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# Destination Competitiveness: A Comparative Study of Hong Kong, Macau and Singapore

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# DESTINATION COMPETITIVENESS: A COMPARATIVE STUDY OF HONG KONG, MACAU, AND SINGAPORE

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This article presents a comparative study of the destination competitiveness of Hong Kong, Singapore, and Macau and those strategies developed to enhance their future positions in the global destination "marketplace." The methodology adopted is secondary in nature in that a critical review of the existing literature was conducted along with a synthesis of current practices across the three city-state destinations. The 15 Cs Framework provides the research parameters for the study in that it advocates an inclusive approach to those challenges and opportunities facing destinations as they seek to enhance their overall competitiveness. In particular, the study explores the specific approaches of the three destinations in terms of their similarity to thematically grouped clusters of the 15 Cs. The article closes by highlighting particular opportunities and challenges and potential management approaches that could be adopted within the destinations for the future.

Key words: Hong Kong; Singapore; Macau; Visitor attractions; Destination management

## Introduction

In recent years Southeast Asia has been transformed by a combination of economic expansion, globalization, universal connectivity, and social adaptation (Bhosale & Gupta, 2006). Subsequent increases in intra-Asian travel have contributed to the city states of Hong Kong, Singapore, and Macau becoming leading tourism destinations (Dioko & So, 2012; Henderson, 2002; G. Li, Song, Cao, & Wu, 2013; Tse, 2001; P. Y. K. Wan & King, 2013; Zeng, Prentice, & King, 2014). As such, each is keenly marketing their destinations' features and product, service, and experience portfolios to maintain a competitive edge in the marketplace. Competitiveness in the context of destinations refers to the means by which the component parts of the destination are brought together to deliver the tourism "product" or "experience" (Fyall, 2011). As such, destination competitiveness represents a combination of comparative advantage and competitive advantage with Ritchie and Crouch (2003) arguing that together the destination's "comparative advantages and its competitive advantages in tourism, create its overall ability to compete in the tourism marketplace and, ultimately, its ability to reach the

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levels and types of success that it realizes in the tourism field" (p. 328).

In the specific geographical context of Southeast Asia, this study thus examines the destination "endowment" in each of the three destinations of Hong Kong, Singapore, and Macau and those management approaches that could be adopted to ensure survival in the competitive international destination "marketplace." It is interesting to note that despite the documented growth of tourism in the settings of Hong Kong, Singapore, and Macau, limited research has been undertaken to date of a comparative nature. That said, some authors have made comparisons between Hong Kong and Singapore as competitive destinations, albeit with Singapore's visitor attractions frequently considered from the perspective of heritage management (Henderson, 1999, 2002, 2007a, 2010; G. Li et al., 2013) and theme parks (Hashim & Said, 2013) while others have focused solely on strategic development (Meng, Siriwardana, & Pham, 2013). Existing research into Macau's tourism industry, meanwhile, has tended to focus on the achievement of a balance between its casinos and gaming industry and its status as a United Nations Educational, Cultural and Scientific Organization (UNESCO) World Heritage Site (Dewar, du Cros, & Li, 2012; Dioko & So, 2012; C. H. Huang, Tsaur, & Yang, 2012; Y. Wan & Li, 2013; Zeng et al., 2014) with a more recent article exploring resident attitudes toward tourism development (X. Li & Wan, 2013). Further studies on Hong Kong have primarily referred to the management of its cultural and heritage attractions and the classification, behavior, and preferences of their visitors, as well as general tourists to the region (Heung, Tsang, & Chen, 2009; McKercher & Ho, 2006; McKercher, Ho, & du Cros, 2004; Wang, 2004).

Notwithstanding, this article presents a comparative study of the destination competitiveness of the three city-state destinations of Hong Kong, Singapore, and Macau. A comparison of their destination features and responses to the operating environment allows the identification of aspects of convergence and divergence that can then be used to identify broader underlying and resultant trends that might be relevant for other destinations. The methodology adopted is secondary in nature in that a critical review of the existing literature was conducted along with a synthesis of current practices across the three destinations. The 15 Cs Framework, first advanced by Fyall, Garrod, and Tosun (2006), provides the research parameters for the study in that it advocates a holistic and inclusive approach to those challenges and opportunities facing destinations as they seek to enhance their overall destination competitiveness. In particular, after an introduction to the three destinations and the 15 Cs Framework, the study explores the specific approaches of each destination in terms of their similarity to thematically grouped clusters of the 15 Cs of relevance to their geographic and tourism context. It closes by highlighting particular opportunities and challenges and potential management approaches that could be adopted within the destinations in the near and more distant futures.

### *Hong Kong, Singapore, and Macau: The Case for Comparison*

Hong Kong, Singapore, and Macau were selected for the basis of this study for a variety of reasons. For the most part, all three destinations share similar favorable strategic geographic locations (at the gateway to Southeast Asia and the crossroad between Australasia and Europe), a similar cultural context, and a colonial historical legacy which, for the most part, has contributed to stable political and social systems coupled with language and cultural diversity. With each demonstrating a lack of abundance of natural resources, the need for manufacturing and export-driven economic activity (including tourism) was a necessity for growth (Horng & Tsai, 2012). Likewise, each has implemented, albeit to varying degrees, active tourism policies with tourism per se being used as a key driver for economic growth (Henderson, 2010; Meng et al., 2013) with public government sector support and investment considerable in each of the three destinations. Although not specific to the three chosen destinations, Kozak, Baloglu, and Bahar (2010) argue that destination competitiveness should in fact be examined through more comparative studies, with a preference for more than two destinations providing a more robust and worthwhile outcome. A similar message was communicated in the study by Enright and Newton (2005), albeit with the use of Hong Kong, Singapore, and Bangkok, and the more recent study by Leung and Baloglu (2013), which compared and contrasted 16 destinations across the Asia Pacific region.

In view of the above, the destinations of Hong Kong, Singapore, and Macau are increasingly viewed as key competitors with each other (G. Li et al., 2013) while each share similar origin markets with visitors from mainland China—a key market for all three. With regard to actual visitor markets and numbers, three quarters of Hong Kong's and two thirds of Macau's tourism and visitor market originate from mainland China while in Singapore mainland China accounts for approximately 15% in 2013 with ASEAN (Association of Southeast Asian Nations) countries collectively accounting for two fifths (Department of Statistics Singapore, 2014; Hong Kong Tourism Board, 2014a, 2014b; Hong Kong Tourism Commission, 2014; Macau Government Tourist Office, 2014b; Singapore Tourism Board, 2014). Hong Kong and Macau are also the top two destinations for outbound mainland Chinese tourists, with Singapore 11th (China Outbound Tourism Quality Service Certification, 2014). All three have relatively short average lengths of stay for all visitors, with 3.4 days, 3.5 days, and 1.9 days, respectively, for Hong Kong, Singapore, and Macau. Table 1 presents the average length of stay and top five visitor markets for Hong Kong, Singapore, and Macau, thus illustrating some features of their common market positions and value for purposes of comparative research.

Table 1
Average Length of Stay and Top Five Visitor Markets for Hong Kong, Macau, and Singapore in 2013

| Destination/Markets | % of Total |
|---|---|
| **Hong Kong (average length of stay: 3.4 days)** | |
| Mainland China | 73.72% |
| South & Southeast Asia | 8.09% |
| Europe, Africa, & Middle East | 4.29% |
| North Asia | 3.92% |
| Taiwan | 3.51% |
| **Macau (average length of stay: 1.9 days)** | |
| Mainland China | 63.50% |
| Hong Kong | 23.10% |
| Taiwan | 3.01% |
| Republic of Korea | 1.60% |
| Malaysia | 1.00% |
| **Singapore (average length of stay: 3.5 days)** | |
| ASEAN[a] | 39.60% |
| Mainland China | 14.58% |
| Australia | 7.22% |
| India | 5.75% |
| Japan | 4.86% |

Source: Department of Statistics Singapore (2014); Hong Kong Tourism Board (2014a, 2014b); Hong Kong Tourism Commission (2014); Macau Government Tourist Office (2014b); Singapore Tourism Board (2014).
[a]ASEAN is the Association of South East Asia Nations and includes the 10-country political association of Brunei, Cambodia, Indonesia, Philippines, Laos, Malaysia, Myanmar, Singapore, Thailand, and Vietnam.

To maintain its competitive advantages and realize sustainable success over the long run, Hong Kong was advised, and is arguably obliged, to respond to increasing challenges from its neighboring competitors in the region, and in particular Singapore and Macau. In particular, Enright and Newton (2004) comment that "given its comparable role as an economic gateway for part of the region, and similar size, it was not surprising that Singapore would emerge as Hong Kong's principal competitor" (p. 782). Finally, although being virtually dominated by its gambling industry, Macau has recently come to realize the necessity of promoting business tourism and the MICE (Meetings, Incentives, Conferences, and Exhibitions) industry to develop itself as "a comprehensive and relaxing holiday destination, luring different kinds of tourists with large varieties of leisure activities and entertainment" (Pao, 2004, p. 92; see also McCartney, 2013). In empirical tourism demand models, both Singapore and Macau are often regarded as substitute destinations of Hong Kong, with their price levels often used (along with those of South Korea) to form the aggregate substitute price for Hong Kong's tourism (see, e.g., Song, Li, Witt, & Fei, 2010).

### *The 15 Cs Framework*

Rather than present an empirical investigation of the competitiveness of destinations similar in nature to recent studies by Leung and Baloglu (2013) and Dwyer, Cvelbar, Mihalič, and Koman (2014), this study sought to identify a suitable holistic framework to present the wider challenges and opportunities seeking a response from destinations. First developed by Fyall et al. (2006), the 15 Cs Framework came about in response to "academic and practitioner frustration over a number of years in trying to present the challenges and opportunities facing destinations in a more unified manner" (Fyall, 2011, p. 341). Its inclusive nature has contributed to its popularity in recent studies (see, e.g., Hosany & Gilbert, 2010; Neuhofer, Buhalis, & Ladkin, 2012; Staszewska & Zemla, 2013) while it has helped overcome the "piecemeal approach" to much similar research in the past (Harrill, 2009). Underpinning its development is the growing corpus of literature on destination marketing and management with early conceptual studies, studies on environmental impacts, destination types, image and perception, consumer behavior, and destination marketing and branding all contributing to its initial conception. Although lacking the empirical rigor of the models advocated by Leung and Baloglu (2013) and Dwyer et al. (2014), a key and flexible feature of the Framework is that "the degree of importance of each of the 'Cs' will vary according to the type and location of the destination in question" (Fyall, 2011, p. 343). This in-built flexibility is consistent with the concerns expressed by Crouch (2011) with the use of quantitative data to measure destination competitiveness, with Dwyer and Kim (2003) also confirming that "there is no single or unique set of competitiveness indicators that apply to all destinations at all times" (p. 399). As such, although acknowledging that each "C" is of significance, reflections and revisions of the initial Framework by Fyall (2011) suggest that the significance and value of each "C" will very much depend on the specific destination context with thematically grouped clusters of the 15 Cs providing a more critically robust analysis of each destination rather than adherence to a rigid and prescriptive "shopping list" approach where some, or even many, of the Cs will be of limited relevance. In the context of this study, those six thematically grouped clusters of relevance to Hong Kong, Singapore, and Macau are: crisis and complacency; complexity, community, control, and collaboration; customers and change; cocreation and culture; competition, commodification, and consolidation; creativity, communication, channels, and cyberspace.

## Challenges and Opportunities Facing Hong Kong, Singapore, and Macau

### *Crisis and Complacency*

In today's climate of global recession and financial instability, *crises* and fear of crises predominate across the tourism industry. In the face of such challenges, destinations should adopt a holistic approach to management, with defined stakeholder coordination and connectivity to counteract the resulting stagnating effect on demand from core markets (Speakman & Sharpley, 2012). Destinations should also be aware of *complacency* as crises affect demand with potentially negative implications for existing, core, and/or repeat visitors.

Despite continuing world-wide financial concerns, Hong Kong, Singapore, and Macau today remain among the most vibrant and open destinations in Asia. Each destination has witnessed exponential growth in visitor numbers in recent decades (Chang & Yeoh, 1999; S. Choi, Lehto, & Morrison, 2007; Tse, 2001; Wong & Kwan, 2001), although this has not always been the case in the region. Unfortunately all three destinations were profoundly impacted by the Asian financial crisis in the late 1990s. This was soon followed by the natural crisis of SARS (Severe Acute Respiratory Syndrome) in 2002–2003 (see Kuo, Chen, Tseng, Ju, & Huang, 2008). These factors, and widespread fear of their effects, had shattering consequences upon the developing tourism industry throughout Southeast Asia. There were devastating implications to both inbound tourism and jobs in these regions. Nevertheless, recovery was unexpectedly swift, visitor numbers improved, and ever since numbers have steadily increased throughout Hong Kong, Singapore, and Macau (Pine & McKercher, 2004).

Although growth continues apace across the region, the ongoing global financial crisis is of concern. For, although the tourism industries in Hong Kong, Singapore, and Macau remain buoyant for now, it is essential that destination marketing organizations (DMOs) and other destination management stakeholders are not complacent and remain fully aware of the imminent challenges and opportunities facing them in their continued development and future competitiveness (Dwyer, Edwards, Mistilis, Roman, & Scott, 2009). More than anything else, perhaps, is the need to continually track the changing needs, wants, desires, and expectations of the inbound market from mainland China as their patterns of behavior will eventually change with growing experience of outbound travel and other international destinations.

### *Complexity, Community, Control, and Collaboration*

The inherent *complexity* of destinations as "product" offers is symbiotic with multifaceted issues of management *control*. There is thus a need for managers to be innovative, flexible, and to practice market responsiveness. This complexity and control dichotomy is synonymous with *collaboration* within and across destinations as an approach to bringing together key partners and stakeholders to compete by offering integrated marketing mixes and delivery systems (Fyall, Garrod, & Wang, 2012). In practice the three destinations operate distinct management approaches and systems within their respective tourism industries. Much of this can be attributed to their differing economic bases (i.e., while Hong Kong and Singapore are built on financial, real estate, and service sectors Macau is more heavily reliant on tourism, hospitality, and gaming with over one third of the working population employed in these sectors) and their contrasting approaches to government and civil society more broadly (Li & Wan, 2013) with varying levels of *community* engagement evident.

Many attractions within each destination are currently managed on individual basis, but there is evidence of collaboration as DMOs enter into strategic partnerships with other organizations. In addition, collaboration with distribution channels can provide a competitive edge for destinations as they seek to become innovators rather than laggards in the use of destination management systems. Evidence of collaboration and use of channels is seen in Singapore through the Association of Singapore Attractions (ASA), which was established in 1992. The ASA represents the umbrella organization tasked with representing the interests of Singapore's attractions on a collective basis, while encouraging cooperation and collaboration among its 50 members. Similarly, the Hong Kong Association of Amusement Parks and Attractions, a subsidiary of the International Association of Amusement Parks and Attractions, was established recently in 2012, with founding members being some of Hong Kong's most established attractions. Interestingly, Macau presently does not have its own collective and collaborative attractions management association and its tourism planning is more centralized (Wan & King, 2013).

### *Customers and Change*

These interrelated factors are focused upon contemporary *customers* of destinations and the recognition of the role of experiential marketing. Related to visitor experience, and seen in the characteristics and preferences of new market segments, is ubiquitous *change* within destinations and consequent pressure to respond to this through modification and customization of existing products and services. *Change* is thus a constant for those marketing and managing destinations. The most significant inbound visitor market by a considerable margin to Hong Kong is that of mainland China as discussed earlier. Mainland Chinese visitors are primarily motivated by shopping in Hong Kong, driven by the availability of well-known branded goods (S. Huang & Hsu, 2005). Much of the existing research into the "new" Chinese tourist and consumer supports this, arguing that China's economic reform and move to its market economy during the late 20th century provided opportunities for China's population to be reborn as consumers. Despite the leading motivating force of retail for these particular visitors to Hong Kong, this market is also drawn by visitor attractions. Ocean Park, (the Asian theme park), is ranked third, one item above branded goods; and the Harbour view and Victoria Peak rated 12th under the category of "sightseeing" with (then recently opened) Hong Kong Disneyland at number 27 (S. Huang & Hsu, 2005). As with Hong Kong, the most significant country of origin for Macau's visitors is mainland China. As a city unique in its blend of Asian and European heritage and architecture, Macau's tourism numbers have sustained large rates of growth (Pao, 2004) as have Singapore's visitor numbers, albeit from a different market composition.

A more recent study by Zeng et al. (2014) provides a contemporary critique of the mainland Chinese market for Hong Kong and Macau with the study distinguishing between gambling and nongambling visitors. Interestingly, gambling visitors to both destinations from mainland China share similar characteristics in that they are primarily male, middle aged, and married, with the majority lacking a university degree. The authors also found a surprisingly high percentage who were either self-employed or held sales positions. In contrast, nongambling visitors to the two destinations are primarily middle aged, single females with much higher levels of education than their gambling counterparts. Interestingly, although partaking in gambling activity many of those gambling visitors to Macau expressed that they were primarily visiting for purposes of "vacation and leisure," possibly explained by the lack of confidence in stating that they were explicitly in Macau to gamble. Zeng et al. (2014) suggest that respondents "may be cautious about revealing their true motives because of concerns about how information provided in response to surveys may be used" (p. 110). The authors also conclude that Macau needs to consider whether it is "positioned exclusively as a gambling destination or as a place of entertainment catering to diverse visitors interested in both gambling and non-gambling activities?" (p. 109).

### *Cocreation and Culture*

In reviewing the characteristics and motivations of different customer segments of these three destinations, there exist some elements of concern with regard to the visitor experience and *cocreation*. The government and civic-run tourism offices in each destination have to varying extents adopted branding strategies that encourage the cocreation of experiences. For example, while the Official Singapore Tourism promotes "Your Singapore" brand (Henderson, 2007b; Singapore Tourism Board, 2011), Hong Kong Tourism Board encourages visitors to "Discover Hong Kong" by experiences and planning of trips (Hong Kong Tourism Board, 2014a). The Macau Government Tourism Office, meanwhile, encourages visitors to "Experience touching moments" (Macau Government Tourism Office, 2014a). Interestingly, research suggests that first-time tourists to Hong Kong will travel extensively throughout the region and visit large "icon" tourist attractions, such as the Victoria Peak. Conversely, repeat visitors tend to consume local and life-related activities in the form of shopping, gastronomy, and spending time with family and friends, and are likely to remain in the Hong Kong for longer (Wang, 2004). This suggests that because first-time visitors may be more motivated and likely to travel to visitor attractions across the different regions of Hong Kong, due to their higher levels of curiosity about the destination, then the visitor attractions of Hong Kong are more appealing to first-time visitors. Further, and of some consideration, are the indications that although visitor numbers to Hong Kong are increasing, the ratio of repeat to first-time visitors has grown even more. This trend raises questions about the continuing commercial sustainability of destination marketing strategies based upon the development of such visitor attractions.

In considering *culture*, McKercher et al. (2004) examine the popularity of the cultural attractions of Hong Kong based upon five attribute categories, namely: product, experiential, marketing, cultural, and leadership elements. Given it is thought that repeat visitors to Hong Kong are more engaged with shopping and spending time with friends than visiting cultural attractions then it would appear that the three factors of product, experience, and marketing are vital considerations in attracting both first-time and repeat customers (McKercher & Ho, 2006; Wang, 2004).

In terms of managing change and the visitor experience Henderson (2006, 2007a) comments on the planning process of the development of new modern, multipurpose visitor attractions in Singapore, including the introduction of casinos, and specifically the development of the Marina Bay Sands Integrated Resort. She suggests that due to the limitations of Singapore's natural and cultural resources as a small urbanized state that there is a need to search for new directions for tourism expansion. Integrated resorts within the context of Singapore are further discussed as a growing trend across the Asia-Pacific region, and similarly the popularity and competitive development of giant observation wheels such as the Singapore Flyer (Henderson, 2010). Resorts World Sentosa and Universal Studios Singapore are further described here as relevant examples of the Singapore government "taking the lead in shaping tourism and facilitating realisation of its ambitious visions for the future of the city state as a destination, and these are signs of perceptions of the appeal of large and expensive attractions and their catalytic role in long-term tourism growth" (Henderson, 2010, p. 257).

With regard to tourism in Macau, much of the sourced literature is focused upon two particular aspects. The first significant strand of literature is based around gaming and casinos in the context of tourism. The second major tourism aspect discussed in the literature, and similar to neighboring Hong Kong, is concerned with heritage and cultural tourism. In attempting to identify how tourism in Macau is represented within marketing communications, and the balance between the casinos industry and other attractions, S. Choi et al. (2007) analyze a series of tourist-industry produced online information sources using both qualitative and quantitative methods. From their analysis of a series of websites, brochures, and blogs, they report that the image projected by Macau's tourism organizations is not purely as a gaming destination. This is despite the physical pervasiveness of casino–hotel integrated resorts and the evidence of its popularity with visitors. Rather, the projected image of Macau as a tourism destination is multiple, depending upon target audiences and communications objectives. Indeed, some tourism organizations (such as MGTO) appear to avoid placing a great emphasis upon the casinos industry as an attraction for visitors. These organizations instead highlight the image of Macau as a heritage city focused around its built attractions and Chinese and Portuguese history. For example, "it can be inferred that Macau is being projected as a city destination that has many old buildings and heritage/historical attractions" (S. Choi et al., 2007, p. 123). After preparing to apply for recognition by raising public awareness of its unique culture (Pao, 2004) in 2005 the "Historic Centre of Macau" was recognized as a UNESCO World Heritage site (Io, 2011; Ung & Vong, 2010). Its designation as such a site is today described on the UNESCO website as being because of its unique Portuguese and Chinese buildings suggesting both East and West aesthetics, cultural, architectural, and technological influences (UNESCO, 2011).

Despite the perceived popularity of gaming in Macau, recent research suggests that today the cultural and heritage attractions of Macau are proving popular with visitors. Lam and Vong's (2009) study supports P. Y. K. Wan and Cheng's (2011) findings that culture and heritage are stronger motivating factors to visiting Macau than casinos and gaming. Similarly, a recent consideration of the experiences of tourists visiting the Historic Center purports that the international recognition bestowed by UNESCO "has strengthened Macau's historical appeal as well as giving the city a facelift as a diversified tourism destination encompassing heritage offerings with gaming entertainments" (Ung & Vong, 2010, p. 157). The authors continue in a similar vein to du Cros (2009), however, by suggesting that the two major tourism products of Macau—casinos and cultural tourism—remain incompatible, suggesting that there should be further consideration into potential overlaps. At the same time, the authors describe recent examples of public resentment directed at the Macau government over public perceptions of their lack of consideration for the protection of the city's heritage sites. In terms of motivations for visiting, the findings of Ung and Vong (2010) are also consistent with those of Lam and Vong (2009) and reported that 53% visited Macau for leisure and entertainment; 40% to visit local heritage sites; and only 16.5% with the motivation of casino gambling. The authors also note that 65% of those surveyed were repeat visitors to Macau. More recently, Zeng et al. (2014) concluded that gamblers are not Macau's primary market, with more visitors traveling there for sightseeing, leisure, and shopping.

### *Competition, Commodification, and Consolidation*

Growth in *competition* has increased substitutability, causing destinations to struggle to achieve differentiation on a global basis with branding now a key competitive strategy. Branded as "Asia's World City" Hong Kong is today still widely viewed as a "shopping paradise" (W. M. Choi, Chan & Wu, 1999, p. 364). Despite this, there is evidence that tourists rank heritage and cultural attractions including the Victoria Peak and Tram, the night view from the Peak, the Star Ferry, and the view of Victoria Harbour by night as being unique landmarks and attractions of Hong Kong. One interesting development is Hong Kong's ambition to leverage benefit from its excellent medical provision and tap into the growing demand for medical tourism with the current market demand anticipated at over US$4.4 billion (Heung, Kucukusta, & Song, 2011). That said, competition is intense with Singapore, along with India, Malaysia, and Thailand, well advanced with their medical tourism portfolios with Hong Kong a little late to recognize the considerable benefit of such activity. Price is also an issue because compared to Singapore Hong Kong is generally viewed to be price uncompetitive, although the reverse is true when compared to Macau (G. Li et al., 2013).

Although a strong player in the world of medical tourism, Singapore has attempted to position itself specifically via its cultural resources, diversity, and heritage as means of portraying a Singaporean identity. Previously, Singapore's development was focused on developing the city's postwar infrastructure before the more recent growing Westernization of its society. The New Asia mindset intersected aspects of local "cultural stock" with global tourism and the authors argue that this has impacted upon the reconfiguring of Singapore "to meet the challenges of tourism in the 21st century, and secondly the strategies adopted to refashion local cultural landscapes" (Chang & Yeoh, 1999, p. 105). This study suggests that Singapore's cultural resources have been redeveloped in three ways. First, it offers a number of "Asian" cultures through its broad cultural ethnic spaces of Chinatown, Little India, and Kampong Glam. These are preserved despite the city's modern infrastructure. Another aspect of Singapore's cultural resource, which has been reappropriated by Singapore, is its colonial heritage of historically and architecturally significant buildings, seen for example through the use of these as museums. The second element to the New Asia approach involved an expansion by positioning of the city as a "springboard from which tourists can appropriate the cultural (and natural) products of the region" (Chang & Yeoh, 1999, p. 107). The third aspect of this approach has been the reinterpretation of Singapore "as the meeting place of East meets West" in the government's development of arts tourism on an Asian basis and global scale (Chang & Yeoh, 1999, p. 108). Writing specifically on the arts and creative industries in Singapore, Lee (2007) discusses how the government's postfinancial crisis 2002 Creative Industries policy was consciously introduced as a means to objectively reposition the city. There was a conscious effort directed in developing a new arts and creative cluster with the aim of attracting creative talent to relocate or be encouraged to visit the city.

The postcolonial and multinational nature of Singapore, meanwhile, is significant to its emphasis upon heritage attractions and its attempts to diminish the threat of being perceived as a *commodified* destination. For example, "heritage and its conservation have thus assumed a heightened relevance in Singapore and sites constitute a narrative of nationalism, unity and multi-racialism" (Henderson, 2002, p. 341). As is the case for Hong Kong and Macau, however, there are a number of social and political implications of the heritage sector in Singapore in that Hong Kong and Singapore exhibit signs of such internationalization, but they have had a history of exposure to outside influences and a fluid culture has emerged that is neither wholly Asian nor Western. In comparing Singapore with Hong Kong specifically, Henderson (2002) further discusses how both destinations combine their unique heritage with modern attractions, promoting these aspects as components of sophisticated, contemporary portals of East and West.

Macau, meanwhile, was established as a Portuguese trading outpost in the 16th century and today is the only remaining Asian-Portuguese enclave. A casino industry has existed since the 19th century in Macau, created as a means of funding colonies, and it is suggested that gambling has become synonymous with contemporary Macau (McCartney, 2005a). In 1999, after Macau's hand over from Portugal to its present Chinese SAR status, the government built upon the gaming industry as a tourism development strategy (McCartney, 2005a). In 2002 the casino sector was prioritized and positioned by the Macau government as both the leading economic activity and tourism growth area for the region. In order to minimize any risk associated with overreliance on this one area, the government also focused upon the MICE sector (Nadkarni & Wai, 2007). This became a directed approach to transform Macau into a center of gaming, cultural events, conferences, and exhibitions' as these were seen as future growth areas (Pao, 2004; Whitfield, Dioko, Webber, & Zhang, 2014). In debating Macau's economic reliance on its casino industry, Loi and Kim (2010) argue that despite the other industries in Macau, "gaming is essentially its only tourist attraction" (p. 269). The growth and continued success of these casinos within integrated hotel resorts and the tourism industry face new challenges as a consequence with high levels of *consolidation* the order of the day.

### *Creativity, Communication, Channels, and Cyberspace*

Finally, *creativity*, *communication*, and *cyberspace* prove to offer both challenges and opportunities for the three city-state destinations. Recognizing the need to remain competitive and to constantly seek new forms of differentiation using image creation factors (Day, Cai, & Murphy, 2012), Singapore's ambitions to transform its cultural industry into a creative economy is central to its desire to be well placed within an integrated global economy (Yue, 2006). Underpinned by government strategy and the launch of a creative economy policy, the creative industries were already contributing over 3% of GDP in the early 2000s with arts and culture, media, and design central to the future development of the new creative and "knowledge" economy. Rather than being viewed as a small tangent to central policy, Singapore is unique in the context of Asia in harnessing its creative economy as a sustained national cultural policy imperative (Chua, 2004). Where Singapore also differentiates itself from other creative industry models in the likes of the US and UK is in its desire to promote Asian values as well as the more obvious target to create new industries and business services (Yue, 2006). Already, a range of cluster-like developments have taken place with Design Singapore, Media21, and Renaissance City 2.0, among others, all contributing to the world's first "digital economy" and evidence of a differential advantage that complements, rather than competes with, the tourism destination brand.

As with Singapore and Hong Kong, Macau is also seeking creative approaches to destination development with a desire to create a more "multifaceted destination image incorporating its gaming reputation, its unique culture and heritage, international festivals and sports events" (S. Choi et al., 2007, p. 118). An interest in motor sport (see McCartney, 2005b) is something that Macau shares with Singapore and is an area where growth probably can be achieved. However, where Macau is still behind its two city-state competitors is in the perceptions that persist in the market that it remains a single-day destination.

As with nearly all destinations in the market for tourists Hong Kong, Singapore, and Macau need to ensure that they keep pace with technological and digital change and ensure that their respective images meet the needs of their key markets. In particular, there is a wide recognition that customer-centric demand is arising from the growing use of Web 2.0 technologies by a market becoming increasingly confident in their use. Consequently, destinations are adopting both online and offline marketing approaches. In their study of internet marketing across a number of Asian destinations, So and Morrison (2004) identified that websites are now a critical element of destination marketing activity. Although now a dated study, very little research has been conducted since with the study by Ip, Law, and Lee (2011) stating that there still was no standard method of evaluating websites in evidence. That said, the three destination websites (http://www.yoursingapore.com/ for Singapore; http://www.discoverhongkong.com/ for Hong Kong; http://en.macautourism.gov.mo/ for Macau) are core components of the respective destination marketing campaigns with them now serving as a key channel of communication and distribution.

Although the Macau site has a more government feel to it than the websites for Hong Kong and Singapore, it is effective in its desire "to outgrow the image of Macau as a side or day trip destination from Hong Kong, by highlighting Macau as an international city with abundant cultural resources and modern facilities" (S. Choi et al., 2007, p. 126). The desire by Macau for a more well rounded, more wholesome, and less one-dimensional reputation is a consistent theme for Macau with its web profile a key future platform upon which perceptions, and behavior, will hopefully change (see McCartney, 2008; Tang, Choi, Morrison, & Lehto, 2009). To achieve this, S. Choi et al. (2007) advocate the need for a more "interactive or authentic visual information highlighting leisure and recreation activities as well as various entertainment options" (p. 127). Finally, and returning to the opportunities of leveraging experience economy measures to the concept of cocreation, a less passive approach to communication is recommended with a need for a more directed effort to communication via the development of key customer relationship strategies through mass-customization campaigns.

## Summary and Conclusions

In times of growing challenges and opportunities the 15Cs Framework provides a useful template for the consideration of the management approaches adopted by destinations set within the broader conceptual understanding of destination competitiveness. As evidenced throughout this article, it is clear that Hong Kong, Singapore, and Macau continue to operate in unique contexts despite sharing a number of common features, both as popular Asian destinations and richly historic cultural and heritage city states. As the leading tourism destination of the three, Hong

Kong has received a correspondingly greater level of academic attention than Macau or Singapore to date. To a great extent Macau continues to be positioned as a casino city (Lam & Lei, 2011; Siu, 2006), despite evidence suggesting that the attraction of culture and heritage is beginning to grow into a serious differential proposition. With regard to organizational effort, it is apparent that Singapore's tourism industry has been consciously developed by the Singapore Tourism Board in marketing and practical terms since the late 20th century (see Singapore Tourism Board, 2011, 2013, 2014). Today the city-state is home to a series of ambitious and unique heritage and modern purpose-built attractions and, while cited as a rival to Hong Kong in tourism terms, has recently introduced casinos to the mix of its destination portfolio. Although somewhat constrained by its scale and natural resources, there appears to be an effort directed in developing ambitious new attractions and alternative contemporary use made of colonial heritage sites. Singapore has recently redirected its marketing strategy to position itself in a highly differentiated way based upon its segmented visitor market and unique individual needs.

For all three destinations, it appears that the respective governments and official tourism organizations have all become increasingly concerned with the development and promotion of strategies for tourism. Furthermore, sustained effort is evident in all three destinations to better understand segmented visitor markets and in growing specific visitor attraction provision. Perhaps the single biggest challenge that all three have in common is the need to understand more fully the specific behavior of the burgeoning domestic Chinese market and their respective changing needs, wants, and levels of expectations (Shen, 2010; Zeng et al., 2014) as at the same time identifying and responding to increasing competition from mainland Chinese destinations such as Chengdu, Chongqing, and Dalian, to name but a few. This will be of particular concern to Macau if the Chinese authorities adopt a more liberalized stance toward gaming.

With regard to their respective desires to be globally significant destinations, Hong Kong, Singapore, and Macau for the most part share similar resource endowments that provide a suitable platform for their continuing global relevance. Each destination displays limited natural resource endowments but one can argue that it is this limited endowment which, in part, has been a catalyst for their record of innovation, energy, creativity, and desire to succeed. The fact that all three are endowed with a massive origin market in very close proximity is one in which many competing destinations around the world can only dream of. Hong Kong and Singapore also share the fact that they each are home to a major international airline hub, an endowment that will most likely continue to prove problematic for Macau. Most interesting perhaps is that each destination refuses to stand still with a combination of cultural and heritage development in Macau, the enhancement of medical tourism in Hong Kong, and building and leveraging further benefit from the creative industries and "knowledge economy" in Singapore all contributing to a more balanced destination portfolio for the future.

In terms of their respective deployment of resources, their competitive advantage, each destination displays a very clear mandate for the continued development of their destination brands and further diversification to meet the varying needs of current, future, and latent markets, with their being a common understanding to move beyond the traditional appeals to each destination. Hence, the extent to which effective strategies can be developed to manage cross-sectoral developments such as tourism and health in Hong Kong, tourism and the creative industries in Singapore, and tourism and cultural heritage development in Macau will go a long way in determining how each destination prospers in the years ahead. Collaboration is thus critical, none more so than with the respective local communities who not only represent the workforce of the future but also represent the future "soul" of the destinations in terms of creating the necessary friendly and welcoming environment in which a destination experience can be suitably cocreated for visitors. The enhanced engagement of local residents, education groups, and other local stakeholders are all critical to develop the authenticity and relevance of the destination's competitiveness while a more fluid connection between all of the above will serve to provide a renewed sense of identity among each destination as they seek to reestablish themselves on the global destination landscape.

In bringing this article to a close, its limitations require highlighting while its overall contribution to knowledge requires confirmation. With regard to limitations, the secondary nature of the study hinders its empirical value. That said, the comprehensive and holistic coverage of the issues raised brings particular value to those managing the destinations with a series of practical and achievable outcomes discussed. A second limitation is the restriction of the study to only three destinations compared to those studies by Leung and Baloglu (2013) and Dwyer et al. (2014), who empirically test a much larger sample of Asia-Pacific destinations. That said, the cautioned espoused by Crouch (2011) as to the worth and validity of such empirical studies is worthy of note with this study, albeit broad and holistic in nature, not pertaining to offer a prescriptive set of outcomes for destinations to follow. Rather, the article sheds light on those elements of the 15 Cs Framework deemed to be of significance to the three destinations and highlighting those challenges and opportunities of relevance to each. Arising from this is arguably one further limitation in that the exponential growth of the mainland Chinese market to Hong Kong, and Macau in particular, warrants more focused attention as evidenced recently in the article by Zeng et al. (2014). This was not the intention of this article, however, with its broad and inclusive nature serving as a complementary contribution to the empirical models advanced by the likes of Leung and Baloglu (2013) and Dwyer et al. (2014). Hence, although of theoretical value to studies of destination competitiveness, the real value of this study is to those seeking to enhance the competitive differential advantage of the destinations under research scrutiny and for the future destination marketing strategies adopted as they seek to not only maintain but enhance their respective positions in the international marketplace.

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