

Major of Art In Economics and Communication

Master in International Tourism

Study Tour

7th – 14th February, 2009

Destination Dubai (UAE) –

The record city:

The Fastest, the Biggest, the Tallest

Written By

Master Class – 2007/2009

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I Acknowledgment

Manuela Barreca, Gianmaria Fragassi, Nadzeya Kalbaska, Nely Nasir

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The last but not the least, we would like to thank the Abu Dhabi Tourism Authority and the Tourism Development and Investment Company in Abu Dhabi for their time, involvement and insight.

II Introduction

The Study Tour is an important step for the Master Program in International Tourism at University of Lugano. Studying International Tourism means taking into consideration the many relations with businesses, governmental institutions and international organizations that are interconnected within the tourism sector. The World Travel and Tourism Council projects that up to 2013, the tourism and Hospitality industry will generate 250 millions of Jobs, 10% of the total world employment. According to these facts and figures, the Master students 2007/2009, in order to respect their master program and use this opportunity in the best way, after a hard work of research activities and presentations of different destinations, have chosen for their Study Tour-2009, Dubai, one of the seven Emirates and the most populous city of the UAE.

The Class has considered Dubai as a destination, having a big chance to study a city in a continuous development as a world-class tourism destination and commercial and business hub in the world. The main aim of our academic travel was to understand how the tourism industry of Dubai is organized from different points of view: official governmental policies (Tourism Authority), Transportation, Accommodation and Development, Shopping and Entertainment, having also the opportunity to interact with Abu Dhabi City, in order to have a possibility to compare different destination development approaches.

We tried to reach our aim following our fixed meeting program, having the possibility to know the challenges and advantages of tourism industry directly from the experts while interacting with them personally.

III Meeting Program

Fig. 1: Dubai Study Tour 7th -14th February 2009

Day 1: Saturday, 7th February: Lugano/Milano Malpensa Airport:

OUTBOUND Milan, Italy to Dubai, United Arab Emirates

Time	Airport	Duration / Stops	Class / Aircraft
14:25	Malpensa Airport (MXP)	6hr 0min 0 Stops	Economy Boeing 777-300ER
23:25	Dubai International Airport (DXB)		

Check-in: **City Season Hotel Dubai** Al Maktoum Rd - Port Saeed | PO Box 56421, Dubai 182002, United Arab Emirates

	Group	Meeting
Day 2: 8 th Feb Dubai	<u>Tourism Experience in Dubai</u> Nadzeya Kalbaska (Leader) Gunita Bogdane Timo Cadlolo Dong Xiongwen	Dubai Department of Tourism and Commerce Marketing “Dubai Experience” Mr. Abdullah Bin Suwaidan, Deputy Director, Inward Mission Cultural Lunch at Sheikh Mohammed Center for Cultural Understanding Desert Adventures Tourism- Kuoni Travel LTD at The Address Hotel “Discover the secrets of Arabia with Desert adventures” Ms. Margarita Larcheva, Marketing Director
Day 3: 9 th Feb Dubai	<u>Transportation in Dubai</u> Alice Stefani (Leader) Carlotta Laffi Jessica Schenk Jieqing Luo <u>Hotel and Development in Dubai</u>	Dubai Transportation Authority “Metro Project” Mr. Adel Jumaa Al Hosani Hotel Management Holding & Coral Deira Hotel Mr. Wael Elbehi, Regional Sale Director Department of Civil Aviation - “The New Terminal 3” Mr. Ali Zaigham, Marketing & Corporate Communications
Day 4: 10 th Feb Dubai	<u>Transportation/</u> <u>Hotel and Development in Dubai Group</u> Christian Dedekind (Leader) Gianmaria Fragassi Enrica Mazzucchi Silvia Ghirelli Vittoria Passini	FxFowel Architecture Atelier “Dubai Creek’s: the sixth largest and tallest arch bridge in the world” Mr. Edward Mayer II Movenpick – Hotel Bur Dubai “The true excellence in Swiss hospitality” Mr. Alex Rawson, Mr. Craig Cochrane Mr. Ludivine Soenmez
Day 5: 11 th Feb Dubai	<u>Shopping and Entertainment in Dubai</u> Paola Miduri (Leader) Manuela Barreca Nathalie Page Francesco Tumino	Tatweer Dubai LLC, Dubailand “The touristic impact of the Dubailand – Present and Future project” Mr. Basel Al Noman, Assitant Manager Public Affairs & Hospitality Mall of the Emirates – Ski Dubai “Ski Dubai, the snow in the desert” Mr. Lucas Marchand
Day 6: 12 th Feb Abu Dhabi	<u>Abu Dhabi Day</u> Salma Abu Shakra (Leader) Giulia Caldarone Cristina Insuratelu Nely Nasir	Abu Dhabi Tourism Authority – “Tour of the Grand Mosque” Ms. Michelle Sabti, Head of Tourism Training Tourism Development and Investment Company Ms. Krisztina Elias, Marketing & Exhibitions Coordinator Mr. Lawrence Franklin, Strategy & Policy Director Mr. Sameer Bagaber, Strategy Planning Manager Mr. Mohammed Al Dhaheri, Quality & Performance Manager Gourmet Festival – Abu Dhabi Cultural District Model for Saadiyat Island at Emirates Palace
Day 7: 13 th Feb Dubai	Free Day: Emirate Beach Resort, Mall and Golden Souk Desert trip (4x4 Jeep) + dinner in the desert	

Day 8: Saturday, 14th February

Check-out: City Season Hotel

INBOUND Dubai, United Arab Emirates to Milan, Italy

Time	Airport	Duration / Stops	Class / Aircraft
09:05	Dubai International Airport (DXB)	6hr 40min 0 Stops	Economy Boeing 777-300ER
12:45	Malpensa Airport (MXP)		

Milano Malpensa/Lugano

To see the podcasts related to the Study Tour 2009, please follow the link below:

<http://www.mt.usi.ch/students-projects.htm>

→ 2009 Dubai

→ <itpc://www.mt.usi.ch/studytour-09.xml>

Created by Gunita Bogdane and Paola Miduri

IV Executive summary

It is important to underline that through all the report, the group presented comparison of Dubai and Abu Dhabi as a tourism destination. The report finally shows the results of the analysis of the tourism experience in Dubai by the master students of Università della Svizzera Italiana, as well as presents their evaluation of Dubai tourism industry.

In this section, the report's structure chapter by chapter will be shown in order to give a general preview of the Dubai Study Tour analysis.

1. Destination Development in Dubai

The content of the chapter Destination Development Dubai is divided into two parts: the first one resumes all the general data needed to understand what is Dubai, such as location, population, climate, religion, language, government and international relations. The second part of this chapter is related to the general structure, facts and figures of the development of Dubai as a tourist destination from the past to the future projects.

2. Segmentation and Targets

Regarding the segmentation and target chapter, the attention was mainly concentrated on the most crucial data of Tourism and Hotel sector, especially on contribution of oil and tourism to the GDP of Dubai and Abu Dhabi. The extraordinarily development of the hotel sector in Dubai was summarized analyzing the numbers such as, hotels statistics, available rooms/beds, occupancy rate and length of stay.

Dubai is offering and will offer a large range of attractions: Dubailand, Ski Dubai, and all the Dubai malls. This kind of attractions contributes to change the tourist segmentation in Dubai. In the last part of the chapter there is a part related to transportation problem and the situation that Dubai City Authority forced to solve with the implementation of the projects as Dubai metro and New terminal airport. The group also took in consideration on how the economic crisis is affecting Dubai's economy today and how big could be the consequences in the future.

3. Buildings, Records, Icons

Having in mind that Dubai is known as "the fastest growing destination in the world", with incredible desire and actual ability of the city authorities to house breaking status and iconic structure (with the next world famous attractions: the first 7 star hotel in the world- Burj Al Arab, Palm Jumeirah, Atlantis hotel, as well as with many other "the biggest", "the tallest" and "the longest" constructions), that makes the city particular as

a tourist destination and creates a special tourist product; as a result the 3rd chapter of the report is devoted to this aspect of the city development.

4. Culture

In term of Culture, the chapter provides information about cultural heritage in Dubai, lifestyle, religion, role of women, local cuisine and traditional dresses as well as cultural attractions.

5. Environment, Politics

Taking into consideration the environmental and political system of Dubai, the attention was focused on three dimensions: social, economical and political. In the social part the analysis of the population's composition and development from the 50s to current days is presented. Bearing in mind that the expatriates have a strong influence on the structure of the population in Dubai, the actions of the UAE Government with the "Emiratisation strategy" were analyzed, in order to understand in which way the know-how transfer from expatriates worker to young UAE national will be ensured.

In the economic growth section, the Dubai development from the beginning of the discovery of natural resources to the current image of Dubai as a multi-purpose development center in terms of commercial and business hub, until the improvement of Dubai to a world-class destination is presented.

At the end of the chapter, political point of view is analyzed: the strong figure of Sheik Mohammed Bin Rashid Al Maktoum, current ruler of Dubai and Vice President and First Minister of the UAE, and his predecessor for the emirates' society in general and tourism development in particular was observed.

Location

Fig.2: Middle East map -Source: www.nationsonline.org/maps



1 Destination Development Dubai

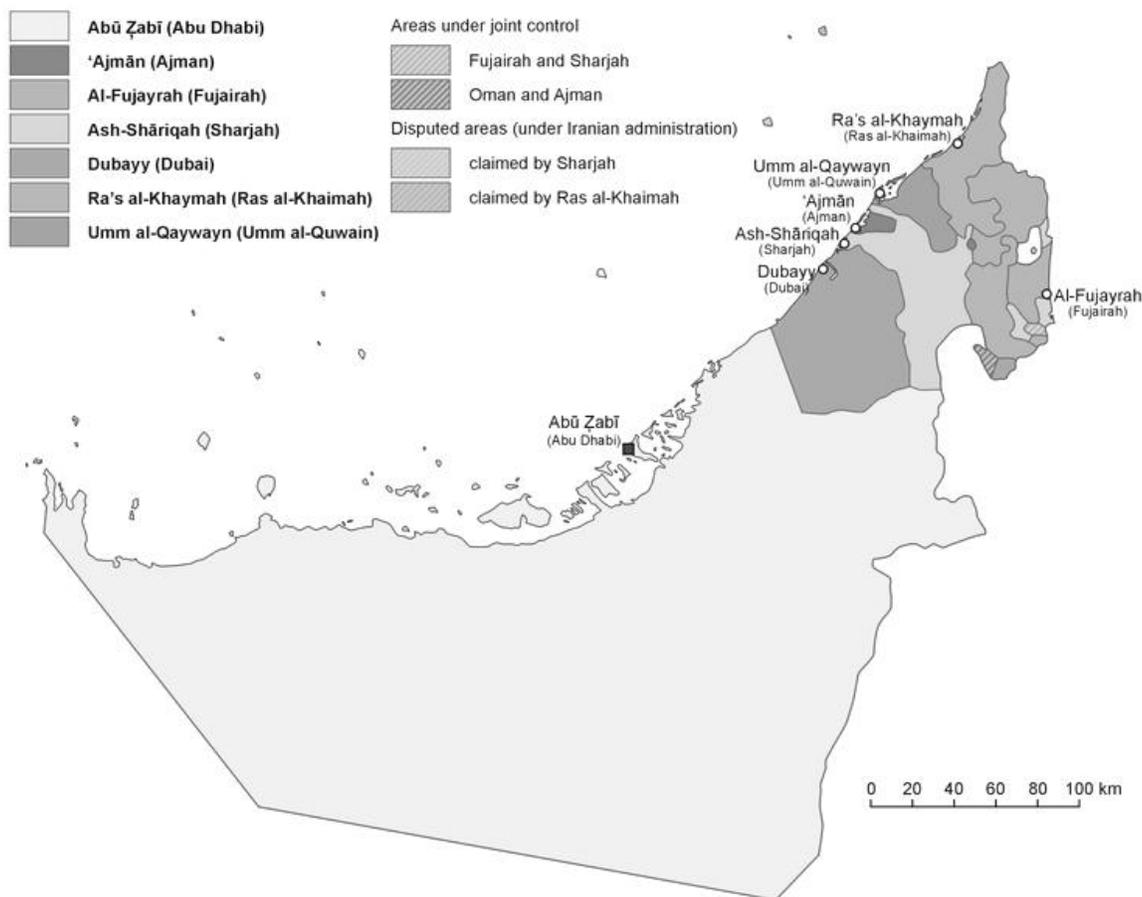
Manuela Barreca, Gianmaria Fragassi, Nadzeya Kalbaska, Nely Nasir

1.1 General data about Dubai (UAE)

The development of tourist destinations is a central theme in the tourism literature and researchers approach the subject from various perspective and disciplines. The temporal and spatial evolution of a destination, the impacts of development, government growth policies, planning imperatives, marketing issues and business strategies are among the many topics studied.

Dubai is one of the seven emirates and the most populous city of the United Arab Emirates (UAE). The United Arab Emirates (UAE) comprises seven members: **Abu Dhabi** (the capital city), **Dubai**, **Sharjah**, **Ajman**, **Umm Al Quwain**, **Ras Al Khaimah** and **Fujairah**.

Fig. 3: United Arabic Emirates map - Source: www.wikipedia.org



UAE is located along the southern coast of the Persian Gulf on the Arabian Peninsula. The total area of the country is about 83,600 square kilometers, much of it in Abu Dhabi emirate. Dubai, with the area of 3,885 square kilometers, is the second largest emirate.

Situated on the banks of the Dubai Creek, a natural inlet from the Gulf, which divides the city into the Deira district to its north, and Bur Dubai on its south, the city ranks as the UAE's most important port and commercial centre. The Dubai Municipality is sometimes called *Dubai city* to distinguish it from the Emirate

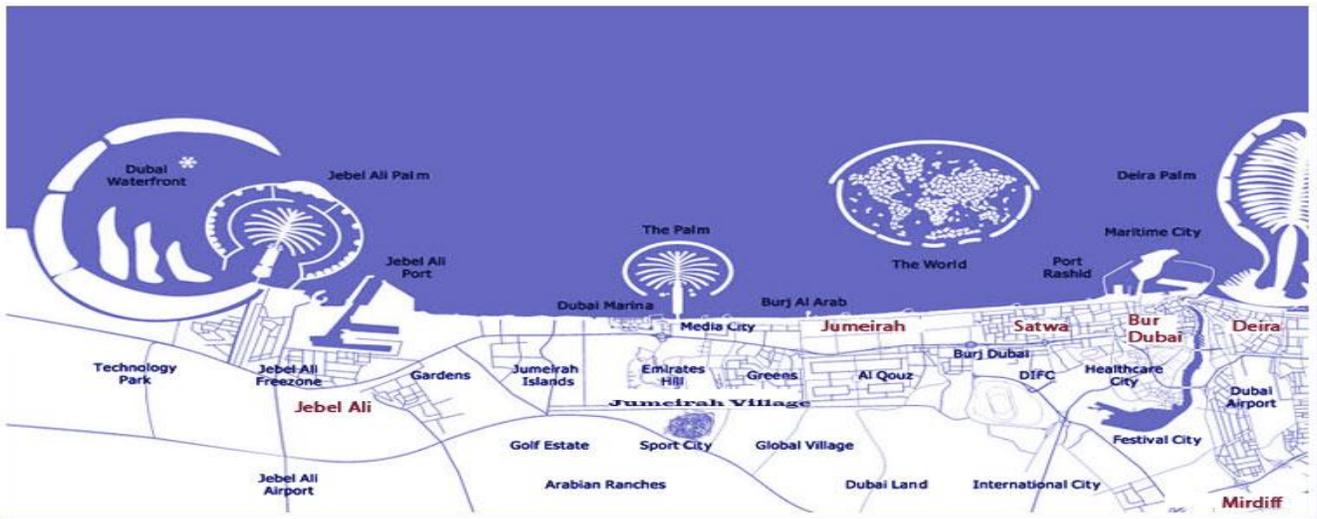


Fig.4: Dubai city

Source: www.dubaiepat.com/images

Climate

Dubai has a hot and, at times, humid climate (drier during extreme heat) with many months recording temperatures of over 40°C. Temperatures range from a low of about 10 degrees Celsius to a high of 48 degrees Celsius. The mean daily maximum is 24 degrees in January rising to 41 degrees in July. Rainfall is infrequent, and is usually centered on the months of January, February and March. The humidity in Dubai is around 60% and it is higher during the cooler winter months.

Population

According to the census conducted by the Statistics Center of Dubai, the population of the emirate was 1,422,000 as of 2006, which included 1,073,000 males and 349,000 females. As of 1998, 17% of the population of the emirate was made up of UAE nationals. Approximately 85% of the expatriate population (and 71% of the

emirate's total population) was Asian, chiefly Indian (51%), Pakistani (15%), Bangladeshi (10%) and others (10%). A quarter of the population however reportedly traces their origins to neighboring Iran. In addition, 16% of the population (or 288,000 persons) lived in collective labour accommodation were not identified by ethnicity or nationality, but were thought to be primarily Asian.

Fig.5: Population’s evolution 1822-2008

Year	1900	1940	1954	1960	1975	1985	1995	1995	2005	2006	2007-2008
Pop.	10,000	38,000	20,000	40,000	183,00	370,800	674,000	674,000	1,204,000	1,442,000	1,587,000

Source: Statistic Centre of Dubai, 2006.

Language

Arabic is the official language of Dubai, Malayalam, Hindi, Tamil, Urdu, Persian, Sindhi, Tagalog, Bengali and other languages are spoken as well in the city. English is the lingua franca of the city and is widely spoken.

Religion

Article 7 of the UAE's Provisional Constitution declares Islam the official state religion of the UAE. Nevertheless Dubai has large Hindu, Christian, Buddhist, Sikh and other religious communities.

Government

Dubai's government operates within the framework of a constitutional monarchy, and has been ruled by the Al Maktoum family since 1833. The current ruler, Mohammed bin Rashid Al Maktoum, is also the Prime Minister of the United Arab Emirates and member of the Supreme Council of the Union (SCU). Dubai appoints 8 members in two-term periods to the Federal National Council (FNC) of the UAE, the supreme federal legislative body.

The Dubai Municipality (DM) was established by the ruler of Dubai, Rashid bin Saeed Al Maktoum in 1954 for purposes of city planning, citizen services and upkeep of local facilities. DM is chaired by Hamdan bin Rashid Al Maktoum, deputy ruler of Dubai and comprises several departments such as the Roads Department, Planning and Survey Department, Environment and Public Health Department and Financial Affairs Department.

International Relations

The UAE became a member of the United Nations and the Arab League in 1971. It is a member of the International Monetary Fund, the Organization of Petroleum Exporting Countries (OPEC), World Trade Organization and other international and Arab organizations, including the Arab Gulf Co-operation Council (AGCC), whose other members are Saudi Arabia, Oman, Qatar, Bahrain and Kuwait.

Present and future expectations for tourist development

It is crucial to mention, that the Middle East as a whole attracts comparatively few visitors. The region recorded only 4.6% (35.4 million) of the world's total arrivals and 3.4% of receipts in 2004 (WTO, 2005). These figures appear to confirm the view that it is 'one of the least developed tourism regions in the world' (Sharpley, 2002, p. 221). Moreover, political events in the current century have generated new uncertainties and tensions which seem likely to further discourage tourists and investors. Additional barriers relate to poor accessibility, a perceived lack of conventional attractions and limited promotion.

Nevertheless, the WTO anticipates that the Middle East will post above average annual growth rates in international arrivals of over 7% until 2020, and significant contribution to this number will be done by Dubai, as a main tourist destination in the region. International tourism has been adopted by the Dubai authorities as a core element in a program of economic diversification. They have invested heavily in expensive facilities, as well as undertook extensive marketing, and the outcome has been seen as a strong growth in tourism. (Henderson, 2006)

From the Total 5,863,509 number of Dubai hotel guests in 2007 by Nationality, the **main markets** that are attracted by Dubai as a tourist destination are Arab Gulf Cooperative Countries - 783,143; United Kingdom- 654,128; Russia and other Commonwealth of Independent States countries - 435 536, Iran- 380,900, USA - 337,945. (DTCM, 2008), those countries as a result are perceived by DTCM authorities to be the main target markets for the promotion abroad. Details of Dubai's international tourist arrivals since 1982 are contained in Table 2 and reveal it to be one of the **fastest growing destinations** worldwide (EIU, 2003).

Fig.6: International tourist arrivals in Dubai - Source: assorted DCTM, DDIA, EIU and WTO reports. 1982–2004.

Year	Arrivals	Annual growth rate (%)
1982	374,400	—
1990	632,903	—
1991	716,642	13.2
1992	944,350	31.8
1993	1,088,000	15
1994	1,239,000	13.9
1995	1,601,000	29.2
1996	1,768,000	10.4
1997	1,792,000	1.4
1998	2,184,000	21.9
1999	2,481,000	13.6
2000	3,027,000	22
2001	3,626,625	19.8
2002	4,756,280	31.1
2003	4,980,228	4.7
2004	5,420,000	8.8

1.2 Dubai as a tourist product

Dubai has positioned itself in Western markets as an exotic, but safe, tourism location. Dubai's attractions centre on its 64km coastline and resort hotels, which boast facilities for sailing, water skiing, windsurfing, diving, fishing, golfing on grass or sand courses and bird watching. Tourists can join excursions into the desert, which is the scene for camel safaris, dune driving, sand skiing, exploring wadis in four wheel drive vehicles, sunset barbeques and visits to isolated Bedouin villages, forts and oases. Falconry and camel racing are other amusements. The city has extensive shopping opportunities, with retailing a prominent component of new mixed developments, and a few sites of built heritage. Events are presented and packaged as attractions; many of them are organized during the hottest summer months, which are outside of the peak season. Highlights of the calendar are the Dubai Summer Surprises and Dubai Shopping Festival, the first combining discounted hotel prices and a series of activities directed at families. For the last ten years, Dubai has tried to revive summer period through the Dubai Summer Surprise – a ten week shopping, child-focused extravaganza. In 2006, 1.87 million tourists came during that period (Gulf News, 2007a). During every winter, The Dubai Shopping Festival takes place and in 2006 attracted over 3.6 million tourist contributing 8 percent to the overall GDP (Gulf News, 2007b). This marks a change in the tourist attitude: in survey conducted during 1998-1999 by the DTCM, it was found that the main reason people came to Dubai was primarily leisure (44 %) and business (39%), with shopping being a low priority (4%) (DTCM, 2007). Colorful ceremonies such as Bedouin weddings often form part of the festivities. Powerboat competitions, horse races and golf, tennis and rugby seven tournaments are held annually with extremely generous prizes. Such occasions put Dubai in the media spotlight globally and are a tool with which Dubai as a tourist destination combat seasonality and convey notions of a superior quality destination in the case of prestigious sporting contests. The last, but most important aspect of Dubai brand is the image of the “fastest growing city in the world”, with incredible desire and implemented ability of the city authorities to house record breaking status and iconic structure - world first 7 star hotel in the world- Burj Al Arab, Palm Jumeirah, Atlantis hotel; that creates a strong image of Dubai as the “city of Icons”.

1.3 Government growth tourism policies

International tourism has been adopted by the Dubai authorities as a core element in a programme of economic diversification. Tourism development has been officially overseen by the former Crown Prince, who is also in charge of the Department of Tourism and Commerce Marketing (DTCM). The DTCM was established in 1989 and is responsible for tourism planning, development and marketing. External consultants and international advisers have been employed in preparing the guiding strategies and the Department has a vision of Dubai as the leading tourism destination and commercial hub in the world. Its mission encompasses tourism sustainability and economic growth, industry partnerships, innovation in promotion, unique experiences for visitors by pushing for quality service and value for money, as well as strengthening the department's partnership with the industry stakeholders. The DTCM department is also the principle authority for planning, supervising and development tourism in the emirate. Underlining the importance attached to developing tourism, the department's Chairman is His Highness Sheikh Mohammed Bin Rashid Al Maktoum, Vice President and Prime Minister of the UAE and ruler of Dubai.

Annually, the department plans and implement an integrated program of international promotions and publicity activities. The program includes exhibition participation, marketing visits, presentations and roads shows, familiarization and assisted visits, advertising, brochure production and distribution, media relations and enquiry information services. (Destination Dubai- Tourism manual, 2009). Tourism according to DTCM's Director, Mohammad Khamis Bin Hareb, currently contributes 18 percent to Dubai's GDP directly and 29 percent indirectly (Al Hakeem, 2007). The intention of DTCM is to host 15 million international tourists by 2010 and 40 million by 2015 (DTCM, 2004).

1.4 Temporal and spatial evolution of Dubai

Fig.7: Historical evolution of the city of Dubai

1830	The small fishing settlement of Dubai is taken over by a segment of Bani Yas Tribe from the Liwa Oasis, led by the Maktoum Family who still, rule the emirates today.
1892	Foreign traders are drawn into Dubai due to the declaration that they will be exempt from tax, the population doubles and the pearling industry is now booming.
1930-1940	The recession hits Dubai's pearl industry which falls into decline leading to social pressures and feuds between the royals.
1958	Sheikh Rashid officially becomes the ruler of Dubai after his father's death.
1959	The Emir of Kuwait lends Sheik Rahid millions of dollars to renovate the Creek so it can accommodate large ships in order to develop Dubai's reputation as being a major trading hub.
1966	Dubai discovers its own oil, attracting traders to settle in Dubai which in turn enhances economic growth.
1968	Dubai begins exporting crude oil and petro-dollars rush in
1973	The Dirham becomes the official unit of currency in Dubai.
1980	Dubai's annual oil income decreases to US\$3.
1985	The Emirates airline is established and Dubai plans its reinvention as a tourist destination.
1990	Sheik Maktoum takes over as the ruler of Dubai, due to his father, Sheik Rashid, passing away during the first Gulf War.
1996	The Dubai shopping festival and the Dubai World Cup are launched and happen to become very popular annual events.
1999	One of the tallest hotels in the world, the Burj Al Arab opens, enhancing Dubai's reputation further as a tourist destination.
2003	Dubai is recognized by The International Monetary Fund and the World Bank, as a financial hub. Also, at this time the property market in Dubai suddenly grows due to the introduction of freehold properties
2006	Sheik Mohammed becomes the Prime Minister and Vice President of the UAE, as well as the ruler of Dubai. He updates the Liberal policies of his Maktoum forefathers and develops Dubai further, raising the city's business and tourism profile.

We should take note of this date: 09/09/09 - one day for 2 world records: the opening of the Burj Dubai, 160 floors for 819 meters high and the inauguration of the 52km subway completely automated. They will be the tallest skyscraper and the longest subway line without drivers in the world. This is Dubai: not so many years ago it was just known as a fishing village, some years later it became the world oil capital and today Dubai is famous for being a cosmopolitan city for business and leisure travelers. The city is continuously changing and all of this happened in a very short period of time. During the 80's Dubai was surrounded by the creek cities, the river that ends in the desert. Around the creek we it was the Bur Dubai district on the left side and the Deira district on the right. It was a cosmopolitan city with just 370 000 inhabitants. It was the city of shops and stores. The development related to real estate was quite clear, during the 80's the rulers of Dubai already knew that the oil supply would not last forever. Thanks to the free zone, Dubai authority began to attract small and medium foreign enterprises. From that moment on new enterprises and companies began to built up the future of Dubai. Then, during the 90's, the Persian Gulf War took a great toll on Dubai's economy after a massive withdrawal of funds occurred due to the Economic uncertainty. During the remainder of the 90's, however, more foreign companies began moving their business to Dubai. Due to this shift in destination development and the rising oil prices, Dubai began to concentrate on free trade and tourism in order to stimulate its economy. Throughout the next decade, numerous structures were erected. Dubai was trying to get on the scale of international business. Dubai authorities began to see Dubai as a touristic destination: luxury Hotel chain such as Crown Plaza, Grand Hyatt and InterContinental came into the city. They launched their own Hotels, the Golf and Yacht Clubs on the creek together with the first shopping mall. At that time the central part of the city was in the north part, near the border to Sharjah. Here they built the Al Mulla Plaza, the first mall in Dubai. In the other direction on the southern part of Dubai towards Abu Dhabi, there were just the Bur Dubai district with the World Trade Center. The central heart of Dubai was located across the creek. The big Sheikh Zayed Road was already present, but it existed of kilometers of nothing, apart from the Hard Rock Café' built in 1997. **Fig.8: Sheikh Zayed Road, Dubai. 1980-2005 - Source: [www. Burjdubaiskyscraper.com](http://www.Burjdubaiskyscraper.com)**



Today, after 12 years, Dubai has the Sheikh Zayed Road, 12 lanes full of cars, cabs and coaches. Thanks to this road and all the new projects the new heart of the city is moving to the south thanks to Jumeirah district, Dubai Marina, Dubailand district, Water front district down to the Jebel Ali where there will be the New Jebel Ali Airport. This is the new city: more aggressive, more fascinating, more business oriented. Here the Media City, The Internet City, the financial district, big, luxury and full of nightlife could be found. This particular city is not simply growing, it is doubled in its size: from 1,200,00 inhabitants in 2005, today there are 2,260,000, while statistics shows that Dubai gets 30 new residents per hour.

1.5 Present and future project in Destination Development Dubai

Along the water front there is an increase of villas of Jumeirah and on the sea the tallest hotel in the world, a present icon for Dubai, the Burj Al Arab has been built. Around the super luxury Burj Al Arab there are all the other hotels and the shopping malls that serve the needs of tourists and locals.

The Medinat Jumeirah is a city region, rebuilt following the gulf village model with narrow streets, stairs, amphitheatre and artificial water channels. This is the new city centre, with the possibility to eat and meet friends, between hotels and prestigious houses, the villas of Sheikh and the Dubai marina for those who appreciate a “yacht style” of life. It is possible to follow the street to Palm Jumeirah driving on a big motorway that cut in the palm into 2 parts.

The palm is an artificial island that represents a very ambitious project, where a big part of them is already ready and built. The Palm Jumeirah has been the first of 3 projects, Palm Jumeirah, Palm Jebel Ali and Palm Deira, each one in front of the correspondent district. The second two are bigger than Palm Jumeirah but none of these two are ready. Another huge project that it is still not visible right now is the World: an archipelago of 300 private artificial islands, that will be recognizable from the space. The world together with the Universe (another super project) will give a new shape to the entire waterfront of Dubai.

On the land, the desert will be reinvented thanks to a new megaproject, that is called Dubailand. This is a project that will cover 270 square km in the desert of Dubai. The construction is divided into different stages. The business idea of the project works in this way: parts of the land have been sold to foreign investors while giving them the guidelines on how residences/houses/villas should be build. There will be something like 50 new hotels inside Dubailand and the biggest commercial area of the world with external air-conditioning to make possible walk under the sun (50° in summer). Dubailand is another huge plan that contributes to make

Dubai the main destination for the real estate investment in the current global scenario. Behind such a project there is Tatweer company: one of the main firm involved in the construction market of the city. The particularity of the project, which also constitutes the major element of diversification from Disneyland, relies on the opportunity of Dubailand to provide also apartments for its inhabitants. Dubailand, indeed is going to be another destination inside Dubai: a city with the size of Singapore. Therefore it is not only offering hotel rooms and accommodations for its visitors, but its aim is to be one place where people are willing to live. Dubailand will be Dubai sport city, Dubai motor city, Dubai car race, Tyger Wood Dubai, Legoland, Universal Studio, theme park of the Dreamwork and many other projects which will be separated and will work individually and independently from others. All this project seeks uniqueness providing some special attractions, once again the research of the record is the driven factor: the most important thing is to be the best.

The central heart of the shopping in the city is the Mall of the Emirates. It is a new building between the creek and the new Jumeirah district and has a lot of shops and services including the Ski Dubai, the coolest things to do in Dubai. As always for this city, records exist just for a short period of time. In fact there is a new mall, called Dubai Mall that has already been opened with 1200 shops, a aquarium with 33,000 fish and 400 sharks that is right near the new Burj Dubai.

Regarding business, the development of Dubai International Financial Centre (Difc) is the city centre for business. In the last four years the new financial district was able to compete with New York, London and Hong Kong. This area possess not just business but also fitness centers, shops, cafes and galleries. Regarding the future, Dubai will be continuously increasing its world Guinness records. Nakheel, the company in charge of the development for the 3 palms project, has already develop a new skyscraper, the Al Burj, that will be the tallest building in the world with more than 1000 meters. Today the record belongs to another tower in Dubai, the Burj Dubai with 819 meters. This is not all, the turning tower will be the first rotating building in the world. The architect is the Italian-Israeli David Fisher and the chosen location is close to the creek.

The new bridge from the studio FXFowle, will be the largest and the tallest spanning arch bridge in the world. It will serve as the crossing bridge as well as the connection road for the new Opera House. Concerning urban planning, we should underline the mega project of the Arabian Canal and the Jumeirah gardens. In terms of transportation it is important to pay attention on the new airport Jabel Ali. The financial crises plays its role in the decision process for this huge project and some of the projects are suspended, but this does not mean that they will decide to cancel some.

1.6 Destination development in hospitality sector

Destination development, especially in the field of tourism is related to the Hotel development. The newest hotel that was built in Dubai is the luxury Atlantis. The hotel is located on the artificial Palm Jumeirah, that is connected to the land by 300 meters long bridge. It is a coral pink building built by 2 towers link by an arch where there are the most prestigious suites where the oriental architecture is combined with sea inspiration equipment. The hotel offers 1539 rooms and below the resort there is a big aquarium with more than 65,000 kind of fishes. This aquarium is, obviously, the biggest in the Middle east. Nearby the Hotel there is the Aquaventure, 17 hectare water pool, with fresh and salt water, waves, rivers and pools with sharks and dolphins. The hotel was inaugurated in November 2008, but it seems already old in respect to the new Hotel projects. The Crescent Hydropolis Resort, is a submarine hotel that will be opened in 2009. The hotel will have the shape of a jellyfish and it will be located on the seabed at 20 meters deep. The reception hall will be on the land and it will be connected to the hotel by a tunnel. The Hydropolis will have bars, restaurants, spa, museum and 220 suites with big panoramic windows. Another amazing project is the Rotating Tower, that will host apartments and a six star hotel. The idea of the architect David Fisher is that it will be possible to watch the sunrise and the sunset from the same point of the Hotel. Some of the most important fashion stylist are also investing a lot in Dubai. This is the case of Versace with his Hotel on the creek and Armani with the Hotel in the Burj Dubai tower. Partially it will be ready already in 2009. The Lebanese Elie Saab will built his first Hotel inside the golf resort The Tiger Woods Dubai in Dubailand, in 2012. Inside Dubailand there is also the project for Asia-Asia the biggest Hotel in the world with 6,500 rooms. The Burj Al Arab was the first to have 7 star in the world. With the shape of a spinnaker sail outside, inside it is a kitsch Hotel with a lot of gold and marble and a submarine restaurant. In front of the Burj Al Arab there is the new Jumeirah Beach Hotel, with wave shape, 618 rooms and 22 restaurants. All those are the projects that are possible to find and admire in Dubai today, but the projects of tomorrow is what is more inspiring.

2 Segmentation and Target markets

Carlotta Laffi, Enrica Mazzucci, Francesco Tumino

Introduction

Worldwide, in 2006, the Middle East Travel and Tourism Economy was ranked 9th in terms of size (US\$150 billion) and it is expected to grow to US\$280 billion by 2020 (WTTC, 2007)¹. According to the global tourism competitiveness report by the World Economic Forum (Rahman, 2007)², UAE ranks 18th in the world and 1st in the Arab region. Abu Dhabi and Dubai are the main economic contributors among the seven emirates; the contribution of the oil-sector is obviously still high, although Dubai is less oil-dependent than Abu Dhabi. In fact, Abu Dhabi contributes 59% to the GDP of UAE (56 percent of which is oil-dependent), while Dubai contributes 29% (only 5% is oil-dependent)³. Indeed, Dubai has succeeded in becoming an important tourism destination, especially thanks to its strategic location and its visionary leadership driven by the ME. Sheik Rashid Bin Saeed Al Maktoum.

2.1 Tourism

In recent years tourism within the Middle East region has started to boom. The World Travel and Tourism Council predicts that UAE tourism industry will grow at 5% between 2007 and 2016, with Dubai having a key role within this growth⁴. Tourism, according to the Department of Tourism and Commerce Marketing, contributes 18% directly to Dubai's GDP and 29% indirectly⁵. DCTM vision is to position Dubai as the leading tourism destination and commercial hub in the world. DCTM is the principal authority for the planning, supervision and development of the tourism sector in the emirate. Dubai tourism offer is composed by deserts, beaches, mountains, but mainly by buildings and hotels. Since the offer is so much diversified, Dubai attracts different range of tourists; according to the information we gathered during our Study Tour, it is agreed opinion that the main segments visiting Dubai are families, businessmen and leisure tourists in general. Concerning the markets, UK, Germany and Asia are the main ones according to the DTCM, but according to Kuoni Travel not less important are the Confederation of Independent States, GCC and Far East.

¹ WTTC (2007), "Executive Summary: travel and tourism navigating the path ahead", World Travel and Tourism Council, London, available at: www.wttc.org/TSA%202007/Executive%20Summary%202007.pdf (accessed March 4, 2009)

² Rahman, S. (2007), "Dubai poised to open new page in history", *Gulf News*, February 4.

³ Balakrishnan, M. S. (2008), "Dubai, a star in the east", *Journal of Place Management and Development*, Vol.1, No.1, pp. 62-91.

⁴ *Ibid.*

⁵ Al Hakeem, M. (2007), "Tourism contributes 18% of Dubai GDP per year", *Gulf News*, available at <http://archive.gulfnews.com/articles/07/02/14/10103984.html> (accessed March 4, 2009)

Abu Dhabi has a different situation regarding the tourism sector. According to Mubarak Al Muhairi, General Director of Abu Dhabi Tourism Authority, tourism accounted for 2.9% of the emirate's GDP and the expectations for the future are quite high. ADTA has launched a comprehensive strategy to develop the tourism sector focusing on promoting the emirate and attracting investments and tourists⁶. Still ADTA is focusing heavily on the MICE segment, even if in the future the cultural sector will become the core of Abu Dhabi tourism offer, as the city is trying to position itself as the "cultural hub" of the Middle East. The creation of a cultural district on Abu Dhabi's Saadiyat Island comprises huge projects such as the Guggenheim Museum designed by Frank Gehry, the Performing Arts Centre designed by Zaha Hadid and the Louvre Abu Dhabi by Jean Nouvel. By now, the average stay of tourists is 2-3 days, as it is still mainly for business travel, but it is expected to increase once the large cultural offer will be complete. As for Dubai, the majority of tourists arrives from Germany, UK and the GCC region.

2.2 Hotel sector

Dubai Hotel sector has extraordinarily developed: at the end of 2000 there were five times more hotels than the number operating in 1990. Much of this added capacity has been transformed in beachfront hotels in the Jumeirah district. According to Jones Lang LaSalle Hotels, Middle East investment in the hotel sector exceeded US\$7 billion in 2007, with UAE investors like Nakheel, Emaar and Tameer accounting for more than 76%. The total accommodation capacity of UAE, including hotel rooms and apartments, is close to 40.000 units and has more than tripled since 1990⁷. With such a huge supply, the question is if demand can meet the supply. What is remarkable is that, up to the moment in which the current crisis started to affect also Dubai tourism sector, demand has followed the growth in capacity; UAE has sustained the growth in visitor arrivals by initiatives such as the Dubai Shopping Festivals and the Dubai Summer Surprises. GCC nationals, especially Saudis and Kuwaitis, have made the UAE one of their favorite destinations for short trips during school breaks and holidays⁸. According to the Analysis of Dubai Hotel Establishment statistics⁹, the total number of operating hotels in Dubai was 329 in 2008, while in 2007 it was 319. The number of hotel rooms available increased by 6% in 2007 reaching 32,617 from 30,850 in 2006, and the most recent data about 2008 registered 34,884 hotel rooms. The number of hotel beds available increased by 6% over 2006 from 50,099 to 52,975 in 2007. Hotel

⁶ Golden L. L. (2007), "Abu Dhabi tourism's GDP contribution put at AED 8.68B", *Ame Info*, available at: <http://www.ameinfo.com/113115.html>

⁷ Balakrishnan, M. S. (2008), "Dubai, a star in the east", *Journal of Place Management and Development*, Vol.1, No.1, pp. 62-91.

⁸ HSBC Economic Bulletin (2001), "Tourism and hotels in the UAE: can demand meet supply?", available at: [http://www.econresearch.net/admin/articles/9\(1\).pdf](http://www.econresearch.net/admin/articles/9(1).pdf)

⁹ DTCM, Analysis 2007 Dubai Hotel Establishment Statistics, available at: <http://www.dubaitourism.ae/EServices/Statistics/HotelStatistics/tabid/167/language/en-US/Default.aspx>

room occupancy rate was 90.2% in 2008, while in the previous two years it went from 82,06% in 2006 to 84,4% in 2007. According to DCTM, though hotel occupancy has raised from 66.8% (in 1999) to 90.2% (in 2008), the average guest nights have not increased significantly (2.5 nights in 1999 to 2.7 nights in 2007); hence, Dubai is not considered as a long stop destination, rather more as a transit point.

Fig.9: Total Number of Operating Hotels - Source: Department of Tourism and Commerce Marketing

2000	2001	2002	2003	2004	2005	2006	2007	2008
265	264	272	271	276	290	302	319	329

Fig.10: Total Number of Available Rooms - Source: Department of Tourism and Commerce Marketing

2000	2001	2002	2003	2004	2005	2006	2007	2008
20.315	21.428	23.170	25.571	26.155	28.610	30.850	32.617	34.884

Fig.11: Total Number of Available Beds - Source: Department of Tourism and Commerce Marketing

2000	2001	2002	2003	2004	2005	2006	2007	2008
33.364	35.483	38.386	41.226	42.812	47.001	50.099	52.975	n.a.

Fig.12: Total Room Occupancy Rate (%) - Source: Department of Tourism and Commerce Marketing

2000	2001	2002	2003	2004	2005	2006	2007	2008
61.21	60.90	70.19	72.36	81.01	84.57	82.00	84.40	90.2

Fig.13: Average Length of Stay - Source: Department of Tourism and Commerce Marketing

2000	2001	2002	2003	2004	2005	2006	2007	2008
2.51	2.34	2.18	2.37	2.60	2.53	2.56	2.71	n.a.

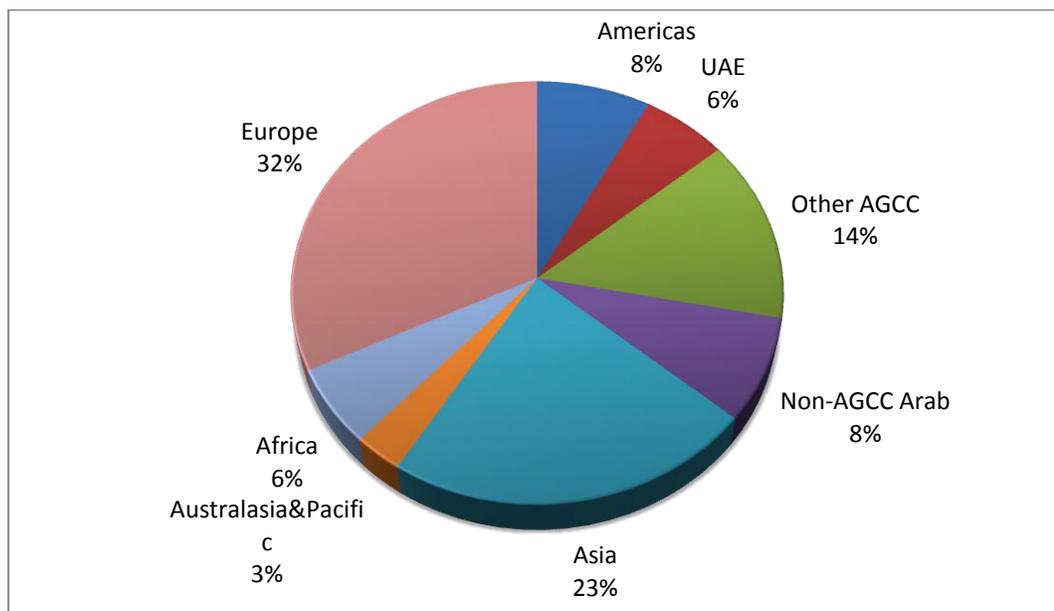
The statistics about the hotel sector reveal also data on guests' nationalities. The total number of guests in all hotel establishments was 6.95 million in 2007, 8% increase over 2006. Among them, 84% stayed in hotels and 16% in apartments. The highest number of visitors in 2007 was recorded during the month of August, followed by December, March, November and February. For what concern guests' nationalities, non-UAE nationals constituted 96% of total hotel establishment guest nights in 2007, as in the previous year, among which 38% were Europeans, Arabs comprises 23% and Asians 22%.

Fig.14: Number of Hotel Guests

2000	2001	2002	2003	2004	2005	2006	2007	2008
2,835,638	3,064,701	4,107,236	4,342,341	4,724,543	5,294,485	5,473,509	5,863,509	n.a.

Fig.15: Hotel Establishment Guests by Region (2007)- Source: Department of Tourism and Commerce

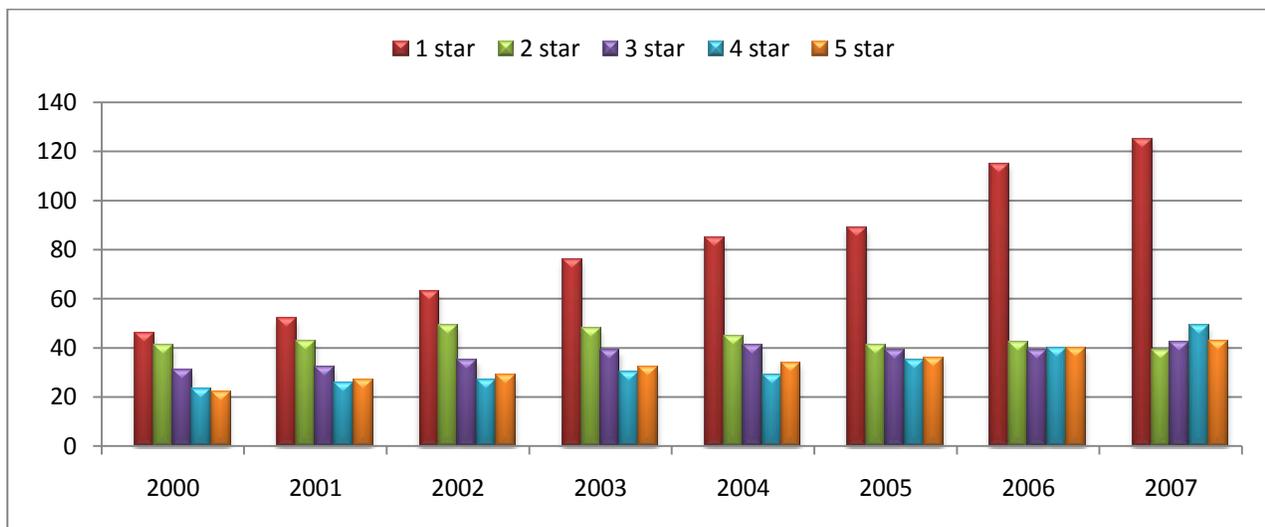
Marketing



There are statistics available also on the type of accommodation by nationality groups; Europeans constituted 46% of total 5 star hotel visitors, followed by Arabs (28%) and Asians (12%). Guests from Europe registered the longest average length of stay (around 5 days). Asians constituted 35% of total 2 star hotel visitors, while 39% of total 1 star hotel visitors were Arabs, followed by Asians (25%) and Africans (20%). Finally, the total revenues of hotels establishments amounted to Dhs. 13.2 billion, with hotels contributing 88% and hotels

apartments 12%. Revenues generated by hotels reached Dhs. 11.7 billion (an increase of 21% over 2006) while hotel apartment revenues amounted to Dhs. 1.5 billion (an increase of 34% over 2006)¹⁰. Data on Abu Dhabi's accommodation sector are not as detailed as those on Dubai. According to Abu Dhabi's Strategy & Policy Director, Lawrence Franklin, in 1998 there were less than 6000 hotel rooms, with 400,000 guests, probably due to the lack of a comprehensive tourism plan, to a limited aviation access and infrastructure. Nowadays there are around 13,000 hotel rooms, with 1.5 million guests. The current, or better to say the pre-crisis occupancy rate, was about 85%. Abu Dhabi Tourism Authority has developed a future scenario, which is expected to reach 2.7 million hotel guests with 27,000 hotel rooms by 2010. According to a survey by Hogg Robinson in 2008, Abu Dhabi's biggest problem are the high prices: it is the fifth most expensive city in the world in which to find a hotel room, indeed hotel rates has jumped 36% between 2007 and 2008, the highest rate of price growth for any city in the world¹¹.

Fig.16: Number of Operating Hotel by Hotel Class (2000 – 2007) - Source: Department of Tourism and Commerce Marketing



¹⁰ DTCM, Analysis 2007 Dubai Hotel Establishment Statistics, available at:

<http://www.dubaitourism.ae/EServices/Statistics/HotelStatistics/tabid/167/language/en-US/Default.aspx>

¹¹ El Shammaa D. (2009), "Abu Dhabi adopts ambitious target of 2.7m visitors by 2012", *Gulf News*, available at:

http://www.gulfnews.com/business/Tourism_and_Travel/10288578.html

Fig. 17: Number of Hotel Guests (2000 – 2007) - Source: Department of Tourism and Commerce Marketing

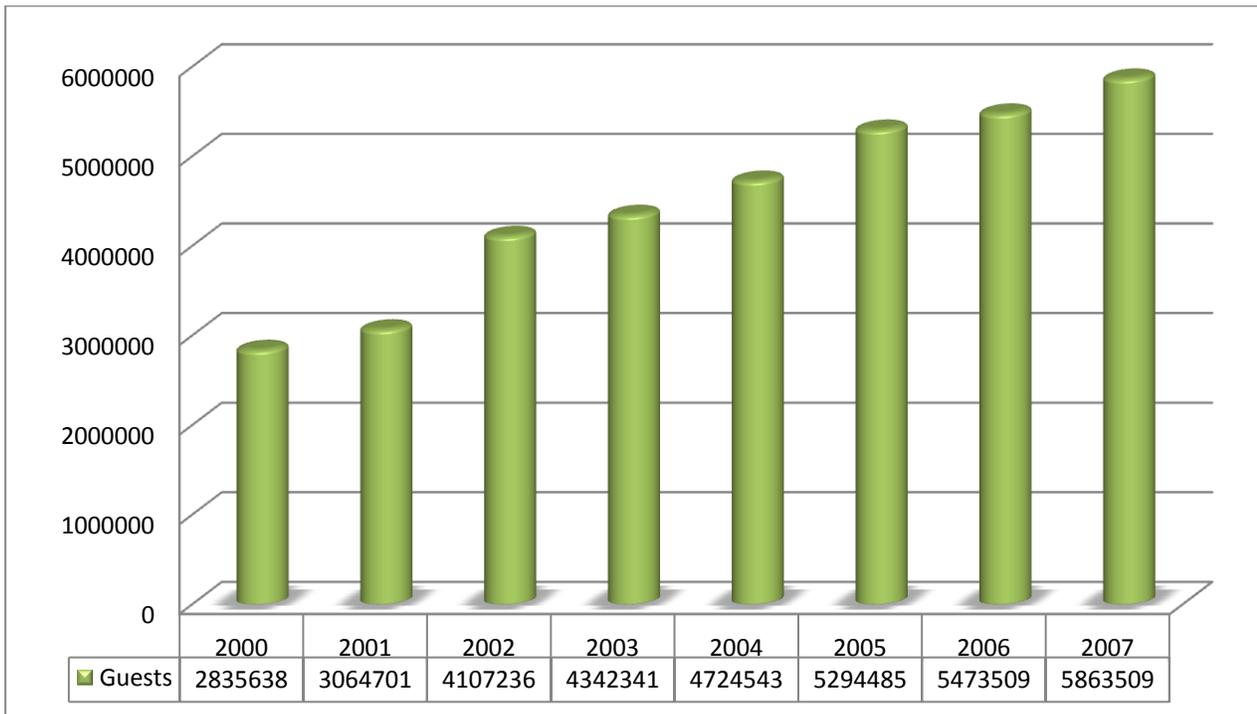
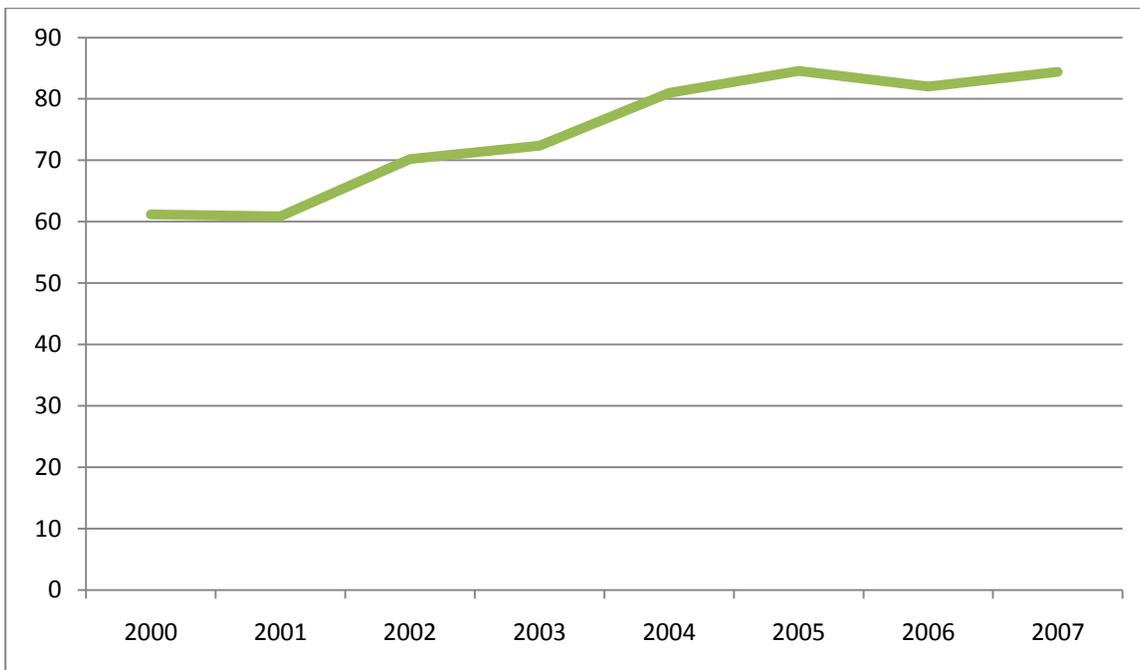


Fig. 18: Total Room Occupancy Rate (%)- Source: Department of Tourism and Commerce Marketing



2.3 Entertainment – Shopping

The UAE has strengthened its position as the tourism capital of the Gulf offering a range of entertainment, leisure and shopping activities. Dubai, in particular, attracts the largest percentage of visitors interested in entertainment and shopping, with expectations being very positive for the opening of DUBAILAND™.

DUBAILAND™ will be the largest amusement park in the world, with more than 279 square kilometres. It comprises 45 mega-projects and its venture is estimated at AED 235 billion. The projects under DUBAILAND™ include theme parks, eco-tourism projects, shopping malls, restaurants and residential units that are being developed by UAE, GCC and International investors¹². Once fully operational, it is expected to attract millions of tourists annually and to become one of Dubai's major economic drivers. For the size of the projects, for the detailed and diversified offer, for the innovation it represents, DUBAILAND™ could be considered the world's most ambitious tourism, leisure and entertainment project, designed with the aim of enhancing the position of Dubai as an international hub for families. The theme park expectation is to receive 40,000 visitors a day and, according to the Strategic Plan 2015, it will contribute to attract 15 million visitors to Dubai by the year 2015. DUBAILAND™ will also host the BAWADI™, which will have the largest cluster of hotels in the world. In addition, BAWADI™ will offer amusement centers, shopping malls, theatres, restaurants and convention centers. It will cater to the needs of a wide variety of tourists visiting Dubai, as well as residents of the UAE. The Bawadi master plan counts for a 10-kilometre long boulevard which will have 51 hotels and more than 60,000 rooms¹³.

Smaller in terms of size but not less prestigious is the Ski Dubai, located within the Mall of the Emirates, which is one of the most important commercial centre in the world. Ski Dubai is the first indoor ski resort in the Middle East. It allows visitors, in particular locals, to enjoy the possibility to experience the “Alps in the desert”: skiing, snowboarding or just playing in the snow¹⁴. For foreign tourists, coming mainly from UK and Germany, it represents the unique chance to enjoy the snow in Dubai all year round. Ski Dubai, the Emirates' latest invention, inaugurated in 2005, brings an Alpine experience to the middle of Dubai's desert. According to Mr. Marchand, Manager of Ski Dubai, the project has been successful as it received 800,000 visitors (300,000 more than forecasted). He also declared that one strength of Ski Dubai is that it offers a more secure environment for locals who want to learn how to ski. Many expatriates from GCC countries living in Dubai, or residents from near emirates, travel abroad and visit skiing destinations around Europe. Thanks to the new facility, they have now the possibility to learn and practice before leaving and when they come back. Foreigners, especially those

¹² Source: www.dubailand.ae

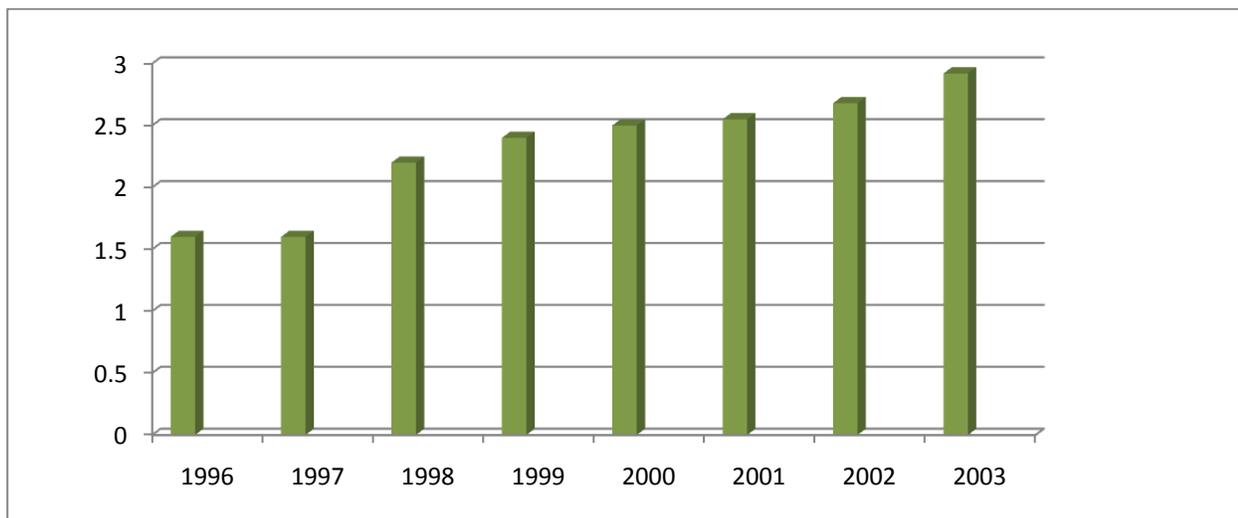
¹³ Source: www.bawadi.ae

¹⁴ Source: www.skidubai.com

that come from central Europe, would visit Ski Dubai for the curiosity and unique experience of skiing in the desert, but most likely they would do it only once during their stay, as for someone used to live in countries like Italy or Switzerland the skiing experience is quite limited. Nevertheless, by focusing on local people, Ski Dubai is able to have a higher percentage of repeated visitors.

Dubai is known as the “shopping paradise”; the city has more than 40 shopping malls, including the largest outside of North America, the Mall of the Emirates. Dubai is also known as the "City of Gold," thanks to its world famous gold souks. One of the most expected event, that every year attracts a large number of tourist, is the Dubai Shopping Festival. Dubai is currently the hot place to shop and the best time for shop-addicted is during this festival, where reductions are offered across a vast range of articles, from jewelry to fashion, electrical goods and carpets. Most hotels and apartments also get involved offering special offers during the period, besides Emirates Airline and most other air companies flying out of Dubai, offer discounted airfares and much needed excess baggage allowances during the festival¹⁵. Since 1996, when it was first started by the Dubai government as a retail event aimed to promote trade in Dubai, it has become an annual shopping, entertainment, and cultural occasion that continues to promote tourism in Dubai and attracts people from around the world each year. In the first year in 1996, 1.5 million people attended the festival and in 1999 this figure increased to 2.4 million, which resulted in incremental sales of US\$ 1.12 billion, and these figures have been growing ever since¹⁶.

Fig. 19: Dubai Shopping Festival Visitors - Source: Dubai Shopping Festival



¹⁵ Source: www.dubaishoppingfestival.com

¹⁶ Source: <http://www.dsc.gov.ae/DSC/Pages/home.aspx>

According to an independent study commissioned by the DSF office, the Dubai Shopping Festival has become a brand icon and a world-class event which is fast growing within the last years. The study shows also that the success of DSF has been mainly due to its “reorganization” as a family and entertainment experience, rather than a purely shopping festival. Even if shopping remains the main focal theme, the family experience complemented the shopping aspects with emphasis and variety of activities with universal appeal (concerts, theatrical performances and art exhibitions). Many shows are dedicated to children, with the support of cartoon or with the animation of street artists. Combining all those activities to the shopping experience, the one month-long event plays a vital role in Dubai’s tourism industry¹⁷.

Fig.20: Main Indicators of Dubai Shopping Festival (2004-2007) - Source: Statistics Center of Dubai

	2004	2005	2006/2007*
Festival days	32	32	45
Total visitors (in 000)	3.100	3.300	3.500
Daily average visitors	96,875	103,125	77,778
Total spending (Million AED)	5,800	6,670	10,200
Daily Average Spending (Million AED)	181	208	228,9

*one session

2.4 Transports

The development of tourism is closely linked to advances in the transport sector. Easy access by air or the development of an integrated transport system are a prerequisite for any destination that wants to attract visitors and improve its image as a global tourism destination. Following this logic, the Government of Dubai has decided to invest heavily in the most recent technologies guided by international best practices to develop its infrastructure and promote its competitiveness¹⁸.

With an economy increasingly based upon financial services, air transport, property development and tourism, Dubai is facing a rapid population growth and severe traffic congestion problems. Population is forecasted to

¹⁷ Source: <http://www.mydsf.com/dsf2009/>

¹⁸ Dubai Strategic Plan 2015

increase by 6.4% annually to reach 3 million by 2017, with the number of tourists expected to reach 15 million by 2010¹⁹.

Regarding Dubai's traffic problem, the development of an integrated transport system appeared to be the best solution in order to solve the traffic congestion and to reduce the time spent on travelling. The aim was to provide an integrated roads and transportation system to facilitate mobility and improve safety. One of these measure is the construction of the metro, a project launched in 2005, which once operational will carry 1.2 million passengers daily. Two lines are under construction, the red line will go from Jebel Ali Port, through the city center, to Al Rashidiya; the green line will move from the Festival City to Dubai International Airport. Other two lines are planned for the future, that will link Dubai International Airport to Jebel Ali Airport, following two different routes. This new system made of the metro with secondary movers (buses, taxis, boats) is conceived as a measure to support the world's fastest growing city, to encourage foreigner and local investments, to sustain economic growth, to facilitate mobility, to create jobs and to revitalize the economy and commercial activities. It will be the first metro in the region and it is considered one of the most luxurious railway system in the world, providing all kind of comforts. The automated trains are fully air-conditioned and designed to meet Dubai's specific requirements. The trains will offer standard 'Silver' class, a women and children only section plus a first class 'Gold' section that will provide the carriage for VIPS. The trains and stations will also feature wireless internet service. When it will be fully operational, Dubai Metro will be the first alternative to the use of the private transport. It is projected to carry approximately 1.2 million passengers on an average day and 355 million passenger per year with an estimated ridership of 25.000 passengers per hour in a single way.

The growth of Dubai can be seen through the increase in terms of passenger traffic. According to the statistics of Dubai Airport, it was estimated that over the last ten years the number of passenger increased by 125%, from 4.3 million in 1988 to 9.7 million in 1998. Dubai International Airport was ranked as the 2nd fastest growing airport in the world according to ACI (Airports Council international) traffic statistics for 2002. In 2003, it catered to 18 million passengers, while in 2004 Dubai International Airport attracted 21.7 million. Concerning the future, 60 million passengers are expected by 2010²⁰.

In order to meet the travel expectations of the passengers and to follow its big expansion, the government of Dubai has decided to start an expansion plan. This expansion program has been designed to turn Dubai International Airport into an efficient airport, in order to maintain the emirate's position as the aviation and business hub of the region. The new expansion included the construction of Terminal 3, entirely dedicated to

¹⁹ Source: www.railway-technology.com

²⁰ Source: <http://www.dubaiairport.com>

Emirates Airline. Dubai’s flagship airline flies to more than 80 different destinations, being today the 4th largest airline in the world in terms of passenger traffic. In 2008, Dubai International Airport has registered an annual increase of 6% in terms of passengers, indeed the open sky policies and facilities have encouraged over 112 airlines to connect via Dubai to more than 165 destinations²¹. According to Paul Griffiths, Chief Executive Officer of Dubai International Airport, despite the global slowing down of air traffic, the airport of Dubai has recorded 37.44 million passengers in 2008, with a 6% increase thanks to the opening of Terminal 3. According to the Airports Council international (ACI) valuations, Dubai International Airport was the only airport among the top 10 largest international ones, that recorded a positive trend during the last quarter of 2008²². Dubai airport plays an important role in developing tourism as it provides services to passengers, complete information about flights, hotel booking and city guides. Nevertheless, Dubai Airport, as a major international hub, is used as a transit point to other destination such as Australia, India, Sri Lanka. According to data provided by Airport, in 2007 the total number of movements was 34,348,110 of which 866,853 were transit passengers.

Fig.21: Passenger Movements at Dubai International Airport 2005-2007 Source: Dubai Airport

Year	Transit	Departures	Arrivals	Total
2005	859,996	11,811,383	12,110,909	24,782,288
2006	863,204	13,816,223	14,109,299	28,788,726
2007	866,853	16,594,249	16,887,008	34,348,110

In addition to being an important passenger traffic hub, the airport is one of the busiest cargo airports in the world, handling over 1.8 million tonnes of cargo in 2008. Dubai’s Government has announced the construction of a new airport in Jebel Ali, which is expected to become the 4th largest airport mainly for cargo.

Despite the data presented by the statistics has always been growing and the positive trends of the latest years, Dubai is not immune to the current crisis, and increasingly often newspapers are publishing news on Dubai and how it is being affected by the crisis. Some of these are rumours, as the one appeared in the newspapers around the world reporting that 3000 cars have been abandoned in the Dubai International

²¹ Balakrishnan, M. S. (2008), “Dubai, a star in the east”, *Journal of Place Management and Development*, Vol.1, No.1, pp. 62-91.

²² Source: <http://www.airport-int.com/news/2008/01/10/dubai-international-worlds-fastest-growing-airport>

Airport's parking, by people overwhelmed by debts²³. Beyond news like this, which has been neglected by authorities and by our own experience, it is true that always more Dubai is reported on magazines regarding the financial crisis and not anymore for its great developments. According to the Times Magazine, Dubai's population will decline by 8% in 2009 and the value of the most luxurious properties has already dropped by 50%. Attracted by the recent impressive growth of the country, many Westerners have come to work to Dubai and to speculate on the real estate market. According to the Italian newspaper "La Stampa", probably Dubai will end up with a lot of half finished skyscrapers, as from now on only the construction of those buildings that are already 60% complete will be ended²⁴. Also giants as Nakheel, the government-owned developer of Dubai's man-made palm island, are suffering the crisis. The company has cut 500 jobs, which correspond to 15% of its employed workforce, as a consequence of the decision of scaling back projects during global financial crisis²⁵.

Not only the real estate industry is facing problems, the same happened to the 2009 edition of Dubai Shopping Festival. Over the years the annual festival, seen as a key barometer of Dubai's economy, has been popular both among tourists and the country's resident population. But during the last edition of the festival, some retailers have witnessed a drop in footfall, per-customer spending and number of tourists. Shopkeepers estimated their sales are currently down 20-50%²⁶.

However, despite the worldwide crisis, the Gulf countries count with very high liquid assets because of oil production. On the other hand, the real estate market in Dubai has experienced a remarkable rise in prices in the recent past, but this increment has been sustained by speculation more than demand; in 2010/2011, when many buildings will be completed and put into the market, prices will tend to fall because of both the greater supply and Dubai's real estate market will at this point enter its phase of maturity and stability²⁷. The latest estimates of the International Monetary Fund predict a 3% growth for the United Arab Emirates in 2009. Raed Safadi, chief economist of the Dubai Government, stated that, in spite of recent difficulties, the emirate is

²³ Billi D. (2009), "Fuga da Dubai", *Blogosfere*, available at: www.petrolio.blogosfere.it/2009/02/2009-fuga-da-dubai.html

²⁴ (2009), "Gli stranieri in fuga dal Dubai, crolla il mito dell'Eden di sabbia", *Il Giornale*, available at: <http://www.ilgiornale.it/a.pic1?ID=328299>

²⁵ Kernahan A. (1/12/2008), "Nakheel cuts jobs as Dubai reels from financial crisis", *Times online*, available at: http://business.timesonline.co.uk/tol/business/industry_sectors/construction_and_property/article5263759.ece

²⁶ (2009), "Crisis hits Dubai's shopping fest", *Brisbane Times*, available at: www.brisbanetimes.com.au

²⁷ Centro Studi Mercati Esteri Omnia Real Estate, "Dubai e la crisi mondiale", available at: <http://www.omnia-re.com/index.php/Ultime/Dubai-e-la-crisi-mondiale.html>

facing the challenge in the best way thanks to the continuous growth that was registered in the previous six years, +8%, and that has allowed to accumulate enough wealth to face a situation of this kind²⁸.

At a first glance, reports by the press as well as some macroeconomic figures on unemployment and trade, seem to portray an apocalyptic scenario for the economy of the emirate. The closing of construction sites and the risk of sharp price deflation in the middle of a global financial crisis would probably raise serious doubts about the economic future of a small country that has invested heavily in the tertiary sector and in construction. However, the emirate can count on the benefits deriving from oil extraction, which will certainly help prevent recession. Furthermore, some observers have stated that, as a member of the UAE, Dubai could rely on the unconditional help of its fellow members if necessary. Another factor that calls for optimism regarding Dubai's situation is the high flexibility of the country's labour market: the absence of labour unions and the provenance of many workers from foreign (poorer) countries, combined with the strictness of immigration laws allow the enterprises to save quite some money.

²⁸ Emirates Business, La crescita degli UAE secondo il FMI, *Omnia Real Estate*, available at: <http://www.omnia-re.com/index.php/Ultime/La-crescita-degli-UAE-secondo-il-FMI.html>

3 Buildings, records, icons

Cristina Insuratelu, Jessica Schenck, Jieqing Luo, Timo Caldolo

Introduction

Dubai is known as the “fastest growing city in the world,” there is a high-speed change in Dubai that can be seen almost daily by both those living in the city and by those who are visiting. It is not just the intensity of Dubai’s growth that is incredible but also a desire for the city to house record-breaking status and iconic structures.

Dubai, an independent emirate until the formation of the United Arab Emirates in 1971, was a small, quaint trade port; important to regional commerce but far from making its mark on the world. Aided by the discovery of oil in 1966, Sheikh Rashid bin Saeed Al Maktoum wanted to change the image of his city and ambitiously changed the city by having the waterway dredged. Sheikh Rashid also began building a modern telecommunications network along with schools, hospitals, and roads; all funded with the lucrative oil money.

This development came hand in hand with an open policy to expatriates and a tax-free haven for both personal and corporate income, lead by the enthusiastic leader. Once Sheikh Zayed bin Sultan Al Nahyan, ruler of Abu Dhabi, and Sheikh Rashid were able to create the UAE, along with five other emirates, they soon dreamed of further transforming the region into a business and tourism center. By the 1980s and early 1990s, their plan began its development and quickly the city started seeing a complete change in landscape.

Today, Dubai is considered the city in the center of the world. While it is considered to only be at 10% of its total completion, Dubai is a city of icons. One of the cities first iconic buildings, the Al Attar Tower, on Sheikh Zayed Road, was completed in 1997 by Al Turath Engineering Consultants. Designed in the postmodern style, the 130 meter high building is easily recognizable by its golden windows.

Dubai really entered that main stage with the constructing of the Burj Al Arab hotel, opened in 1999. Designed by architect Tom Wills-Wright (WS Atkins), the hotel was designed to look like a billowing sail; the world’s first seven star hotel, at 321 meters, is the third tallest building in Dubai and the tallest building used exclusively as a hotel. The Burj al Arab also contains the world’s tallest atrium. The hotel was constructed on an artificial island 280 meters offshore and is accessible only by a private bridge. The equally famous interior design of the Burj, designed by Khuan Chew, is known for its lavish luxury with 8,000 square meters of gold leaf and 24,000 square meters of 30 different types of marble.

Once the Burj al Arab was opened, the city of Dubai truly became an international name. Soon, other mega structures began popping up, usually in record building time.

3.1 Examples of buildings, icons and records

1. Palm Jumeirah

It's located on the Jumeirah coastal area of Dubai, facing the Arabian Gulf. It can be reached by advanced monorail directly from Dubai international airport in 30 minutes.

The Palm Jumeirah, Palm Jebel Ali and Palm Deira, the three development projects are conducted by Dubai's leading property company Nakheel. According to the vision stated by the company, initially, the realization of Palm was to solve the beach shortage problem²⁹. With the idea that it's not only for beach creation but also for tourism development as part of Dubai strategic plan, the Palm Jumeirah which was realized first and became an international icon to attract tourists and property investors. The attractions and facilities embody the innovation and progress in Dubai and create value for people to come and enjoy.

Palm Jumeirah was built with the concept to be an icon from the beginning. The construction of islands, the realization of high-rise and other architecture attractions are elements to embody this feature.

Although there are some critics for the quality and speedy development problems, the iconic fame already overweight those issues. According to the reporter from AMEInfo³⁰, in October 2007, it became the world's largest man-made island, and 75% of the properties were ready to hand over, with 500 families already residing on the island.

2. The 6th Crossing

FXFOWLE Architects won the project which was called the biggest ever single road project launched by the Dubai Roads and Transport Authority³¹. It began in March, 2008 and is expected to complete in 2012. The arch bridge situates over the creek link Creek on one side and new developments on the other side. The main purpose was to solve the potential traffic problems between the two sides.

The bridge was designed to resemble an acoustic wave toning with an opera. It can be seen as looking like the new moon in Dubai.

²⁹ <http://www.thepalm.ae/vision.html>

³⁰ <http://www.ameinfo.com/133896.html>

³¹ http://www.gulfnews.com/nation/Traffic_and_Transport/10185678.html

It not only serves as a transportation solution, it is also a new landmark standing over the river. Serving as link between Dubai Creek where the Opera is situated and new developments such as Dubai healthcare and Dubai Festival city etc, it can enchant the experiences of tourists.

3. Metro

As another record in transportation system, Dubai Metro will be the longest, driverless and full automated network in the world when it opens in 2010. Its purposes are to ease congestion, reduce the mobility time for tourists and provide a better travel experience. Dubai Metro is different from normal metro mainly on two aspects, one is that the stations and tracks are built over the ground but not underground, another is that international and local companies can negotiate with authority over naming the stations, namely corporate branding³².

4. Dubai Marina

The vision of Dubai Marina is to create an awe-inspiring city-within-a city that delights residents with its cosmopolitan, free-spirited atmosphere and unique, invigorating lifestyle. It will be an urban centre on the water, comparable to the most exclusive waterfront developments in the world's leading cities. Dubai Marina is unlike anywhere else in Dubai, the Middle East and even the world.

The Marina living has become one of the most desirable and sought-after lifestyles in the world. The exclusivity, the status and the rewards of waterfront living are awaiting you at Dubai Marina. One of the world's largest, most meticulously planned waterfront developments, Dubai Marina offers the exhilaration and vibrancy of a chic, urban lifestyle together with all the advantages of owning a home on the water. Unobstructed views across the marina, fresh sea breezes and the experience of a lifestyle most people can only dream about.

5. Dubailand

The world's most ambitious Leisure, Tourism and Entertainment destination with over 3 Billion square feet of world class theme Parks, Culture, well being, Sports, Shopping, Hospitality and Entertainment set to launch its first phase in December 2010.

³² "Is Advertising the New Indicator for Emerging Markets?" Contrarian Profits. 2008-08-11. Retrieved on 2008-08-12.

The project for Dubailand was officially announced on October 23rd, 2003 by Dubai's ruler Sheikh Mohammed Bin Rashid Al Maktoum. It is built on a 3 billion square feet (278 km²/107 mile²). Dubailand will inevitably be an attractive place to 'live, work and play' for the Emirate's growing population. An attractive environment is essential for a leisure and tourism destination and an appropriate setting for business and Entertainment development.

To date, there are 22 projects under development on a land Area of 320 million square feet. Some of the Dubailand projects are already operated, such as Dubai Autodrome and Dubai Heritage vision.

3.2 The “Island of Happiness” and its icons

There are 200 islands just off Abu Dhabi , among them there is a 27 square kilometers one called Saadiyat Island, which means "Island of Happiness" in Arabic. A project that goes far beyond traditional real-estate investment is going to be realized there in order to help the city to stand out on the world stage. Saadiyat Beach, South Beach, The Wetlands, The Island Lagoons, Al Marina, Eco-Point and the Cultural District are the seven distinct districts undergoing. Once two bridges and a tunnel will connect the island to the mainland, 170,000 people will live there and millions of tourists will be attracted.

The nine kilometers Saadiyat Beach aims to be a top class touristic destination with luxury hotels and resorts. The South Beach, “the family resort”, will comprise an area of 268 hectares with boardwalks with restaurants and cafés, leisure and entertainment, where a dynamic beach life can be enjoyed. In the 523 hectares of TheWetlands, “the eco destination”, luxury villas and boutique eco hotels will offer the possibility to live very closely to the waterside nature.

The Island Lagoons, “the height of cosmopolitan style”, will be a 600 hectares luxury residential area with recreational spaces and an equestrian centre. Al Marina will be a vibrant hub of 440 hectares, with berthing for over 1000 boats, a mediatheque and an oceanarium.

The Cultural District, which will be the heart of the new Abu Dhabi, is the area where the icons are concentrated. Five buildings will host four museums and a Performing Arts Centre. This set of outstanding constructions, signed by architects such as Zaha Hadid and Tado Ando, is going to shape the area. In particular the Louvre Abu Dhabi is one of the major investments. The seemingly floating dome structure was designed by Jean Nouvel and will cost \$108 million. The French architect described it as "made of a web of different patterns interlaced into a translucent ceiling which lets a diffuse, magical light come through in the best tradition of great Arabian architecture." For using the name of the world most famous museum they have invested \$520 million. Moreover, in exchange for art loans, special exhibitions and management advice, coming

from the Louvre and other top French museums, they invested an additional \$747 million. This partnership, which will help the city to achieve the goal of attracting wealthy and educated tourists, has created a number of critics in France, as the Louvre has previously refused the financial help from philanthropists who asked that galleries be named after them in return.

The Guggenheim Abu Dhabi has been projected by Frank Gehry, who designed a building in relation with the peculiar landscape of desert and sea, far away from what could be thought in Europe or America. With 450.000 square-feet, it is going to become the largest facility of the Guggenheim foundation and it will feature permanent-collections and special-exhibitions galleries; a center for art and technology; a center for contemporary Arab, Islamic, and Middle Eastern culture; an education facility; a research center; and a state-of-the-art conservation laboratory.

Gehry's architecture and the Guggenheim's art have proved an irresistible combination.

In the early nineties, Bilbao was facing an economic regression and identity crisis because the heavy industry was in precipitous decline. The response of the local government was to create an international major cultural initiative. The Basque administration mobilized €90 million and in January 1992 Frank Gehry was appointed. In October 1997 the museum was opened; starting the so-called "Bilbao effect". Since then, the museum has attracted between 800.000 and 1 million people yearly, 90% coming from outside the Basque region and half of them were not Spanish. The economic impact has been so great that it is said that it has already paid the initial investment in the first year. It has also sparked a transformation including the opening of new restaurants, hotels, and museums while also leading to a renovation of the transport system.

Although Abu Dhabi aims to become a tourist magnet as the Basque city has done, it is not possible to make a complete parallelism between the two cities tactic. First, the gritty port city has started its transformation in the early nineties. Twenty years ago the Guggenheim under the leadership of Tom Krens had just started to explore the possibilities of international partnerships, first in Venice and then in Salzburg, enjoying the position of first starter. Second, Bilbao decided to put itself on the map in a period of European integration, when it was easier to enter into a new geography. Third, the reference markets of the city in northern Spain are domestic, the British, the German, the Italian and the USA, which are rather close.

Nevertheless, Abu Dhabi has great chances. First, it has a strong and unified leadership. Second the project has been exhaustively planned, with feasibility studies, business planning and visitor projections. Third the rulers seem to be flexible enough to get the most interest from the external world, as they have already demonstrated by setting new and more attractive policy to bring more foreign investment for Saadiyat island.

Finally they have thought everything in a larger scale, building not one but five outstanding architectures, implementing the Bilbao model in order to get closer to the new “Dubai effect”. The only insecurity point is related to the meaning of the museums. If the content of the Louvre and of the Guggenheim is clear, there are more doubts related to the Maritime Museum and the Sheikh Zayed National Museum. The first one will reflect the nature of the place, linked to the maritime trade, while the second one will be connected to the local cultural heritage. The critical point is to represent effectively a culture which is mainly intangible, but probably nowadays with all the new technologies the result will be magnificent.

Sheikh Zayed Mosque

The Mosque of Abu Dhabi is a powerful landmark. Its size, as big as five football field, has place for up to forty thousand people, and quality level, which personally checked by Sheikh Zayed, makes it a main tourist attraction. Attracting tourists was always a goal while constructing this mosque. Men and women from all over the world are welcomed to visit it and accompanied by highly trained guides in order to enhance the cultural and political understanding. It is possible to admire the biggest Persian carpet of the world where up to 9.000 faithful can find place, some amazing chandeliers decorated with thousands of Swarovski crystals and wonderful walls covered by the finest marbles from all over the world.

3.3 Review

Dubai is run as a constitutional monarchy, this means that the government, by way of the Sheik, has their hand in almost all aspects of the economy and building. The government helps finance many of the projects in the area and has input on what can and cannot be built. This is different from the approach in many countries where private enterprises have the ability to make more decisions in their policies and building.

In Dubai, the major part of the work force is imported, mainly from India and Sri Lanka, to allow for low cost labor; a system that allows for the exploitation of cheap labor for the purpose of faster building, with lower costs. In September of 2006, the government of Dubai “issued a law that bans strikes and calls for deportation of workers involved in strikes,” according to the Financial Times. This was done to future constrain the workers and force labor against many international human rights codes.

This can easily be done in a country that is, by all rights and purposes, run but the ruling family. While many countries in the Gulf region have similar issues against what much of the world considers ‘basic human rights’ within the confines of the UAE, these practices are not illegal. Without such exploration of labor, it is questionable if Dubai would be able to create its world icons; for sure these icons would not be built in the record speeds they are also famous for.

The icons and buildings can pop-up in high speed due to the experienced international architects' work. The collaboration among the different global partners allows these projects to come to life, giving them their own significance. The architects go through great efforts and pressure to create designs that embody the vision of the development of the ruling government. During the design phase, architects have to understand the local culture and potential impact of their design. When it comes to the implementation phase, the different global partners (architects) who are cooperating with each other promote their work internationally, bringing touristic effects for Dubai. Since Dubai wants to position itself in the global market, the work of these international architects adds the value to its goal. As long as architects have unique ideas that generate something valuable for Dubai to surprise the world, they can realize astonishing projects there. One project might have several partners; each of them has his own specific field of work, which realizes quality and perfectionism. The successful buildings and icons become a major attraction for international tourists. But how people access to the world records and icons to enhance their experience, as the city is not a walking city? How can the metro provide better travel experience? What's more, architects now thrive to build landmarks rather than typical buildings; their surprising and innovative ideas continue to create more and more icons in Dubai. But what's the next and what will the development will lead to?

The term "icon" has been applied to many of Dubai's high-design towers and it is easy to think of Dubai's as the Middle East version of New York or London.

Increasingly today's developers are integrating elements from the region's traditional architectural roots and features into major developments. For example the Madinat Jumeirah successfully combines Arabic culture with western design. There has been a great push to bolster the culture and tradition of the Middle East and to maintain an its identity. Increasing number of developers are integrating this important local aspect into design to deliver signature and individual project that will appeal to those who are seeking a taste of the Gulf.

Dubai thrives on newness and bigness, in an act of ongoing self-stylization and fantasy. Hence architecture is crucial, for it defines these elements. Little more than a grand-scale "shopping mall", the city is comprised of "mind-zone" spaces and of airportlike lobbies. In this "Theme Park"-orientated cityscape, there is no differentiation between old and new. Everything is recent. Yet everything seems to point to the twin towers of consumerism and tourism.

Dubai is turning into a huge business-meet-leisure park. Hundreds of luxury hotels are being built and many hundreds of thousands of flats and luxury homes aimed at housing the rich, the retired and the tourists as well as the immigrant workers tasked with making dreams reality.

The economic vitality of the United Arab Emirates is clear. A few years ago, Dubai launched a drive to diversify its economy towards new technologies, commerce and luxury tourism, making a special effort to develop its financial sector. Through its dynamism and attractive business environment, Dubai city has become the leading financial market in the Middle East. In addition, Dubai is aiming to be the world's top luxury tourism location and a leading tourist destination within the space of a few years.

Without these icons, Dubai would not have been able to gain its competitive advantage over other nations on the Gulf region. Dubai's fame and position started with astonishment and amazement over its iconic structures; a position that Dubai is working hard, despite the world's economics downturn, to maintain. The current and future projects in Dubai are already set up to be the most extravagant in the world.

4 Culture

Salma Abu Shakra, Giulia Caldarone, Silvia Ghirelli, Nathalie Page

Introduction

In this part of the report we will be discussing culture. In our study tour we had very little interaction with the local culture, the main event was the cultural lunch at the Center for Cultural Understanding. In order to understand the topic and be able to explain it we had to resort to research and to information gathered from friends who resided in the U.A.E.

Culture is the summation of the collective memory, heritage, traditions, beliefs, literature and the arts which identifies and differentiates people of different countries. It is their identity and it is defined by the history of the people and also by current activities and projects which are changing and evolving that definition. Culture is not always a touristic attraction but it can affect the way tourists are perceived by locals, and vice versa how tourists perceive the destination.

In destination promotional material, we usually find many titles, attractions, and activities under the topic culture; among them, archeological sites, historical buildings, museums, art exhibitions, festivals, dance, music,...etc. The U.A.E., however, is a rather young country; forts and old buildings, or tangible non-movable cultural heritage sites are scarce. Being a state of recent settlements of nomadic Bedouins, the country has a rather intangible cultural heritage. That is why in tourism promotional material reference is always made to religion, food, traditional dress, camel racing, falconry, and architecture.

Therefore, we will briefly discuss history, religion, language, multi-ethnicity, status of women, customs and traditions which have an indirect but significant effect on the tourism product and on tourist-resident interaction and perception. We will also discuss the cultural product or the alternative which is offered to the tourist now and which will be offered in the future according to the many planned developments. This cultural offer or attraction includes reproductions of traditional houses, mosques, Global Village, theme parks, as well as new versions of traditional activities such as Camel racing, equestrian, and falconry. While discussing culture we cannot ignore the tendency for the superlatives in this country. It is how they want to be perceived, as the young emerging country which has the best of everything according to both western and oriental measures. Hence, we will briefly discuss their attitude towards architecture and the legacy they are planning to leave for future generations.

4.1 Brief Historical Account

“Material discovered from archeological explorations suggests evidence of fishing settlements along the Gulf coast in the 1300s. The people who roamed the hot deserts as nomads with their camel herds were known as Bedouins” (4).

These tribes settled near the sea for abundance of food, and diving for pearls was how they made a living. “Work on the coast involved dhow building to service the lucrative fishing and pearl diving industries. It was the discovery of pearls that led to the rise of Dubai as a trading city”(4). Bedouins settled in the Abu Dhabi island when they found drinking water.

Until 1959, photographic evidence shows that the U.A.E. people were living in mud houses and palm huts. The discovery of petrol changed their lives radically and very quickly. The confederation dates back to 1971, previously the emirates were mostly in conflict against each other. The discovery of petrol and the sudden growth had an immense impact on the country. Suddenly, Bedouin herders living in tents have become owners of big towers and palaces. There was little time for adjustment, the Emiratis had to follow and try to keep up with the fast development in their country. The know-how and the work force had to be imported from far and near foreign lands. Even now with the many governmental efforts to increase the number of locals in key positions, still the overwhelming majority of the working force of Dubai and the Emirates are foreigners of various nationalities.

4.2 The Arabic Language

The language of a people is a fundamental part of their culture and of their identity. The official language of the United Arab Emirates is Arabic, but English is widely used in business and commerce.

Arabic is one of the oldest languages of the world and it is the written and spoken language of more than 150 million inhabitants of the Middle East, North Africa and the Gulf. The Koran, the Muslims’ holy book, is written in the Arabic language. Arabic belongs to the Semitic family of languages of which Hebrew is also a member. Arabic alphabet contains 28 characters and its script reads from right to left. While it is universally written, read and understood in its classical form, spoken Arabic present regional and dialectical variations and shades.

In spite of the importance of religion and the sanctity of the Koran, in Dubai the significance of the Arabic language is marginalized for the sake of progress. They adopt a more flexible attitude towards language.

4.3 Multi-Ethnicity

The culture of a place is always related to the people that live in it, and in Dubai this is even more so. Because of the multiethnic population, there is a pluralism of cultures living in the same place, trying to get along together.

About 4,7 millions of people live in the UAE, 1,6 millions of which just in Dubai and 1,5 millions in Abu Dhabi. UAE has one of the most diverse populations in the Middle East. 19% of the population is Emirati, and 23% is other Arabs or Persians. An estimated 74% of the population is non-citizens, one of the world's highest percentages of foreign-born. In addition, since the mid-1980s, people from all across South Asia have settled in the UAE.

The high living standards and economic opportunities in the UAE, driven by the oil industry, are better than almost anywhere else in the Middle East and South Asia. Moreover in Dubai authorities have a more liberal attitude towards religion and other aspects of life, more openness and more liberty is exercised in Dubai in comparison with the other emirates.

All these factors make the nation an attractive destination for Indians, Filipinos, Pakistanis, Afghans and Bangladeshis along with a few thousand Sri Lankans. In 2007, there were approximately 1.4 million Indian nationals, half of whom came from Kerala, making them the single largest expatriate community in the UAE. Inhabitants from over twenty Arab nationalities, including thousands of Palestinians who came as either political refugees or migrant workers, also live in the United Arab Emirates. There is also a sizeable number of Emiratis from other Arab League nations who have come before the formation of the Emirates such as Egyptians, Somalis, Sudanese and from Persia or Iran, who have adopted the native culture and customs. Further, Somali immigration also continued in the 1990s as a result of the Somali civil war.

There are also residents from all other parts of the world like Europe, Post-Soviet states, and North America. The UAE has attracted a small number of very affluent expatriates (Americans, British, Canadians, Japanese and Australians) from developed countries.

The product of this multi-ethnicity is a city that offers an unprecedented diversity of cuisines, a wide range of ethnic consumer products and a multiplicity of religions and traditions. There is, for example, in Dubai a big number of churches to cater for the many different communities of residents. These churches are not just divided per the different sects but per nationalities too. For instance, there are churches frequented by Philipinos and others by Lebanese Christians. As a consequence, there is in this city a peculiar lifestyle, and it is interesting to see how these many cultures interact and coexist.

4.4 Lifestyle

Apart from professional co-existence, in Dubai people of different nationalities lead almost separate social lives. Especially the few locals rarely mix with foreigners. It is a society divided into classes according to nationalities and type of job.

The typical UAE family is the result of an arranged marriage – in many cases between cousins or other blood relatives. Many houses are divided in separated spaces reserved to men and women. Women have the possibility of demanding the divorce from their husband, but this actually happens very rarely. Families are almost always pretty big, with ten or twelve people living in the same house.

Another characteristic of the Gulf culture is the separate social activities that men and women participate in. Being a very reserved religious tribal culture, men and women seem to have separate lives. In traditional dances, men dance alone, sometimes they are accompanied by little girls or little boys. Women have different types of dances where they do not mix with men. For example, during a wedding women guests celebrate with the bride while men guests celebrate with the groom in separate rooms or sections of the house.

Whoever is not an UAE native, meaning the 80% of the population, has a different lifestyle. Foreigners coming from the Indian subcontinent, South-East Asia, Africa and China, work for very low salaries and live in poor conditions, even if they earn much more than in their own countries. These immigrants accept the most humble jobs, mostly in the construction industry, but they work also as house servants, taxi drivers and shop assistants, with the goal of earning enough money to buy a house or start their own activity in the homeland.

Having more abilities and expertise, Arabs coming from the rest of the Middle East have well paid jobs, mainly as medium level managers, in the sector of communication, in the public and in the service sector. Nevertheless they receive lower salaries compared to the ones earned by local employees. The growing economic trend of the last years has attracted to the country and mainly to Dubai young people from all over the world, especially from Europe (UK, Germany and Russia), South Africa and Australia.

Employees coming from the other Arab nations usually earn good salaries, receive a better treatment and have on the whole a better lifestyle than other foreigners coming from Asiatic or African countries. In general, there is a trend of discrimination and differentiation according to the origin of the resident, and it is manifested in the level of compensation and the type of job. For example, residents of British origins have the highest level of jobs, they get the best salaries, and they live extremely well in the UAE.

This separated lifestyle may not be clearly apparent to the tourist. At a first glance Dubai seems to be a modern westernized society. However, tourists will quickly notice how jobs are distributed according to nationalities. Tourists will realize who is doing managerial or more important jobs and who is given the so-called lower jobs.

4.5 Clothing

Traditional conservative clothing is usually a fundamental issue for Islamic societies. Westerners very often do not understand the reasons behind this conventional attire. The Arab national dress is designed for the high temperatures and according to the religious beliefs in the region. Men are really proud of their clothing, where simplicity and uniformity have the aim of hiding any social and provenance differences. Men wear an ankle-length, loose-fitting garment, known as *kandoura* or *dishdasha*, which is usually made of white cotton, although darker, heavier materials may sometimes be seen in the winter.

Women wear a long-sleeved, full-length dress, called *Abaya* and is often elaborately embroidered in gold, silver or colored thread. The hair is covered and the face may also be covered by a veil, known as a *gishwa*, or a kind of mask which covers the nose and mouth.

Many believe that men are responsible for forcing women to cover their face. In reality this conviction seldom correspond to the truth. In fact, in the majority of the cases Arab women decide to cover their face to be more comfortable when they pass in front of groups of men. Moreover, the veil is not part of Islam, but it has much older roots. Bedouins affirm that the veil dates back to the Pre-Islamic period and that it was a practice adopted in order to protect the skin and the hair from the sand and the sun.

According to our hosts at the Cultural Lunch at the Center for Cultural Understanding in Dubai, Traditional Dress has become a form of Self-expression and distinction for UAE Nationals. A simple Long Black Abaya and head cover (Sheyla) for women and a long white dress for men have become so personalized that they have turned into forms of expressions and style. These traditional clothes have also become a form distinction and differentiation from the many ethnicities and Nationalities that inhabit the UAE.

As our lady hosts at the Cultural Lunch at the Center for Cultural Understanding in Dubai, have explained, a head cover and Abaya can be personalized and distinguished by the extra ornamentation which is mainly done with extensive decorative needle-work and beads. Different colors and combinations can be used. These decorations are usually done on the edges of the head cover, also on the edges of the sleeves and the center of the dress/Abaya.

Men's dresses have more discreet needle-work, mainly on the collar and in matching color. The color of the dress or Kandoura can also vary according to the season and to the mood. While white prevails in Summer, navy blue, dark beige and brown may be used in winter. The men's head cover can be white or red and white; it can also be put in different ways to signify a more casual or a more formal situation. The ladies said, "our National attire can help us spot and find each other, it is our way to distinguish ourselves in the midst of the multi-nationals that live in the UAE, it is also our heritage and we are proud to wear it".

Dubai has a rather relaxed attitude towards clothing, and the "western" style is generally tolerated. However, tourists visiting a mosque should take care to wear adequate clothes that cover the body in order not to offend the local population. As in many religious places around the World, veils are provided for lady tourists during mosque visits. Excessive bodily exposure on the beach or in public is not advisable either.

4.6 Islam

Dubai appears to be a westernized, liberal city, but it still belongs to an Islamic country. Islam is a religion that governs all the actions of an individual and of the society. Daily routine is considerably influenced by the rules imposed by Islam, which has an impact also on other non-Muslim residents, on tourists and on all the activities related to tourism.

Islam is the official religion in the UAE and it is widely practiced by the majority of the local population. Despite the recent connection with fundamentalism and the violent beginning in the Arabic peninsula, Islam is a pacific religion. In fact, the word Islam means not only submission but also peace. In practice, Islam aims to reach the peace within the person itself, with the society and the environment through a conscious submission to God's will. The submission to God's will means not only to adore him, with prayers and rites, but also to pay homage with thoughts and everyday actions.

The mosque is the place of worship where Muslims can come together for prayer, it can also be a center for information, education and dispute settlement. It is also interesting to mention, from an informational viewpoint, that the Dubai airport and the majority of Hotels and malls have prayer rooms, because Muslims usually have to pray 5 times a day. There is also always signage which indicates in which direction Mecca is.

Concerning the role of tourists in such a sacred places, which are also attractions in their point of view, they have the possibility to visit the interior and admire the mosque in all its splendor and magnificence, but both women and men have to dress appropriately and with respect. Women have to wear a full-length Abaya on top

of their clothes and to cover their heads. When tourists visit a destination, they have to follow some rules and they have to respect the local culture, tradition, way of life and their religion which for UEA inhabitants is extremely central in their daily life.

The holy month of Ramadan is a particular period for Muslims, which changes the daily work routine and it affects the city life in general. During Ramadan most businesses and government offices are closed between 2 and 4 p.m.. Business activities tend to slow down. Delays in commercial or bureaucratic activities can be expected. Almost all restaurants and cafés close during the day but many extend their opening hours at night. However, some fast food restaurants do allow drive-through, delivery, or take-outs. Restaurants within international hotels are open during the day for non-Muslims and will have separate sections or keep curtains closed as a sign of respect to Muslim passersby. Room service is available as normal during the day in most international hotels. Hotel guests can still enjoy the beaches and facilities of the hotel as normal. Supermarkets and shopping centers start later in the morning, but are normally open an extra hour or two at night.

The UAE is tolerant to foreigners who do not practice the religion of Islam, but tourists must be aware that during this period, eating, drinking and smoking is not permitted in public during the day and they must behave in a respectful way. It is respectful and polite to dress more conservatively during Ramadan.

Ramadan brings along with it a lot of changes in working times, changes in the lifestyles and habits, but it is still an attractive month to visit Dubai. During the month of Ramadan numerous activities and festivities are celebrated during the night after Iftar.

4.7 Women in Dubai

Islam allows men to have four wives, but only if they can guarantee equality among all of them. In reality only few men can afford two houses and two families and even less four. Moreover, many cannot devote the same time to more than one partner. It is not only a matter of money. Even if the law allows men to take four wives, no man “of quality” would take advantage of it and no woman of high class would accept such a law. Actually women have much more power than what we could think of and they don’t like the idea of sharing their husband (and his money) with another woman exactly as the western wives don’t. If the wife is not satisfied for some reason, she can make her husband’s life unbearable thanks to the great power she owns in the house. Divorce can also be obtained without much trouble and it is not considered anymore a taboo.

Today UAE women are well-read and in many cases can obtain a great success in their jobs. Besides they have the right to keep their income for themselves, while the men have to spend it for the family, and for this reason women enjoy a great independence.

Almost all the mosques have separated prayer rooms, where women can pray without feeling uncomfortable for the presence of men. Men cannot enter women's prayer rooms, while the opposite can happen.

It is the same in the new metro of Dubai: here a special wagon is reserved for women and children only, and men are not allowed to enter. However women can have access to all the wagons. This is because women who have to travel by themselves, or without being accompanied by a man from the family, do not feel comfortable being close to other men.

4.8 Cuisine

Local cuisine is nowadays more and more an important attraction for tourists. The real Emirates food, however, is almost impossible to find in the restaurants of Dubai, and probably the only place where it is served is in the traditional way at the Sheikh Mohammed Centre for Cultural Understanding. Emirati food is in itself the product of the different influences of the many nationalities that lived in this country since earlier years. There is a very evident Persian influence, where rice accompanies all main dishes; there is also the Indian influence with the presence of many spices. Vegetables and salads are almost none-existent in the Emirati food, clearly for the lack of those ingredients in the earlier days.

However visitors from many parts of the world along with a multi-ethnic resident community have ensured that a sophisticated and innovative food culture has developed in the UAE. Almost any type of food is available, from classic Europe to the Pacific Rim. You can eat Mexican, Polynesian, Japanese, Chinese, Thai, Korean, Lebanese, Indian, Pakistani, Persian, Italian and French cooking, and more, at some of the finest restaurants in the Middle East. International fast-food chains, serving the standard menu of hamburgers, chips, pizzas etc (McDonalds's, Pizza Hut, Pizza Inn, Hardees's, Wimpy, Dunkin' Donut) are everywhere.

4.8.1 Arabic coffee

Arabic coffee is one of the main pillars of hospitality in the Arabic tradition. It is a gesture of welcome for every occasion. Preparing Arabic coffee is a long process of boiling and filtering of ground blond coffee beans with cardamom, until a clear golden colored drink is obtained. It has a special coffee pot called *dallah* and the coffee

cups are small but with no handle. The portions are very small, covering the bottom of the cup. It is served in houses and in good restaurants by specially clad waiters called *gahwaji*, and it is usually offered free with the compliments of the house. It is also served at all social events as well as weddings and funerals or meetings.

4.8.2 Pork

Muslims cannot eat anything that contains pork, blood or meat of animals dead for natural causes. At the time of their introduction, these restrictions were justified by hygienic norms. Moreover meat must be authorized, in other words the animal must be butchered in the prescribed way (Halal), showing respect and inflicting to the animal the less suffering as possible. In restaurants pork is not served, instead veal or lamb are offered. However, non-Muslim residents can buy pork products from specific shops. Tourists are advised, out of respect, not to ask for pork in public places or restaurants.

4.8.3 Alcohol

Alcohol drinking is banned by the Islamic religion, originally for reasons of abuse and the fact that the effect of alcohol would increase by the hot weather. Alcohol is generally only served in some hotel restaurants and bars. Exceptions are some clubs (e.g. golf clubs) and associations. Restaurants that are not associated with hotels are not permitted to serve alcohol. Many 4 and 5 stars hotels in Dubai do not serve alcohol to their guests. This kind of policy, however, can present an obstacle in attracting European and American tourists. Non-Muslim residents can obtain a license to purchase alcohol for consumption at home.

4.9 Cultural Attractions

4.9.1 Museums, Mosques and Traditional houses

Museums, mosques, and heritage sites are listed and promoted on Dubai tourism pages. Museums usually display artifacts and old photographs of the old nomad life, which still existed until 1959. The heritage houses are found in touristic compounds and they are renovated old houses or rather new houses built in the traditional style. The distinct feature of those houses is the tower which was built for cooling purposes, it is sort of an early type of air-conditioning. These touristic compounds usually have restaurants around, and sometimes a traditional Emirati restaurant. These heritage sites are listed but are not as heavily promoted as shopping or other activities and entertainment centers. The Jumeirah mosque is one of the more famous heritage attractions in Dubai.

In Abu Dhabi, on the other hand, much more emphasis is placed on culture and heritage. The Grand Mosque is one of the main touristic attractions. Detailed listings and promotions are dedicated to heritage sites. As for future plans, the Cultural district of Saadiyat Island is their main attraction. A mixed-use complex which will host many hotel developments and will house 5 museums; Louvre Abu Dhabi, Guggenheim Abu Dhabi, Performing Arts Center, as well as the Maritime museum and the Sheikh Zayed Museum both dedicated to local culture. At the TDIC meeting a lot was said about plans to preserve the old Emirati culture. The tourism authorities are also branding Abu Dhabi as a cultural destination.

4.9.2 Sheikh Zayed Mosque

The Grand Mosque is the third largest mosque in the world, located in Abu Dhabi. It is named after Sheikh Zayed bin Sultan Al Nahyan the founder and the first President of the United Arab Emirates, who is also buried there. The Mosque was officially opened in the month of Ramadan in 2007.

Although it is illegal for non-Muslims to enter mosques in the United Arab Emirates, this mosque is one of the exceptions. Tours of the mosques are given to both Muslims and non-Muslims since mid-March 2008 in order to promote cultural and religious understanding. The mosque tours allow residents and tourists alike to experience this inspiring addition to Islamic architecture and to receive an insight into Islam and Abu Dhabi's heritage from trained and certified national tourist guides. The tours also demonstrate Abu Dhabi's inclusive approach to becoming a global tourism destination with true universal appeal.

Set to become a signature building for the UAE capital, the impressive mosque is clearly visible from the main road approaching Abu Dhabi city. One of the world's largest mosques, covering 22,412 square meters, this landmark is an architectural statement of the UAE capital's evolving landscape, it combines traditional Islamic designs and modern architectural techniques.

Abu Dhabi's global approach has also extended to the building of the mosque with craftsmen from all corners of the world commissioned to build it with the finest of construction and interior materials. The urge to construct the biggest and tallest architectural landmarks, built to be part of the World's Guinness is not overlooked even for a building where the main function should be a religious one. These highlights can give an idea of what we are speaking about:

- **The mosque has the world's largest carpet at 7,119 square meters from Iran**
- **The world's largest chandelier from Germany made from one million Swarovski crystals**
- **It has 28 types of marble and 24-carat gold throughout**

- **The 22,412 square meter mosque site equates to around the size of five football fields.**
- **The mosque has 82 domes all of traditional Moroccan design - all decorated with white marble.**

4.9.3 Centre for Cultural Understanding

Sheikh Mohammed Centre for Cultural Understanding, is a place where tourists can have a unique and unforgettable experience with locals. It offers different activities such as the Jumeirah Mosque visits; cultural breakfast or lunch; a walking tour in one of the oldest residential areas in Dubai; spoken Arabic classes; cultural awareness programs and a heritage shop which offers hand made art with stones, bags and belts.

Among this range of activities, we think that the cultural lunch experience is a must for every tourist. It consists of a traditional local lunch and an exchange of information with the staff and the volunteers of the center related to their culture and religion. The purpose of the centre is to maintain the local traditions in such a modern and cosmopolitan city. Its concept lies under the slogan “Open doors. Open minds” and it is a creative program that brings people closer not only to the Islam culture but also among people of different nationalities. Tourists can increase their awareness and understanding of Islam and culture in Dubai. As a result, they can achieve a better communication, co-operation and cultural integration.

4.9.4 Architecture the future legacy

This topic will be covered extensively in another part of the report. However, we would like to underline the relationship between architecture and the perception of culture in the U.A.E. We want to highlight the fact that architecture has become an attraction in itself. Architectural projects are the biggest feature on all tourism promotional pages, whether they are related to tourism or not. These buildings are being promoted as attractions that tourists must see.

“Growing at unbelievable pace, Dubai, with its Manhattan-style skyline and colossal shopping malls, is known as a City of Superlatives”(4), that is how the Department of Tourism and Commerce Marketing (DTCM) defines the city under the title ‘Lifestyle Destination’. These super accomplishments are what will characterize the non-movable cultural heritage of the Emirates in the future. This is a country that has become rich overnight, and with little to show as historical landmarks, they went on to create new landmarks in order to earn their spot in the limelight. While promoting this city, there is always the tendency to boast “architectural icons and ultra-luxurious hotels” and all the superlatives that exist. The saying goes, “everything that shines is not gold” however in the UAE, everything that shines is Gold. This is how they are defining their culture; it is the kind of legacy that they want to pass on to future generations.

4.9.5 Dubailand

DUBAILAND, the world's most ambitious Leisure, Tourism and Entertainment destination with over 3 Billion square feet of world class theme Parks, Culture, well being, Sports, Shopping, Hospitality and Entertainment set to launch its first phase in December 2010. The significance of Dubailand is that it offers a taste of world culture represented in the Global Village, and the Freej Theme park which is based on local culture.

Global Village: the cultural center of Dubailand

Global Village brings together diverse customs and cultures covering a broad spectrum of activities including music, dances, arts and handicrafts, theatre, costumes and cuisine of different countries. Global Village is located within Dubailand, the world's biggest tourism, leisure and entertainment project. The visitor can have a glimpse of the different parts of the world, purchase typical products and participate in a variety of entertainment and cultural events. The main attractions of Global Village are the pavilions where you can buy merchandise of countries around the world without actually traveling there.

Dubailand "Freej" Theme Park

The Dubailand developers will build a theme park based on local characters of a popular cartoon TV series. The park will depict local daily life and culture, which are the setting and focus of the series.

FREEJ (In Emirati Arabic: meaning "neighborhood") is a 3D animated series Produced in the United Arab Emirates. It is the tale of four old national women living in a secluded neighborhood in modern day Dubai. The show's main characters try to live a peaceful life in the midst of the ever-expanding city around them, but the city's boom unveils new social issues every day that they would have to tackle in their own simple way. (19)

According to the Dubailand project model the theme park will have a cartoonish look with awkwardly leaning buildings. It will be a four million sq. ft. family entertainment destination based on the popular cartoon characters. The fantasy world of the FREEJ theme park will offer rides, attractions and fun-filled experiences.

According to Dubailand authorities, "The launch of the theme park is only the first initiative of an ambitious growth plan for the FREEJ brand, transforming it from a television series into a world class leisure and entertainment Arab intellectual property. We will provide an innovative regional touch to our entire offerings, in line with the Dubai Strategic Plan 2015, further boosting the tourism sector"(18). With a total of 2,600 hotel rooms, FREEJ DUBAILAND® will also feature retail, food and beverage outlets. It is planned to welcome two million visitors a year.

The development will be the first theme park to focus on Arab culture and creativity, heritage and achievement. The four elderly ladies in FREEJ will act as ambassadors to each of the four distinct lands within

the park – Window on UAE, Golden Age of Discovery, Myths and Legends, and the Land of FREEJ that will be an exact replica of the famous neighborhood that is portrayed on television. The characters will also serve as storytellers providing a glimpse into Dubai’s unique past, present and future.

If well executed, this innovative project could become a successful touristic attraction. It would offer a unique and original opportunity for observing the Emirati culture. The Freej theme park has the potential of becoming an attraction for regional tourists because the TV series itself is popular in the whole Gulf region.

4.10 Traditional Activities

Camel herding and racing, horse breeding and racing, as well as falconry are some traditional activities that still thrive in the U.A.E. Camel and Horse racing have evolved and become big attractions for the local and international elite. Falconry, an ever popular activity in the region, has acquired a new dimension in Abu Dhabi with the establishment of the Falcon Hospital.

Camel Racing

The camel is known in Arabic as the ship or vessel of the desert. It is the symbol of desert life. It is the only animal that can endure, survive, and be of service to Bedouin nomads roaming the desert . Owning camels used to be a sign of richness in this part of the world.

Even nowadays, owning and maintaining camels is rather expensive. “Camel racing is supported by the highest levels of UAE society, former President Zayed owned a personal stable consisting of 14,000 camels and 9,000 workers for their upkeep”(12).

In addition to seeing camels in the desert farm or having a short camel ride as part of your desert safari trip, camel racing enjoys big popularity in Dubai. The ancient sport of camel racing is still attracting a sizeable audience and thousands of tourists.

“The former president of the UAE, Sheikh Zayed, endorsed camel racing and provided financial support for citizens who are caretakers of camels. Camel races take place on an annual basis, mostly during the late October to early April racing season and periodically throughout the year. The UAE has 15 racetracks across the country with spacious and well-kept stadiums for viewers”(12). Nad Al Sheba is one of the most famous camel race tracks in Dubai.

Horses

Even though the camel is a highly-prized possession, Arab men are even more passionate about their horses. “The Arabian horse is a breed of horse named for the Arabian peninsula. It is one of the oldest breeds, with archaeological evidence of horses that resemble modern Arabians dating back 4,500 years. Throughout history, Arabian horses from the Middle East spread around the world by both war and trade; they are used to improve other breeds by adding speed, refinement, endurance, and good bone. The Arabian developed in a desert climate and was prized by the nomadic Bedouin people, often being brought inside the family tent for shelter and protection. This close relationship with humans has created a horse breed that is good-natured, quick to learn, and willing to please. But the Arabian also developed the high spirit and alertness needed in a horse used for raiding and war. This combination of willingness and sensitivity requires modern Arabian horse owners to handle their horses with competence and respect”(13).

All through history, Arabs have maintained a great love and respect for horses. In Dubai “This tradition lives on in the rapid growth and development of horse racing. Every year thousands of visitors attend the Dubai World Cup”(4). DTCM

“The Dubai World Cup is a thoroughbred horse race event held annually since 1996 at the Nad Al Sheba Racecourse, in Dubai. The race was the creation of Maktoum bin Rashid Al Maktoum, emir of Dubai, brother of the current Dubai ruler. It is the world's richest horse race, with a purse of USD 6 million since 2004”(14).

Falconry

Another peculiar tradition of the country is falcon training. “Falconry, an integral part of desert life for many centuries, was practiced originally for purely practical reasons”(15), that is for hunting. Falconry has developed into a major sport enjoyed by the poor and the rich alike. Falconry is a traditional and highly valued custom in the UAE, reflecting the Bedouin love of this sport. Training falcons requires both courage and patience and it is an operation that is carried out by the "Saqqar" or the trainer. The ability of a predator to be tamed and made to obey the call of its master is a mystery of nature that adds fascination to falconry for Arabs.

In addition to regular falcon shows and activities, in Abu Dhabi there is the Falcon Hospital, an attraction it seems recommended among the things to see in the city. It is “the first institution in the world to provide comprehensive veterinary health care exclusively for falcons”(3). According to the Abu Dhabi Tourism Authority a visit to the hospital is “an unforgettable experience of the fascinating world of falcons and falconry and offers fabulous photographic opportunities”(3).

Partial conclusion

Like every other destination in the World, the U.A.E. want to use their culture to attract tourists, but this is a difficult job. It is hard to compete with Europe in terms of cultural attractions for a country that doesn't have the resources to do so. There are no old towns or historical buildings, and museums and theaters in Dubai are few and not appealing with respect to their western counterparts. Dubai's main attractions are ultra-modern infrastructure, extreme architecture and the incredible pace at which it is being built. Nonetheless, it still offers a few humble remains of an almost extinct nomadic culture. The U.A.E. is a very young country, it was put on the map because of oil discovery. Descendants of the Bedouin tribes who used to roam the area settled there when they found fresh water and a way to make a living. Since nomads have usually no monuments or buildings, tangible and non-movable cultural heritage is scarce in the U.A.E. Instead there are a lot of particularities, customs, traditions, and beliefs that distinguish them from other people and countries. However, even these traditions, especially the ones related to religion, sometimes can be more a threat than an opportunity, when it comes to draw non-Muslim visitors. Maybe for this reason Dubai is putting aside parts of its identity, for instance the Arabic language, to become somehow a westernized, liberal city, a much more viable destination than the other cities in the Gulf. Most westerners on vacation do not want to feel in conflict with the local culture but at the same time they are not willing to change their attitudes and their lifestyle in order to please the local population. Nowadays, the Emiratis are overwhelmed by the speedy modernization and by the staggering growth of foreign residents. The locals tend to keep to themselves trying to hold on to a vanishing lifestyle which keeps them isolated from tourists. The multi-ethnic population of Dubai might concern the locals but this example of globalization enhances the appeal of the city. This multiplicity; for instance, implies an abundant selection of international cuisines that cater for tourists of every taste as well as residents. The only restriction is the limited availability of pork and alcohol. Bedouin hospitality, cuisine and coffee still exist for those who are lucky enough to have close interaction with locals. Tourists will have to settle with simulated situations in a reproduced setup; for example, the Center for Cultural Understanding. On the other hand, some other traditional activities, like camel racing horse racing and falconry, still flourish and are open to non-local residents and to tourists.

In Abu Dhabi attempts and strategies are well aimed towards a cultural destination, but what it has to offer are reproductions of the traditional; for example the Sheikh Zayed Mosque, or new alternatives; for instance, another Guggenheim, and the second Louvre. While still trying to hold on to what is left of their Bedouin and sea-trading culture in newly built museums dedicated for old culture. This is a country in the process of creating its future and consequently it is writing its history, and creating its cultural heritage.

5 Dubai's Environment and Political System

Introduction

The following paper will present an overview of Dubai's environment, in terms of social development, economic growth and political system.

The first part will present the social structure, composition and development in the last 50 years. The section also deals with expatriates' movement towards Dubai and the social consequences of this phenomenon.

Following, we will review of the economic situation of the emirate showcasing Dubai's economy development history, from the discovery of the oil to the actual movement towards a city based on service industry.

Afterwards, the paper will present the political situation of the emirate, with a special interest on the role of the Sheik in the development process and the international relations of the UAE and other nation states.

5.1 Social development

Starting out as a fishing settlement and becoming later a reference trading port for the whole area, Dubai is the city which has seen one of the fastest growths ever, becoming a landmark for innovation all over the world.

Dubai's demographic growth, from 20.000 inhabitants in the 50's, to an actual population of 1,587,000³³, has been dramatically influenced by mass migration from the other parts of the Asian continent. Its attraction to immigrants has been continuous along history especially for its geographical location. At the beginning of the 20th century the facilities for trade and free enterprise were enough to make Dubai a natural haven for merchants, while in the seventies it became the destination of a mass of foreign workers attracted by the discovery of oil. This resulted in a 300% growth of the population of the city from 1968 to 1975³⁴. In the last two decades the city population has lived a further expansion, receiving foreign workers for the accelerated economic growth of Dubai.

Nowadays the population of the emirate is composed by a high percentage of Indians, Emiraties, Pakistanis, Bangladeshis, other Arabs and Westerners nationals. This increasing number of expatriate labor workers has had deep influences on the structure of the population: a high ratio of males to females, due to the large

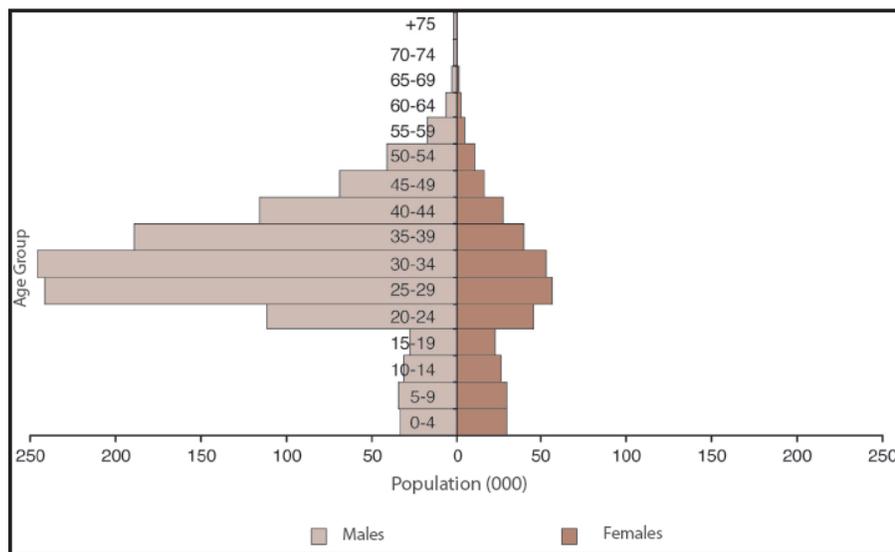
³³ Dubai Statistics Centre, "Dubai in figures 2008"

³⁴ Dubai Statistics Centre "Historic population statistics"

number of male laborers who have entered the emirate without their family members and a low median age. According to the demographic statistics of the Government, in the city of Dubai, on a total population of 1,587,000, there are 1,213,000 males and 374,000 women.

The following chart shows at best the actual structure of the society where the highest number of individuals are in the three age groups of 30-34, 25-29 and 35-39.

Fig. 22: Population pyramid of Dubai – 2007 - Source: Dubai Statistics Centre, “Dubai Population Bulletin 2007”



The dependence of the UAE on foreign workers has led the UAE government to create the *Emiratization* movement, a measure intended to proactively employ its citizens in the public and private sectors.

Since the early 1990s the Government has applied this strategy which aims to optimally use the country's human resources in the economic process and to transfer skills and knowledge from expatriates to UAE Nationals.

The challenges of this strategy regard both the supply and the demand sides: private sector industries have to cope and ensure knowledge transfer from expatriates to nationals and have to create a comprehensive step-by-step approach on how to roll out their *Emiratization* strategy, while UAE nationals, being now relatively young and inexperienced, have to create themselves an educational background.

The *Emiratization* process is clearly stated also in the Strategic Plan 2007-2011 for the city of Dubai: the objective is to “Increasing nationalization rate” through the SMART strategic objective “To Emiratize 75% of positions by the end of 2011”³⁵.

The integration is a crucial issue for a city which hosts over 202 nationalities among its inhabitants. According to The HSBC Bank International Expat Explorer survey in 2008, which examines the challenges faced by individuals relocating to a new country, the United Arab Emirates was revealed to be the most difficult country in which to make friends with the locals. The UAE scored low on the all 4 categories of inquiring: whether they made friends with people from the local population, whether they joined a local community, such as a religious or sports group, whether they learned the local language, whether they bought property. This was in some extent confirmed through our direct experience in Dubai where we were able to observe the segregation between classes, huge distinction in the urban settlements and the resistances between nationalities in everyday integration.

5.2 Economic growth

Dubai’s development has been greatly facilitated by the discovery in the 1960s of natural resources (E.g. Petroleum and natural gas) which contribute around 3% of the UAE's gross domestic product. However oil revenues in Dubai have always been a fraction of those in Abu Dhabi. For this reason, Dubai has looked for other source of revenues changing dramatically over the last three decades, becoming a major business centre with a more dynamic and diversified economy.

The significant presence of the Jebel Ali port, built in 1970s, which is the biggest man-made harbor in the world and a chief tourist destination, boosted Dubai's economy, encouraging the city to expand amazingly into trading, manufacturing and tourism, which now dominate the country's economy. Moreover, the modern banking and financial centers of the city, concentrated in the port area, are gradually turning the city into a hub for service industry also through the new Dubai International Financial Centre (DIFC), finance and IT centre.

Another contributor to the development is their national carrier, Emirates Airline. The airline, established in October 2008, it’s headquartered at the new terminal 3 of Dubai International Airport. During our study tour we had the opportunity to visit the airport and meet two experts that confirmed the increasing importance of the airport in the global air market scenario. The airport and Emirates airline improvements are further evidences of Dubai’s growth and its role in taking part to the process of diversification, through reinforcing its transport links and its economy simultaneously.

³⁵ *Dubai Municipality, “Dubai Strategic Plan 2007-2011”*

Today, Dubai is committed to a progressive vision of itself, keen to diversify its economy and diminish its reliance upon shrinking oil revenues, has begun to be developed into the Arabian Gulf's leading multi-purpose business center and regional hub city, placed as the forefront of the globe's, dynamic and emerging market economies. These circumstances led Dubai to improve its tourism flow and attract visitors from all over the world, becoming one of the most visited and requested tourist destination.

The factors that contribute to this ongoing success story are its low logistical and operational costs and excellent infrastructure, its international outlook and liberal government policies. These factors, combined with a strategic, accessible location for major regional markets, and an extremely pleasant, stable and safe working environment create an ideal and attractive investment climate for local and expatriate businesses alike. Not surprisingly therefore, the UAE ranks high in the list of the Middle Eastern and GCC countries deemed to be the most attractive to direct foreign investments.

There are four primary sectors attracting investment and providing the main driving force for moving the economy forward. These are hydrocarbons (11.1 per cent), manufacturing (17 per cent), transport and communications (18.3 per cent) and real estate (14.6 per cent). Additional sectors include water and electricity, hotels and restaurants.³⁶

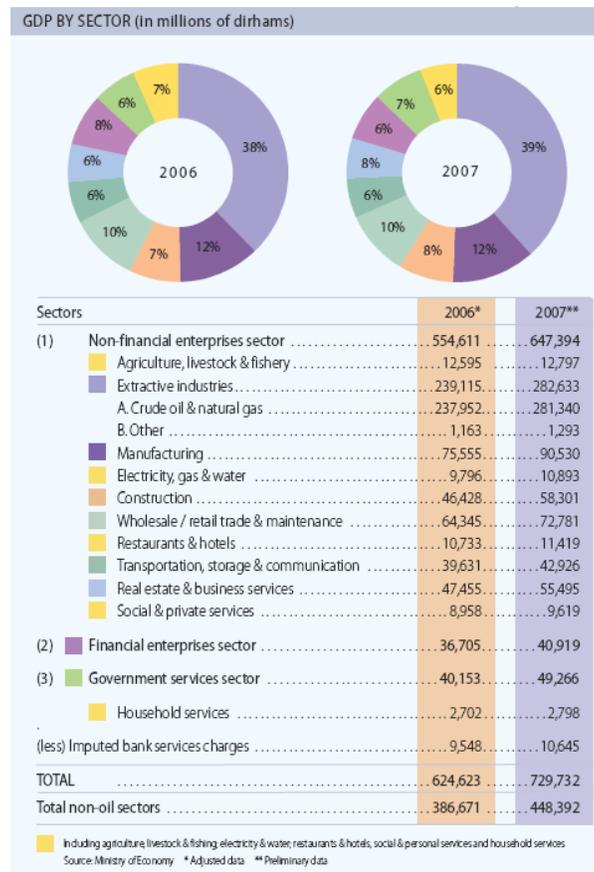
According to the Ministry of Economy and the Central Bank, Dubai's GDP is divided into oil and non-oil GDP, with the latter representing an overwhelming part of the GDP. The components of Dubai's GDP by economic sectors are the non-financial corporation sector; the financial corporation sector; government services sector; household's domestic services sector; and the residual balancing item imputed bank services. The primary sector includes agriculture, livestock, fishing, mining and quarrying. The secondary sector includes manufacturing industries. The tertiary sector includes the rest of the economic activities, which are basically services.

The UAE's real economic growth rate in 2007 was 5.2% compared to 11.5% in 2006. Meanwhile, nominal GDP (based on current prices) grew by 16.8% in 2007 compared with 28.7% in 2006 and 25.6 % in 2005³⁷ (please see chart 2).

³⁶ National Media Council, Department of External Information "UAE Yearbook 2009"

³⁷ National Media Council, "UAE at a glance 2009"

Fig. 22: GDP by sector - Source: National Media Council, Department of External Information "UAE Yearbook 2009"



The crisis effects hit also UAE which shows the intricate connectivity of global markets: events in New York, Japan or London reverberated throughout the world, even affecting economies such as that of mainland China which were previously thought to enjoy some degree of immunity from global financial turbulence.

Despite the steadying of economic growth due to the crisis, the country remained one of the fastest growing economies on a global scale. The causes that make this situation possible relied on both oil and non-oil sectors. While the first has increased by 18.2% in 2007, the second also performed impressively, contributing for 64.1 per cent of overall GDP.

According to the UAE Central Bank statistics, the key factors influencing growth in the economy have been the following: construction and building sector (25.6 %), manufacturing and industry (19.8 %), real estate (16.9 %), financial sector (11.5 %), transportation and communications (8.3 %) and tourism (6.4 %). Added to these positive influences, the state maintained its strongly supportive role through investment in government services, electricity and agriculture.³⁸

³⁸ National Media Council, Department of External Information "UAE Yearbook 2009"

To what concern the tourism sector the impacts of the economic crisis have been different. According to the firms and government departments met during our study tour, we could observe the different impacts that the world financial crisis arose. Some examples as the metro project by the Road and Transport Department had not experience delays due to the crisis and the project will be inaugurated next September. In the hospitality industry the situation is different: while Cora Hotels has being heavily affected by the current economic crisis, Mövenpick hotel chain has reduced these negative effects by introducing several management policies to contain the situation, obtaining better results to those forecasted.

It is possible to say that diversification remains the key to achieve sustainable growth in the UAE. The government encourages the non-oil sector, with a particular attention to the tourism development. Dubai took the strategic decision to emerge as a major international-quality tourism destination already in the 1980s and early 1990s making investments in tourism infrastructure which has paid off handsomely over the years. One of the first steps that Dubai made has been the establishment of the Department of Tourism and Commerce Marketing in the 1997. During our stay in the city we had the chance to meet this department which introduced us Dubai as Tourist destination. Nowadays, tourism is now worth more to Dubai than its income from oil. Abu Dhabi has also invested in developing a tourism industry and has announced a number of ambitious projects in this field. The emirate offers to tourists several attractions such as their sea, sun, culture, shopping malls, leisure and sporting facilities. All this combined with their continuous development of impressive and luxurious resorts and accommodation facilities makes Dubai a great tourist destination.

Today Dubai boasts 320 hotels with more than 30,000 rooms³⁹, 47 shopping malls and over 6 million foreign visitors a year (2003) rising to 15 million by 2010. Dubai offers a world-class airline (Emirates Airline, winner of more than 200 industry awards since its formation in 1985), over 35 five star hotels, the world's first seven star hotel (The Burj Al Arab) and an international airport recognized as "The Best Worldwide and Overall Passenger Satisfaction" by IATA's Global Airport Monitor⁴⁰.

5.3 Dubai's Political Structure

Dubai is one of the 7 emirates that conforms United Arab Emirates federation. The emirate, ruled as a constitutional monarchy is under the reign of the Al Maktoum family since 1833. Sheikh Mohammed bin Rashid Al Maktoum is the current ruler of Dubai as well as the Vice President and Prime Minister of the UAE

³⁹ Dubai Statistics Centre "Tourism Statistics reports 2007"

⁴⁰ Department of Tourism and Commerce Marketing Official Website (www.Dubaitourism.ae)

succeeding his late brother Sheikh Maktoum Bin Rashid Al Maktoum which passed away in Australia in 2006. In his position as sovereign of the emirate, Sheikh Mohammed has continued the vision of previous rulers, guiding Dubai's government and transforming the reign into a modern and prosperous city.

During the study tour to Dubai, we had the opportunity to meet with different government officials. These meetings allowed us to observe and sense the strong leadership figure that Sheikh Mohammed and his predecessors have over the emirate's society. We were explained that Sheikh Mohamed is continuing the legacy of his father Sheikh Rashid, considered by many, including Sheikh Mohamed as the "...true father of Dubai, from which he has learned to become a leader". It was Sheikh Rashid who understood that the economy of Dubai could not be supported only by the revenue from their oil and gas reserves (as Dubai has only 1/20th of the reserves in comparison to Abu Dhabi)⁴¹ and there was a need to develop and boost other industries (e.g. Commerce and Trading, Financial services, Tourism) to ensure a future for the emirate.

The society in Dubai agrees and supports the decisions and direction taken by their ruler, or at least that is the attitude that they shared with us as visitors. The soft-authoritarian position of the ruler has contributed, (together with other determinants such as: exploitation of natural resources, location) in the fast development of the emirate. Having only one decision-maker has reduced bureaucracy and increased speed in which governmental plans, policies and projects are put into practice and approved.

The development of Dubai is based on a common strategic plan with the other emirates of the UAE. Their strategy is based on the adaptation and implementation of all best practices in every government sector by benchmarking other countries. This strategy aims for the prosperity and promotion of the emirates and federation's image abroad. The process of development of Dubai and the adoption of the strategy is being done at full-throttle, as Sheikh Mohammed states⁴².

The other members of the Al Maktoum family such as Sheikh Hamdan bin Rashid Al Maktoum; second son of Sheikh Maktoum is also part of the government. Sheikh Hamdan is the head of several key governmental offices such as the Ministry of Finance and Industry, Roads Department, Planning and Survey Department, Environment and Public Health Department and together with Sheikh Mohammed control the state owned company Dubai Holding. This company is in charge of all major property developments such as Dubai Land, Dubai Internet City, Hotel Developments (e.g. Jumeirah), and others.

⁴¹ Malty, M., Dillon, L. (2007) *DUBAI STRATEGY: PAST, PRESENT, FUTURE*. Harvard Business School

⁴² Extracted from Sheikh Mohammed bin Rashid Al Maktoum Official website:(<http://www.sheikhmohammed.co.ae>) last accessed 23-02-2009

Many sources explained that the exploitation of Dubai's oil and natural gas resources were determinants for the first development of the city, which nowadays is mainly based in a service and real estate development industry. Nevertheless, official websites cataloged the use of oil as only a "help" in the development, while granting all the recognition to the Al Maktoum family as being the reason of Dubai's current situation⁴³ as a modern, first-class city.

Dubai shares, as it is part of the federation, several legal, political, military and economic functions with the other members of the UAE, but there are several areas in which each emirate has autonomous jurisdiction, one of them being the tourism industry (e.g. destination's marketing and development).

The business operations, in the tourism sector are overseen by the department of Tourism and Commerce Marketing (DTCM), which is chair by Dubai's ruler itself Sheikh Mohammed bin Rashid Al Maktoum. The direct guidance of the Sheikh in tourism related matter shows the importance of this industry as a key element of the strategic plan for the development of the emirate. The department was created in 1997 and is responsible for the planning, supervision and development of the tourism sector in the emirate as well as the promotion of Dubai's commerce and tourism interests abroad⁴⁴. Like other government offices, the DTCM uses the same strategic plan as the UAE and Dubai, based in the implementation of all best practices in their sector. This government agency has set up heavy regulations for companies that would like to operate in the tourism sector in order to ensure the highest quality in the tourism supply. One of the main responsibilities of the DTCM is the issue of licenses and operating permission for tourism related companies. In order to grant these licenses, tourism companies have to comply with several international standards (E.g. Building Regulations, HACCAP, Safety and Security) as well as the traditions and values of an Arabic and Islamic culture⁴⁵.

In comparison to Abu Dhabi, the capital of the UAE, the figure and role of the late Sheik Zayed, ruler of Abu Dhabi until 2004, can be compared to the imagine of Dubai's late Sheik Rashid. Both of them are highly considered by local population and residents of the UEA as they were the founders of the federation and the initiators of the "new age" of development for this region. Their sons, now rulers of Abu Dhabi and Dubai, are continuing with their legacy, and as followers of their parents vision they are respected, but not venerated like the founders.

⁴³ *Extracted from Sheikh Mohammed bin Rashid Al Maktoum Official website: (<http://www.sheikhmohammed.co.ae>) last accessed 24-02-2009*

⁴⁴ *Extracted from the Department of Tourism and Commerce Marketing official website (<http://www.dubaitourism.ae>) last accessed 23-02-2009*

⁴⁵ *Extracted from the Department of Tourism and Commerce Marketing official website: "Following-up with the tourism licenses according to the UAE laws and Administrative Orders while observing the Arabic and Islamic traditions and values" (<http://www.dubaitourism.ae>) last accessed 24-02-2009*

5.4 Dubai Strategic Plan 2015

During the past few decades Dubai has faced a major change, from a small trading centre to become a major economic center and traffic hub in the Middle East. To achieve this, Sheikh Mohammed and the government has set up the development of the city based on the Strategic Plan 2015, which focuses on 5 key guidelines:

- **Achieving comprehensive development and building human resources**
- **Promoting economic development and government modernization**
- **Sustaining growth and prosperity**
- **Protecting national and public interests while improving societies wellbeing**
- **Providing an environment conducive to growth and prosperity in all sectors**

These guidelines set the direction and assessment for future achievements of the city. The plan “Dubai...Where the future begins” follows these guidelines focusing on 5 main sectors for macro development⁴⁶.

5.4.1 Economic Development

Maintaining Dubai’s high GDP and income per capita growth rate, attracting more foreign direct investment, strengthen economic ties and international trade with developed world and emerging economies, boost the private sector, reducing dependence on oil and diversify the economy in non-oil sectors such tourism, trade, transportation and financial services. Dubai will be moving to a new growth path, it would focus in high-value added sectors, raising productivity, retaining and attracting highly educated workforce.

5.4.2 Social Development

Preserve national identity, increase national’s participation in workforce and social activities, improve education opportunities and quality of healthcare for the population, and ensure equality social service and acceptable working conditions.

5.4.3 Infrastructure, land and environment

Optimize land used in urban planning and protect natural environment, develop and provide efficient energy, integrate road and transport system and maintain Dubai’s environment as safe, clean, attractive and sustainable location.

⁴⁶ *Extracted from “Dubai’s Strategic Plan 2015”*

5.4.4 Security, Justice and Safety

Preserve security and order in society, ensure that security entities in term of integrity, transparency and protection of human rights, endue crisis management, improve access to justice and remove all economic, legal and procedure barriers, guarantee equality, neutrality, accuracy and clarity of judicial judgments and investigations, ensure safety for all nationals, residents and visitors, protect public health and improve quality of life.

5.4.5 Government Excellence

Strengthen strategic and forward-looking focus, enhance organization structures and accountability, increase governmental efficiency, enhance responsiveness and customer service, empower and motivate public service employees.

5.4.6 International relations and the UAE

One important aspect of the tourism industry, especially related to the political arena, is the relations between nation states. Countries are sources and recipients of tourist and visitors from other nations, hence, good relations between them are important to foster economic, cultural and social exchange.

In regards of international relation, Dubai is under the federal framework of UAE along with the other six emirates. The foreign policy of UAE is based on the Charter of the United Nations and the Charter of the Organization of the Islamic Conference. Unity with the Arab countries especial around the Gulf has been a topic of foreign policy. The Gulf Cooperation Council was formally established at a summit meeting in Abu Dhabi in 1981, with the idea of “We in the Arabian Gulf are one family”.

The UAE has maintained good relations with most Western, Middle East and Asian countries, establishing diplomatic relations with 143 countries, with more than 40 embassies abroad and two Permanent Missions in United Nations⁴⁷.

The federation is actively involved in international humanitarian programs (more than 50 nations have received aid or relief assistance from UAE). It has also participated in international peace-keeping activities such as the coalition in Kuwait in 1991 and in United Nations operations in Somalia.

International relations, especially with UK are very strong as they are one of their main markets for outbound

⁴⁷ Extracted form UAE official website http://www.uae.gov.ae/Government/int_relations.htm last accessed 28-02-2009

tourism and foreign investment (UAE is UK's biggest export market in the Middle East for non-military material). Also, the federation maintains very close partnerships agreements with France, Germany, US and other western countries as they have strong links with several companies, organizations and cultural institutions.

The relations with other countries such as India, Pakistan and China are based in reciprocal agreements of collaboration between states. There are several Indian and Chinese companies based in the emirate contributing in the economic and infrastructural development of the Dubai and other emirates.

Russia, Brazil, Japan, Spain, and other countries have also close relations with the UEA federation as they work on the basis of trade agreements, sharing friendly ties⁴⁸.

Partial conclusion

Dubai has grown phenomenally over the past ten years. Due to Dubai's warm, welcoming people, world class facilities and infrastructure and farsighted, open and liberal economic policies, today the city serves as the biggest re-exporting centre in the Middle East providing activities such as trade, transport, tourism, industry and finance which have shown steady growth and helped the economy to achieve a high degree of expansion and diversification. Therefore it is not surprising that the Municipality estimates that Dubai will be nearly two and half times the size it is today by 2015.

"Observing Dubai's ultra modern skyline today and the plans for development, it is difficult to imagine that just 20 years ago there was a vast desert instead of today's modern city"⁴⁹. The words of the Director of Planning and Surveying Department of Dubai Municipality explain at best what the urban development of Dubai has been.

The demographic booming and the consequent huge expansion of urban areas, facilities, and infrastructure boost the construction and real-estate industry as a major contributor of Dubai's Gross Domestic Product.

This sector goes hand in hand with tourism development, being the continuous progress and changing status of Dubai the major magnet for tourists from all over the world.

⁴⁸Extracted from UAE official website http://www.uae.gov.ae/Government/int_relations.htm last accessed 27-02-2009

⁴⁹Quote from Abdullah Abdul Rahim, Director of Planning and Surveying Department of Dubai Municipality presenting Dubai's Master Plan

However the real estate is also a very resource-intensive sector, which means it also has heavy negative environmental impacts.

The rapidly and large-scale construction development seems to have neglected also its impact on local inhabitants. During our study tour we had a lunch with a local cultural organization which aims to spread the Arabian and Islam culture and values to the tourists willing to learn more about their world. Thanks to this meeting, we had the chance to look at the fast growth of Dubai from the point of view of its inhabitants. The members of this organization explained that the new malls and buildings constructed in such a short period of time make locals, especially the older ones, live a sense of disorientation in their own hometown and a feeling of losing their local tradition and identity.

Politically, the emirate is quiet stable; with a strong the leadership figures of the Al Maktoum family, in particular the image of Sheikh Mohammed. The soft-authoritarian regime has helped to increase the speed of the city's economic, social, and cultural developments. The international relations with most countries are strong and of mutual support. The reciprocity and open relation contribute as well in the development by having the possibility to import the know-how and equipment needed.

Thanks to the meeting at the Abu Dhabi Tourism Authority, we got the idea that the city of Abu Dhabi seems to be more sensitive regarding both the natural and social environment: the city is developing as a culturally sensitive tourism industry, preserving the local traditions and promoting their soft culture. The Authority showed a sounder concern towards environmental issues, mentioning governmental initiatives such as environmental agencies, implementation of sustainable energy systems and a set of certifications for buildings.

Looking at the strategic plan for 2007-2011 done by Dubai Municipality, many strategic objectives they have planned are intended to control the impact on the natural and human environment but we are still wondering what could be the future of these unique destination.

CONCLUSION

Manuela Barreca, Gianmaria Fragassi, Nadzeya Kalbaska, Nely Nasir

The findings of this study tour are deduced based on the meetings with various government officials as well with as other tourism related organizations. Despite the time limitation and having gone through a mix of interesting and unanticipated occurrences throughout the study tour, perceptions and curiosities lie in every participant of the trip has been partly unveiled. After having spent a week in Dubai to examine and learn the tourism industry such as the entertainment and shopping experience, the culture, the destination development, the architectures and its politics and environment, some interesting points are exposed in this report.

One notable thing about Dubai is the speedy transformation from a traditional oil producer to a well-known shopping haven as well as the city known for exceptional and amazing architectures. Indeed Dubai has a drastic make over, shifted from a plain and pure desert to a metropolitan city thus conferred themselves as the world's fastest growing city.

Dubai has been making several attempts to shift the base of the economy to other industries such as commerce, finance and tourism. Nowadays, Dubai is synonymously known for its superlative and iconic buildings and architectures, a shopping bliss and luxury resorts and hotels, that makes Dubai a luxury destination in the Middle East.

Clearly, Dubai has tremendous promotional and marketing campaign that seems to be successful from the increasing tourist arrival, the hotel occupancy rates and so on. The construction of the Metro would merely be another icon to Dubai rather than serving the local people which operates only certain areas such as the shopping malls or tourist areas. Workers may not be able to utilize this service as the links would not be running in the industrial area. Upon completion, the Metro would be the fastest rail transportation service offered in Dubai and it serves only to main area. It is noted that tourists are the main target who will use the service. It casts a doubt if the service meets the main objective as to ease the traffic congestion.

As expatriates of various nationalities making about 80% of the population in the region, the genuine and actual culture is not apparent. However a lot of particularities, customs, traditions, and beliefs that distinguish them from other people and countries are still can be observed.

The group has the opportunity to visit the capital of the Emirates, Abu Dhabi and has uplifted the learning experience for its well prepared arrangement both the welcoming part as well as the information provided throughout the meeting. Comparatively, the ADTA with its Strategic Plan 2012 shows a clear guide of what to do now, what direction to go and what outcome to achieve in the future. The plan of Abu Dhabi is bending more towards capturing high-end business tourism through business and cultural activities/products. The country is the first emission-free city in the world, they are developing and implementing sustainability and environmental policies and standards. They are genuinely concerned with the issue and are being proactive. On the contrary, the main important observation in Dubai was that the city barely wants to be recognized as an unbeatable place for luxury tourists destination. Its high class and luxury resorts and accommodations indicated that Dubai is mainly for the elite groups.

The future of Dubai

Albeit, Dubai is engrossed to progress and advance towards modernization, observation has been focused on the other side of story. Our study revealed some important points needed to be highlighted. For instance, questions are still left unanswered in connection to the importance of sustainable tourism in their project development plan. It is still arguable as to whether action is taken to consider the impact on the environment although no doubt it was clearly written in their Strategic Plan 2015. The implementation is still questionable.

As being one of the richest countries in the UAE, notwithstanding with the global economy crisis surfacing, Dubai will continue to progress. Dubbed as the city of icons, Dubai will continue to create more icons one after another and it seems this process will have no ending. Buildings for hotels, shopping malls, amusement parks and offices are going to be constructed continuously and all project developments will still take place although at a slower pace. Its strategic plan was clearly outlined that Dubai has taken into consideration the model of successful destinations such as Las Vegas and Hong Kong and benchmarked themselves in the process of developing the country. This was visibly evidenced during our trip however as far our studies are concerned, despite its success creating and establishing world records in real estates and projects development; to be the tallest, the biggest, the fastest or rather to be the only one in the region or world, it seems that what will happen to this rich country in the future is still vague and anticipate question.

One important aspect that difficult to be detached from Dubai is its undying aspiration and strong desire. The sky is the limit. The city's plans to expand its contemporary arts after the constant successful

creating architecture records and after emerging as a shopping paradise. This year the city will participate in the 56th Venice Biennale exhibition which takes place from 7 – 22 November 2009. Behind this reason, it aspires to become the World Centre of Art in the Middle East. The question follow is will this plan promoting and upholding the contemporary arts as a whole or just setting another record? Having started to understand Dubai, it is likely that this question is getting its answer already.

The long term sustainability of local developments remains the question. Dubai still needs more than a proper strategic plan to determine its route in the future, albeit a written plan is seen but what important is to look at its implementation. What will its tourism industry be seen in the future is still vague and ambiguous. Will Dubai be more inclined towards mass tourism in the future? Will there be more diversified tourism products? Will events be more varied rather than just shopping activities? Will Dubai continuously trying to establish records with iconic landmarks? What will happen to Dubai once the place is crammed up with buildings? How convincing the mega projects in sustaining the economy and further developing? All these questions are still puzzling and need answers. What direction Dubai needs to achieve in the future still does not give a concrete answer or event a single hint. At the moment, the only image portrayed is that Dubai will continue to be the luxurious, the biggest, the fastest, the tallest, the greatest and the only in the world! How long will this hype remain is still a question.

Appendix

Daily reports

1; Gunita Bogdane; Nadzeya Kalbaska

Topic: General tourism in Dubai/ Introduction

Aims of the day (personal questions):

- 1. How climate change can influence tourist flows to Dubai and what are the major actions to deal with it?**
- 2. What is the level of business collaboration in touristic sector with neighboring emirates and also countries e.g. Oman and Saudi Arabia? Do you make promotion under the umbrella of common destination- Arabian Peninsula?**

Result/personal conclusions:

The first day in Dubai was introduction or “Dubai experience” day. We had three meetings where we had an opportunity to know Dubai better as the destination in terms of development, progress and cultural side of it.

The first meeting at Dubai Department of Tourism and Commerce Marketing was purely introductive. We were well prepared and aware about all the “hot” topics that were covered by DTCM representatives. They gave us short information about Dubai city’s development from early 70s till now and showed nearest future projects. On our question about climate change and very hot weather during summer in Dubai, DTCM representative said that a great number of shopping malls and under roof entertainment parks have been built in order to deal with hot temperature in Dubai and to satisfy all the tourists’ needs.

On the question about common promotion Mr. Abdullah bin Suwaidan indicated that Dubai is not collaborating with other emirates and neighboring countries, as tourists authorities are promoting unique and differentiated product, - Dubai.

The second meeting of the day happened in Sheikh Mohammed Centre for Cultural Understanding. The aim of this meeting was to know more about Arabic culture and traditional food. We received open and honest answers that certainly changed some cultural stereotypes in our minds.

The third meeting took place at “The Address” hotel, which impressed all of us with its fancy design, luxury, and the view from 68th floor on Dubai’s construction sites. The meeting was with the Desert Adventures Tourism responsible for inbound tourism. Unfortunately this meeting wasn’t successful enough, especially questions-answers session. To be honest, in our mind, speaker’s answers were so long and sometimes so abstract that it didn’t give any initiative for asking further questions.

Open questions:

Overall it was an interesting and busy day with nice surprises, such as, cultural lunch and “The Address” hotel. Nevertheless we still have some curiosities connected with the first day.

First of all we were surprised to get to know from official authorities, that they don’t perceive any competition on the market. Later on we have asked the same question in Abu Dhabi, as we do perceive this city to be the main competitor for Dubai. Unexpectedly the answer was identical – Abu Dhabi Tourism Office doesn’t see any competitors for their destination on the market. We have described more precisely this issue in the report about Abu Dhabi.

Another interesting fact that we got to know during the meeting with DTCM office was that before the main target of Dubai as a destination was high-expenditure and luxury class of tourists, but now they are approaching medium-income target. Nevertheless the tourist authorities promised that the quality of the product will not be reduced.

Topic: Transportation

Metro project:

- 1. Are you going to have separate metro wagons for men and women?**
- 2. At which level do you think the new metro project will solve the situation with traffic congestion in Dubai?**

Airport:

- 1. On your website is stated that the 3d terminal is build and will operate in sustainable and environmentally friendly way. What does that mean in reality?**

Architecture:

- 1. We all know that your bridge will be the longest in the world. What is your opinion about tendency in Dubai to make everything longer, larger or higher?**
- 2. Do you think that there is a structured, thoughtful urban planning in Dubai?**

Result/personal conclusions:

The second topic of the study tour was dedicated to the transportation of Dubai city within three meetings.

The first meeting took place in the office of the Road and Transport Department. On the question about separated wagons for men and women, metro project's representative- Adel Jumaa Al Hosani answered that metro wagons will be distinguished by golden and silver classes, where women that don't want to stay in the same wagon with men can travel in the separate section just for women with children in the golden class wagons.

On the second question about solving congestion problem, the speaker was rather positive about the influence of the metro project in Dubai. But actually during evening recap session we got to know, that in reality the metro project can solve the traffic problem in short time span, but in the long term probably not, as by 2020 the population of Dubai will increase by 8.5 mil (now 1.4) and the current metro project will not be able to serve all the needs of the population.

During the second meeting we had an opportunity to meet Dubai Airport's representatives. We directly started with questions-answers session and met quite a weird situation when on several questions we didn't get clear answers. That was quite unexpected as we had meeting with people who were in charge of Marketing and Media communications of the airport. To be honest, we had a feeling that they treated us not enough seriously. And at the end we even didn't get an answer for our question about sustainability and environmentally friendly way of operating the airport, so we leave it for the future curiosity.

Third meeting was with the representatives of the architectural firm FXFOWLE. We have to admit, that our group was well prepared after the course "Architecture in tourism", and we have asked rather relevant questions for which we got interesting and professional answers.

Our curiosity about the image of Dubai, that generates the longest, biggest, and greatest world's class products, was answered that this creates an identity of the city and this is the main promotion strategy of a tourist destination - Dubai.

On the question about existence of thoughtful urban planning in Dubai we got a curious and predictable answer: there is no structured urban planning in the city. Moreover there are no guidelines from above. Architectural companies are working separately. In the city there are 2 types of the companies: one creates icons, others solve the problem that this icon generates (traffic, congestion - bridges, roads, etc).

Open questions:

After the meetings we got several open questions and curiosities. The first one is:

- How the Road and Transport Department is going to create and support new perception of the public transport in the region?

We were surprised to know that the developers of the Metro project were taking into consideration not only the possibility to solve the congestion problem in the city, but also with this new project they want to develop a new tourist experience, when the metro stations will become attraction points by themselves and the trip in the metro will become an overall touristic experience.

Topic: Property development

- 1. Are you affected by global economic crisis? If yes, how?**
- 2. What is the ECO hotels main purpose – sustainability or creation of the economy-class hotels in Dubai?**

Result/personal conclusions:

The third day of the study tour was dedicated to the development of Dubai city. We had two meetings related to the hotel business where we visited the Coral Deira hotel and the Movenpick hotel.

The first meeting was with Coral Deira Hotel's representatives. We had a promotional presentation during which we asked the questions we were interested in. On the question about "crisis", the representative of the hotel said that the hotels' business also in Dubai is highly affected by global economic crisis with 40-50% overall occupancy drop, but still projects are moving on quite successfully in comparison with other regions of the world. This hotels' chain target different audiences launching several types of hotels, such as, ECOs, EWA apartments, CORP executive hotels, Coral hotels and resorts. On the question about ECO hotel project's intended purpose – "sustainability or economy-class", they said – "both", but proceeding with more questions

about environmentally sustainable projects we understood that this project is more about ECONomic than ECOlogic sustainability.

The second meeting was arranged with the representatives of Movenpick hotels' chain. This meeting caught our attention with it's simple but highly professional approach. We met different hotel's representatives. It was a great experience for both – us and them, we had an opportunity to know more about Movenpick hotels' business values, such as, quality, care, personal touch, and also current and future development plans. Overall analyzing the meeting we can say that we, as a group of students, were not less important for them, as we are potential future employees and clients.

During previous study tour days we received different explanations of Dubai, where the main message was: “the First, the Greatest, the Highest, the Longest etc...” that still wasn't so obvious, as a great part of Dubai is still under construction, as well as the things that are already done, are kind of lost among numbers of construction sites. But we've got another interesting explanation from meeting with Movenpick representative. They said that:”Dubai is manufactured but it is done very well”. This statement probably has converted our own thoughts of what Dubai is.

Open questions:

As for the Coral Deira hotel we have paid attention that they have one very strong problem:

They have several sub brands that are created for different target groups, and as a result it is very complicated to held one strong promotional campaign for the unique image o f the company.

As for the Movenpick hotels we got one curious detail: in some regions (like Middle East), being not an American company, promoting themselves as being Europeans, Swiss, etc., creates an added value and advantage in the operational activities.

Topic: Entertainment

Aims of the day (personal questions):

Dubai land:

- 1. What was the primary objection for you to create the park: to satisfy the needs of local population or to attract new tourists to Dubai?**

Ski Dubai:

1. **As your idea of creating “winter experience” in the desert is rather successful one, does your company have plans to repeat it in other Middle East countries?**

Result/personal conclusions:

During the day of entertainment sites in Dubai we have visited Dubai land and Ski Dubai projects. The main difference was the development stage: where Dubai land is on the project development stage, but Ski Dubai is already developed and successfully working winter Entertainment Park.

From the presentation in Dubai land the answer for our question was quite clear - there are 2 targets: locals (for short stay visits) and foreigners (for the period up to 2 weeks stay). As well as tourism authorities of Dubai want to diversify the target: from business travelers to leisure tourists.

We would like to pay attention to one of our personal feelings. The developers of current Dubai land - do behave as “spoiled” children, they want to get everything (autodrome, cricket and polo clubs, amusement parks, global village with the main attraction - Tour Eiffel, that, according to the representative of the Dubai Land, in comparison with the prototype, probably will be taller!) without any structure or clear campaign as a background. Everything that is “the biggest”, “the longest”, “the tallest” is in the list of their precious wants and desires, and this become main motivation for choosing and supporting the project.

Ski Dubai - The answer for our question was also clear. Even if the project is successful economically in Dubai, the developers don’t have plans of repeating it in other Middle East countries, as they want to preserve and develop the project as a unique one.

We highly appreciate the idea of having “indoor ski resort” in Dubai, as we see that in the government driven logic together with investments from private sides there is still a lot of care of local population as well as of children.

Open questions:

As for the entertainment topic we got some suggestions:

Dubai Land: We do believe that the developers have to pay more attention on the solving of the problem of mobility inside the Land.

Ski Dubai: More strong cooperation with overseas ski resorts could be done. By now they held just Swiss national days inside the park. To our mind other countries and resorts could be successfully involved into cross promotion campaign.

Topic: Abu Dhabi

Aims of the day (personal questions):

- 1. Does Abu Dhabi, as a tourist destination have direct competitors on the market?**

Result/personal conclusions:

Having in mind, that during the first day, on the meeting with Dubai Tourism and Commerce Marketing office, the presenter, Mr. Abdullah bin Suwaidan, answering our question about competitors of Dubai in the world map in general and in the Middle East market in particular, admitted that Dubai has no competitors for being absolutely unique and occupying niche market. We have asked identical question in Abu Dhabi at the representative of Abu Dhabi Tourism Authority, and the answer surprisingly was similar: Abu Dhabi tourism office doesn't see any competitors for their destination on the market.

As we still do believe, that those 2 cities, Dubai and Abu Dhabi are direct competitors, we would like to make a short analysis on what we have seen about similarity of 2 products: Dubai and Abu Dhabi as a tourist destination.

- Both of the destinations do position themselves as a "niche one", attracting up market- luxury tourists.
- Both of them nowadays attract tourists from same markets: UK, Germany, Golf countries; as a result, their promotional campaign does target those countries.
- Both of the destinations are developing global transit air hub (having a strong national airline), as well as trying to promote new cruise terminals.
- Both of them are trying to emerge hotel development.
- Both do the promotion of events, in order to diversify main product - luxury leisure experience.

But we would like to mention, that to our mind, Abu Dhabi as a destination has some advantages, such as:

- Clear destination management structure.

- Clear vision of the future development of the destination.
- The program of involvement of the local population – “Emiratisation” of tourism up to 5% by 2015 (actual involvement of locals in tourism is around 1%).
- Tourism authorities in Abu Dhabi pay attention not just on architecture (peculiar buildings) per se, but also on the architects as “media covered personalities”; as a result they are trying to attract world famous architects on board, like Zaha Hadid or O’Ghery.
- Tourism authorities trying to diversify the product – through creation of the cultural district.
- Emirates authorities are trying to preserve local culture and identity through building of the mosque as a local icon.
- There is a clear program of sustainability of the environment in the emirate of Abu Dhabi.

Open questions:

The question that was not clearly answered during the meeting at Abu Dhabi Tourism Authority but still very important to get an answer on:

What can be the motivator for foreign tourists to come to Abu Dhabi in order to visit Louvre or Guggenheim museum, if they can see the prototype in Paris and New York accordingly?

2: Gianmaria Fragassi, Alice Stefani

Topic: General Tourism

Aims of the day (personal questions):

1. How is segmented the tourism market?
2. What about the oil situation? When will it finish?
3. What do we have to expect from Dubai as tourist destination?

Result/personal conclusions:

It is not easy to talk about tourism in Dubai. In order to make this concept clearer the Department of Tourism and Commerce Marketing helps us to create a general overview of the destination.

The oil discovering was in 1967 and was the basis to make UAE became a rich place. In Dubai there are around 180 different nationalities and since the world nations are about 205, it means that in Dubai there are people from all over the world. In 2007 there has been 7 million of overnights and the interesting aspect is that Dubai seems to not suffer of seasonality problems. Indeed, even if in summer there are around 45 degree and the sea is inaccessible, people can enjoy several attractions: from its exaggerating building such as the Burj Dubai (800metres high) or The World, to its huge mall where visitors can get lost in having shopping. What come out from the presentation was that Dubai is the "Ideal destination for family" because it is safe and because there are several attractions like theme parks and festivals. The tourism market in Dubai is divided as follow, 70% is leisure and travel and 30% is business. If you put Europe as centre of your map Dubai is situated at the centre of the world. The new Terminal 3 at the International Airport of Dubai contributes the destination to become an important hub for all the middle east and the GCC. Dubai is a destination like no one else: it aims to be unique with its own identity to be well-recognizable and well-distinguishable at a global level. In order to do that, they want to offer a product that is not available in any other places in the world.

Its added value relies on its hospitality that characterize all its services and its facilities and especially on the high quality of the tourism product provided by its hotels. Moreover due to the fact that the salaries of labor force are very low, all companies engaged in the tourism sector are over-employed compared to Europe cities. Today Dubai shows just 10% of what it will be in the future. They are planning to finish part of their project by 2012. But having in mind Emirates ambitious, it is likely that in future they will continuously project and invest in new building, new construction, new "world". Tourism in Dubai is one in a life time luxury tourism. Probably in future they will switch to mass tourism, but we should take into consideration that every year the biggest/largest/highest/ tallest building are constructed, making Dubai the fastest growing city in the world.

Open questions:

- How it will be possible to make people come back just offering new building finishing?
- Could be the tourism experience simplified to the quality of hotel? What about the tourism experience in term of viability and "panorama" of the city?
- Besides buildings, what is the tourism vision for the future?

Topic: Dubai Transport System

Aims of the day (personal questions):

- 1. Is it necessary to make a distinction between carriage classes?**
- 2. How will it be the price policy of the metro? How it will change the price policy compared with other transport system?**
- 3. How the airport has been developed? What are the element that make the success of the airport?**
- 4. What is the utility of the pedestrian path in the 6th Cross Creek Bridge?**

Result/personal conclusions:

Dubai transport system is still at a very early stage of its development. The Traffic congestion is one of the main problem that affect the city. In order to resolve this situation the Department of Road and Transport is planning the construction of the metro rail system through two line the Red and the Green one, that at the moment have been terminated at 70%. The particularity of the project rely on its characteristics to be divided in two classes. The golden class will provide higher quality and services only through paying a little higher price. The aim of such distinction is to provide a better stay on the metro and a better travel experience. For this reason the metro stations and tracks will be built over ground and not as usual underground, because in this way the users will enjoy the panorama of Dubai city. The metro will be the central project of the transport system and in order to be much integrated into the city, it will be supported by trams and bus lines which will have lower price to be usable by the labor force class. Moreover the department introduced the project to make Dubai a walk able city through the construction of pedestrian paths to increase also the metro accessibility.

This topic was also introduced by the FxFowle Architect Company which are working on the realization of the 6th Cross Creek Bridge. The aim of the bridge is first of all to provide a way to access to the future Opera House which will be built on a small island in the middle of the creek, secondly to improve the traffic congestion. The bridge will be composed by twelve lanes, a metro station and a pedestrian path. To what concern this facility, they compare their bridge to that of Brooklyn, but the 6th Creek Cross Bridge connects nowhere to nowhere, it means that at the extreme of the bridge there is no area on which is possible to walk in and the utility of the pedestrian path could be also justified to the opportunity to have a view experience, but also in this terms the experience is limited by the fact that the path is under and not on the bridge.

Dubai quick development has been made possible also thanks to its International Airport that has been enlarged and improved in very few years, in order to provide a solution to the need of the city to be accessible

from all over the world. Ten years ago the airport was based especially on oil business with a terminal for seaplane, while today it is characterized by three terminals and with its own Airline Company: The Emirates. Its fast development and lack of direct competition make this airport an important hub at global level, but on the other hand its management missed of competence and knowledge. Today this airport is facing the main phase of its success and in the future the possibility of opening of new airport will reveal if the new facility will work as complementary, as they believe today, or will work as direct competitor.

Open questions:

- Is the metro so unique and different from the model of North Europe countries?
- Could the metro make a real difference for the future traffic situation?
- Will be in the future any space for low-cost airline given the assumption that oil by 2025 will be finished?
- Could the opening of a new airport a complementary and not a competitor of the Dubai International airport?
- Could the bridge be compared with the Brooklyn Bridge?
- Are there any opportunity in the future to make Dubai a walk able city?

Topic: Property Development

Aims of the day (personal questions):

1. **In which way do the company face the current economic crisis?**
2. **What is the geographic segmentation of your target?**
3. **Which kind of client do you have? Are they more leisure or business visitors?**

Result/personal conclusions:

Dubai is the largest market in the world for real estate development. Its almost 330 hotel for a total of 46.000 hotel rooms, its villas apartments and its house development and its shopping malls make Dubai the fastest growing city in the world. Hotel play a fundamental role in this growing industry.

During our stay we had the occasion to spoke with two board of directors of 2 different Hotel; the Coral Deira Hotel and the Movenpick Dubai hotel. The regional Hotel chain Coral Deira works with a simple strategy: they make building and then they manage the structure as an hotel assigning to it one of their four brand, according to the characteristics of the facility. On the other hand The International Hotel chain, Movenpick, is just based on the management of a sole well-defined logo which principles depend on some chosen Swiss

values which give uniqueness to the hotel chain. Investors look for Movenpick because it is one of the leaders in managing hotel chain.

To what concern the economic crisis the two hotels talked about this argument differently; while Coral Deira looked like to be quite affected by the global economic situation, Movempick discussed about this topic as the crisis is having less impact on Dubai. The crisis has shown trough a little decrease of the hotel occupancy rate. In the previous years, before this crises, the occupancy rate was around 90-95% while nowadays is around 80%. This is a significant decrease in terms of presence, but it is still higher than the average of some UE destinations. About market segmentation, Coral Deira hosts more business traveler, whereas Movenpick has a mix between leisure and business visitors. The biggest geographic market for both hotels are UK, UE, Russia, Far east and GCC.

According to Craig Cochran, the director of HR for Asia and Middle east for Movenpick, Dubai will continue to be a top destination” thanks its good whether all year long. Moreover he put the focus also on the high quality of Dubai hospitality. For this reason he stressed a lot on the importance that all the employees are happy and satisfied in practicing their job. In this way hotel can guarantee top services and top availability for their guests. A big weakness of both hotels, Coral Deira and Movenpick is related to the topic of environment. Dubai has no idea of what means to be environmental friendly, it is a young nation and right now it is not forecasting at all the environmental problems. In future, in the next years, considering the fastest growing development of the city, the environment will be a big challenge for Dubai.

Open questions:

- From the Economic point of view, is not a contradiction to be a dry Hotel? We know that the F&B department do a lot of profit selling alcohol more then with food. Is so easy to renounce to this revenue? Compare with an alcohol Hotel how do you face this lack in your balance sheet?
- Is it enough to say that people should come to Dubai for its “good weather”?
- Could the crisis reduce the tourism flow?

Topic: Entertainment and Shopping

Aims of the day (personal questions):

1. **How is Dubailand structured and organized?**
2. **What is the main difference between Dubailand and Disneyworld?**
3. **How do you manage to keep the snow resort so cold?**

4. **To whom is the ski resort dedicated?**
5. **How many visitors you have per day/month/year?**

Result/personal conclusions:

Dubailand is another huge plan that contributes to make Dubai the main destination for the real estate investment in the current global scenario. Behind such project there is Twatweer company: one of the main firm involved in the construction market of the city. The particularity of the project, which also constitutes the major element of diversification from Disneyland, relies on the opportunity of Dubailand to provide also apartments for its inhabitants. Dubailand, indeed is going to be another destination inside Dubai: a city with the size of Singapore. Therefore it is not only offering hotel rooms and accommodations for its visitors, but its aim is to be one place where people are willing to live. Dubailand will be Dubai sport city, Dubai motor city, Dubai car race, Tyger Wood Dubai, Legoland, Universal Studio, theme park of the Dreamwork and many other projects which will be separated and will work individually and independently from others. All this project seek uniqueness providing some special attractions, once again the research of the recordis the driven factor: the most important thing is to be the best.

The what concern the experience at the Ski Dubai it was impressing. It was really an unforgettable snow experience. The Ski Dubai is located close to the biggest shopping mall in Dubai, the emirates shopping mall. It covers 22.550 m² (equivalent to 3 football fields) and it has 2 slopes of 400 meters. The isolation system makes easy to keep the temperature around minus 2 degree and therefore to provide real snow all year round. The resort can host up to 1500 guest but usually is not so full. The main goal of the first indoor ski resort in the Middle East is to provide local people with the opportunity to try the snow and to experience this new reality that otherwise they should go to the other part of the world. It is the first step for Arabian people who wants to enjoy a vacation in a snow destination. Consequently the target is first the local that wants to try and than curios visitors and tourists.

Building a Ski Resort in the middle of the desert brought a strong contribution to the image of Dubai as city of records, increasing its attractiveness from a tourist point of view. It is even more impressive in summer when outside there are 50 degrees and inside minus 2/4. It is for sure the coolest thing to do in Dubai.

Open questions:

- Are people really willing to live in such place?
- Can be Dubailand only a complement of Dubai city and not a competitor?
- Is the Sky Dubai developed only thinking to the local needs?
- How much the fact to be located in Dubai has influenced the project?

Topic: Abu Dhabi Daily Excursion

Aims of the day (personal questions):

- 1. What is the principal factor that distinguish Abu-Dhabi from Dubai?**
- 2. What is its cultural district?**
- 3. Is Dubai a direct competitor?**

Result/personal conclusions:

Abu Dhabi is the capital of United Arab Emirates and it has the 80% of the nation oil.

As Dubai, the city has the goal to diversify its economy and improves the tourism access to emirates providing around 27000 hotel rooms by 2012. For this reason is developing a lot of project to make the city one of the major tourist destination in the world. Differently from Dubai the tourism of Abu-Dabhi has a long term common vision developed by the Abu-Dhabi Tourism Authority which aims to increase tourism based on a joint-cooperation of all the city and on a system of values related to the local traditions and culture. It wants to be unique and be well-distinguishable from Dubai providing the first museums in the Emirates related to the Western culture. Indeed, one of the project which deserve more attention is the development of a cultural district on the Saadiyat Island which will host the first Louvre museum outside Paris, the Guggenheim signed again by Frank O'Ghery, the Performing Art Centre of Zaha Hadid and the Maritime Museum by Tadao Ando. The district, the Mosque, the Cultural foundation, the Heritage Village are all the elements that compose the soft culture on which the tourism of Abu Dhabi wants to attract its visitors.

Another important characteristics which contributes to distinguish the city from Dubai, is its geographical composition, thank to the natural small island that composed this little gulf, Abu-Dhabi can better organize the urban plan of the city and it has been also easier to develop and invent new projects. Moreover Abu-Dhabi

looks to be more sensitive about the environmental issue than Dubai, it is proposing some future plan in order to limit the problem.

Although these differences, Abu Dhabi and Dubai have also some similar characteristics such as the research of being the best. Even if Abu-Dhabi has a simpler and clearer vision of how organize its tourism, it is not forgetting to make it outstanding. Indeed thank to the help of star architects, it is realizing unique icons that will attract visitors from all the world. It is also important to underline the records achieved by its Mosque like the longest carpet and the biggest chandelier in the world which contribute to attract visitors not for its spiritual atmosphere, but for its unique characteristics.

To what concern a possible comparison between the two cities, they do not look to consider each other competitors, but more complements. At the same time they have neither talked about the opportunity to cooperate, maybe in the future when their tourism facilities will be finished and visitors will be billion they will set up a competitive strategy based on a concrete cooperation between this extraordinary cities.

Open questions:

- Is Abu-Dhabi so different from Dubai?
- How high is the risk to realize such cultural district?
- Can Abu-Dhabi be considered a complements and not a competitor of Dubai?

3: Jessica Schenck and Jieqing Luo

Topic: General Tourism Dubai: Dubai Department of Tourism and Commerce Marketing; Cultural Lunch and Kuoni Travel Ltd.

Aims of the day (personal questions):

1. What are the factors that affect the implementation of tourism development strategies?
2. What are Dubai's unique selling points(USP)?
3. What's your plan to promote this cultural center?
4. How do you differentiate your tourism products from others'?

Result/personal conclusions:

The first meeting with Dubai Department of Tourism and Commerce Marketing (DTCM) provided us general view on the development of Dubai tourism. The presentation showed us the strategic plan for tourism development. They stated that the initial reason why Dubai decided to develop tourism was to avoid over-dependent oil exportation economic growth. "Dubai experience" introduced the attractions and activities in Dubai, but no answer to " what is so-called Dubai experience?" It's evident that the Sheikh decides how to develop and make decisions, but there was no clear answer to the question on influential factors. Quality is the USP, according to the speaker, standards are set to make sure high level of quality for tourists.

We had cultural lunch at Sheikh Mohammed Center. Many questions about local culture were discussed. We knew that people travel to Dubai for icons, shopping and business. What kind of people will come and visit this center? It seemed that this center as an education place for people who really want to learn something about local culture. According one of the ladies, financial support mainly comes from foundation, what's more, in the near future, they would like to promote this center through different channels. It hardly become the must-going place for tourists with the scope of Dubai tourism image, and tourists can go to the cities around Dubai to experience Arabian culture.

Presentation from Margarita Larcheva showed us how a destination management company design and sell tourism products. Customer-oriented services were emphasized from design to selling packages. According to the speaker, creating added-value to products in order to attract more customers and to be differentiated from others' product. But how to differentiate, there was only vague answer available during this meeting. When it comes to the question about city tour, we only got an unclear description. But, take a look at this city,

the so-called city tour could be the show of icons, records and buildings, combined with hospitality and personalized services.

Open questions:

1. **What are the standards for quality?(Accommodations, entertainment, transportation etc.) How to ensure every sector realize such qualities.**
2. **How to get access to the resources which can be a part of city tour? E.g icons, buildings.**

Topic: Transport: Metro, Airport, Sixth Crossing

Aims of the day (personal questions):

1. **Will there be a metro connection between Dubai and Abu Dhabi?**
2. **Will Dubai simply continue fighting to have the tallest, biggest, largest, etc structures?**

Result/personal conclusions:

The metro meeting with the Road and Transport Agency showed us that Dubai hopes to have the leading railroad service in the region. They hope to have a high quality, healthy, safe, and environmentally friendly system that will improve the traffic congestion problem that is facing Dubai. The first stage of the plan is to have 4 lines, with the first two lines already in construction and opening by 9-9-09 (the red line) and in March 2010 (the green line). They system will be the largest fully automated (driverless) metro in the world. It will incorporate both over land metro rails and under ground metros. The red line will have 29 stations, stopping at the most important attractions and high traffic zones.

When I asked if there will be a connection between Abu Dhabi and Dubai, to help both commuters and tourist, the answer was not with the Dubai metro system but the UAE is planning on a highspeed line that will go through all seven emirates. The Dubai line and the UAE line will not connect, which seems that there will still be the need for taxis and/or alternative forms of transportation. Also, there will be a need for cars/taxis to get to the stations (as they are currently designed); so it seems like the metro may not be very successful at alleviating traffic, especially as it will not be for the 'working class.'

At the Dubai Airport we were told that the airport wants to be the "hub of the world" as they see Dubai as the center of the world. With the recent opening in October of 2008, the airport now has a 60 million-

passenger capacity, 60% of whom are in transit. There is also another airport being built on the other side of Dubai in the Jumeria area that will be the biggest airport in the world. While the natural thing to wonder would be, how would these two massive airports compete (along with the competition that could be coming from Abu Dhabi Airport), our hosts were hardly able to answer these questions, saying that it is a future problem that they are in the process of considering.

The meeting with FXFOWLE about the Sheikh Rashid bin Saeed Crossing seemed a little confused. Our host said that the bridge will have two spans, one of 350 km and the other of 600 km. This seems impossible, especially for pedestrians! The bridge will be the largest arch bridge in the world, and it is believed that it will be an icon.

When asked if Dubai will continue to compete for the tallest, largest, ect? The answer was that this is something that has always happened in the world (with the example of the Empire State and Crystler Buildings) and that Dubai will probably continue until some other place can compete or Dubai is out of money. There may be growing competition in the GCC region soon.

Open questions:

1. Will people actually use the metro and will it alleviate traffic?
2. Will people walk across the bridge and use the pedestrian areas?

Topic: Property development: Coral Deira Hotel; Mövenpick Hotel

Aims of the day (personal questions):

1. How do you plan to deal with the changes brought by financial crisis in hotel industry?
2. How to make sure a steady growth as an important part of tourism industry?

Result/personal conclusions:

We were very welcome by the speakers from Coral Deira Hotel. According to the presentation, they planned to expand business to eco-hotels based on the observation of new market trend. This niche market is consisted of people who want high quality, environmental and low cost accommodation services. Local newspapers and TV all reveal the impacts of financial crisis on the real estate and destination development, Coral hotel was aware of that, they intended to adapt themselves to market trends in order to overcome the

challenges result from financial crisis. But even they planned to provide new markets with new products, there is no clear description or definition about their eco-hotels, such as how to ensure low cost but green and high quality. What's more, there is no evidence that the percentage of people come to Dubai for such hotel.

For Mövenpick Hotel, the first impression was that they qualified their products with Swiss hospitality and they've done well to embody the famous Swiss hospitality. We learned about their strategic plan, business model towards middle east market, personnel development and managing toolkit. They showed us a clear view on how they expand business. When we mentioned about the financial crisis, according to the answer from the speaker, the impacts might be investments, there would be a slow-down for business expansion. Meanwhile, the high quality can still make sure they are gaining customers. Location choices are closely related to its hotel type, e.g. business or resort, as well as target market, e.g. business travelers or others.

In Dubai, the real estate companies construct and buildings and sell to companies as offices or hotels, to individuals as apartments. The slow-down investments on real estate of Dubai influence the growth of hotel industry. Whether to invest in one building and change it into hotel, where to locate the hotel might be the first two questions put on the table for investors. And the management team also plays an important role, at present, they may need to solve the problems between supply and demand.

Open questions:

As there is no data about niche market analysis, without clear products description, how can Coral management team attract investments?

Topic: Entertainment/ Shopping: Dubailand (Tatwer), SkiDubai

Aims of the day (personal questions):

- 1. What is Dubailand going to about seasonality as much of the year is too hot for theme parks?**
- 2. Will theme parks be operational during Ramadan and will there be leniency towards tourist during this holy month of fasting?**
- 3. Why will Formula 1 not be in Dubai if they have already built a Formula 1 standard course?**

Result/personal conclusions:

Dubailand seems to definitely be a one of a kind location. The total area of land being used is half the size of the city of Singapore. While it is all in construction now, it was soon be a collection of "cities" that will

incorporate theme parks or theme areas with housing, schools, mosques, malls... everything. The real question, which I found it would be rude to ask is: who wants to live in a themed city?

As for the seasonality of the theme parks, I was told that each theme park expects to make enough money during the 'high seasons' to make up for the 'low seasons.' This is a task that is difficult for any theme park, but I feel that Dubailand will have a lot of difficulty, especially when I was told that it seems that Dubailand will not give any cultural leniency during Ramadan but it is not yet fully decided. By my own calculations, removing a month of business for Ramadan and estimate at least four months when it is too hot, that is about half the year when it will be difficult to have visitors (either local or international) to the theme parks/ golf courses.

Sports city seemed less tourism oriented but more for training and team building. While motor city, the first of the theme parks to open, will cater more to tourist, along with the built in housing developments and city needs. I still wonder, of course, why the guide lied and said the rest Formula 1 will not be in Dubai is that it takes place in capital cities.

Ski Dubai on the other hand, seems more promising. Already a very successful enterprise, Ski Dubai mainly caters to the Arab community as the gateway for the first ski/snow experience. This is an angle that I did not expect and it seems to be working very well. While of course, it is an exciting sight for anyone to see an indoor ski 'resort' for the first time!

Open questions:

The people we met with at Dubai Land seemed so enthusiastic and optimistic about this project, I wonder if they truly believe it will be a success or if they are just being professional.

Topic: Abu Dhabi: Sheikh Zayed Mosque, TDIC, Gourmet Abu Dhabi, Cultural Center models

Aims of the day (personal questions):

1. How does Ramadan affect tourism?
2. Is there any cooperation between different organizers of "gourmet" and "culinary tourism" events?

Result/personal conclusions:

Abu Dhabi is a city of contrasts when compared to Dubai. The city's goal is to be the cultural center of the UAE. It is being designed for high level, luxury tourism whereas the Tourism Development Investment Company (TDIC) sees Dubai as more of a mass tourism destination.

Our first stop was the Sheikh Zayed Grand Mosque. This is the world's third largest Mosque and holds the world's largest carpet. While it is technically illegal for non-muslims to enter mosques in the UAE, the Sheikh Zayed Grand Mosque is an exception, as they would like to help close the cultural gap and give tourist the opportunity to see the beautiful mosque.

I asked the guide how Ramadan (the Islamic month of fasting) affects tourism. According to her, there is hardly a change. Hotels have divider walls so that everyone who walks into a hotel cannot see restaurant and diners but otherwise there is no big change. I find this very hard to believe since during Ramadan, Muslims can't drink water or smoke or eat during day-light hours and it is considered rude of the non-muslims/tourist to do so.

The second meeting was at the Tourism Development Investment Company (TDIC). They expect to have 2.7 million tourist by 2012 and the government and private sector are currently busy constructing hotels rooms to allow for this future demand. While currently their main guests are business traveler, the TDIC believes that with the completion of the cultural area on Saadiyat Island will encourage cultural tourist to visit their museums, including: the Shiekh Zayed National Museum, Guggenheim Abu Dhabi Museum, Louvre Abu Dhabi.

Their goal is to promote the native culture and tradition. Based on the knowledge that Abu Dhabi has less than 25% locals living in the Emirate, it was interesting to hear that Abu Dhabi is making a conscious effort to employ locals in the fields of tourism and hospitality. This could help make the city more "real."

The TDIC sees little to no competition between Dubai and Abu Dhabi. As Abu Dhabi is the UAEs capitol, they believe there should be cooperation between the two cities. When asked about day trippers, the response was that they hope people will take day trips to Dubai from Abu Dhabi but that mostly the products are highly differentiated, so they are not too concerned.

Gourmet Abu Dhabi was the third stop. It is the first edition of what is expected to be an annual event. Incorporating the chefs of first class restaurants from the region and around the world, the event is not

considered for the typical tourist, as each event is costly to participate in. Their hopes are to in the future be able to supply a larger range of events that can incorporate more mid-range events.

When asked if the organizers of such events work together on a world scale, I was told that this rarely happens yet organizers learn from each other and take ideas from other events.

The final stop was to see an exhibit of the cultural center. This was a very fast run through where we saw the models of the future museums.

Open questions:

I wonder if, once completed, Abu Dhabi will have the same feel that Dubai has, that everything is too planned, too fake. It seems they are attempting to quickly build a cultural center, but will it be able to have a “real” feel of local culture?

4: Enrica Mazzucchi, Christian Glathar Dedekind

Topic: General Tourism Dubai.

Aims of the day (personal questions):

- 1. Which is the role of the Department of Tourism and Commerce Marketing? And how is Dubai promoted worldwide?**
- 2. What is the current situation of Dubai as tourism destination?**

Result/personal conclusions:

The meeting with Mr. Abdullah bin Suwaidan, Deputy Director of the DCTM, was focused on the “Dubai Experience”. The Department of Tourism and Commerce Marketing is the principal authority for the planning, supervision and development of the tourism sector in Dubai. It plans and implements an integrated program of international promotion and marketing activities. One interesting aspect of DCTM’s activities is the “Emiratisation” it has initiated, in order to attract a qualified workforce, underlining the opportunities that the tourism sector offers to young UAE nationals. The goal of DCTM is to position Dubai as the leading tourism destination and commercial hub in the world.

During the presentation, in particular in the video they showed us, we could notice that Dubai is promoted worldwide through beautiful images and a clear wording strategy, the 6 X’s: Experience, Exotic, Exhilarating, Extravagant, Exciting, Exquisite. Some kinds of promotion is done in collaboration with other Emirates, but apart this type of cooperation, they stressed the uniqueness of Dubai, identifying the quality of the product as its USP. They follow the vision of the Sheik for the development of the city, mainly focusing on quality: the government is in charge of the audits and quality controls, having implemented a Quality Management System complying with the International Standard ISO 9001:2000.

For what concern the current situation of Dubai as tourism destination, the first answer we had was that Dubai is an ideal family destination, as it is very safe, as well as a great business destination. Over 70% of visits are for leisure, meaning that 30% comes from the MICE sector. The percentage of repeated visitors is 10%, but considering the continuous construction it is expected to increase. Regarding the source markets, UK, Germany and USA are considered to be the main ones according to the DCTM, while as stated by Margarita Larcherva, Director of Marketing of Desert Adventures Tourism, the most important markets are Russia, GCC and Far East.

Dubai tourism offer is composed by deserts, beaches, mountains and different activities, but mainly by buildings and hotels; there are around 331 hotels and 140 apartments, which hosted 7.000.000 guests in 2007.

Topic: Transport – Special focus on the Metro Project

Aims of the day (personal questions):

- 1. Which were your objectives when you decide to build the metro? According to which plan did you decide where to build the stations?**
- 2. How is the metro project integrated with the other in-city public transport modes to move passengers from the Metro stations to their final destination?**

Result/personal conclusions:

The meeting with the Road and Transport Agency of Dubai presented the opportunity to know more about the new metro project. Their main objectives are to relieve the traffic congestion, to support population growth, to encourage foreign and local investments, to sustain economic growth, to create public transports, to create a travel hub and tourist destination and finally to create a first class city. The metro project is just a part of a whole macro project which includes: metro, tram, monorail, high speed rail and a training centre.

One interesting topic covered during the presentation was about the metro stations. The Road and Transport Agency defined the type of structure and services of the metro stations taking special care on the quality of the installation. They presented the metro system as a 5-star service and, in order to deliver this, they had to build high-quality stations which include shopping mall, all facilities for disable passengers, etc. Also, there was special care in defining the locations of this stations. Mr. Al Hosani said that the location of the metro stations follow functionally as they are located near the most popular areas on the course. The location was decided considering the future development of the city; for example, the plans for future building developments were considered collaborating with the main property developers, however he explained that this is sometimes difficult due to the speed to the constructions occurring in Dubai at the moment.

In regards to the integration with other means of transport, Mr. Al Hosani said that the system will be an integrated transportation, where the metro will be the main mover and there will be other transport services, named as secondary movers, such as boats, taxis and buses. These secondary movers will transport the

passengers from the stations to their final destinations. This situation will allow passengers to depend totally on public transport, giving the possibility to arrive to their final destination (or within 100 meters from it) using only public transport. The government of Dubai is particular proud of this project, as it is the first system of its kind in the region and will help in the economic and social development of the emirate, contributing in the creation of a first-class city.

Open questions:

What do you think will be the main social costs and benefits of the new Metro project? The meeting was based mainly in the benefits of this project, but we were not able to ask information regarding the costs, especially from a social perspective.

Have you also planned a campaign to incline people towards the use of the metro? We received very little information regarding the new policies that will convince the public to use these services instead of using their car as its being done until now. (The speaker didn't elaborate in the idea of introducing a Circulation or Vehicular Tax as a way to regulate traffic)

Topic: Property development – focus on Hotels & Accomodation

Aims of the day (personal questions):

- 1. Which is the strategy of Mövenpick Hotels&Resorts? And how important it is the Swiss origin of the brand?Why they are so much present in the Middle East?**
- 2. How the current crisis is affecting the hotel sector in Dubai?**

Result/personal conclusions:

Mövenpick brand was founded in 1948, related to a restaurant/food company. This international hotel group with roots in Switzerland is expanding and has the objective to increase its hotel portfolio to 100 by the year 2010. The company has a clear strategy, based on four cornerstones: the Vision, which is to be the preferred and most enjoyable upscale hotel management company of Swiss origin, for guests, employees, hotel owners and shareholders); then Quality, Reliability and Care. Mövenpick has one brand and focuses on specific types of

hotels, developing through management agreements, providing experience and expertise but not building the hotels. While companies such as Hilton and Marriot focus on standards, they “glocalize” global operations with local adjustments. The Swiss origin is a very important aspect of their strategy: using the Swiss values into the operation, they assure to customers quality, reliability and care, generating and attracting business. The reason why Mövenpick has such a strong presence in the Middle East (16 Hotels with 3.468 rooms) is that nowadays it is very difficult to enter the “key cities”, such as Milan, Paris or London, without making a huge initial investment. For this reason the company is developing so fast in the Middle East, as here it’s easier since there is a high availability of cash.

Since the current global crisis is affecting so much the world economy, we were interested to know how much it is impacting the hotel sector in a city like Dubai, where it seems that the crisis doesn’t exist. The response of Mr. Craig Cochrane, Director of Human Resources Middle East, was that in Dubai is starting a sort of saturation of the market (for this reason Mövenpick is planning to move soon towards the Asian market) and the crisis is obviously affecting also the hotel sector, with the occupancy rate going down. Also during the other meeting we had with Mr. Wael Elbehi, Regional Sales Director of Coral Hotel&Resorts, we spoke about the crisis and again the answer was that it exist and is affecting strongly the market, registering 50% drop in record. They spoke about the 1st recession of the Middle East and again about the saturation of the market: there are more or less 520 hotels/apartments in Dubai but the demand is decreasing, while the supply is still going to increase. Finally Mr. Elbehi mentioned the main constraints for Dubai tourism, which are Visa restrictions, the lack of charter flights and prices which are too high, especially airline tickets.

Topic: Entertainment – Focus on Ski Dubai

Aims of the day (personal questions):

- 1. Ski Dubai: According to which needs you decide to create such park? To provide local population with something that they can not experience without travelling abroad or also for foreign tourists? Do you have more locals or foreign participants? Do you consider Ski Dubai as a direct competitor of the most popular ski destination?**
- 2. Dubailand: Why have you decided to start such a huge project? Which are your main objectives?**

Result/personal conclusions:

The meeting with Ski Dubai manager presented the opportunity to know more about this company which built a ski slope in the desert. Basically, the project provides the opportunity for local residents and visitors of Dubai to experience a different ecosystem and sport to the one they are used to. One of the major issues is the difference between a natural skiing area and this “fabricated ski slope”. Mr. Marchand said that Ski Dubai is not presented as a substitute of a natural ski resort; this attraction is sold as a “new” experience for everyone who is willing to experience skiing in the desert. The Ski Dubai manager also explained that this project has been successful, as it received 800,000 visitors (300,000 more than forecasted) and this number keeps increasing. One of the main problems is the affluence of people not properly distributed throughout the facilities (Slope and Snow Park), as most of the visitors only use the snow park and not the slope. This situation is due to the limited skiing knowledge of visitors, but it is expected to change over time, as the demand for ski lessons is increasing and this will probably solve the problem. According to Mr. Marchand, one of the opportunities of Ski Dubai is that many expatriates from GCC countries living in Dubai travel abroad and visit or experience skiing destinations around Europe. Ski Dubai offers them a more secure and controlled skiing environment to the people that would like to practice this sport.

Dubailand will be of course the largest amusement park in the world, with more than 279 square kilometers. It is the most ambitious tourism, leisure and entertainment project, catering the needs of the entire family. Dubailand wants to attract millions of tourists (they expect 40,000 visitors a day), planning to have more than 55 hotels within its location. The huge land has been divided into different projects, categorized into seven themed zones, and everything has been designed to put Dubai into the global map, reinforcing its ambition to become an international hub of family tourism. Within Dubailand we visited Sport City area, which will host exhibitions, sport events with a busy calendar of international events.

Open questions:

Do you believe that your partnership with Dubai mall creates synergies to attract more customers?

As your idea of creating "winter experience" in the desert was a successful one, does your company have plans to repeat it in other Middle East countries? It would have been interesting to know if they are planning to repeat the project in other emirates or other GCC countries?, and if they are, it will be interesting to know if they will continue the idea of building it bigger, longer or taller.

Topic: Abu Dhabi

Aims of the day (personal questions):

- 1. What are the main elements of Abu Dhabi's tourism offer? (So we are able to compare it to other emirates)**

Result/personal conclusions:

The meeting with Abu Dhabi's Strategy & Policy Director, Lawrence Franklin, presented the opportunity to understand the emirate's strategy for the future of the tourism industry. At first sight we were able to observe a city which is being developed at a slower pace than the neighboring emirate of Dubai.

Abu Dhabi, up to some extent, shares the same idea of development by building everything better, bigger and larger done the others, but they are being more conservative on the building and growth speed.

We were also presented with a "touristic product" completely different to the one presented by Dubai Tourism authority. Abu Dhabi has focused on culture as the key component of their tourism appeal. The emirate is building world-wide known museums (e.g. Louvre, Guggenheim) designed by star-architects (Zaha Hadid, Frank Gehry) to enlarge the activities and attractions offered to the tourist. We could think that by building a Guggenheim museum they will like to repeat the success achieved by Bilbao, but they understand that by building only one museum the impact will not be as important as building three. Moreover, all those museums will be encompassed within a cultural district, which will be located on the Saadiyat Island. The cultural offer which will be sold to the tourists will be national and international. The authorities are taking special care of the preservation and presentation of their own local identity (as being a Muslim federation) by building a Mosque and a museum of local culture.

The aim of all these investments is to increase the cultural offer, not only to attract more tourists, but also to extend the length of stay up to 4 or 5 nights.

Similar as in Dubai, the quality of the tourism supply is highly important within their strategy as they aim to attract well-educated, high-expenditure tourists; but in comparison to Dubai, they add the cultural element to their offer.

It is worth saying that they haven't started with their global marketing campaign as they are waiting for further stages in the emirate's development in order to fulfill the expectations and deliver high-quality products to their future customers.

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Master Class – 2007/2009

First Row: Nathalie Page, Manuela Barreca, Alice Stefani, Judit Zoltan.

Second Row: Alex Rawson (Mövenpick Manager), Silvia Ghirelli, Enrica Mazzucchi, Vittoria Passini, Carlotta Laffi, Paola Miduri, Jieqing Luo.

Third Row: Gianmaria Fragassi, Christian Dedekind, Francesco Tumino, Claudia Scholz.

Fourth Row: Craig Cochran and Michael Nugent (Mövenpick Managers), Nadzeya Kalbaska, Gunita Bogdane, Nely Nasir, Jessica Schenck.

Fifth Row: Prof. Rico Maggi, Timo Cadlolo, Salma Abu Shakra, Giulia Caldarone, Cristina Insuratelu, Xiongwen Dong.