## Original Article

# Brand Dubai and its competitors in the Middle East: An image and reputation analysis

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**ABSTRACT**  Dubai is probably one of the best known examples of a city brand that has established itself in a very short period of time while riding the waves of globalization. This has resulted in a schizophrenic image among the global audience combining Middle-Eastern stereotypes with images of a modern, rich, glamorous metropolis. However, while the image of modern Dubai has been challenged by the global financial crisis, it seems that competition in the region has stepped in. This article therefore studies the competitive brand position of Dubai, compared to Abu Dhabi, Qatar and Bahrain, through content analysis of global social media using Radian6. It shows that Dubai has attracted and still attracts most attention in mainstream as well as social media. This buzz is generally positive with the exception of the enormous amount of noise around the Dubai debt crisis announcement end of 2009. Nevertheless, the competition has been able to attract lots of positive attention for short periods of time occasionally overshadowing Dubai in recent years with the Abu Dhabi and Bahrain Grand Prix and the selection of Qatar as host for the 2022 FIFA world cup soccer. Lastly, a dramatic change that has occurred in the second quarter of 2011 is the fact that social media buzz (more so than mainstream media attention) for Bahrain has drowned out the competition in the region. However, this consists of generally very negative buzz around the opposition protests and government reactions. Therefore, all in all, it seems that Dubai still has a lot going for itself. At the same time, the results of this study offer several routes for new future research.
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## INTRODUCTION

With the Spring 2011 Qatar talks on Libya, Kristian Coates Ulrichsen (2011) published an interesting paper on 'Qatar and the Arab Spring'. It provides food for thought on how some Gulf States, or rather, Emirates, are competing for nation brand hegemony in the region. For many

years since the start of the new millennium, Dubai was the example of the modernization of the Persian Gulf in the twenty-first century while rapidly building place brand image awareness (Govers and Go, 2009). Have they been overtaken, considering the recent media coverage of the Gulf, with lots of attention for Abu Dhabi, its grand prix and cultural projects, and FIFA's stunning decision to have Qatar host the 2022 World Cup, not to mention the unrest in Bahrain?

One major difference between Dubai and Qatar, Bahrain or Abu Dhabi is that the latter three are resource rich, while Dubai was forced to diversify its economy because it will soon run out of natural resources (since 2007 these contribute less than 2 per cent to Dubai's GDP) (Dubai Statistics Center, 2010). The strategy to build an internationally strong brand through the launch of large scale developments aiming at trade and tourism supported with foreign investment (in 2006 the UAE – predominantly Dubai – attracted almost as much foreign investment as the whole of India) (Economist Intelligence Unit, 2007) was not all that irrational. Unfortunately, the global financial crisis came right in the middle of the boom.

The international debt crisis induced postponement of payment announcement for Dubai World forced the Dubai government to lay low for a while in order to let the dust settle in the international media. In the meantime, resource-rich and thus less-crisis-affected Doha, Bahrain and Abu Dhabi made use of this Dubai silence to build their own brands. In fact, some would argue that Abu Dhabi's financial help for Dubai created the opportunity for the dominant Emirate to leap-frog Dubai's strong brand, exemplified by the renaming of Burj Dubai – the world's tallest tower – to Burj Khalifa (after the ruling family of Abu Dhabi).

Tourism in Dubai is still doing very well with constant growth in airport traffic (Dubai Airports, 2011) and profits for the airline (The Emirates Group, 2011), but has Dubai's brand been damaged? Has Qatar moved to pole-position as the most respected nation brand in the Gulf with its election as host for the 2022 FIFA World Cup Soccer games? This article will attempt to provide some answers from a place brand management perspective, looking at projected and perceived image analysis.

## RESEARCH BACKGROUND

Govers and Go (2009) have done extensive research in terms of Dubai's identity, projected image and reputation. In a global online survey they asked 600 respondents what they thought their experience would be like if they were to travel to Dubai for the first time (that is the respondents had not been to Dubai before). Contrasting images of modernity (fancy hotels, modern architecture, shopping, wealth and luxury) on the one hand and rootedness on the other (different Arab Muslim culture, desert, camels, busy markets – souks – with rich and colorful smells of spices and fragrances) come to the fore (see Table 1). This conflict in the imaging of brand Dubai is exemplified by the fact that many – particularly women in the Western world – comment on the position of women in Muslim society, incorrectly assuming that they will not see many women in the streets in Dubai or will not be allowed to drive cars. This Middle-Eastern stereotyping can obviously be problematic.

In addition, an analysis of 20 Dubai-based websites that promote the city as a tourist destination showed large inconsistencies in the way that different kinds of actors communicate the image of Dubai. Therefore, the projected image provides a confusing brand positioning and issues of stakeholder collaboration and cooperation need to be addressed. While government actors promote the cultural heritage and Arab roots of Dubai, private actors focus on modernity and product facilities. Hotels for instance refrain entirely from including any reference to local people and Arab heritage on their websites. This is not surprising when one realizes that most of these businesses are managed almost entirely by an expat population that has little or no

**Table 1:** Consumer image associations for Dubai based on Govers and Go (2009)

| Dubai (n=598, words=63 918) | % of 3706 meaningful words | % of respondents |
|---|---|---|
| Hot (warm weather/heat/warm climate) | 5.8 | 28.6 |
| Culture (as in different, local culture) | 5.4 | 27.1 |
| Hotel (famous/7-, 6-, 5-star/ luxury/expensive hotel) | 6.0 | 26.9 |
| Building (as in amazing/special architecture/buildings) | 5.6 | 25.9 |
| Desert | 6.0 | 25.4 |
| Shop (shops/shopping) | 5.5 | 24.9 |
| Arab (Arabic/Arabian) | 5.4 | 24.6 |
| Modern | 4.7 | 23.7 |
| Rich (wealth/wealthy/rich) | 4.6 | 22.6 |
| Never (never been there/visited/ heard of) | 3.8 | 21.1 |
| Luxury (luxurious) | 2.9 | 15.9 |
| Woman (as in position of women in Muslim/Arab reg.) | 3.5 | 14.2 |
| Smell (smell of spices/food/ fragrances/heat) | 2.8 | 13.2 |
| Water (water/sea) | 2.5 | 13.0 |
| Souq(s) | 2.3 | 12.7 |
| Beach(es) | 2.3 | 11.5 |
| Street (busy/lively/people in the street) | 2.3 | 11.0 |
| Muslim | 2.5 | 10.9 |
| Sand | 2.2 | 10.6 |
| Oil | 1.8 | 9.7 |
| Camel(s) | 1.6 | 9.2 |

connectedness with the place identity of Dubai. It should be of interest to study how this results in social media buzz for Dubai and how it relates to competing place brands in the region.

## CONCEPTUAL FRAMEWORK

There seems to be consensus about the idea that to manage place brands one is concerned with linking place identity to perceived image and reputation (our perception of public opinion among knowledgeable audiences and opinion leaders). This is extensively discussed in Govers and Go (2009) and reflected in the title of Anholt's 2010 monograph. Govers and Go's book (2009) revolves around the argument that place branding is about avoiding three pitfalls or gaps (see Figure 3.1 for the 3-gap model on page 41). First, from a strategic perspective, place brands should construct an attractive offering (potentially attracting tourism, trade,

talent or treasury) and communications effort (in the broadest sense) based on the unique sense of place or place identity. Second, places should build appropriate perceived images, creating the right expectations, based on the above strategy and culturally sensitive customer, media and trade relations. Lastly, the brand needs to be delivered through internal branding and cooperation, building reputation through consumption experience and positive word-of-mouth/mouse.

Therefore, image and reputation are clearly key concepts in building a brand and they are influenced through several channels or image formation agents (Gartner, 1993). Most importantly, people's own experiences influence their perceptions. These agents are referred to as organic images. In addition, the so-called solicited and unsolicited organic images are the stories that people share with each other, either face-to-face or now, more and more, online, through Web 2.0 applications either on request or spontaneous.

Although these organic images on the demand side are most influential, there are several other image formation agents that impact peoples' perceptions. Induced agents are the supply driven communication efforts, that is overt induced agents such as marketing communications/advertising campaigns/brochures that are initiated by place marketers (tourism promotion boards or destination marketing organizations; export, trade and investment agencies; convention bureaus; ministries of foreign affairs; chambers of commerce; private businesses and intermediaries (tour operators/travel agents); financial institutions, larger corporations and/or trade associations) and covert induced agents, which are endorsements by celebrities, travel writers, the press in general or through popular culture. These are often the result of press and public relations initiatives and many places are now actively trying to lobby creative industries and sports agencies in order to attract movie shoots, tv shows, music and sports events, and other forms of popular culture. This is also referred to as projected image.

In between these supply and demand side agents there are the so-called autonomous agents. These sources, such as independently produced guidebooks, news, articles, reports, documentaries, popular culture and programs about the place in the media, have high credibility and market penetration and therefore considerable impact, which, nevertheless, tends to be short-lived if similar reporting is not sustained. Particularly places with a historically strong image are – in the long run – less impacted by incidents. For instance the movie Borat has had considerable impact on the image of Kazakhstan (Van Ham, 2008) while the dramatic terrorist attacks on New York and London only seemed to have had short-term effects. However, what is often forgotten is to monitor what is being communicated in these channels and to actively engage in the discussion or to engage in damage control if needed (not all publicity is better than nothing and ideally it should be 'on-brand').

It seems that autonomous agents and, particularly, organic agents build reputation, which could be defined as our perception of public opinion among knowledgeable peer audiences and non-commercial opinion leaders. It is because of this that social media have had such an impact as the influence of organic agents has tremendously increased. What is more is that people tend to put more trust in their peers than in corporations and government organizations.

Also, with advanced technology, cross-medial initiatives, utilizing all agents (advertising, social networks, media activation and popular culture) are becoming more popular and are proving their success (think for instance of Tourism Queensland's Best Job in the World campaign). Technology also provides people with richer alterative place experiences such as in virtual worlds (for example Second Life), 3D-cinema and other forms of popular culture or copied environments (for instance in Las Vegas, Dubai or Macau). The boundaries between induced, organic and autonomous agents are therefore increasingly blurred and it is essential to monitor the conversation. The main channels to collect data from are now the mainstream media and the social networks (where, on platforms such a Facebook, Twitter or Blogger, people find peers, but also marketers, journalists and other opinion leaders).

## METHOD

Monitoring of media is well established through the method of content analysis. There are many different types of content analysis, ranging from simple frequency counts – increasingly done by computers, based on media databases – to complicated assessments of arguments and media frames. Several organizations provide such analyses in the context of place branding. Media Tenor conducts studies that are based on the analysis of the content of TV news in 11 media markets by trained coders of the Zurich-based research institute Media Tenor International. Schatz and Kolmer of Media Tenor (2010) report on a study involving 11 countries and how visible they are in the international media and how the visibility changes over time and based on what issues. Cromwell of East West Communications (2011) reports on the 'East West Nation Brand Perception Indexes that rank 200 nations (that is, the 192 member states of the United Nations, as well as eight major territories, such as Hong Kong) in quarterly and annual listings based on scores they achieve derived from the tone of news coverage received in a given period. Coverage of these nations is analyzed in several dozen major international publications by algorithms that assess tone [or sentiment] in text through the grammatical association of words and phrases with proper nouns. For most countries, there is considerable fluctuation in scores from quarter to quarter, and national events, and reporting on those events, can be correlated with scores, enabling countries to get a good sense of what in their news is driving perceptions up, and what down'.

However, both these tools rely on major news channels only. Radian6, used in this article, provides content and sentiment analysis based on both mainstream and social media (not just covering autonomous agents, but

organic and possibly induced agents as well, although being with blurring boundaries). Radian6 (2011) 'scans 150 + million blogs, 90 + million Tweets, 25k + online mainstream news sites, 420 + video and image sharing sites, hundreds of thousands of discussions boards, Facebook, Friendfeed, and LinkedIn Answer in 13 international languages – English, French, Italian, German, Spanish, Russian, Finnish, Korean, Japanese, Simplified Chinese, Portuguese, Dutch, and Swedish'. The main metrics used here are number of postings and sentiment score. Although the former is a straightforward quantitative count, the latter requires a more complex automated process of assessing whether the posts, and in particular their qualitative content, are either positive, neutral or negative in sentiment. Automated sentiment analysis is based on the idea that there is a conceptual connection between words that are grammatically linked (such as applied by East West Communications referred to above). 'Sentiment towards a target term [e.g. Dubai] within a sentence is calculated by measuring the number of co-occurrences of the target term and a pre-defined list of sentiment words known to have positive or negative sentiment' (Dickinger et al, 2011). This type of analysis relies on the work of linguists and is readily used to a large extent in natural language processing. However, because sentiment words are not necessarily always used, particularly in short postings such as on microblogs (for example Twitter), or in comments on social media in general, many postings are often categorized as neutral. Also, whether manual of automated, sentiment analysis is always subjective and does not take into account aspects such as sarcasm, irony or personal interpretations by an individual reader (what is negative for one person, can be positive for someone else). Nevertheless, large changes in the proportions of positive versus negatively categorized postings can provide an indication towards general changes in sentiment among social media buzz.

For this study, a search was conducted on the Radian6 platform for postings that included mention of Dubai, Abu Dhabi, Bahrain (and/or Manama) or Qatar (and/or Doha). It is obvious that Bahrain and Qatar were included as nations and/or their capitals, while Abu Dhabi and Dubai are both Emirates and corresponding cities with the same name as part of the federation of United Arab Emirates. However, it was considered that at a brand level this is not an issue, as indeed Abu Dhabi and Dubai seem to be positioned as separate brands while the country does not seem (to want) to boast a strong awareness or reputation as a whole (for instance, a national or federal tourism promotion board does not exist). That Abu Dhabi, Bahrain, Dubai and Qatar compete as major place brands in the Middle East is also supported by Bagaeen (2007, p. 184).

## RESULTS
The daily number of postings in mainstream versus all media channels for the 3-year period, 30 June 2008 – 30 June 2011, is depicted in Figure 1. It is clear that generally Dubai generates most of the buzz, also in 'calm waters' up to November 2009, after which there is a period of increased attention with the Dubai debt crisis, the inauguration of the Burj Dubai (and its simultaneous renaming to Burj Khalifa) on 4 January 2010, as well as the Dubai Tennis Championship and simultaneous Hamas assassinations in Dubai during February 2010. However, since then, the competition has succeeded in occasionally attracting significant buzz, for instance with the Abu Dhabi and Bahrain Grand Prix. In fact, it seems that the whole region is attracting more attention since the beginning of 2010, although this might also be a reflection of increased use of social media. Two events, however, had a dramatic impact on global attention. First, the election of Qatar by FIFA as host to the 2022 World Cup Soccer generated off-scale postings totaling 178 116 in all social media, including 'only' 2433 postings on news-media websites. Then, the Bahrain protests as part of the Arab spring generated a tremendous amount of buzz over an extended period. The highest number of posts on 1 day was off-scale both in news
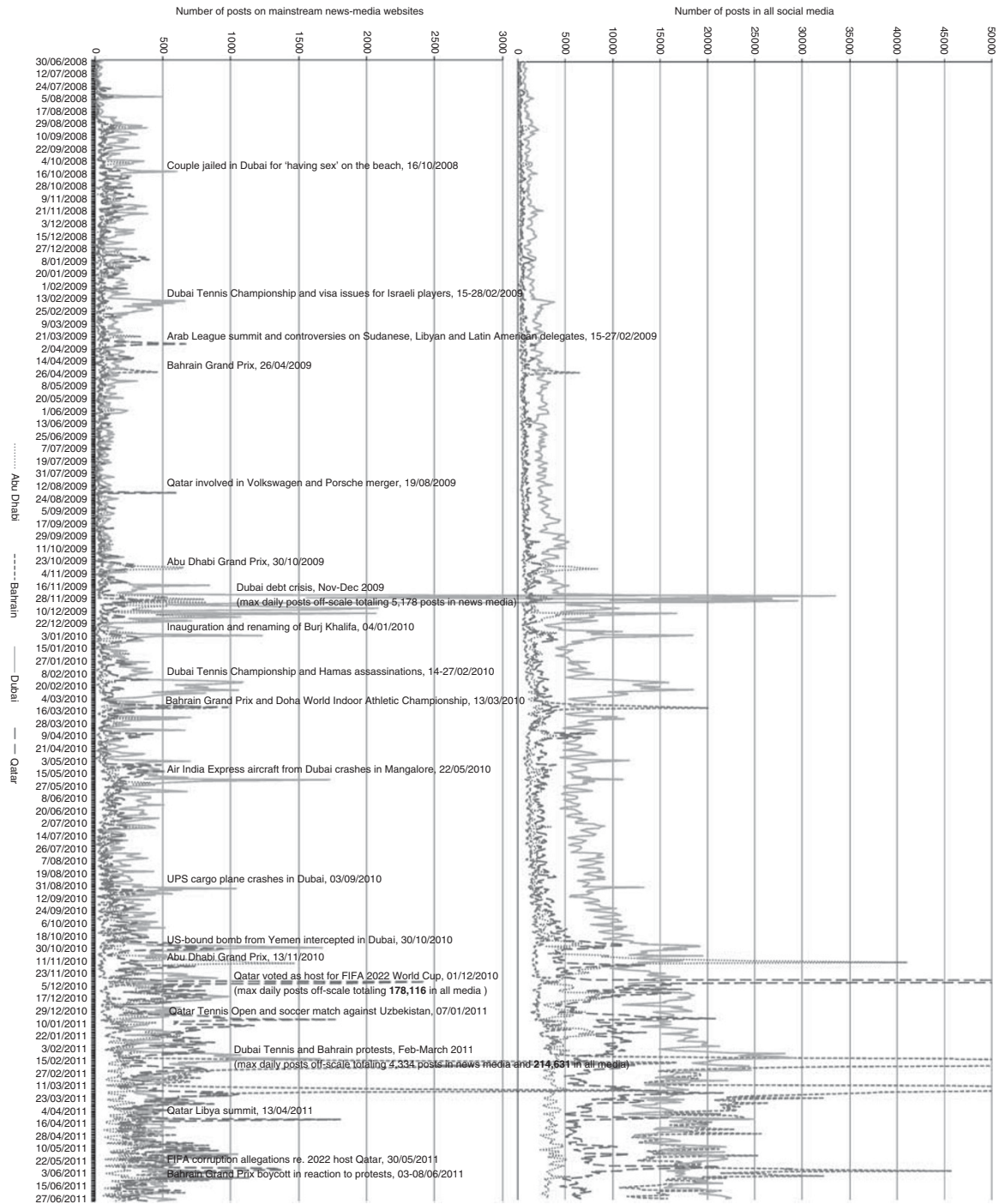
**Figure 1:** Number of posts on news-media websites and in all social media linked to events between June 2008 and June 2011.
*Source*: Author's interpretation of Radian6 data.

media and social media postings totaling 4334 and an astonishing 214 631, respectively. These numbers are not visualized in Figure 1 where the scale is cut–off at 50 000 social media posts in order not to dwarf the rest of the graph into illegibility.
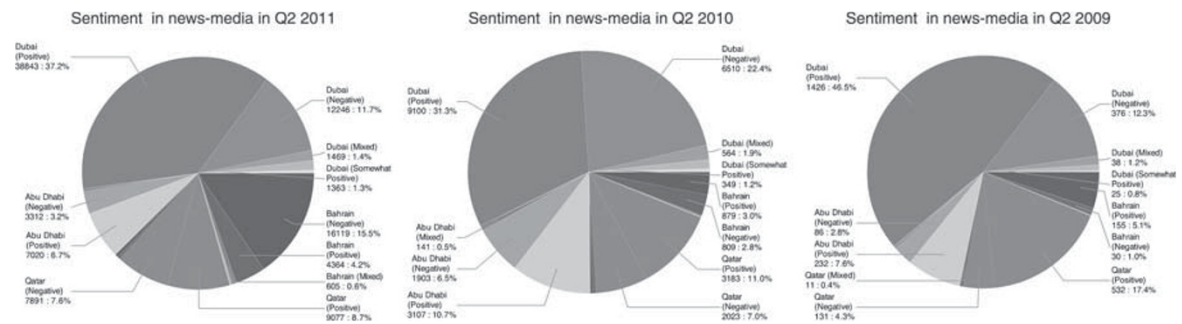
**Figure 2:** Sentiment in postings in mainstream news-media websites in second quarter 2009–2010–2011 (excluding neutral postings).
*Source*: Provided by Radian6 Analysis Dashboard™ July 2011.

What is also interesting is the swing in sentiment that events can cause. Figure 2 shows that over extended periods, in this case the second quarter (1 April – 30 June) of 2009, 2010 and 2011, which are relatively stable periods without many major events, the sentiment is steady with, as expected considering its dominance in social media, not only relatively lots of positive attention for Dubai, but also some negative (note that the majority of neutral postings is not included in these graphs for legibility and that sentiment analysis is conducted on news-media postings only as the amount of data would otherwise overload the system; it is assumed that news-media sentiment is similarly reflected in social media sentiment). In the second quarter of 2010, the buzz on Dubai is more balanced, positive as well as negative, probably as a result of the Dubai debt crisis. The increase in negative buzz on Bahrain as a result of opposition protests in Q2 2011 is also clearly identifiable. However, Figure 3 shows what dramatic impact particular events can have on sentiment in all social media over a shorter period of time. During the Dubai debt crisis in November–December 2009 the generally positive buzz on Dubai was balanced out with lots of negative coverage. The Abu Dhabi Grand Prix warrants short-term dominance with positive coverage as did the election of Qatar as host to the World Cup Soccer in 2022, even though there were some negative

sentiments about this as well. Lastly, buzz in the region was suddenly dominated in Q2 2011 with negative sentiment as a result of the Bahrain protests.

What is also notable in Figure 1 is that some events gain news-media attention without much social media buzz, such as the April 2011 Doha summit on Libya or the Arab League summits, while other events generate relatively more social media buzz as opposed to mainstream media attention such as the Bahrain protests or sports (related) events (also: indoor athletics and Formula 1 racing get similar coverage in the news media, but the latter generates much more buzz in the social media). This is exemplified in Figure 4, which shows the relevance of different channels in the second quarter of 2010 and 2011 in terms of number of postings. As can also be assumed from Figure 1, it is clear that in terms of generating buzz, micro-media such as Twitter have a large impact and particularly dominate the effect that the Bahrain protests have on the reputation of the country.

## CONCLUSION

Dubai's focus on creating a brand image of luxury, prestige and modernity might have boomeranged with the financial crisis. Considering the fact that, through its consistent one-dimensional communication in the past, the image of Dubai was made up of primarily two elements – a stereotypical image of a city

## Sentiment during Dubai debt crisis Nov 25 – Dec 14 2009

Dubai (Positive) 2477 : 34.3%
Dubai (Mixed) 256 : 3.5%
Dubai (Somewha Positive) 48 : 0.7%
Dubai (Somewha Negative) 25 : 0.3%
Bahrain (Positive) 69 : 1.0%
Bahrain (Negative) 31 : 0.4%
Qatar (Positive) 603 : 8.3%
Qatar (Negative) 237 : 3.3%
Abu Dhabi (Positive) 547 : 7.6%
Abu Dhabi (Negative) 370 : 5.1%
Dubai (Negative) 2524 : 34.9%

## Sentiment during Abu Dhabi Grand Prix Nov 12-13 2010

Dubai (Positive) 2444 : 24.3%
Abu Dhabi (Mixed) 18 : 0.2%
Abu Dhabi (Negative) 1437 : 14.3%
Dubai (Negative) 922 : 9.1%
Dubai (Mixed) 45 : 0.4%
Dubai (Somewhat Positive) 44 : 0.4%
Bahrain (Positive) 314 : 3.1%
Bahrain (Negative) 175 : 1.7%
Qatar (Positive) 460 : 4.6%
Qatar (Negative) 285 : 2.8%
Abu Dhabi (Positive) 3895 : 38.6%

## Sentiment around Qatar 2022 FIFA World Cup draw Dec 1-2 2010

Qatar (Mixed) 214 : 0.8%
Qatar (Somewhat Negative) 40 : 0.1%
Abu Dhabi (Positive) 641 : 2.4%
Abu Dhabi (Negative) 211 : 0.8%
Dubai (Positive) 2685 : 9.9%
Dubai (Negative) 956 : 3.5%
Dubai (Somewhat Positive) 49 : 0.2%
Bahrain (Positive) 305 : 1.1%
Bahrain (Negative) 282 : 1.0%
Qatar (Positive)
Qatar (Negative) 10464 : 38.8%

## Sentiment during Bahrain protests Feb 17-19 2011

Bahrain (Positive) 9243 : 18.3%
Bahrain (Mixed) 341 : 0.7%
Bahrain (Somewhat Negative) 115 : 0.2%
Qatar (Positive) 1042 : 2.1%
Qatar (Negative) 664 : 1.3%
Abu Dhabi (Positive) 842 : 1.7%
Abu Dhabi (Negative) 345 : 0.7%
Dubai (Positive) 4352 : 8.6%
Dubai (Negative) 1586 : 3.1%
Dubai (Mixed) 63 : 0.1%
Bahrain (Negative) 31654 : 62.8%

**Figure 3:** Sentiment in all media during major news events (excluding neutral postings).
*Source*: Provided by Radian6 Analysis Dashboard™ July 2011.

## Types of media in Q2 2010

Dubai (MicroMedia) 189020 : 17.5%
Dubai (Forum Replies) 75038 : 7.0%
Dubai (Aggregator) 30166 : 2.8%
Dubai (Blogs) 190414 : 17.7%
Bahrain (Blogs) 35675 : 3.3%
Bahrain (MicroMedia) 31138 : 2.9%
Abu Dhabi (MicroMedia) 55720 : 5.2%
Abu Dhabi (Blogs) 60871 : 5.6%
Qatar (Forum
Qatar (Blogs) 81356 : 7.5%
Qatar (MicroMedia)

## Types of media in Q2 2011

Dubai (MicroMedia) 588730 : 15.4%
Dubai (Blogs) 238572 : 6.2%
Dubai (Aggregator) 208605 : 5.4%
Dubai (Facebook) 140672 : 3.7%
Dubai (Other) 157302 : 4.1%
Abu Dhabi (MicroMedia) 99926 : 2.6%
Qatar (Blogs) 151654 : 4.0%
Qatar (MicroMedia) 279026 : 7.3%
Bahrain (Other) 190748 : 5.0%
Bahrain (Blogs) 114727 : 3.0%
Bahrain (MicroMedia) 1225772 : 32.0%

**Figure 4:** Types of media used during second quarter 2010 and 2011.
*Source*: Provided by Radian6 Analysis Dashboard™ July 2011.

in the Middle-east and one of a cosmopolitan modern global hub – Dubai has been at risk. It seemed that even before the financial crisis many consumers would literally consider this story of a modern city a mirage in the desert and one could assume that with the negative buzz that resulted from the Dubai debt crisis, the mirage faded.

In fact, many would argue that Dubai is soulless, like the Las Vegas of the Middle East, an artificial world with architectural megalomania, fake replicas and cosmopolitan population that has lost its sense of belonging. However, long-term residents in Dubai will know that behind the facade there is still rootedness to be found. On the other hand, Dubai's history is one of a trading nation that has been a melting pot for over a century, even long before oil was discovered and therefore Dubai has, in fact, always been more entrepreneurial and cosmopolitan than many of its neighbors, that is one could argue that Dubai's current character is partly inspired by its rooted sense of place. Nevertheless, to forge a link between the brand essence and identity of place seems to be a priority when it comes to managing the brand Dubai, if only to deal with the social pressures of its rapid development. This has been somewhat incorporated in the last communication initiative of www.thisisdubai.ae, which shows an intimate human face of Dubai, but it might be too little too late with the damage already done, creating opportunities for major competitors such as Qatar and Abu Dhabi.

The above content analysis of social and news media coverage does not confirm this though. Dubai has attracted most attention for long and still does. What is more: most of this is positive buzz, even during various crises. Only occasionally the competition is able to drown out Dubai's buzz with major events such as the Abu Dhabi and Bahrain Grand Prix and, in particular, the FIFA election of Qatar as host for the 2022 World Cup Soccer. Such events temporarily create lots of buzz and turn the tables in terms of the positive sentiment generated with respect to the four competing

city/small state place brands in the Persian Gulf. The Spring 2011 Dubai-style negative media coverage that Abu Dhabi received with the art world's boycott of its Saadiyat Island's Guggenheim (Ouroussoff, 2011) and the arrest of human rights and democracy activists (Coates Ulrichsen, 2011) seem not to have hurt it, considering that it did not show up in the above projected image analysis. While at the same time it seems that Bahrain's image and reputation is damaged extensively and will require long-term repair. Therefore, even though the competition has entered the place branding game in the region, Dubai has still a lot going for itself and with proper reputation management should be able to maintain its dominant position.

In general terms it is interesting to see in the above analysis what dramatic effect certain events can have on social media buzz and how important social media have become. Some type of events seem to be more effective in attracting social media coverage than others and it would therefore be of particular interest to conduct future research on how this impacts public opinion and reputation. Similarly, some events have longevity while others have a tsunami effect. Again, it would be interesting to study which type of buzz has most impact. On the one hand repetition of a message increases impact, but on the other hand, a short-lived tsunami of buzz similar to the attention that Qatar has attracted as a result of the FIFA World Cup Soccer 2022 vote, will guarantee that most individuals on the planet will have heard about such an achievement and might possibly firmly establish a place on the map (including peoples' mind-map). Again, this assumption would warrant corroboration in future research.

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