) of foreign tourists between 2003 and 2008 (Euromonitor International, 2009).

This difference in findings and approach offered two caveats to the Govers et al. (2007) assertion that the Internet and advertising may have received more marketing consideration than merited. Like the Govers et al. research, non-sponsored media, such as news and personal relations, proved to be the most common information sources when assessing *all* sources for *combined* populations. However, participant location and relative source importance warranted notes of caution in utilizing aggregated global results for marketing and advertising strategy decisions.

First, location highly influenced the relative importance of source type. Matching the findings of Govers et al. (2007), personal experience and personal relations mattered most to London participants, befitting Britain's position as Dubai's number one inbound tourist market (Euromonitor International, 2009). In addition, the more physically distant New York participants counted news as their top information source, as did Singaporeans. However, the majority of New York participants cited the Internet as a news source, and a substantial minority of Singaporeans identified advertisements as their primary source. Thus, location-specific importance of sources merits attention. Additionally, connecting these top information sources, such as placing Dubai banner ads on a newspaper web site, may result in powerful, image-building synergy.

Second, participants demonstrated a moderate association between visiting Dubai and advertisement awareness that was independent of location. While the study did not establish causality, these ads likely held importance in either attracting people to Dubai, affirming the worth of their previous Dubai experience, or a mixture of both. Thus, advertising budgets could be justified by either directly gaining tourists, new or

repeat, or persuading previous tourists to become information sources for their friends, relatives, and coworkers.

Concerning headline responses, the majority of participants considered all but one media depiction of Dubai as consistent with their overall impressions. Among these, tourism-oriented images of architecture, shopping, desert, wealth, luxury, and modernity fit the impressions of over 75% of participants. These results generally matched the de facto image assumed in previous studies (Bagaen, 2007; Balakrishnan, 2008; Go & Govers, 2009; Lee & Jain, 2009a). Architecture was not nearly as ubiquitously perceived as Bagaen presumed, however. While majorities in all three cities identified with Dubai's architecture image, a notably smaller percent did so in Singapore. Considering the targeted nature of the current study, this example and others should temper assumptions that Dubai image familiarity is universal (Kotler & Gertner, 2004; Olins, 2004).

More instantly recognizable, participants viewed headlines of grandiose (86%) opulence (89%) as highly consistent regardless of location. However, such heavy emphasis on materialism created a wedge in participant favorability. Though Lee and Jain (2009a) argued that such prestige-oriented themes would find their best reception among Asians, only London respondents favored opulence more than disfavoring it, while the plurality in both Singapore and London favored "big is best" images. In either case, this perception could unintentionally limit Dubai to a niche tourism market if not addressed through diversification, as has been noted elsewhere (Euromonitor International, 2009).

This tourism image familiarity contrasted with less familiar but more frequently projected business images. The lower awareness is unsurprising given participants

much more frequent international holiday travel compared to business trips. With the largest Dubai expatriate population of the three cities, London participants expressed the greatest business image familiarity. Considering New York and London's roles as global finance hubs and Dubai's previous US market entry challenges, Dubai would do well to consider the higher rate of negative business headlines found in *The New York Times* and *The Times* compared to *The Straits Times*. Dubai's low 4th quarter 2009 NBPI ranking testifies to the need to address this challenge, though the effect of such coverage on potential stakeholder's impressions remains an item for further study.

Highly unfavorable perceptions of governance coverage also pose a potential threat to the Dubai brand. While previous research identified environmental neglect, overstretched infrastructure, and lack of privacy as Dubai brand threats, none of these topics made the headlines. Socio-cultural conflicts arising from the gap between local and foreign norms did, however, in line with Govers and Go (2009) findings. Although large majorities viewed these issues unfavorably, they were also generally unfamiliar with them, indicating a limited impact on Dubai's identity. However, as noted by Govers and Go (2009), sustained negative coverage of these issues could be damaging, and thus threaten the Dubai brand.

Overall, Dubai's efforts serve as a model to other relatively unknown places seeking to build global awareness and benefit from increased global engagement. While Dubai's media projected images were well known and generally favorable among global professionals in Singapore, New York, and London, they could also be divisive. Fortunately, however, highly unfavorable images appear to have been largely absent from the public consciousness. Given the highly adverse fourth quarter media coverage in 2009, however, further study could shed a helpful light on whether such repeated

headlines might have an enduring effect on public opinion, or merely temporarily inconvenience the emirate's branding ambitions.

In addition to assessing effects of the shift in media coverage, future research could explore how Dubai media coverage, information sources, and brand perceptions differ in additional locations. Important and emerging markets such as India, Germany, Russia, France, China, Pakistan, Turkey, and Japan would provide a broader understanding, as well as analysis in places where the English press is of less importance. Assessing more peripheral markets such as Mexico, Brazil, and Spain would also allow assessment of the brand in places where it may be in more of its infancy. Such broader study would shed light on the ubiquitous nature of Brand Dubai.

Finally, the headlines did not include all of the possible Dubai brand identities. Categories that indices ranked highly (e.g. – dining), stereotypical views (e.g. – restrictions on women) and researcher-identified threats (e.g. - infrastructure, privacy, and environment) were also absent from the coverage (Bagaen, 2007; FutureBrand, 2007; FutureBrand, 2008; Govers et al, 2007; Lee & Jain, 2009b). The perceived prevalence of such identities could be identified through the creation and inclusion of related headlines in future research, if not found among the sampled media.

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Appendix A

Nation Brand Index Definitions

Exports:

Determines the public's image of products and services from each country and the extent to which consumers proactively seek or avoid products from each country-of-origin.

Tourism:

Captures the level of interest in visiting a country and the draw of natural and man-made tourist attractions.

Culture & Heritage:

Reveals global perceptions of each nation's heritage and appreciation for its contemporary culture, including film, music, art, sport and literature.

Governance:

Measures public opinion regarding the level of national government competency and fairness and describes individuals' beliefs about each country's government, as well as its perceived commitment to global issues such as democracy, justice, poverty and the environment.

Investment & Immigration

Determines the power to attract people to live, work or study in each country and reveals how people perceive a country's economic and social situation.

People:

Measures the population's reputation for competence, education, openness and friendliness and other qualities, as well as perceived levels of potential hostility and discrimination.

Appendix B

City Brand Index Definitions

Presence

Based on the city's international status and standing and the global familiarity/knowledge of the city. It also measures the city's global contribution in science, culture and governance.

Place

Exploring people's perceptions about the physical aspect of each city in terms of pleasantness of climate, cleanliness of environment and how attractive its buildings and parks are.

Pre-requisites

Determines how people perceive the basic qualities of the city; whether they are satisfactory, affordable and accommodating, as well as the standard of public amenities such as schools, hospitals, transportation and sports facilities.

People

Reveals whether the inhabitants of the city are perceived as warm and welcoming, whether respondents think it would be easy for them to find and fit into a community that shares their language and culture and whether they would feel safe.

Pulse

Measures the perception that there are interesting things to fill free time with and how exciting the city is perceived to be in regard to new things to discover.

Potential

Measures the perception of economic and educational opportunities within the city, such as how easy it might be to find a job, whether it's a good place to do business or pursue a higher education.

Appendix C

Survey

Consent to Participate in Research

You are being asked to participate in research which will be conducted by William Coombe, a student in Middle East Studies at the American University of Beirut in Beirut, Lebanon. The study will investigate factors related to perceptions of Dubai.

You are requested to participate in one survey which is estimated to take no more than 10 minutes. If any items on the survey seem personal, please do not feel obligated to respond to questions that are uncomfortable for you.

Participation in this research is not believed to result in any benefit to the participant. It is hoped that the results of this study will improve the understanding of the role of media in building location perceptions. You will not receive any compensation for participating in this study.

Your responses on the survey will be anonymous. Only group results for the survey will be reported. If you have any questions about this research, you may contact Dr. Nabil Dajani, dajanin@aub.edu.lb.

Your participation in this research is purely voluntary, and your check ('X') below indicates that you have read this page and agree to participate in this research.

Please check this box to indicate your voluntary participation in this research.

Date

American University of Beirut
Center for Arab and Middle Eastern Studies
Branding Dubai
Survey Conducted by Bill Coombe

This survey is aimed at assessing global impressions of Dubai and the origins of those impressions. Names of participants will not be provided and complete anonymity is guaranteed. Please answer the following questions either by circling or filling in the answers as appropriate.

General Background

Gender: Male Female

Age: 18-30 31-40 41-50 51-60 over 60

Citizenship(s) Held: _____

In the past 10 years, I have traveled internationally to/within:

 Asia Africa Europe Middle East North America South America
 Oceania

Over the last 5 years, I traveled internationally for business:

Never 1-5 times 6-10 times More than 10 times

Over the last 5 years, I traveled internationally for vacation/holiday:

Never 1-3 times 3-6 times More than 6 times

Sources

I know about Dubai from:

(check all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Newspaper advertisement | <input type="checkbox"/> Newspaper article |
| <input type="checkbox"/> TV advertisement | <input type="checkbox"/> TV news |
| <input type="checkbox"/> Radio advertisement | <input type="checkbox"/> Radio news |
| <input type="checkbox"/> Internet advertisement | <input type="checkbox"/> Internet news |
| <input type="checkbox"/> Magazine advertisement | <input type="checkbox"/> Magazine news |
| <input type="checkbox"/> Travel magazine article | <input type="checkbox"/> Travel Web Site |
| <input type="checkbox"/> Travel TV program | <input type="checkbox"/> Movie |
| <input type="checkbox"/> Friend/Relative | <input type="checkbox"/> Geography lessons |
| <input type="checkbox"/> Blog | <input type="checkbox"/> Personal Experience |
| <input type="checkbox"/> Guide Book | <input type="checkbox"/> Other: _____ |

My top three sources for information about Dubai are:

- 1) _____
- 2) _____
- 3) _____

Sample Headlines Exercise 1

Instructions: The following sample headlines are related to Dubai. For each sample headline, please circle whether the content is consistent or inconsistent with **your overall impression** of Dubai.

Worldly pursuits in Dubai; No doubt about it - The World in Dubai belongs to the rich and famous	Consistent	Inconsistent
Dubai sets awful precedent by barring Israeli tennis player	Consistent	Inconsistent
Laid-Off Foreigners Flee as Once Booming Dubai Spirals Down	Consistent	Inconsistent
Briton faces jail in Dubai for adultery	Consistent	Inconsistent
City on the Gulf: Architect Koolhaas Lays Out a Grand Urban Experiment in Dubai	Consistent	Inconsistent
Dubai investment fund looks east as it confirms plans to retreat from Western markets	Consistent	Inconsistent
Dubai - More local firms flock to the Mid-East city to set up shop	Consistent	Inconsistent
Dubai Firm Buys Racehorse Auction House	Consistent	Inconsistent
Dubai to lure biggest sports names	Consistent	Inconsistent
Big is always best, in Dubai at least	Consistent	Inconsistent
Shiny new malls or beautiful arid deserts - living in Dubai gives you the best of both worlds	Consistent	Inconsistent
Killer Whale in a Desert: Dubai Plans Theme Parks	Consistent	Inconsistent

Sample Headlines Exercise 2

Instructions: The following sample headlines are related to Dubai. For the following, please: Rank each headline from 1-12, based on how similar the headline is to your image of Dubai (1 being the statement most similar to your impression and 12 being the least similar). Please do not use the same rank twice. Feel free to use the following numbers to help you track your choices.

Most Similar 1 2 3 4 5 6 7 8 9 10 11 12 **Least Similar**

Rank

- _____ City on the Gulf: Architect Koolhaas Lays Out a Grand Urban Experiment in Dubai
- _____ Briton faces jail in Dubai for adultery
- _____ Dubai - More local firms flock to the Mid-East city to set up shop
- _____ Shiny new malls or beautiful arid deserts - living in Dubai gives you the best of both worlds
- _____ Dubai to lure biggest sports names
- _____ Laid-Off Foreigners Flee as Once Booming Dubai Spirals Down
- _____ Worldly pursuits in Dubai; No doubt about it - The World in Dubai belongs to the rich and famous
- _____ Dubai investment fund looks east as it confirms plans to retreat from Western markets
- _____ Killer Whale in a Desert: Dubai Plans Theme Parks
- _____ Dubai Firm Buys Racehorse Auction House
- _____ Dubai sets awful precedent by barring Israeli tennis player
- _____ Big is always best, in Dubai at least

Sample Headlines Exercise 3

Instructions: The following sample headlines are related to Dubai. For each statement, please identify the impression created of Dubai by circling favorable, unfavorable, or no impression.

	Image		
	Favorable	Unfavorable	No Impression
Dubai to lure biggest sports names	Favorable	Unfavorable	No Impression
Big is always best, in Dubai at least	Favorable	Unfavorable	No Impression
Dubai sets awful precedent by barring Israeli tennis player	Favorable	Unfavorable	No Impression
Briton faces jail in Dubai for adultery	Favorable	Unfavorable	No Impression
Dubai - More local firms flock to the Mid-East city to set up shop	Favorable	Unfavorable	No Impression
Laid-Off Foreigners Flee as Once Booming Dubai Spirals Down	Favorable	Unfavorable	No Impression
Worldly pursuits in Dubai; No doubt about it - The World in Dubai belongs to the rich and famous	Favorable	Unfavorable	No Impression
City on the Gulf: Architect Koolhaas Lays Out a Grand Urban Experiment in Dubai	Favorable	Unfavorable	No Impression
Dubai investment fund looks east as it confirms plans to retreat from Western markets	Favorable	Unfavorable	No Impression
Killer Whale in a Desert: Dubai Plans Theme Parks	Favorable	Unfavorable	No Impression
Dubai Firm Buys Racehorse Auction House	Favorable	Unfavorable	No Impression
Shiny new malls or beautiful arid deserts - living in Dubai gives you the best of both worlds	Favorable	Unfavorable	No Impression

Appendix D

Headline Adjustments

Insertions

Dubai to lure biggest (sports) names (Hopkins, 2008)

Dubai Firm Buys (Racehorse) Auction House (The Associated Press, 2008)

City on the Gulf: (Architect) Koolhaas Lays Out a Grand Urban Experiment in Dubai
(Ouroussoff, 2008)

Replacements

Dubai sets awful precedent by barring (Israeli tennis player) ~~Peer~~ (Brijnath, 2009)

Deletions

Dubai - ~~home away from home~~; As more local firms flock to ~~the bustling~~ Mid-East city
to set up shop, ~~more S'poreans are heading there to live and work~~ (Van Miriah, 2008a)

~~Hit the Highs of Dubai~~: Shiny new malls or beautiful arid deserts - living in Dubai gives
you the best of both worlds (Chee, 2008)

No Change

Worldly pursuits in Dubai; No doubt about it - The World in Dubai belongs to the rich
and famous (Van Miriah, 2008b)

Laid-Off Foreigners Flee as Once Booming Dubai Spirals Down (Worth, 2009)

Killer Whale in a Desert: Dubai Plans Theme Parks (Howard, 2008)

Dubai investment fund looks east as it confirms plans to retreat from Western markets
(Robertson, 2008)

Briton faces jail in Dubai for adultery (Briton faces jail in Dubai for adultery, 2008)

Big is always best, in Dubai at least (Big is always best, in Dubai at least, 2008)

Appendix E
Subject Descriptions

Table E1

Participant Frequency Per City

City	Frequency ^a
Singapore	38% (44)
New York	34% (40)
London	28% (33)

^a n = 117.

Table E2

Age Frequency Per City

Age	City		
	Singapore ^a	New York ^b	London ^c
18-30	30% (13)	55% (22)	33% (11)
31-40	30% (13)	23% (9)	42% (14)
41-50	14% (6)	18% (7)	15% (5)
51-60	23% (10)	5% (2)	6% (2)
Over 60	2% (1)	0% (0)	3% (1)
No answer	2% (1)	0% (0)	0% (0)

^a n = 44. ^b n = 40. ^c n = 33.

Table E3

Gender Frequency Per City

Gender	City		
	Singapore ^a	New York ^b	London ^c
Male	43% (19)	35% (14)	33% (11)
Female	36% (16)	58% (23)	52% (17)
No answer	21% (9)	8% (3)	15% (5)

^a n = 44. ^b n = 40. ^c n = 33.

Table E4

Citizen Frequency Per City

Citizenship	City		
	Singapore ^a	New York ^b	London ^c
Native	48% (21)	80% (32)	64% (21)
Other	52% (23)	20% (8)	36% (12)

^a n = 44. ^b n = 40. ^c n = 33.

Table E5

International business travel frequency during previous 5 years per city

Frequency	City		
	Singapore ^a	New York ^b	London ^c
Never	30% (13)	70% (28)	30% (10)
1-5 times	39% (17)	20% (8)	39% (13)
6-10 times	7% (3)	8% (3)	12% (4)
More than 10 times	25% (11)	3% (1)	18% (6)

^a n = 44. ^b n = 40. ^c n = 33.

Table E6

International Holiday Travel Frequency During Previous 5 Years (by City)

Frequency	City		
	Singapore ^a	New York ^b	London ^c
Never	5% (2)	18% (7)	0% (0)
1-3 times	25% (11)	28% (11)	6% (2)
4-6 times	30% (13)	23% (9)	21% (7)
More than 6 times	41% (18)	33% (13)	73% (24)

^a n = 44. ^b n = 40. ^c n = 33.

Table E7

Travel Destinations During Past 10 Years

Location	Frequency ^a
Asia	73% (85)
Europe	71% (83)
North America	65% (76)
Oceania	25% (29)
Africa	22% (26)
Middle East	21% (25)
South America	18% (21)

^a n = 117.