

can also improve the quality of tourism is the technology, access to internet should be available in the major places such as the airport, hotels, restaurants and centers, we have seen in the case of Dubai that technology was classified among the criteria of attracting tourists, tourists now days are always connected with friends and family members they want to send photos and videos instantly for any event during their stay, GPS and Maps are also used by tourists, develop new applications are keys of success.

Diversifying the product in another key recommendation, have multiple and a variety of tourism products can attract traditional and new categories of tourists, leisure (beach, solar, culinary), business (short stay businessman, investor, firms, exhibitions, and fairs), shopping (festival, traditional products, fairs), cruise (large boat for touring), family (new product such as Halal tourism, family residence, group packages), organized tours, medical, ecological, sports tourism (local and international sports events), seasonal tourism (winter and summer), those are few examples that are interesting to be explored.

Other recommendations are a mix of several issues related to political, social and environmental characteristics, some characteristics might stop and retard tourism such a secure and safe destination are the first required criteria when choosing a destination, this is an external factor by promoting a safe and secure sector is the responsibility of the tourism sector, removing all signs of poverty and wholesomeness in public places, hiring qualified labor in different tourism offices to secure tourists, having a call center or a toll free phone line to receive any complain and urgent cases (restaurants, hotels, centers, stations etc..), more green spaces, access to health facilities, sign of cleanness in hotels, restaurants, beaches, natural resorts and thermal stations, and alleviate the visa and entrance restrictions for international tours and group of tourists.

The factors of a successful tourism are interrelated, in isolation the factors have a minimum impact on the development of tourism, but collectively that would create an environment favorable and opportune for further expansion of the tourism sector in Algeria. With the above recommendations, we think that Algeria is a considerable and potential candidate for a long term sustainable tourism, with a clear vision, a secure and safe environment, reliable infrastructure, diversified product, continuous improvement and high quality, and a strong marketing of the destination, Algeria can play an important role in the development of the tourism sector locally and internationally.

Note

- 1)-Diversification raises non-oil share of UAE's GDP , Gulf News, 2011.
- 2)-UAE most diversified economy in Middle East, Emirates Business, 2014.
- 3)- Dubai Statistics center, statistical year book, 2013.
- 4)- Dubai Statistics Center, Tourism Publication, Reports 2013.
- 5)- International Overnight Visitor Market, 2006/07, DTCM, 2007.

The first recommendation is institutional, managerial and structural, the role of governmental official authorities involved in the planning of a quality and sustainable tourism sector, a medium and long term realistic and tangible strategic plan is strongly required (as adopted by DTCM), with the involvement, consultation and coordination of all local authorities and governmental bodies with direct and indirect link to tourism, a new business structure of all tourism entities to avoid redundant tasks and budgets (reevaluation of the resources and capacities at all levels), appointment of qualified management and skilled staff with good experience in the modern sustainable tourism sector, seeking affiliation and experiences from international offices, adoption of new technology and information systems to develop a national database (micro-data is important for future decision making), a reliable system to control, regulates and evaluate the implementation of the planned tourism policies, a reliable system of communication internally and externally between all organisms, a media center to promote and market in the local and international market, a reliable portal website for global audience and a research center specialized in the sustainable tourism.

The second recommendation is to change the strategy and focus on the local market, Algerian residing outside the country and later on the regional and international tourism. The number of local and Algerians residing outside Algeria is a good indicator of a successful tourism, as a first these two categories of tourists will revive the sector. With the change in the social structure, more Algerian are looking for competitive touristic products in other markets such Tunisia, Morocco, Dubai, Turkey and other European countries, using a concern based surveys and face to face interviews, the tourism offices can easily collect all the information required to understand the local market and make, evaluate and make necessary adjustment to the sector, Algerian tourist residing outside has almost the same expectation of western tourist, it would be a good sample for research.

The third recommendation concerns the infrastructure, we have seen in the case of Dubai the aggressive investment in term of the infrastructure (direct and indirect). Infrastructure has a direct impact on the success of tourism, Air transportation including the airline and airport are the image of a healthy tourism, a lot should be done in Algeria to have a quality and competitive airline (suggestions are left for specialized people in transport), following the footsteps of Dubai in the quality of hotels, apartments hotels, retail sector, restaurants and shops are good indicators, new investment by international firms, more shopping malls with quality brands, easy access to centers, opening money exchange offices, flexible banking systems with ATMs, access to Visa and MasterCard lines from anywhere to facilitate transactions, we have seen the total spending of Europeans in the retail sector using credit cards. There is also a need for a control system (benchmark) for the classification of hotels and restaurants, adopting the ISO (standardized quality model) licenses are a solution to improve the retail sector, affiliation with international firms in the retail sector might accelerate the process of developing the sector. Another indicator that

highest international standards, DTCM drew on the American, British, French, and Spanish models and availed of the expert advice of the UN's World Tourism Organization. The system was also the result of extensive deliberations by a committee comprising hoteliers and representatives from all concerned government departments, thus ensuring that it complies fully with local economic and social conditions.

3.7 Security

Finally the security is one of the most important factors in the stability of the region, country and the destination. Dubai is seen as a comparatively liberal and cosmopolitan society, with little threat of civil unrest and low crime rates, and expatriates make up about 80% of the 1.2 million population (Maza, 2010).

Conclusion and recommendations

The purpose of this paper is to present and discuss the key factors of the development and successful tourism sector in the case of Dubai and how this experience can be of benefit to the Algerian Tourism sector.

Dubai made a significant development in the tourism sector described by its contribution to the UAE and Dubai GDP and its indirect impact on employment, transportation, retails, services and other hidden sub economical sectors. Despite some challenges and barriers such as the harsh climate and seasonal effects, cost of imports (food), high cost of living, political tension in Middle East and complexity of the foreign labor, the tourism sector was a considerable vehicle to economical development and growth, Algeria in contrary the barriers and challenges faced by Dubai are great potential for Algerian tourism. According to World Tourism Organization (UNWTO, 2008), the tourism sector now contributing some 35% of global exports of services, and according to the same agency the tourism sector in many less-developed countries has enjoyed significant growth and continues to do so, most recent data suggest that the contemporary global growth in tourism is underpinned by growth in emerging destinations in Asia, Africa and the Middle East (UNWTO, 2006, p. 3). According to the UNWTO (2008), tourism now represents over 70% of service exports in LDCs less developed countries.

Even though being rich in touristic resources and potential such as geographical location, natural resources, human resources (young population), rich and fertile soil, cultural characteristics (roman archeological sites), rich desert, also the late investment by creating new poles (172) of tourism and allocated new zones of development (48000 hectares) (SNAT, 2012) coastline cities and investment in transportation, Algeria still faces several challenges that represent barriers to tourism's development (we don't mean by development the total number of tourists and nights spent, but the wealth created by the sector and its direct and indirect contribution to the national economy).

restaurants, tours, and all centers and organizations must adhere to the quality control system adopted by Dubai. This is the foundation of a high quality tourism (90% of visitors are satisfied with their experience and 62% will return to Dubai one day).

For continuous improvement Dubai is constantly striving to innovate from its new Tourism Portal www.definitelydubai.com to introduce training courses for the industry in collaboration with professionals. It also conducts unique inward and outward missions to promote Dubai's tourism and commerce industry. DTCM employs highly sophisticated technology and a range of e-services to manage its business and its response to customers and vendors such as; Complaint Management System, One Stop Information Centre (OSIC). OSIC the first comprehensive central database of Dubai available to the public (facts and figures) through various means of communication, where there are currently more than 1000 lists of Tourism & commerce information, and comprehensive statistical reports.

The Visitors Information Bureaus (VIB) is another system it plays a key role for DTCM; Provision of right information at the right time is crucial to a destination's success and Dubai has been utilizing this marketing tool effectively with resounding success. The VIBs manned by multi-lingual, trained and courteous staff are located in the airports. The VIBs are equipped with touch-screen monitors to help the tourists obtain information easily.

Dubai Tourism Department is also a member of several international touristic organizations round 40 affiliations such as: USA (Association of Travel Marketing Executives), Russia (Russian Union of Tour Industry (RST), Japan (Japan Association of Travel Agents), Australia/ New Zealand (Australian Society of Travel Writers, Arab Australia Chamber of Commerce & Industry), BestCities (BC), Destination Marketing Association International (DMAI), Society of Incentive and Travel Executives (SITE) and "Bundesverband deutscher Pressesprecher".

DTCM has a Business and Research department is responsible to liaise between the Dubai tourism constituency and other government departments to address the industry's concerns and improve service provision. Also assisting the government departments in their communication with the tourism community, handling and analyzing complaints about the DTCM and about other Dubai entities, with regards to facilities and services provided, and conducting surveys to understand Dubai and DTCM customer needs and expectations, and sharing the findings with the relevant industry and government bodies

Quality Assurance department is another department responsible for coordinating and championing the development, implementation and improvement of the effectiveness of the Quality. The department introduced a phased classification system for hotels and hotel apartments in early 1999, the first in the region. To ensure the classification system met the

East and North Africa as well as the GCC, leading to the boom of Dubai medical tourism industry.

Another initiative that's worth to mention is the special-needs tourism which under developed in many destinations, Dubai is fast developing itself as a destination and is accessible to Special Needs visitors with its eyes set on an estimated market of 600 million tourists worldwide. Dubai's hotels, travel agencies, airlines, airports, shopping malls and different modes of public transport are increasingly gearing themselves to become disabled-friendly, a series of measures are being adopted and upgraded to welcome more special needs tourists into the emirate. Dubai's share of the special needs tourism market is estimated at one per of the approximately one per cent of the six million tourist worldwide and if they stay for an average of five days every year and spend \$ 100 daily, the emirates total tourism revenue will be boosted by \$ 3 billion every year (DTCM, 2013).

3.5.3 Sports Tourism

Recently the sports tourism is a new fashion destination to Dubai, new investments have been made 17 golf courses, dhow racing, horse racing, and tennis. Future sports attractions range from cricket, football, formula one racing and the development of the "Sports City" make it an ideal venue for future Olympics.

3.5.4 EcoTourism

DTCM has also announced the official launch of the first-ever initiative to reduce carbon emission (CO₂) in the hospitality industry by 20 per cent and Dubai Green Tourism Award, which will be in line with the World Environment Day. The main objectives of the initiative are to increase awareness about the global warming and CO₂ emissions and energy usage in the tourism industry, encourage environmental practices in the hospitality industry (Sustainable Tourism).

3.6 Quality, Benchmark, Affiliations and R&D

To maintain its high quality tourism and high customer's satisfaction, Dubai is a member of international Tourism boards and organizations, being part of the accreditations programs will ensure the quality of the sector. The government of Dubai has integrated a sophisticated information system in accordance with ISO9001:2008, ISO14001: 2004 and OHSAS18001:2007 to satisfy our customers' requirements, providing a safe and environmentally friendly workplace for employees, contractors, visitors and other interested parties and to comply with all relevant laws and regulations in order to achieve our Vision and carry out our Mission. Dubai is committed to continually improve the products and services, the effectiveness of the management system and both environmental, health and safety issues. Dubai will use the management system as an improvement tool and have set relevant quality, health, safety & environmental objectives, against which they monitor their performance. All entities active in the tourism sector, travel agencies, hotels,

length of stay was 7.3 days, with business visitors 6.4 days and leisure 7.8 days. 68% of visitors were married, 72% male and 28% female, 62% of the visitors said that they will return to Dubai for a holiday, 90% of visitors are highly satisfied with their experience in Dubai. The above figure⁵ describes the percentage of each visitor's category, and Table 1 describes the festivals and events hosted every year.

In the next lines, we will describe few of the diverse products.

Festivals and Events	Time
Dubai Shopping Festival	February
Dubai Desert Classic (Golf)	February
ATP Men's Tennis Open & WTA Tournament	February/March
Dubai World Cup (Horse racing)	March/April
Dubai to Muscat Sailing Race	March
Dubai Summer Surprises	July/August
Dubai Film Festival	December
Dubai International Rugby Sevens	December

3.5.1 Cruise Tourism

Dubai Cruise tourism is rapidly growing with 135 cruises and 375,000 tourists visiting Dubai in 2011. By the end of 2012, Dubai was expected to host 150 cruises with 475,000 passengers. By 2015, these numbers are projected to grow by 30% and 35% respectively.

The opening of the new Dubai Cruise Terminal facilitated the inflow of more cruise passengers and ships to Dubai than ever before. Spanning an area of 3,450 square meters, the new terminal continues to fuel Dubai's burgeoning cruise industry. The terminal is designed to handle between three to four ships simultaneously. Dubai Cruise Terminal has been built to cater for the emirate's increasing number of cruise tourists. It is the only cruise terminal in the world operated by a government tourism department, implying that extra attention will be provided to visitors and guarantees the provision of enhanced services such as certified tour guides and a swift entry system with no visa issues for visitors. Now Dubai is a major destination of choice to many global cruise lines, such as Costa Cruises, Costa Deliziosa, and US Royal Caribbean International (RCI).

3.5.2 Medical Tourism

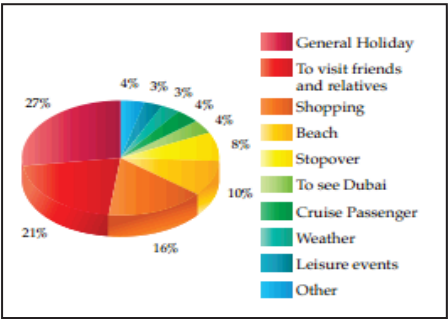
Medical tourism in Dubai is regarded as an integral aspect of the healthcare sector and Dubai is looking to strengthen its position on the global healthcare tourism map. To achieve that objective, Dubai Healthcare Authority (DHA) is exerting huge efforts to put in place policies and regulations that can help streamline the functioning of the sector. Dubai has become a destination for quality healthcare services especially by visitors from the Middle

	Destination City	Country	Visitors (millions)					%Δ 2013 & 2014	2014 Visitor Spend (US\$ bn)
			2010	2011	2012	2013	2014		
1	London	United Kingdom	14.71	15.29	15.46	17.30	18.69	8.0%	\$19.3
2	Bangkok	Thailand	10.44	13.80	15.82	18.46	16.42	-11.0%	\$13.0
3	Paris	France	13.27	13.88	14.33	15.29	15.57	1.8%	\$17.0
4	Singapore	Singapore	8.80	10.14	11.11	12.10	12.47	3.1%	\$14.3
5	Dubai	UAE	8.41	9.20	10.16	11.12	11.95	7.5%	\$10.9
6	New York	USA	9.43	10.27	10.60	11.08	11.81	6.6%	\$18.6
7	Istanbul	Turkey	6.45	7.51	8.82	9.87	11.60	17.5%	\$9.4
8	Kuala Lumpur	Malaysia	8.90	8.99	9.26	9.56	10.81	13.1%	\$8.1
9	Hong Kong	China	8.13	8.43	8.37	8.26	8.84	7.0%	\$8.3
10	Seoul	South Korea	6.06	6.56	7.51	8.24	8.63	4.7%	\$11.5
11	Barcelona	Spain	6.18	6.89	6.91	7.18	7.37	2.7%	\$11.2
12	Amsterdam	Netherlands	5.86	6.07	6.10	6.74	7.23	7.2%	\$4.4
13	Milan	Italy	5.83	6.59	6.88	6.85	6.82	-0.4%	\$5.3
14	Rome	Italy	6.65	6.66	6.82	6.63	6.79	2.5%	\$5.6
15	Taipei	Chinese Taipei	3.52	3.96	4.70	5.80	6.29	8.4%	\$10.8
16	Shanghai	China	6.67	6.18	6.04	5.66	6.09	7.6%	\$5.3
17	Vienna	Austria	4.64	5.08	5.38	5.67	6.05	6.8%	\$5.6
18	Riyadh	Saudi Arabia	1.82	4.16	4.83	5.52	5.59	1.3%	\$4.1
19	Tokyo	Japan	4.47	2.94	4.07	5.05	5.38	6.5%	\$7.4
20	Lima	Peru	2.07	2.94	3.94	4.91	5.11	4.1%	\$1.8

Another Department worth to mention in term in promoting Dubai globally, The Dubai Convention Bureau (DCB) within the DTCM, generates meeting, incentive, convention and exhibition (MICE) business for Dubai. Convention bids are coordinated and submitted on behalf of all stakeholders in Dubai. While marketing to organizers, the DCB also liaises with local professionals to assist them in bringing their affiliated conventions to the city. In addition, this department brings education and training opportunities to Dubai’s convention service providers. As a member of Best Cities, DCB ensures a high level of customer service and strives to make Dubai the world’s leading destination for these events.

3.5 Diversification

A variety of touristic products, Dubai always strives to innovate in its touristic products, ranging from Leisure & entertainment, Business, Cruise, Green tourism, and Archeological, other activities are in the innovative plan (conferences, expos, sports, guided tours and safaris, and ecological Bird watching). It would be more interesting if we had access to data and information on each product (but we refer the reader to the previous section that described in details the investments on each category). To have a clear vision on the Dubai characteristics of the tourism market, we will rely on the 2007 tourist’ survey (The Dubai Visitor Profile DVP) conducted by the DTCM to understand the characteristics of the tourism market. According to the survey, 29% of visitors to Dubai were on leisure breaks, 32% on business trips, 17% shopping, 10% beach resorts, 22% visiting friends. Popular months for holidays are taking in general in July/August (18%), December (16%) and January (15%). 77% of visitors stayed in hotel accommodation, 47% of which was in 4 and 5 stars hotels. The average



brands like the Jumeira International Group (hotels), Emaar, Nakheel and Dubai Holding (real estate), Emirates Airlines and DP World (port management) are among its brand ambassadors. Several investments have a direct impact in promoting “Dubai Brand” many of its home grown brands are superlatives (biggest, tallest, richest, magic etc.), for example, the world’s first underwater hotel “Hydropolis”, World tallest building “Burj Khalifa”, the World’s richest horse race “Dubai Cup”, World’s largest man-made marina “Dubai Marina”, The world’s largest mall “Dubai Mall”, World’s largest gold souk, the world’s largest airport “DWC”. Those are few examples that contribute to attract more visitors.

In 2014, Dubai issued a law to establishing a new body, Dubai Corporation for Tourism and Commerce Marketing (DCTCM). It will become the entity responsible for the promotion and marketing of the Emirate of Dubai (UAEinteract, 2014), the Corporation will have a mandate which includes promoting the Emirate as a prime destination for tourism, entertainment, and events. The main tools used for marketing and advertisement are: production of promotional videos and TV commercials, industry partners for the promotion of Dubai, Preparation and distribution of publicity material including brochures, guides and leaflets promoting Dubai, Presence in international events exhibitions and fairs, partnership and sponsoring international clubs, teams and sports tournaments, and international advertising campaigns. Some of the major exhibitions that the DTCM regularly participates in are the ITB (Berlin), WTM (London), EIBTM (Barcelona), IMEX (Frankfurt) and ITME, as well as in smaller fairs like Holiday World (Dublin) and MATKA (Finland).

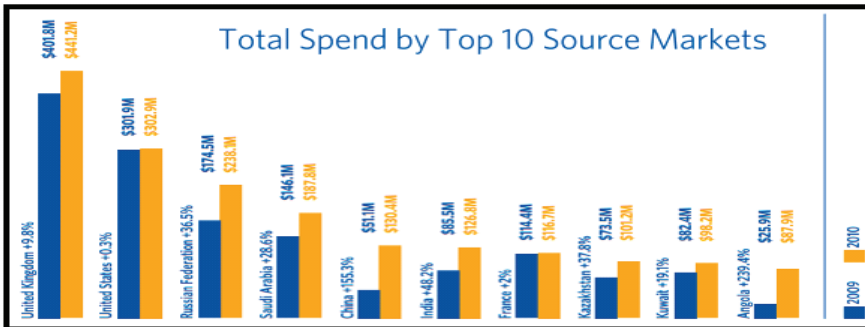
The government constantly benchmarks itself against other cities and nations. The Department of Economic Development of the Government of Dubai partnered with the IMD World Competitiveness Centre to identify a competitive framework. The 2014 MasterCard Top 20 cities, London, Bangkok, Paris and Singapore led the survey in that order and Dubai is benchmarking itself against the best 5th city, the following table shows the ranking (Table: MasterCard 2014, Global Top 20 Top Destination Cities by International Overnight Visitors (2014)).

(Khaleej Times, August 2014). This growth is due to the infrastructure boom with new retail centers such as the “Mall of the World” with an investment of 6.8 billion \$ (Emirates24/7, September 2014), other massive infrastructure and development projects will open soon, including the “Falcon city of Wonders”, and other famous building as “Eiffel Tower”.

Another type of retail is booming in Dubai the Luxury Brands and high end retail stores, the “Luxury Galleria” contains more than 100 retail and food outlets, including Alexander, McQueen, Jimmy Choo, House of Fraser, Cartier and Bulgari, this attracted new types of High class tourists from Eastern Europe and GCC countries.

Despite the harsh summer weather in Dubai, in the last years Dubai has tried to revive this period through the Dubai Summer Surprise a ten week shopping, according to the Dubai Economic Department Development (DED, 2013) in 2012, 4,360,000 visitors participated in the festival with a total of 12 billion AED, with an average daily spending of 384 Million AED. Another Shopping event organized in the winter season the “Dubai Shopping Festival”, in 2012, 4,400,000 visitors with a total spending of 14.7 billion AED.

To show the role of the retail sector on tourism, we will use some data developed by Visa credit line in 2010 on UAE Market (66% of Dubai). In 2010, international visitors spent 3.1 billion \$ on Visa cards, visa cards holders are from United Kingdom, USA, Russia and other European and African countries. The following chart shows the total amount spent in UAE in the retail sector (source: VisaVue Travel Data, 2009-2010).



3.4 Marketing and Media infrastructure

Despite the presence of the DTCM “Dubai Tourism and Commerce Marketing” in more than 18 big cities in the world (page 10), Dubai free trade zones and it’s no direct tax policy participated a lot in promoting the tourism sector. There are more than 500 Fortune companies setting up offices (Microsoft, Nokia, CNN, Pepsi), Banks (Credit Suisse; Merrill Lynch; Deutsche Bank, etc.) and Hotels (Sheraton, Hyatt, Meridian, Raffles, etc.). Home

According to the same report, the government plans to improve its healthcare infrastructure to ensure that adequate medical services are provided in the emirate. While many UAE residents have traditionally sought medical care overseas, the UAE government hopes to ultimately reverse this flow, turning the UAE into a medical tourism destination. Imports of medical devices reached a new high of USD 779.4 million in 2012.

For the last few years, Dubai has become a destination for quality healthcare services especially by visitors from the Middle East and North Africa as well as the GCC, leading to the boom of Dubai medical tourism industry. It is estimated that, Dubai medical tourism industry generates over USD 30 billion worth of revenue annually. Dubai Healthcare City (DHCC) free-zone has about 900 clinics and hundreds of medical professionals both national and international, to serve the country's residents and visiting patients. It is claimed that Dubai Healthcare City is the largest international medical center between Southeast Asia and Europe.

3.2.7 Sport facilities

Sport facilities, part of the Sport tourism Dubai is investing (17 golf courses, horse racing, and tennis), Future sports attractions range from cricket, football, formula one racing and the development of the "Sports City" make it an ideal venue for future Olympics. Dubailand will also host the Bawadi – a hotel strip similar to Las Vegas and the world's largest Ski Dome which will attract an additional 200,000 visitors per day (Husain, 2007b). The "family" is partly the focus with Dubailand's Universal theme park however these are expensive options.

3.3 Retail Sector

Dubai's retail sector will be worth 150 billion AED (39.78 billion \$) (Business Monitor International BMI) and it will grow by 33% in 2015 (Ventures Middle East, September 2014), Dubai's retail sector represents around 60% of UAE market. The city is now rivaling established global shopping hotspots like London, Milan, New York and Sydney, with the U.A.E now ranked as the world's fourth most attractive retail destination in AT Kearney's latest global index. According to the same global index (GRDI, 2014) report UAE has continued its strong growth as a dynamic retail market, retail sales grew five per cent in 2013, boosting annual sales to \$66 billion (Dh 240.5 billion) and seeing the UAE climb one spot in the GRDI from last year, to claim its highest position ever on the index.

Dubai Economic Council also estimates the city's retail sector to have become as big as the financial and real estate sectors in terms of value. The retail revolution is set to intensify, as Dubai welcomes 25 million visitors in the build-up to World Expo 2020. The retail sector remains one of the most vital streams for economic activity in the emirate and the industry is likely to witness significant growth in the lead up to Expo 2020 in six years' time

network is currently integrating eServices of all 24 government offices. Not only does it allows electronic payment of bills but also allows access to information on fines, utility bills and business queries. Hotlines like Al Ameen (a security hotline for suspicious activities not in the general purview of the police) have been launched to improve government services. All visitors have access to inquire any info about Dubai. Most of the shopping malls, centers and retail shops are linked to banks credit lines (Visa, and MasterCard). Dubai will also free Wi-Fi free connections in major centers.

3.2.5 Education and Institutions

Education is another potential area for tourism; HE Sheikh Mohammad announced an AED 37 billion fund (US\$10.8 billion) for education and knowledge-development in the region (Zawya, 2007).

Higher education institutions in Dubai are either branch campuses of international universities or private universities located inside or outside Free Zones. Dubai's higher education institutions offer a wide range of programs, including vocational diplomas and higher diplomas, and degrees at associate, bachelor, master and doctoral levels.

Dubai currently has 57 higher education institutions from which 26 are international universities, 3 federal universities, a total of 52,586 students from over 140 different countries, 56.8% are international (29,868 students) and this has created a rich and varied learning environment. In addition, there are three campuses of federal institutions for Emirati students only (Knowledge and Human Development Authority KHDA, 2014).

3.2.6 Medical infrastructure

The Medical infrastructure plays a major in the tourism sector; the focus is to attract 6 million tourists with special needs and get residents to use medical facilities.

Medical tourism exceeds US\$56 billion worldwide in 2006 and is growing at 15 percent pa according to a report by the Abu Dhabi Chamber of Commerce and Industry (Al Deen, 2007). Within the UAE it is expected to generate AED 7 billion (US\$1.9 billion) by 2010. The focus is to attract 6 million of the 600 million tourists with special needs and get residents to use medical facilities within the emirate rather than going abroad. Education is another potential area for tourism. HE Sheikh Mohammad announced an AED 37 billion fund (US\$10.8 billion) for education and knowledge-development in the region (Zawya, 2007).

In 2012, it was estimated that UAE healthcare expenditure represented about 3.8% of UAE GDP, equivalent to USD 14.2 billion or USD 1,752 per capita which is among the top 30 highest rates in the world. Private sector funding represented 25.4% of total spending in 2012 (Dubai Chamber of Commerce report, 2013).

3.2.2 Transportation

Transportation is one of the largest investment that contributed to boost tourism, according to “Dubai Civil Aviation” and DRTA Dubai Roads and transport Authority” (DCAA, DRTA 2013), Dubai International Airport DBX reported in 2013 a total flight of 373,534, with 66,496,000 passengers. Itself Emirates Airline serves 83 destinations, today Emirates is the 4th largest airline in the world (in terms of passenger traffic) with its 18th consecutive year of profit. Dubai’s open sky policies and facilities have encouraged over 112 airlines to connect via Dubai to more than 165 destinations (Emirates Airlines, 2007). Another World Central International Airport “Al Maktoum International Airport” of the new 6-runway still under construction with phase 1 fully operational. The new airport is slated to be the world’s largest airport handling 160 Million passengers by 2025.

Dubai Duty Free, people spend over US\$700 million per annum, which is the third largest in term of turnover next to Heathrow (London) and Incheon (Korea) (Retail ME, 2006a, b).

Dubai ports reported 226 vessels arrived into Dubai Ports with a total of 226,271 passengers (Dubai Ports World, 2013). Dubai also invested in the Cruise terminals to attract another type of tourists, this required new investment in cruise docks. Dubai expects to attract 1 million cruise tourists by 2020. Last year, the emirate welcomed around 400,000 cruise passengers. This year, passenger numbers are expected to grow by between five and six per cent (Bin Mejren, Gulf News, 03/2014).

The land transportation, Dubai has 1065 public buses, 103 bus routes with a total number of 116 million passengers. Dubai Metro has 52.1 Km lines lengths with 89 million passengers. Another ambitious transportation project that will boost the tourism sector is the new railway network to connect all emirates cities and GCC countries of 1200 KM.

3.2.3 Licensing and Travel agencies

The number of national and international travel agencies is increased every year, Dubai Chamber of Commerce reported that in 2013 has issued 214 new tourist licenses and 1975 renewed ones and 38 were canceled which make a total of 2189 agencies.

According to the Dubai World Trade Center (DWTC, 2013), Dubai hosted and organized 80 exhibitions and fairs, 266 conferences and meetings, 39,946 companies contributed with 1,581,401 visitors from different nationalities.

3.2.4 Telecommunications and Technology

Dubai has one of the most performing telecommunications and mobile networks. The communications and information technology sector registered a growth of 7.4%, contributing around 3.2% to the domestic product in 2012, and it is considered among the leading sectors in terms of activating the policy of diversification and the reinforcement of the foundations of the knowledge economy (Ministry Of Economy, 2013). The internet

tourism destination in the world”; other objectives are to increase the awareness of Dubai to global audiences and to attract tourists and inward investment into the emirate. It is empowered with the responsibility of organizing the tourism sector for Dubai (DTCM, 2010).

DTCM is the principal authority for the planning, supervision, implementing, and evaluating the tourism strategy of the emirate. From the literature, DTCM played a major role in the success of tourism in Dubai for the following reason: strong marketing in addition to its head office in Dubai, the DTCM has 18 overseas offices. They are located in New York, London, Paris, Frankfurt, Stockholm, Milan, Moscow, Sydney, Johannesburg, Mumbai, Beijing, Hong Kong, Tokyo, Jeddah, Riyadh and Berne. A strong regulatory board for licensing and classifying hotels, hotels apartments, tour operators, travel agents and all other tourism services, also supervising archaeological and heritage sites, also providing training programs for personnel from the tourism industry to ensure that Dubai’s tourism industry continues its world-class development with world-class people involved at all levels. DTCM also has a main role to identify, assess, manage & monitor any kinds of risks, develop programs to monitor quality, health, and environment, corporate values human resources, and customers as well as the various systems and procedures, DTCM issues legislation, instructions and policies to govern and regulate the tourism industry in Dubai.

3.2 Infrastructure

Providing a good infrastructure is the second key factor of a successful tourism. As mentioned in the introduction and overview of the tourism and travel industry, Dubai invested heavily in the infrastructure; Hotels, Airport, Land, Ports, retail (shopping centers), Financial centers, exhibition centers, specialized cities, free zones, technology and Educational and training institutions (International Universities).

3.2.1 Hotels, Restaurants, Special Centers and Resorts

Dubai success in the tourism sector is mainly because of the heavily investment in the hotels, restaurant and resorts sectors, according to the report published in February 2013 by the Dubai chamber of commerce (DCC, 2013), Dubai’s restaurant and hotel sectors were the highest growing sectors in Dubai’s economy registering 16.9% annual growth rate. The spectacular GDP growth of Dubai restaurant and hotel sector over the past few years, has led to the increase in its percentage share in Dubai’s economy increasing it to about 4.5% in 2012 compared to 3.4% in 2008.

In 2013, Dubai counted 416 hotels, 61,670 rooms and 8,641,355 guests. The total number of hotel apartments 195 in total, 22,864 flats and 2,371,132 guests. The hotels industry in 2012 generated a total output of 31 billion AED and 14 billion AED as value added (Dubai Statistics Center, 2013).

2. Key Factors of A successful Tourism Sector

In the following sections we will present in a sequential way the major factors that served as a vehicle to the development of the tourism sector in Dubai.

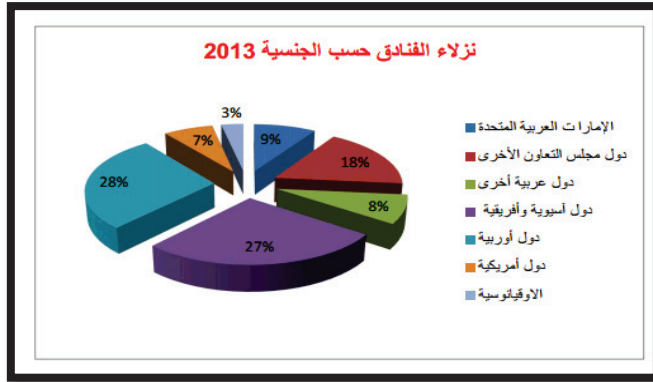
3.1 Governance, strategic planning and leadership

A long run well planned strategy is a major key for development and economical transformation, at earlier stage (1970), Dubai decide on a three strategic plan with a goal to move from away from a non- hydrocarbon to a diversified economy, Dubai had a limited supply of oil and gas reserves (1/20th the reserves of Abu Dhabi) that would run out by the beginning of the 21st century (Matly, 2007), and was determined to build an economy to survive the end of the oil boom. In my consideration, the current Dubai's success in not one of luck but a well planned three strategic road maps for a well developed economy described in the following table "Dubai Strategic Development Plan" (Dubai Economic Department, Studies and Economic Policies, 2006).

Phase 1 1996 - 2000	Phase 2 2001-2010	Phase 3 2011 - 2020
Investment driven	Investment driven	Innovation driven
Setting a policy framework to encourage investment	Expansion of regional production and the market based	Technology based activities
Upgrading of business climate	Promoting (selective) investments	Upgrading of science and technology
Improving productivity and economic diversification	Searching for skills	

One of the major goals of the strategy is to establish Dubai as a hub of trade by sea and a center of tourism and business travel by sea, air and roads. There exploiting the oil boom era, several mega projects were planned to provide a foundation to a competitive tourism sector in the world; two large ports Mina and Jabel-Ali were constructed, Jebel-Ali free zone "JAFZ", Dubai Airport with a competitive Emirates Airline and another large airport, World Trade Center, Media city, internet city, Dubai Exhibits Center the largest in middle-east, Dubai International Financial Center DIFC, Dubai Health Care City, recently Dubai is investing in Iconic high class projects such the 7-stars hotel Burdj al Arab, Khalifa Tower, Palm island, Dubailand, Several shopping malls and and 422 luxury hotels four to three stars. These projects provide a foundation to a successful tourism sector and to reach the ultimate goal "Dubai as a World Travel Hub". This shows the governance and the vision of the leadership.

For a continuous development, sustainable and long run vision of tourism in Dubai, a specialized economical entity was established in January 1997 the DTCM "Department of Tourism & Commerce Marketing" with a mission to "to position Dubai as the leading

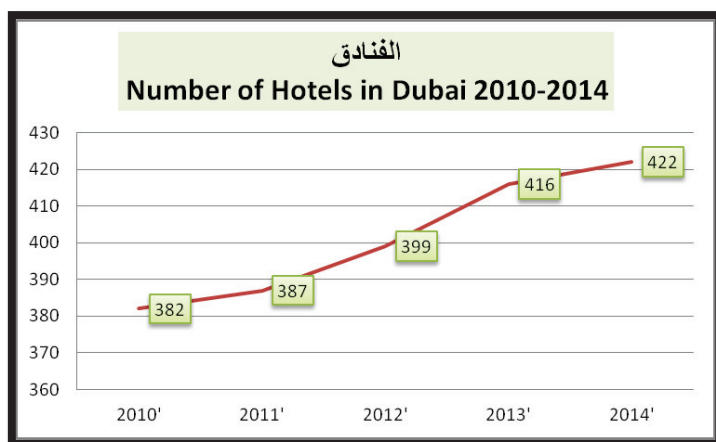


The hotel guests stayed in hotels 29,049,743 night in 2012 of which 37.8% were European, 25.7% were from Asian and African countries , 14.7% were from G.C.C countries (excluding the UAE), 7.4% from Arabs (excluding the G.C.C. countries), 6.2% were from United Arab Emirates, 5.9% were Americans and finally 1.8% from Oceania countries. The following data will describe the quality of the guests derived from the number nights stayed in high class hotels⁴.

We can see from the above table that a large number of guests used 5-stars hotels that show the quality of guests; guests at 5-stars hotels were 39.7% of the total, followed by 26.2% at 4-star hotels and 17.8% at three 3-stars hotels.

The total number of hotel apartments in 2012 was 200 building contained 23,069 apartments with occupancy rate of 77.2%. The number of guests at hotel apartments was 2,134,045 guest in 2012 stayed a total of 11,442,350 nights, 29.5% were G.C.C. (excluding the UAE), 24.9 % were Asian and African countries, 18.8 % were European, 12% were the from United Arab Emirates, 7.3% were Arabs countries (excluding G.C.C. countries), 5.5% were Americans, finally 1.7% were from Oceania countries.

المجموع Total	مدرجة Listed	نجمة 1-Star	نجمتان 2-Star	ثلاث نجوم 3-Star	أربع نجوم 4-Star	خمس نجوم 5-Star	البيان
416	18	122	50	66	83	77	عدد الفنادق
61,670	463	4,606	4,962	9,016	16,411	26,121	عدد الغرف
80	68.6	73.5	81.5	83.2	83	78.1	إشغال الغرف %
8,641,355	57,955	713,369	641,764	1,541,879	2,260,981	3,425,407	عدد النزلاء
29,049,743	199,364	2,072,730	1,990,652	4,359,670	8,364,855	12,062,472	ليالي الإقامة



2.2 Main Indicators

The total number of hotels in the Emirate of Dubai was 422 hotels in 2014 with a total number of rooms 62,726 and an average occupancy rate of 86%.

The total number of guests at Emirate hotels was 8,641,355 guest in 2013 of which 28.4% were European, 28 % were from Asian and African countries, 17.5% were from G.C.C. countries (excluding the UAE), 9.2% were from United Arab Emirates, 7.5 % were Arabs (excluding the G.C.C. countries), 7.2 % were American and finally 2.5% from Oceania countries.

مركز دبي للإحصاء
Dubai Statistics Center

الفنادق ومتوسط الإشغال للغرف - إمارة دبي
Hotels and Occupancy Average of Rooms - Emirate of Dubai
(2010- 2012)

جداول (12 - 04) Table (12 - 04)

البيان	2010	2011	2012	2013	Title
عدد الفنادق	382	387	399	416	Number of Hotels
عدد الغرف	51,115	53,828	57,345	61,670	Number Of Rooms
الغرف المشغولة	35,780	39,833	44,729	48,103	Occupied rooms
إشغال الغرف %	70.0	74.0	78.0	80.0	Room Occupancy %

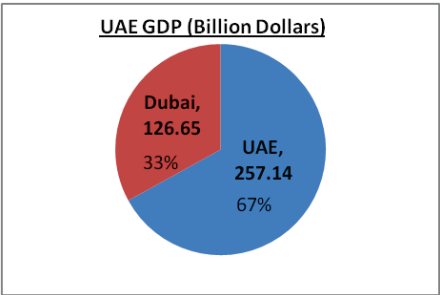
المصدر: دائرة السياحة والتسويق التجاري

Source : Department of Tourism & Commerce Marketing

will reach AED 858 billion by 2016 (United Arab Emirates Ministry of Economy, Annual Economic Report, 21st issue, 2013).

Dubai played an important role in the achievement of the UAE economy growth and global competitiveness; because of the research topic of this paper we will just shed light on the tourism sector.

At glance, Dubai contributes with a considerable amount of 33% to the national UAE GDP 464.80 billion AED (126.65 billion \$). Dubai's economy expanded 4.6 per cent year on year in 2013, Dubai tourism now contributes more than oil to the Emirate's GDP. The International Monetary Fund (IMF) and the Institute of International Finance (IIF) have forecast Dubai's GDP growth in excess of 5 per cent in 2014.



The DSC3 report showed that the fastest growing sector in Dubai in 2013 was once again hospitality, which recorded 13 per cent growth, the third consecutive year of double-digit growth in this sector.

2.1 Overview of Dubai Tourism Infrastructure

Before we present the key success factors of the tourism sector in Dubai; having on overview and insight on the types of hotels, number of tourists, countries and services.

If we look at Dubai's hotel infrastructure, we notice that visitors have a wide range of choices since all global hotel chains own or operate hotels in Dubai .It is not the number of hotels that attract visitors but the very high service quality and standards provided by these hotels. Dubai is also famous for being a shopper's paradise and caters for all tastes and budgets through its shopping centers, in addition to its parks and various gardens in different parts of the emirate. Dubai is also renowned for holding periodic shopping festivals and international exhibitions for different activities. The number of hotels in Dubai increased from 387 hotels in 2011 to 399 hotels in 2012, or at 3.1% increase rate with a corresponding increase in the number of rooms and beds

credibility of security services, and the ethical conduct of companies, the following table Competitiveness Index (2011-2013) shows few other indexes where UAE ranked high.

Competitiveness Index (2011 – 2013) ¹		
index	2011/2012	2012/2013
Institutions	22	12
Infrastructure	8	8
Macroeconomic Environment	11	7
Health and Primary Education	41	37
Technological Preparedness	30	32
Innovation	28	28
Innovation and Factors of Sophistication	27	25

¹ Global Competitiveness Reports 2011/2012, 2012/2013, World Economic Forum.

The tourism sector is considered among the important sectors of the national economy; Based on the World Travel & Tourism Council (WTTC), in 2012 the estimated total value added generated by the UAE travel and tourism sector either directly or indirectly, reached about AED 193.6 billion (52.75 billion \$) , approximately accounting for 14.3% share of GDP. The UAE travel and tourism sector value added percentage share is expected to reach about 16.4% of total GDP and to register an average annual growth rate of 5%, to reach AED 325.4 billion (88.66 billion \$) by 2023. The UAE travel and tourism sector is expected to create 245,000 jobs directly by 2023, registering an annual growth rate of 4.1%, according to the latest research analysis released by Dubai Chamber of Commerce and Industry.

This achievement was made possible by the attractiveness of the UAE as tourism destination alongside a number of strategic projects which have been implemented or are being implemented in all across the country. Moreover, the sector is known for the availability of hotels, restaurants, hotel apartments and quality resorts which have become its important pillars. In this context, UAE aims to attract 15 million tourists by 2020 and the World Travel and Tourism Council estimates that the total tourism investments in the UAE

1. Dubai Tourism and Travel Industry

Before we discuss the important factors that contributed to the success and growth of the tourism sector and to have a better understanding of this sector; we briefly introduce the macroeconomic environment of UAE and other economical indicators that show the positive status of the tourism sector in UAE and in Dubai in particular.

The economy of the United Arab Emirates is the second largest in the Arab world (after Saudi Arabia), with a gross domestic product (GDP) of \$377 billion (AED1.38 trillion) in 2012. The United Arab Emirates has been successfully diversifying its economy, 71% of UAE's total GDP comes from non-oil sectors¹

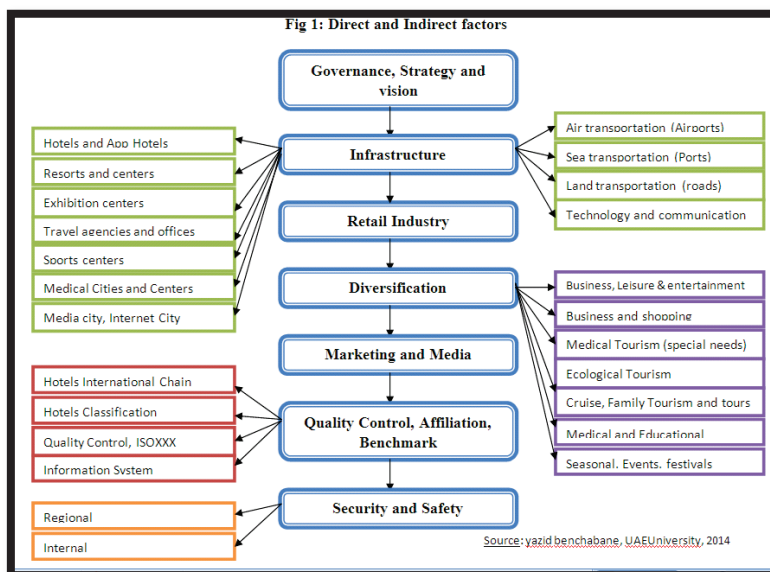
UAE has the most diversified economy in the Middle East and in the world; according to IMD World Competitiveness Centre Index they ranked UAE as the 26th most diversified economy in the world², and 24th among 144 countries in 2013 in the global competitiveness. Since independence in 1971, United Arab Emirate's (UAE) economy has grown by nearly 231 times to AED1.41 trillion in 2013. The non-oil trade has grown to AED1.2 trillion, a growth by around 28 times from 1981 to 2012. The economy of the UAE is endowed with positive characteristics which have contributed to the strong growth rates, the creation of a stable fiscal and financial sector, and an attractive investment climate. In addition, the economy enjoys low inflation rates, which amounted to 0.66% in 2012, and stable political and economic conditions which have helped drive the various economic sectors forward towards greater progress (Annual Economic Report 2013, 21st issue, Ministry of Economy, UAE).

In addition to the above macroeconomic indicators, we can cite others sub-indicators that have a positive impact of the tourism sector in UAE. United Arab Emirates achieved eighth position in the infrastructure index due to the excellence in the quality of the air, sea and land transport infrastructure, electricity services, cellular phone service, and the high standard of the infrastructure in general. Other factors include the insignificant presence of organized crime, government procedures that are not cumbersome, the

billion (52.75\$ billion) approximately accounting for 14.3% share of GDP, Dubai generated AED 127.77 billion (22.98\$ billion).

In this paper, we will focus on the key factors that contributed to the growth of the Tourism sector in Dubai Economy. We found several factors but we will present only the ten key factors that we think are the most important for the growth and successful modern tourism sector. The sequence of the presentation of the key factors is intentionally from the ones with high impact to lesser even though that they all interrelated; these factors ranging from strategic, organizational, financial, infrastructural, economical to technological factors; The first factor that highly contributed to the success of the tourism sector is the vision and leadership of Dubai government by heavily investing in this sector (diversification strategy away from hydrocarbon sector) by creating a specialized economical entity the DTCM “Department of Tourism & Commerce Marketing” responsible for the implementation of the Dubai global tourism strategy since 1997 and direct responsible of the success of this sector. The next important factors after the leadership and governance are; infrastructure development (hotels, transport, banks and exchange offices, gastronomy, iconic resorts, world class attractions park, and communication), diversification of the sector (leisure, business, family, medical, educational and Halal tourism), affiliations and partnerships with international organizations, strong marketing strategy, security, Technology, qualified workforce, training and professional development programs and finally the quality control and continuous improvement of the touristic products.

The important factors are summarized in the following figure (Fig 1).



Abstract

The tourism sector is one of the most important economic sectors which experienced a dramatic growth in Dubai and has been driven by several factors that will be presented and discussed in details in this paper. The tourism sector in UAE United Arab Emirates plays a vital role in the growth of the economy; UAE is ranked the 28th among 139 countries and 1st in the Middle East in the World Economic Forum's "Travel & Tourism Competitiveness Report 2013", Dubai contributes by 33% to the UAE GDP and Tourism represents 66% of the UAE's tourism economy [Dubai Chamber. 2014]. Another fact, in 2012 the estimated total value added generated by the UAE travel and tourism sector either directly or indirectly, reached about AED 193.6 billion (52.75\$ billion) approximately accounting for 14.3% share of GDP, Dubai generated AED 127.77 billion (22.98\$ billion). The goal of this paper is to present in details the key factors that contributed to the success and growth of Dubai Tourism sector, any developing country can benefit from this experience despite that Dubai faces several challenges such as it's a foreign labor dependent, hot climate and high cost of living, we think that Algeria is one of the countries that have the potential, similar opportunities and economical strategy (to be less reliant on hydrocarbon sector) to reach that success and growth in the tourism sector. In the first section we will present an overview of the macroeconomic indicators of Dubai economy in UAE, followed by an overview of the Tourism and Travel industry and its impact on the national economy and finally the key factors of the Tourism success in Dubai and how Algeria can benefit from it. Our research is based on secondary research; we were surprised to find a lack of the literature and comprehensive researches on this topic, that's why we will rely on secondary data from national and international governmental agencies, data from available research papers and interviews of representatives from Dubai Government media centers.

Key words: Tourism, Tourism in Dubai, DTCM, Green Tourism, Tourism diversification.

Introduction

The tourism sector is one of the most important economic sectors which experienced a dramatic growth in Dubai and has been driven by several factors such as its strategic geographic location situated between Europe, Asia and Africa excellent infrastructure, proactive economic policies, clean beaches, sunshine throughout the year and its mild winter season especially for visitors from western countries to enjoy coastal areas and archeological sites. Although tourism represents only 2.5% of recorded GDP, it has a profound impact on retail sales and transportation, which together represent some 44% of recorded GDP; in other words, tourism generates a powerful multiplier effect on the economy [N. Saadi, F. Scacciavillani, 2013]. According to data by Dubai Chamber, the UAE United Arab Emirate's tourism sector is expected to grow by 6.5 per cent annually between 2011 and 2021. The reader might ask why we focus on Dubai tourism and not United Arab Emirates, UAE is ranked the 28th among 139 countries and 1st in the Middle East in the World Economic Forum's "Travel & Tourism Competitiveness Report 2013", but Dubai represents 66% of the UAE's tourism economy [Dubai Chamber. 2014]; Another fact, in 2012 the estimated total value added generated by the UAE travel and tourism sector either directly or indirectly, reached about AED 193.6

The Key Factors of a Sustainable and Successful Tourism Sector, The Case of Dubai

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ملخص:

قطاع السياحة واحدًا من أهم القطاعات الاقتصادية التي شهدت نموًا و نجاحًا كبيرين في دبي، وهناك العديد من الدوافع والعوامل التي أسهمت في هذا النجاح منها: العوامل الإستراتيجية، والعوامل التنظيمية، والعوامل الاقتصادية و العوامل التكنولوجية.

وفي هذه الورقة سيتم التركيز على أهم تلك العوامل، تمهيدًا لعرضها ومناقشتها بالتفصيل في الفقرات التالية. ويلعب قطاع السياحة في الإمارات العربية المتحدة دورًا حيويًا في نمو الاقتصاد، كما تحتل دولة الإمارات العربية المتحدة المرتبة الثامنة والعشرين (28) من بين مئة وتسع وثلاثين (139) دولة، والمرتبة الأولى في الشرق الأوسط (المنتدى الاقتصادي العالمي للسياحة والسفر / تقرير التنافسية 2013م، وتمثل دبي 66% من اقتصاد السياحة في دولة الإمارات العربية المتحدة (غرفة دبي. 2014).

وقد بلغت القيمة المضافة الإجمالية، المقدمة بشكل مباشر أو غير مباشر، لقطاع السياحة والسفر لدولة الإمارات العربية المتحدة، في عام 2012م، نحو 193.60 مليار درهم (52.75 مليار دولار)، وهو ما يعادل تقريبًا نسبة 14.3% من الناتج الإجمالي المحلي، وساهمت دبي بقيمة 127.77 مليار درهم (22.98 مليار دولار) منها، وهو ما يمثل 45%.

والهدف من هذه الورقة هو عرض تفصيلي للعوامل الرئيسية التي ساهمت في نجاح قطاع السياحة في دبي ونموه، على الرغم من أن دبي تواجه العديد من التحديات مثل المناخ الحار، واعتمادها على العمالة الأجنبية، وارتفاع تكلفة المعيشة. ويمكن لأي دولة نامية أن تستفيد من هذه التجربة، ونعتقد أن الجزائر هي واحدة من البلدان التي لديها إمكانات، وفرص استثمار، وإستراتيجية اقتصادية مماثلة (أقل اعتمادًا على قطاع النفط والغاز) للوصول إلى هذا النجاح والنمو في قطاع السياحة. في القسم الأول هذه الورقة سوف نقدم لمحة عامة عن مؤشرات الاقتصاد الكلي لاقتصاد دبي في دولة الإمارات العربية المتحدة، تليها لمحة عامة عن صناعة السياحة والسفر وتأثيرها في الاقتصاد الوطني، وأخيرًا العوامل الرئيسية لنجاح السياحة في دبي وكيف يمكن للجزائر أن تستفيد من هذه التجربة. ونقوم منهجية البحث على الاستناد إلى الأبحاث والمعطيات الثانوية؛ لقلة الأبحاث الشاملة حول هذا الموضوع، وهذا هو السبب في أننا سوف نعتمد على البيانات الثانوية من وكالات حكومية وطنية ودولية وبيانات أخرى من الأوراق البحثية المتاحة، مع التركيز على مقابلات مع ممثلين من المراكز الإعلامية لحكومة دبي.