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Tourism in Singapore: An Overview of Policies and Issues

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The management of tourism in Singapore has undergone various changes over the decades. The adoption of different policies and strategies aimed at promoting and championing tourism in Singapore has been subject to socio-economic changes on the local and global fronts. A deeper understanding of the issues pertaining to tourism development in Singapore necessitates a review of the “background” of these challenges as they relate to particular social, economic and political conditions of Singapore. As an introduction, this section aims to review tourism policies of Singapore with particular emphasis on the responses to the issues arising during different periods of Singapore’s post-independence history. This will be followed by a synopsis of the chapters included in this book, which will serve to provide a summary map of the main arguments in this volume. A third section will address the future prospects and challenges for Singapore in its tourism management efforts.

Tourism Management through the Decades: A Review of Tourism Policies

Tourism management in Singapore has sought to be adaptable to the changes in the wider socio-economic environment. Tourism policies and strategies have thus largely corresponded to global forces influencing trends in tourism and economic development, as well as responded to local factors such as changing social conditions in the city-state.

The post-independence period (after 1965) in Singapore saw a tourism boom not unlike that in many parts of the world, spurred on by technological improvements in transportation and communications (Teo, 1994). As it became faster and cheaper to travel, tourist arrivals increased. Tourism during this period yielded considerable economic returns, while the impacts of tourism went relatively unrecognised as a result of the relative “youth” of the phenomenon. In Singapore, tourism was welcomed as a means to create much-needed employment in a newly-independent nation with pressing needs to broaden and develop the fledgling economy and reconfigure its urban and industrial infrastructure (Chang & Yeoh, 1999). The formation of the Singapore Tourist Promotion Board (STPB) was a “conscious” policy effort by the government to recognise the significance of the industry to Singapore’s economic and planning agenda (Toh & Low, 1990:249). Correspondingly, the nature of tourist promotion was shaped by similar “modernist” aspirations (Teo, 1994:131). Throughout the 1970s, strategies to promote tourism concentrated on developing “garden attractions and modern hotels” (Chang & Yeoh, 1999:10) and the marketing of Singapore as “Instant Asia”, a place where the various “Asian cultures” may be found (Chang, 1998; Chang & Yeoh, 1999). Attractions attempting to encapsulate the “melting pot” of Asian cultures included the Singapore Handicraft Centre, opened in 1976 as a showcase of Asian arts and crafts, and the “Instant Asia Cultural Show”, which featured dances incorporating the different “races” in Singapore (Chang & Yeoh, 1999). These “*Instant Asia*”-scapes, however, were largely housed in modern structures that catered to the comfort and security of tourists while they in turn “consumed” the tourism product presented.

The mid-1980s saw shifts in the economic sector as well as in the focus in tourism management. The changes in tourism policies were partly engendered by effects resulting from previous policies, and partly influenced by shifts in the social and economic arenas, both in Singapore and globally. The most significant impetus for the shift in tourism policies was the world economic recession in 1985. The first signs of the effects of the recession on Singapore’s tourist figures appeared as early as 1982, when the lowest rate of tourist arrivals (4.5%) since the formation of the STPB were recorded (Hornby & Fyfe, 1990). The following year saw the tourist arrivals rate plummeting to –3.5%, the first time a negative growth was recorded. In 1984 and 1985, tourist arrivals became positive again but growth was slow.

Local factors had also played a part to spur a rethinking of tourism policy. An oversupply of hotel rooms was experienced in the 1980s, owing to

the overbuilding of new hotels and expansion of some existing ones in tandem with the widespread optimism of the 1960s and 1970s (Khan *et al.*, 1990; Wong & Gan, 1988). On the economic front, the slowdown in the manufacturing sector and the decrease in Singapore's competitiveness in labour-intensive operations were significant factors prompting the change in policies. Expanding the tourist industry was believed to be an important strategy to address some of these problems. Besides creating employment, tourism also had a role to play in the quest for Singapore to become an "international business and service centre" (Chang & Yeoh, 1999:104) as economic diversification and the upgrading of local skills and services became the new emphasis (Chang, 1998).

Besides changes in the local economic climate, the "'weaknesses' of the existing tourist product" at that time were also identified as reasons for the slowdown (Khan *et al.*, 1990:411). Such "products" included natural, historical and cultural attractions that were being sacrificed to the need for rapid urbanisation and industrialisation. Indeed, one of the consequences of the emphasis on modernist urban and economic development of the 1970s and early 1980s was the lack of attention to the conservation of sites of historic interest (Chang & Yeoh, 1999). Heritage conservation, which had been largely neglected in view of the more "pressing matters" of infrastructure development, emerged in the mid-1980s as a strategy to counter the sterility of the industrial and economically efficient cityscape (Chang & Yeoh, 1999).¹

The conservation of culturally and historically significant sites was seen as a panacea to alleviate one of the major problems associated with the older tourism strategies. The Tourism Task Force Report of 1984 pointed to the need to look into the loss of Singapore's "Oriental mystique and charm" which had been wrought by the rapid erasure of "old buildings, traditional activities and bustling road activities" from the urban landscape (Ministry of Trade and Industry, 1984:6). Indeed, as Chang (1998:82) pointed out, the "Instant Asia" theme which had successfully catered to the "cash-poor/time-strapped" Western tourist no longer appealed to the majority of "new"

¹The desire for conservation was also a response to other stimuli. One was the concern of the government of the increasing "Westernisation" of Singapore's society brought on during the period of industrialisation (Chang & Yeoh, 1999). The profusion of certain "Western values" that were perceived to be antithetical to the "Asian" values of Singapore society was seen to be a threat that could be countered by the emphasis on the preservation of "Asian" values, identity and heritage.

tourists, which had changed in profile and tastes, being neither cash-poor nor mainly from the West.

A number of new policies were codified in the *Tourism Product Development Plan* (Ministry of Trade and Industry, 1986). The Plan devoted US\$223 million for the redevelopment of ethnic “enclaves” such as Chinatown, Little India, and Kampong Glam, as well as that of historically significant sites like the Singapore River, the Raffles Hotel and Bugis Street (Teo, 1994; Chang & Yeoh, 1999). Unlike previous plans, these policies were explicitly aimed at creating “local cultural consciousness” (Teo, 1994:132) among Singaporeans, as well as creating attractions for the enjoyment of tourists.

The STPB released a new masterplan in 1993 called *The Strategic Plan for Growth*. This plan assessed the achievements since the *Tourism Product Development Plan* and noted that, in general, Singapore’s tourism infrastructure is already well-developed. Rather than a continued focus on new attractions, it was felt that the tourist landscape in Singapore was more in need of “refinement” (Chang & Yeoh, 1999:105). In popular perception, however, there was some concern among locals that redevelopment projects such as the conserved shophouses in Tanjong Pagar and Kreta Ayer (flagship conservation projects which form part of the redevelopment of Chinatown as a Historic District, see Yeoh & Kong, 1994; Yeoh & Lau, 1995), had lost much of their original character and authentic elements. One concern that was particularly felt was the removal of familiar activities and people that had previously inhabited the sites, resulting in a loss of meaning in the places (Teo, 1994; Teo & Huang, 1995). Another concern was the perception that redeveloped sites such as the Civic and Cultural District were “elitist” (Teo, 1994:132; Teo & Huang, 1995:589) and aimed first and foremost to please the tourist, and were somewhat divorced from the everyday lives of the locals. These concerns reflected the developing awareness among Singaporeans of the significance and value of heritage landscapes in the rapidly changing fabric as well as the need to ensure that the historical and cultural resources of the city-state are carefully reconfigured to meet the demands of *both* locals and tourists.

As the 21st century approached, yet more changes in the regional economic and political climate, as well as changing local consumer preferences, necessitated more than a “soft” approach to tourism management in Singapore. The challenges posed in the 21st century were spelled out in STPB’s report on a “national tourism planning exercise” conducted to review its tourism policies (STPB, 1996:3). *Tourism 21: Vision of a Tourism Capital* (STPB, 1996) noted

that as new tourist destinations in countries such as Malaysia and Indonesia were opened up, competition for the tourist dollar was intensifying. This growing competition must be addressed by Singapore, whose small size and lack of natural resources put the country at a disadvantage while contending with its “culturally-rich and naturally-blessed” neighbours (STPB, 1996:15).

As Chang (1998) argues, tourism policy is a reflection of national policy, and this is especially so given the local pressures that underpin policies to develop Singapore as a “Tourism Capital”. One such pressure is that of the changing nature of tourism. Increasing affluence and an increasing number of regional air links in Asia, the latter being part of the general technological improvements in global travel, have changed the profile of the majority of tourists to Singapore, as well as the demands on the destination (Chang, 1998). “Tourism” and its “parameters” (Yeoh & Chang, 2001) have to be redefined. The solution to Singapore’s continued competitiveness has to be found in the forging of regional tourism and business alliances, and this is summed up in STPB’s “strategy” of “Tourism Unlimited” (STPB, 1996:6). This strategy sees members of the tourism industry “break[ing] free of their traditional geographical boundaries” and “packaging complementary products” consisting of Singapore’s attractions with regional tourist destinations. This aims to forge linkages between Singapore and the region, and in doing so establish Singapore as a “tourism hub” (*ibid.*, p. 6), a “primal node” generating and benefitting from tourism flows within Southeast Asia (Yeoh & Chang, 2001).

A second challenge being addressed by the STPB relates to the image of Singapore being projected. Where Singapore was previously marketed as “Instant Asia”, the changing local landscape from a relatively “undeveloped” nation in the 1960s to that of a “thriving metropolis” today (Chang, 1998:82) warrants a new image to be projected to tourists. Concomitant with the changing landscape is the shift in the way tourists were beginning to perceive the Singapore experience. Singapore’s “clean and green” environment and world-class infrastructure had become more impressive in the eyes of tourists than the “exotic”, multi-cultural experience (Chang, 1998:82) being offered by “Instant Asia”. The new tourism tagline—“New Asia-Singapore”—was hence created to address this change, and to reflect Singapore’s new roles as “tourism business centre” and “tourism hub” (STPB, 1996). According to the STPB (1996:5), “New Asia-Singapore” suggests “a Singapore which is progressive and sophisticated, yet still a unique expression of the Asian soul”. The renaming of the STPB to that of the Singapore Tourism Board (STB) also reflects the changing face of tourism in Singapore, one that should be “championed” rather

than simply “promoted” (STPB, 1996:7), in line with Singapore’s vision of becoming a “Tourism Capital”.

While “Tourism Unlimited” encourages local tourist enterprises to go regional, STB’s policy also included bringing into Singapore lifestyle concepts from abroad. The influx of “Western” companies such as Planet Hollywood, Starbucks and Tony Roma’s has been attributed to STB’s attempts to “enhance the Republic’s image with tourists” (*Directions: The Business Magazine*) by actively seeking to “match-make” foreign franchises with local ventures. Furthermore, cultural and entertainment events such as the staging of world-renowned musicals like “Cats” and “Les Miserables” (1994), and performances by Luciano Pavarotti and Michael Jackson (Chang, 1998) in Singapore aim to “tap” the regional tourist market by establishing Singapore as a regional arts and cultural “hub”. Indeed, Singapore has been identified as being an ideal setting for “gateway tourism” (Low & Toh, 1997, cited in Chang, 1998:85). As a potential “gateway” to Southeast Asia, Singapore has several distinct advantages—sophisticated transportation and telecommunications infrastructure, political stability, manpower, a conducive social setting, and a strategic location (Chang, 1998). It has been stressed again that by “bring[ing] the world to Singapore” (STPB, 1996:16), such ventures also intend to “serve the domestic population’s well-being” (STPB, 1996:17), both economically and in terms of widening lifestyle choices for Singaporeans (Chang, 1998:86).

Tourism 21 also took stock of the tourism-related industries in Singapore such as the hotel, retail and conventions sectors. The report projected a 6.1% increase in hotel rooms supplied, from 1995 to 1999. With tourist arrivals targeted at a 6.4% increase annually, a shortage in the supply of hotel rooms was forecasted (STPB, 1996:14). The challenge of the retail sector, on the other hand, was to create a more “vibrant and exciting” shopping experience for tourists and locals alike. This was to counter declines in shopping expenditure in the early 1990s. The conventions industry was reported to be growing at a “healthy pace”, with Singapore maintaining its status as the top convention city in Asia. The report, however, tempered this optimism with caution against complacency, as competition from rival cities such as Kuala Lumpur and Bangkok threaten Singapore’s ambition of becoming *the* tourism gateway in Asia (see also Yeoh & Chang, 2001).

It is evident that tourism policies through time have been inseparable from the wider shifts in the socio-economic context, both internal and external. It is not unexpected then that tourism policies will continue to be responsive to such changes and challenges in the future. The chapters in this book attempt

to elucidate some of these current trends and opportunities that shape, and are shaped by, past and present policies and strategies.

A Summary Map of the Chapters

The substantive chapters in this book may be divided into three sections—Tourism Plans, Tourism Resources and Infrastructure, and Tourism Products. The increasing role of technology in Singapore’s tourism plans and policies, operational issues for tourism hubs and gateways, and competition, “complementation” and regionalisation are the major focus of the first section of this book.

Singapore, in its role as a tourism hub and gateway, is constantly facing new challenges, especially in the aftermath of the Asian financial crisis. In the opening chapter, Low examines the leaner and more competitive environment in which the tourism sector must now operate. Within this framework, she explores the escalating role that information technology plays in Singapore’s future development and examines how tourism can be an integral part of this growth. She proposes that since policies and strategies in Singapore have always been proactive and forward-looking, Singapore’s experiences, problems and prospects as a tourism hub and gateway may offer an analytical framework for other countries in the region. Important issues she suggests need to be considered include whether tourism policies will lead to head-on competition or more collaborative “complementation”, the efforts at economic co-operation both in ASEAN and APEC, and the role of regional and international politics as a threat to Singapore’s viability and sustainability as a tourism hub.

Khoo complements Low’s discussion, predicting sizeable growth in the tourism industry in Singapore—as a tourist destination, a tourist business centre and a tourist hub. He investigates the Tourism Satellite Account (TSA), which was established in 1993, finally providing a consistent and coherent standard of measure of the economic contribution of this industry. The TSA yields credible and comparable data on tourism’s contribution to the country’s GDP in addition to strategic and value-adding information critical to the economic planning, marketing and management of tourism. Currently Singapore is the only Asian country to have such an account. The STB and the Department of Statistics are constantly developing the methodology of TSAs in order to both generate accurate and up-to-date information and facilitate on-going monitoring of tourism and its related activities in Singapore.

Tourism 21, Singapore's blueprint for creating Singapore into a tourism capital, is introduced by Tham. *Tourism 21* recommends regionalisation to spearhead the development of Singapore's tourism future, with Singapore becoming a vital regional tourism hub and business centre. Regionalisation would promote regional tourism investment, develop local enterprises and enhance stronger linkages to the region's major tourism destinations. Tham suggests that this strategy offers the visitor "destination twinning", where Singapore is the modern cosmopolitan city-destination providing easy access to the rich and myriad mix of culture, history and people of the region, thus benefitting the whole region.

The gateway function of Singapore is further explored by Sriram, Raguraman and Lew. Singapore is already a well-established gateway to all the major urban centres in Southeast Asia for the long haul traveller. It competes directly with Bangkok and Hong Kong since it is the explicit aim of each of these three cities to become the travel and tourism gateway for all of Southeast Asia at the international transportation hub level. Based on their analysis, the authors propose certain steps that must be taken to ensure continuing gateway status for Singapore.

In the next section, tourism resources and infrastructure in Singapore are examined. Two of Singapore's tourism aims for the new millennium are to make Singapore a "must see" destination as well as to enhance its active participation in the development of tourism in the region, creating "win-win" partnerships. Historically, the region's trade policies have been restrictive, but to achieve Singapore's aims, a more co-operative, liberal and economically stable environment is required. Chin examines the implications of an "open-skies" policy on route development in the region in addition to the aftermath of the Asian financial crisis on airport development. Inevitably, these events will have tremendous implications on tourist arrivals and movement within the region.

Chong, Ho, Ng and Tan present a methodological concept for developing a model based on competency for employees in the Singapore tourism industry. The aim of their model is to formalise skill standards so that it can be used for competency certification, training and development. They also intend their model to be able to identify crucial areas of staff training. With the growing importance of competency in the new knowledge-based economy, the authors argue for the need to develop a rigorous methodology that is both effective and efficient while at the same time relevant to the existing conditions in the industry.

The Asian financial crisis affected all areas of tourism in Singapore, including the hotel industry. Boon's investigation into strategic management of hotels in times of economic stress, found that a hotel's performance was significantly related to its size, market positioning and types of management, but not significantly related to its location. Initiatives and policies of the STB favourable to the hotels also helped them cope with the economic uncertainties. Boon proposes several strategies that hotel operators could adopt to ensure that they remain viable into the next millennium.

Chang examines some of the issues and challenges that the Singapore government must face in order to realise its vision for the new millennium, that is of Singapore as a "Global City for the Arts" (GCA). He argues for the pressing need to cultivate arts and cultural "software" (talents and human resources) over the present focus on "hardware" development (infrastructure); explores the challenges of exporting Singapore-initiated entertainment events worldwide; and highlights some of the local peculiarities inherent in the arts industry that might hamper Singapore's quest to be a global arts hub. He warns that unless local rules and regulations governing entertainment events are relaxed in conjunction with changing mindsets of local audiences, Singapore's GCA vision will remain at a purely rhetorical level.

Singapore offers a wide range of tourist and business attractions to entice foreign visitors. The final section provides a broad coverage of Singapore's tourism products as well as offering guidance for future developments. As such, Yong describes a framework for the estimation of a demand model for retail sales in Singapore. Using this demand equation, he found that tourist arrivals were both statistically and economically significant to retail sales. Based on figures for 1998 and early 1999, he predicted that each additional tourist increased retail sales by an amount ranging from \$1,748 to \$2,934. In addition, his investigation suggests that a very modest increase in tourism promotion expenditure, \$13.60 per tourist, could result in considerable improvement in the retail industry's performance. He recommends that the retail industry should increase its involvement in initiating and funding tourism promotional activities.

Although leisure and tourism are central to social life, they are seldom acknowledged as primary determinants of space and culture. Teo and Yeoh however argue that since tourism is a spatially differentiating activity, it has great potential to define geographies. In this chapter, the authors explore the interconnectedness of Singapore with the rest of the world and outline the impact of the economic crisis on tourism in Singapore. Using theme parks as

their mode of investigation, they show how volatile and responsive this industry must be to changes on a worldwide scale. Given the negative outcomes associated with a decline in tourist arrivals, they address the issues faced by theme parks and suggest both short- and long-term strategies to reposition the industry.

In his investigation, Lee finds that despite the economic crisis, Singapore's cruise industry has been experiencing healthy growth: Singapore registered a 33% growth in cruise industry passenger throughput in 1998 over 1999. Lee further provides an overview of the dynamics of the regional and local cruise industry from the general economic and tourism angles. He also examines the impact that world market forces have on the industry.

Beach tourism, a subcomponent of coastal tourism, implies an interaction of two systems: tourism and beaches. In the case of Singapore, Wong analyses the extent and nature of beach management, examines the concept of Singapore as a tropical island resort and evaluates the prospects of beach tourism in Singapore. He argues that managing beach tourism in the future will require a wider understanding of non-structural aspects and also of the impact of a projected rising sea level. He reminds us that the beach is not only for tourists but also for protecting the land at the coast and is an important resource for coastal inhabitants.

The term "authenticity" is not a new characteristic of tourism; the industry having become an expert in marketing images of authenticity to tourists. With the increasing popularity of cultural heritage and tourism, Chia explores and attempts to provide an understanding of the links between issues of authenticity and culture, in particular, the tourist industry's claim of "authentic culture" or "authentic heritage", by investigating how places of worship, gazetted as national monuments, are used as sites for the "staging of authenticity". She highlights the ever-present play of power relations in tourism and suggests that they are not necessarily between tourists and locals, but importantly, between locals and the state.

In the concluding chapter, Seah asserts that geographical research and scholarship on convention tourism have been lacking even though it is recognised as a highly specialised and major element of urban tourism in contemporary societies. In the first part of his paper, he examines the nature of convention tourism and its development in Singapore. In the second section he uses the results of fieldwork with the delegates' family members to construct a convention tourism model. He argues that family members are a distinct segment of convention tourism and that the ability to attract family members leads to a "win-win" scenario for the host country.

Future Prospects and Challenges

The above sections, together with the chapters in this book, provide readers a sense of where Singapore has gone and where it is heading in terms of tourism policy and management. From the reports and analyses, it is evident, and obviously should come as no surprise to observers and researchers, that Singapore has a proactive state which seeks to maintain a vibrant economy through forward planning, timely interventions, entrepreneurial activities, and infrastructural development.

Indeed, the visible hand of the state can be found in practically all sectors of the economy, including tourism. By and large, the evidence indicates that the involvement of the state has been positive, and will likely continue to be so. The positive outcomes for the economy may be attributed to a key characteristic of tourism policy and strategy in Singapore—flexibility. Over the years, tourism strategy has evolved from the simpler “Singapore–Instant Asia” to the much more sophisticated “New Asia–Singapore” and “Singapore as tourism hub, capital, and gateway” approach. The latter “new tourism” strategy reflects, in the lingo of contingency theories in organisational studies, an open system approach which recognises that “there is no single way to organise” and that “the best way to organise depends on the nature of the environment to which the organisation relates” (Scott, 1998:95).

Obviously, the environment confronting Singapore and its tourist industry has changed tremendously since the sixties. Whether the transformation is labelled globalisation or attributed to the advent of the new millennium, the fact remains that tourism planners must develop effective policies which can mobilise internal and external resources, as well as overcome constraints and impediments. This calls for making constant adjustments, even to the extent of allowing for paradigm shifts. Given the turbulent and fast-changing environment confronting Singapore tourism, it is difficult to predict whether the “new tourism” will boost tourist figures and bring in more tourist dollars to the extent hoped for. What is more certain is that Singapore’s tourism policy will continue to exhibit a high degree of flexibility, a characteristic which augurs well for its future in an ever changing and increasingly interconnected, competitive world.

Understood as both a microcosm as well as a subset of the government’s macroeconomic policy, we have good reasons to believe that Singapore’s tourism policy can help Singapore survive the growing business competition in the region and globally. However, the issue is not merely about economics

and profits. Apart from being an economy or a mega-corporation, even if it has often-time been called Singapore Inc., Singapore is also a relatively new nation with a multi-ethnic, multi-religious citizenry. While the latter characteristic has been used as a tourism selling point in the past, there is concern that local identities, needs, heritage, and authenticity would be compromised—even sacrificed—at the altar of global capitalism, including the production and marketing of tourist attractions and the commodification of buildings, sites and activities.

Nevertheless, the response to this local/tourist tension does not have to be of the “all-or-nothing” type, just as the response to globalisation does not have to be extreme nationalism or economic protectionism. The challenge is to find an optimum position which balances the needs of locals and tourists (Tyler, 1998:2). Chia’s case study (in this volume) on religious attractions in Singapore, for example, reflects succinctly the challenge of using religious sites and festivals as tourism products, without offending the religious sensitivities of local participants. More generally, Yeoh and Chang (2001:1035–1036) point out the need to “reconcile local and regional tensions with Singapore’s international ambitions”, including global tourism ambitions, and suggest that meeting this challenge involves, among other things, conducting meaningful dialogues with the “voices of dissent emanating from the grassroots”. There is no doubt that forging a partnership between the different stakeholders can contribute towards making the tourism industry in Singapore more vibrant and resilient.

All in all, the challenge of tourism policy and management is not merely about developing tourism resources, infrastructure and products, but, more importantly, about confronting globalisation in a way which benefits the local economy, empowers the citizenry, and helps to forge a national identity. This process involves contestations, but allowing for dissents and encouraging participation can only benefit Singapore, the economy (including tourism hub, capital and gateway), polity and nation.

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