

March 2010

A White Paper on Singapore's Integrated Resorts



Introduction

This White Paper demonstrates Brandtology's services and system with specific analysis of a topic of public interest. By sampling a month's worth of online conversations, this white paper demonstrates how Brandtology maps out the social media conversations concerning the Integrated Resorts, zooms in on public perception of the subject matter, and tracks the trends, patterns and key influencers in such conversations. Such intelligence will help stakeholders understand the ground sentiments and concerns of the public, and formulate strategies for the engagement of key levers in the social media landscape.

ONLINE CHATTER ON THE INTEGRATED RESORTS – AN EXAMINATION OF SOCIAL MEDIA CONVERSATIONS IN SINGAPORE

BACKGROUND OF THE INTEGRATED RESORTS

In 2005, Singapore, which had banned casinos since its founding as a nation, announced that it would allow two Integrated Resorts incorporating casinos to be built in Singapore. The rationale was that this would give the economy a boost by increasing tourist arrivals and bringing in more tourist dollars. Immediately, there was significant public concern over the possible rise of social problems relating to gambling, including crime. Since then, such concerns have continually surfaced in both mainstream media and in social media conversations, with the public following every milestone in the development of the Integrated Resorts and related policies closely. The highly controversial casino component of the Integrated Resorts finally opened on 14 Feb 2010, and continues to be the talking point of citizens.

A SNAPSHOT OF ONLINE CONVERSATIONS CONCERNING THE INTEGRATED RESORTS

Using Brandtology's "Buzz Clusters" feature, the in-house Research and Services Team did a quick survey of the conversations taking place in cyberspace concerning the Integrated Resorts. At first glance, it would seem that most Singaporeans are concerned about government policies, like the implementation of the **Exclusion Orders**.¹

Further contextualization reveals that the designated restrictions placed on **Singaporeans and PRs** has resulted in unhappiness about how **Foreign Workers** were 'swarming' the casinos. The plan to open the casino at the start of the **Chinese New Year**, too, has generated considerable chatter, although in depth analysis revealed that many actually complained about how the casino was, in reality, only 'half-ready'.

There also seems to be an interest in the the Integrated Resort's Theme Park as well. Netizens have also been following news about the first few casino crimes closely.

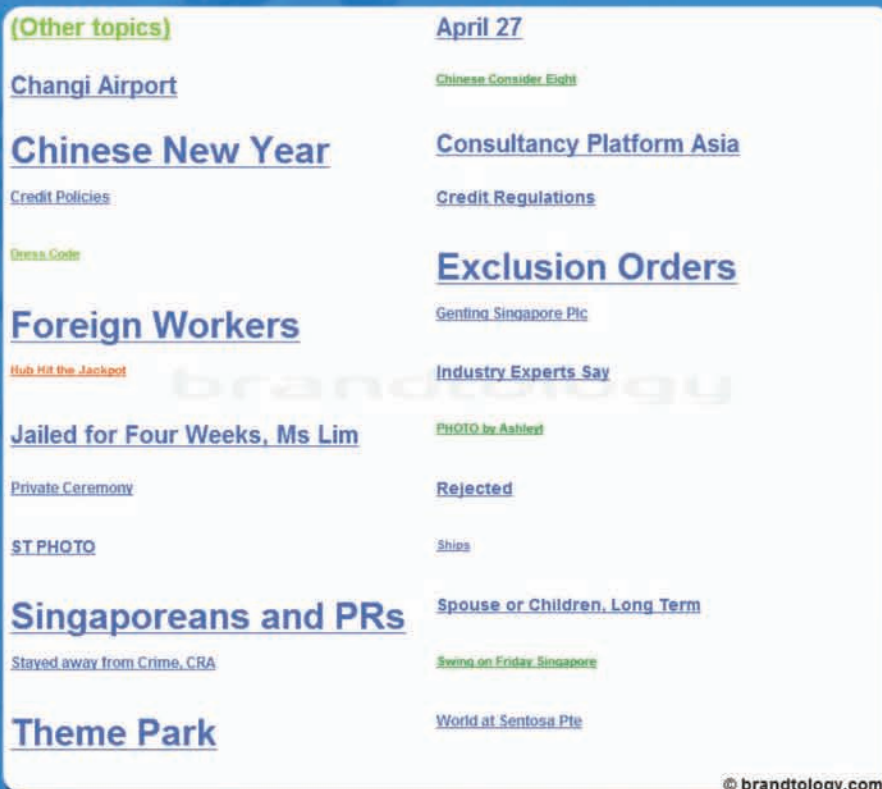


Figure 1 - Buzz Clusters identify the concepts around which most social conversations about a given topic revolve. The larger the font size, the more popularly discussed the topic

¹ Exclusion Orders prevent at-risk individuals from entering the casinos to gamble.

ONLINE PERCEPTIONS OF THE "INTEGRATED RESORT" BRAND



Figure 2 – Majority of conversations continue to associate the Integrated Resorts with casinos, with significantly less discussion about their hotel and theme park attractions.

Brandtology's propriety Digital Conversation Management System (DCMS), with its team of dedicated Social Media Analysts and Research Analysts, monitored and analysed the social media conversations for sentiments and emergent issues.

The "Integrated Resort" brand name or concept was investigated by Brandtology by examining the concept's share of online conversations and its associated topics. This was done with the careful research and categorization of keywords. Research into the volume (buzz) and subject matter of actual conversations has revealed that in spite of the attempt to term the Integrated Resorts as a leisure, entertainment and business zone² with a casino as merely one of its components, a large majority of social media conversations continue to refer to the Integrated Resorts merely as 'the casinos', with little association of the integrated resort with its other features like the hotels, convention centres and theme parks.

PUBLIC OPINION CONCERNING LEVY POLICY FOR LOCALS

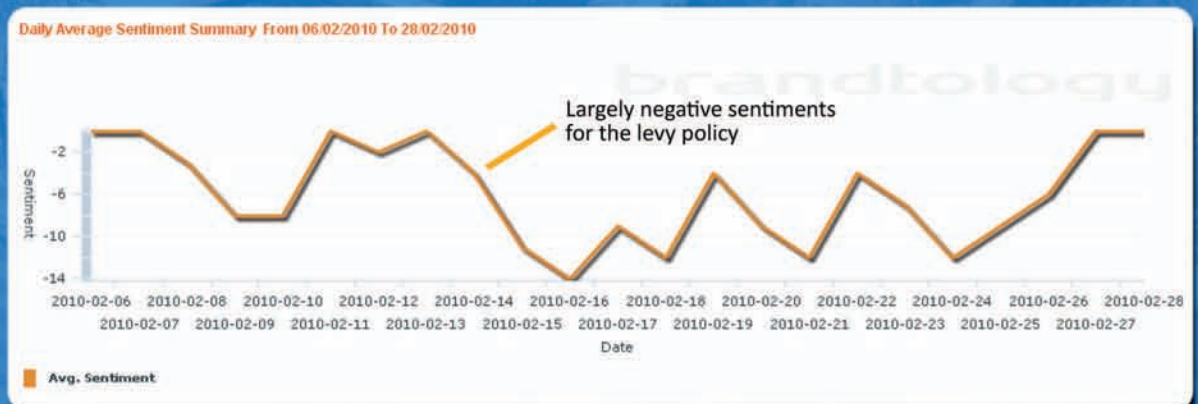


Figure 3 - Netizen sentiments³ towards casino levy policy

It has been found that a SGD\$100 entry levy for Singaporeans, designed to deter those who are financially at risk and unlikely to be able to indulge in compulsive gambling in the Integrated Resorts, is not well-regarded online. Support for the levy has been slightly negative, with the average sentiment³ hovering at -5. Many netizens are concerned that SGD100 is too low to be a deterrent, while others have expressed dismay at being 'discriminated against' as compared to unskilled foreign workers, who are not subject to the entry levy. Some astute commentators remarked that foreign workers were at greater risk of causing social problems if they became bankrupt due to gambling. Interestingly, some even added that excluding the mass market could adversely impact the economic success of the casinos. Catching such emerging issues allows organizations to tap into public debate and avoid potential public relations issues by being 'close to the ground.'

² Statement by Prime Minister Lee Hsien Loong on the Integrated Resorts on 18 Apr 2005

³ Sentiments are rated on a scale ranging from -100 (most negative) to +100 (most positive) with 0 being neutral

TRADITIONAL MEDIA AND ITS IMPACT ON PUBLIC OPINION

It was found that in terms of concern over social problems resulting from the Integrated Resorts and their perceived impact on tourism, media coverage had a limited impact in improving local sentiment.

A fuller picture of how news media and social media channels influence social conversations will help organisations maximize their return on investment in terms of media engagement, advertising campaigns and press cultivation.

Sentiment From 12/02/2010 To 28/02/2010

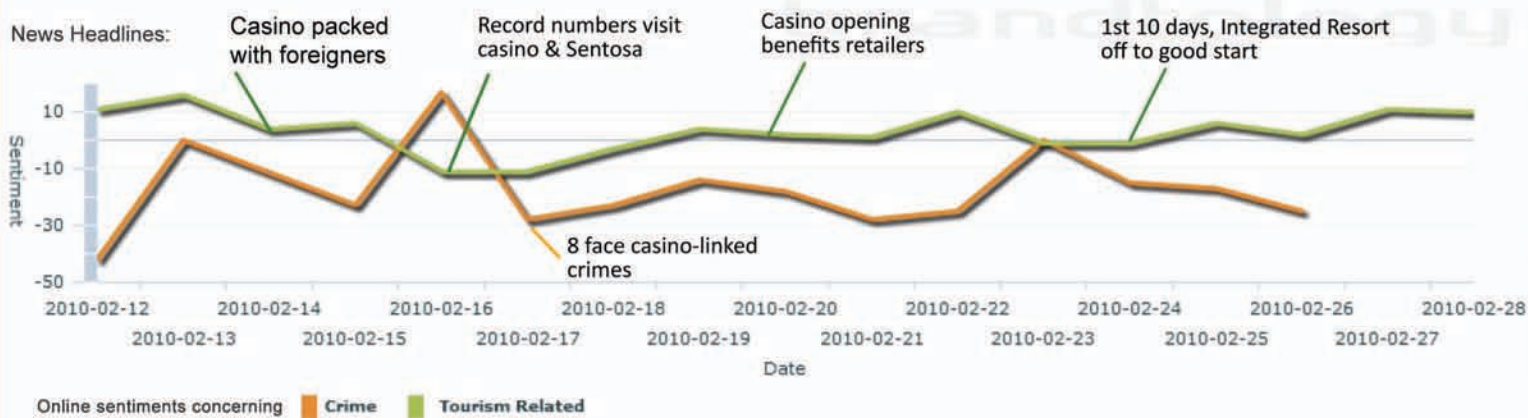


Figure 4 - Impact of media coverage on online sentiments

By utilizing Brandtology's trending tools, the impact of media coverage on public opinion was analysed and co-related with media coverage on the issue. The effectiveness of public relations campaigns and advertising campaigns could also be likewise investigated and evaluated.

THE REAL ISSUES OF CONCERN AMONGST NETIZENS

Brandtology's propriety Digital Conversation Management System (DCMS), with its team of dedicated Social Media Analysts and Research Analysts segmented and broke down the social media conversations into key issues.

Buzz Trend From 01/02/2010 To 28/02/2010

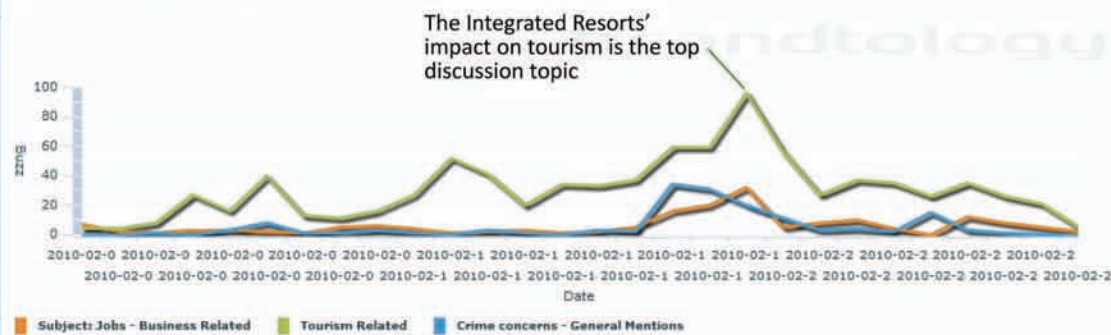


Figure 5 - The Integrated Resorts' impact on tourism emerges as the most frequently discussed issue

Despite all the media publicity and concern about casino crime and the casino's ability to generate jobs, it was found that the chief concern amongst netizens was still about the Integrated Resorts' impact on tourism. The next top discussed issues were crime and job creation. Thus, at the end of the day, it could be said that a larger percentage of netizens are still concerned about whether the Integrated Resorts works in terms of bringing in more tourists, amongst all the other concerns raised by social groups and opposition parties.

TOP ONLINE NEWS/SOCIAL MEDIA CHANNELS AND CONVERSATION GROWTH ANALYSIS

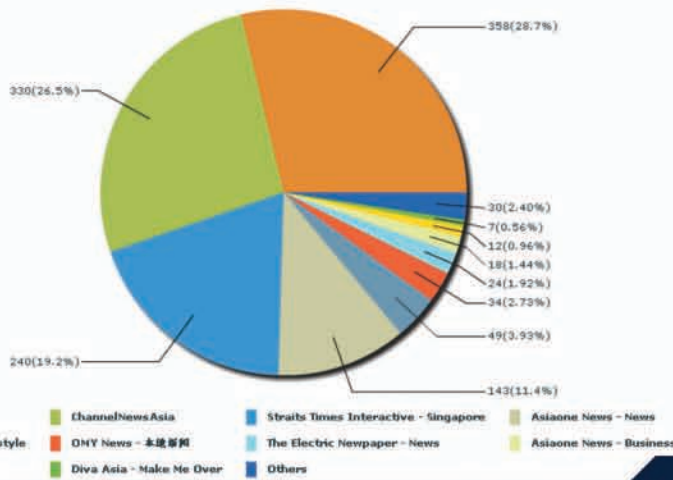


Figure 6.1 - Top 10 Online News channels discussing the Integrated Resorts

It was found that the top Social Media channels where the Integrated Resorts are discussed are **CNA Forum – MarketTalk**, where conversations revolve around the casino’s economic success, **Hardwarezone**, one of the liveliest forums in Singapore in general, and **Sammyboy**, which has dedicated forums discussing gambling haunts and techniques.

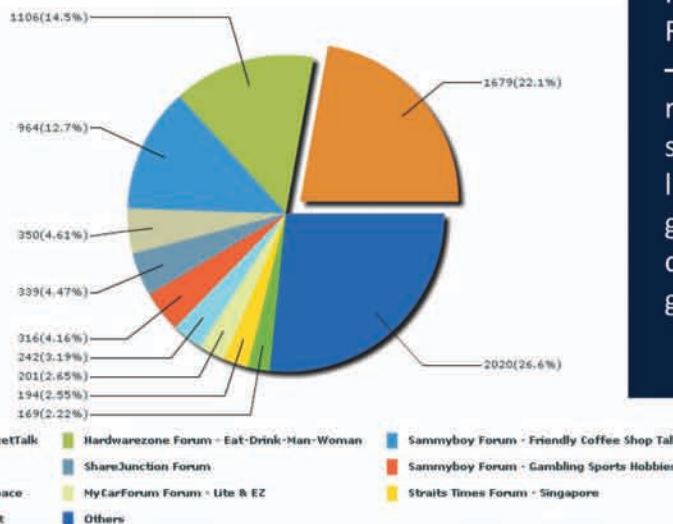


Figure 6.2 - Top 10 Social Media channels discussing the Integrated Resorts

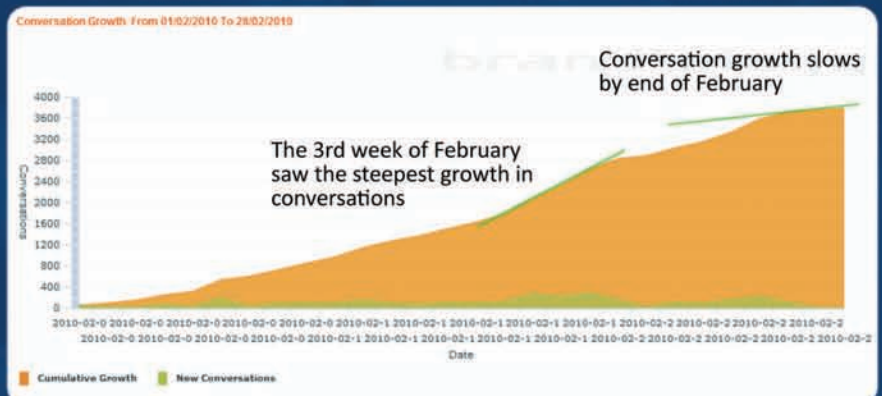


Figure 7 - Conversation growth throughout February

It was found that the steepest growth in online conversations about the Integrated Resorts occurred in the third week, soon after the opening of the casino component of the Resorts. It was noted that the conversations continued to grow, but at a slower pace, till the end of the month.

IDENTIFYING HOTBEDS OF CONTROVERSY ABOUT THE EFFECTIVENESS OF THE INTEGRATED RESORTS

Top 10 Buzziest Channels From 01/02/2010 To 28/02/2010



Figure 8 - Sentiments within the Top 10 Channels on the Integrated Resorts (Tourism Related)

A sample breakdown of negative sentiments about the Integrated Resorts' impact on tourism reveals that Sammyboy Forum and ChannelNewsAsia MarketTalk Forum have the highest concentrations of negative posts, with about 60% of Sammyboy posts rated as 'negative' or 'very negative'. This is consistent with past research on Sammyboy forum, where a few key personalities, like the participant who goes by the avatar of "makapaa", make extended and long contributions to on-going complaints about Singapore politics. The forum also features topics like "the FT-bashing ring"⁴, indicating its bias and slant.

Based on such findings, interested stakeholders may choose to launch focused engagement and intervention efforts on specific forums to mitigate negative online sentiment on an issue.

⁴ FT is shorthand for 'foreign talent', usually used to refer to migrant workers

THE MOVERS AND SHAKERS IN CYBERSPACE

List of Influencers: From 01/02/2010 To 28/02/2010

All Categories

Influencer Name	Influence	Influence Score	Author/Commenter	Channel	Total Posts	Avg. Sentiment	
Neubie		89		ChannelNewsAsia Fc	15		All Posts
@HAblog		87		Sammyboy Forum	27		All Posts
solidghost		86		Hardcorezone Forum	18		All Posts
zh3ng82		85		Hardcorezone Forum	3		All Posts
General Veas		85		Sammyboy Forum	7		All Posts
Dumbell		84		Sammyboy Forum	3		All Posts
christmas_		82		SGClub Forum - Loc	10		All Posts
poose123		82		ChannelNewsAsia Fc	6		All Posts
Pan		81		ChannelNewsAsia Fc	12		All Posts

Figure 9 - A profile of key influencers in social conversations regarding the Integrated Resorts

Who are the key online story-tellers shaping the conversations on the Integrated Resorts?

For organizations keen on zooming in on specific online netizens that are having an impact on public opinions in cyberspace, being able to identify the drivers of conversations on issues related to the Integrated Resorts is crucial. By analyzing variables such as number and frequency of posts, as well as the number of responses to their posts, the DCMS system is able to rate and identify key influencers impacting online sentiments. The propriety Influencer score gives a basic profile of the key online story-tellers, like their frequently visited channels and their number of conversations initiated and participated in, helping to identify individual online personalities that may warrant further attention.

CONCLUSION

Understanding public opinion on an issue as intricate as the Integrated Resorts is a task that is as complex as it is important. Having access to the statistics, facts and trends will help key stakeholders in government, private businesses, policy-makers, sales, marketing, advertising and public relations entities understand online conversations regarding the Integrated Resorts better. This will better facilitate the formulation and direction of intervention strategies for the engagement and influencing of public sentiments in accordance with organizational goals. There is much from which interested organizations can benefit by undertaking to examine the social media conversations about the Integrated Resorts using a thorough, structured and rigorous methodology that combines both machine precision with human understanding.



About Brandtology

Brandtology is one of the largest independent business and brand online intelligence service providers that combines technology, processes and trained professionals to deliver accurate and relevant intelligence to global organizations. Our proprietary opinion mining technologies aid organizations in listening to digital conversations across countries in multiple languages while our trained Social Media Professionals ensure high accuracy and relevancy of the intelligence provided to clients. Astute use of such intelligence has enabled Brandtology's global clients to make timely and informed strategic decisions for public engagement, crisis management, media planning, campaign measurement, product development and strategic planning, amongst other uses. For more information, please visit www.brandtology.com or email contact@brandtology.com

Brandtology Pte Ltd

22 Changi South Avenue 2 UPS House #02-05 Singapore 486064

www.brandtology.com