The State of Online Conversations

BRAND DUBAI: PULSE REPORT
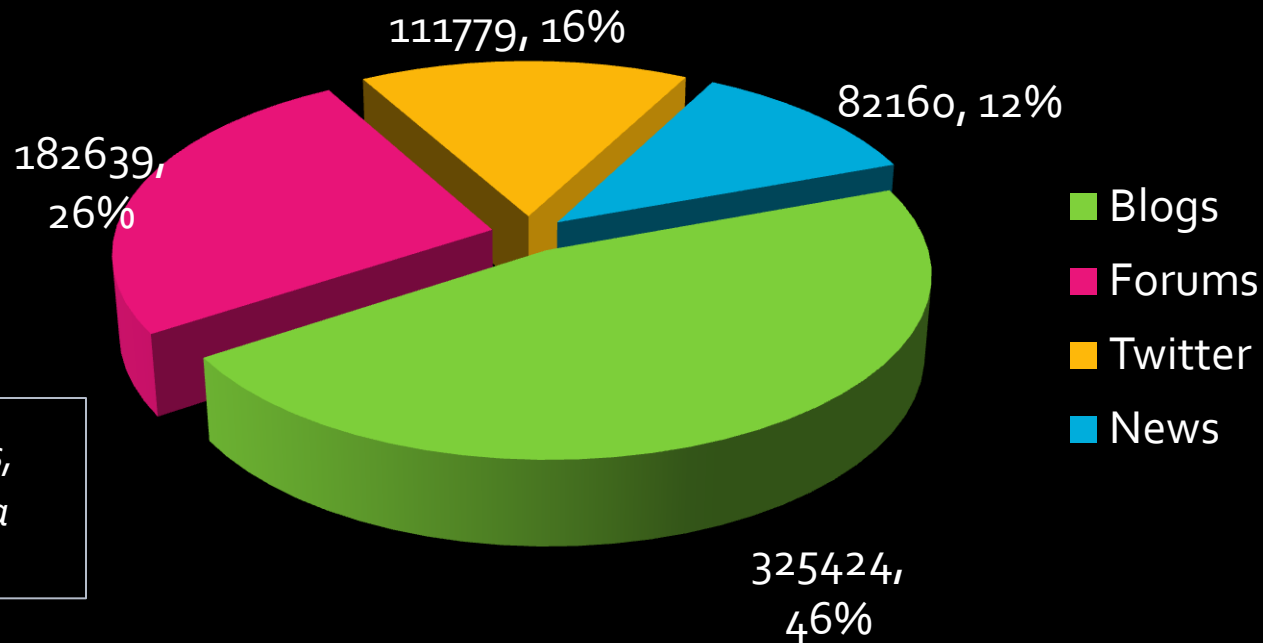
"Brand Dubai" Pulse Report

- **About this report**
  - Objective is to assess the state of "Brand Dubai" since the financial crisis in Q4 2009
  - Provides an understanding of current feelings and opinions around Dubai within the general public around the World
  - Analyzed nearly 3/4 million (725,000) postings on the Internet referencing Dubai
  - In-depth review of the last 6-9 months (May 2010 to Dec 2010)
  - Benchmark used to capture progress is Nov 2009
  - Covers all online media channels (including Blogs, Twitter, Social Networks, Video, Forums, and Mainstream News sites)

Why Social Media?

- How BIG is the Buzz on the Net?

- 386,000 mentions of Dubai per month
- from blogs, forums, Twitter, Facebook, Flickr, YouTube, mainstream news, etc.
- for our study we sampled 725,000+ mentions over 6-9 months

- Social Media is where Dubai gets talked about!

- For all mentions of Dubai on the Internet…
- 88% are coming from social media
- 12% mainstream news sites

Brand Dubai "Share of Voice" Analysis (Last 6 Months)

👍 *88% of all mentions of Dubai on the Internet are coming from social media channels vs. mainstream news sites*

111779, 16%

82160, 12%

182639, 26%

#Mentions, % by Media channel

325424, 46%

- Blogs
- Forums
- Twitter
- News

Analysis from May, 2010 to Dec, 2010 of over 700,000 of the most active mentions of Dubai across all online media channels
Twitter volumes with retweets/spam may reach up to 40% of total volumes

Brand Dubai Report Methodology

4 Key analyses were prepared to assess the state of online conversations on Dubai:

Sentiment Analysis

- Signifies the emotions, thoughts, views, or attitudes related to Dubai
- Expressed as "# of mentions" or postings categorized by:
  - Neutral
  - Positive
  - Negative

Themes Analysis

- Expressed as "word clouds"
- Shows the top words associated with Dubai
- Size of word indicates frequency of mentions

Share of Voice

- Shows which media type has the most mentions of Dubai
- Online media types cover blogs, vides (e.g. YouTube), images (e.g. Flickr), microblogs (e.g. Twitter), forums, and mainstream news sites (e.g. CNN.com)
- Expressed as "%" and in "# of mentions" by media type

Hot Topic Analysis

- Provides focused analysis on the reputation of a particular topic related to Dubai
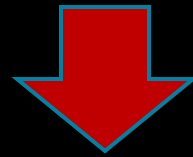- Topics presented here include
  - His Highness Sheikh Mohammed

Brand Dubai Key Analytics

Sentiment
Analysis

Themes
Analysis

Q4 2009 vs. Today

Brand Dubai Sentiment Index Q4'2009

- During a one month sample from Nov 19 to Dec 19, 2010, the analysis across all media channels showed overwhelming negative sentiment

- ..reaching its high on 11/27 with 95% of all mentions being negative

- For the last month of 2009, the ratio of positive to negative sentiment was running 1:3

- As a result, highly negative associations of debt, fear, crisis, and worry marred Dubai's once lustrous reputation

Brand Dubai Sentiment Analysis (Nov19-Dec19,2009)

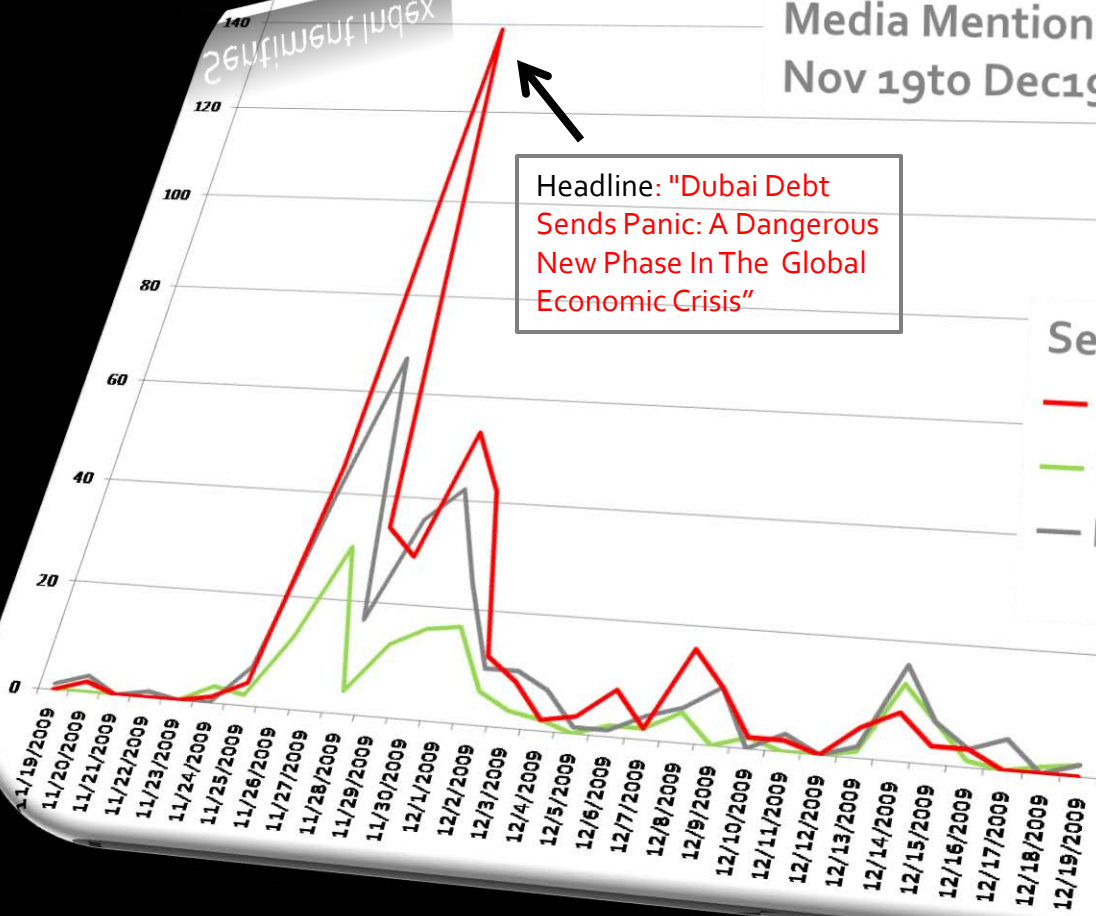*In time of high crisis, negative sentiment exceeded even neutral sentiment for Dubai*

Brand Dubai Sentiment Index

Media Mentions of Dubai Nov 19 to Dec19, 2009

Headline: "Dubai Debt Sends Panic: A Dangerous New Phase In The Global Economic Crisis"

Sentiment
— Negative
— Positive
— Neutral

- One month sample during debt crisis
- Analysis across all media channels
- Sample of most active, unique mentions
- During the peak period about 95% of all media mentions were NEGATIVE

Brand Dubai "Themes" Analysis (November 2009)

Highly negative words associated with Dubai as waves of negative sentiment were left unchecked

How does Dubai fair Today?

- Tracking social media buzz from May 1st to Dec31st

- Over the last 6-9 months the sentiment for Dubai has changed to an overall net positive

- For the last 6 months of 2010, the ratio of positive to negative sentiment was running 5:2

- However many spurts of negative opinions and perceptions cloud the recovery of Dubai's reputation
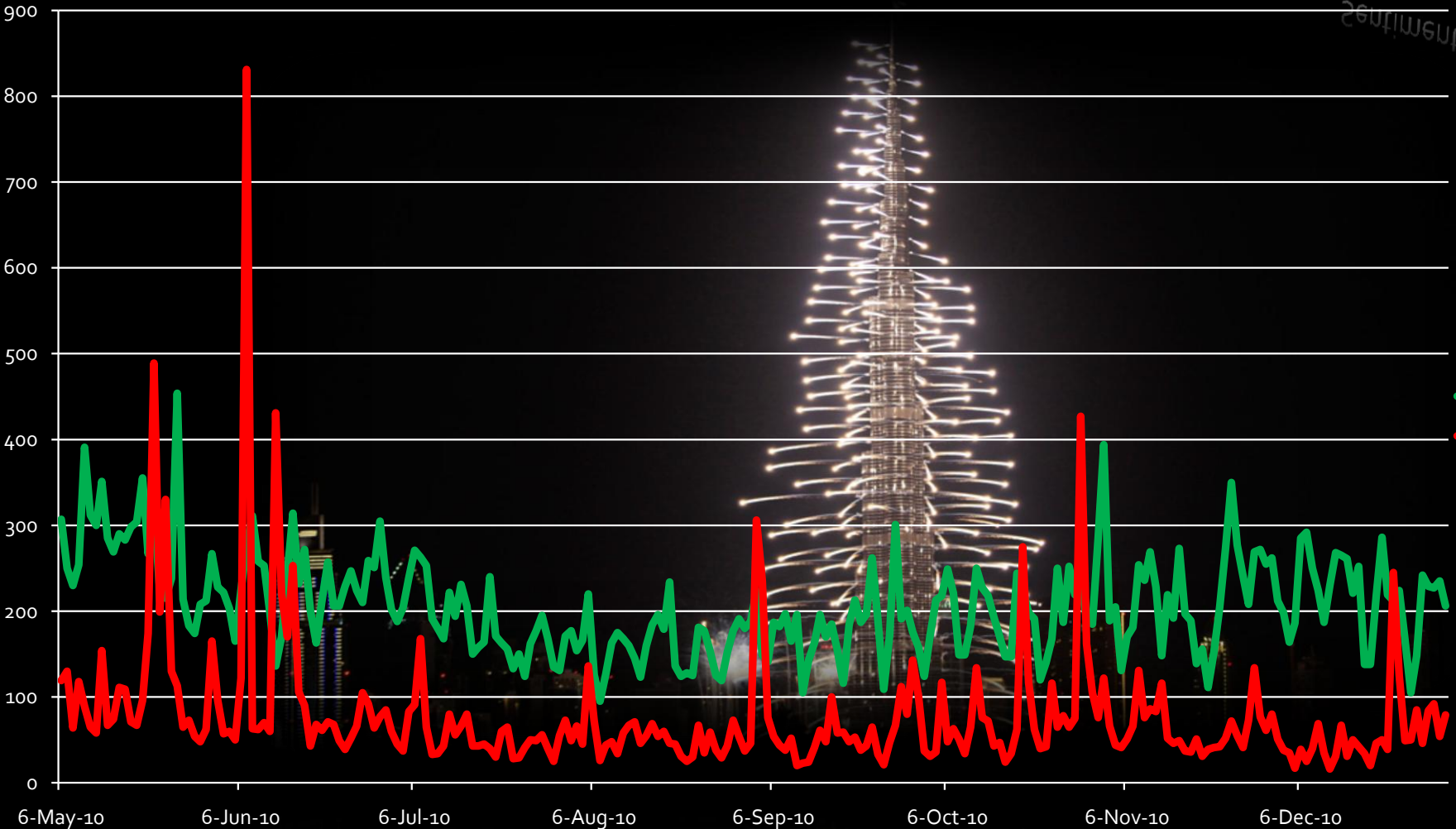
Brand Dubai Sentiment Analysis (Last 6 Months)

👍 *Trending positive, but better crisis management needed to contain bursts of negative sentiment*

Brand Dubai
Sentiment Index

Period: May – Dec 2010

Legend: Positive (green), Negative (red)

X-axis: 6-May-10, 6-Jun-10, 6-Jul-10, 6-Aug-10, 6-Sep-10, 6-Oct-10, 6-Nov-10, 6-Dec-10

Y-axis: 0, 100, 200, 300, 400, 500, 600, 700, 800, 900

Brand Dubai "Sentiment Index" Q2 through Q4 2010

Brand Dubai "Themes" Analysis (Last 6 Months)

👍 *Today there are more positive words associated with Dubai, but problem areas remain*

Desired
- *resort/luxury*
- *championships*
- *logistics*
- *air travel*
- *fashion*
- *shopping*
- *etc...*

Undesirables
- *terrorism*
- *bombs*
- *assassins*
- *police arrests*
- *debt*
- *etc...*

Brand Dubai "Themes" Analysis (Last 6 Months)

👍 *Today In 2009 Dubai's image recovered in many aspects, but new reputation management challenges were raised.*

- Dubai has recovered much of its reputation.

- "Shopping", "Luxury Hotels", "Air Travel", "Championships", and "Trade Logistics" now resonate clearly again.

- Global security challenges and lingering financial health issues remain a significant impact on Brand Dubai.

Brand Dubai "Share of Voice" Analysis (Last 6 Months)

*Mainstream news vs. social media sites*

- Research has shown that Dubai generally has a much higher positive rating among social media users than the traditional media.

- It seems that global mainstream media is focusing too much negative attention on Dubai and its progress towards recovery. Social media through citizens, residents, and the general public however continue to view Dubai positively in general.

Brand Dubai "Share of Voice" Analysis (Last 6 Months)

*☞ Mainstream news sites appear to be crushingly negative on Dubai*

Media Channel: Sentiment about Dubai on Mainstream News Sites
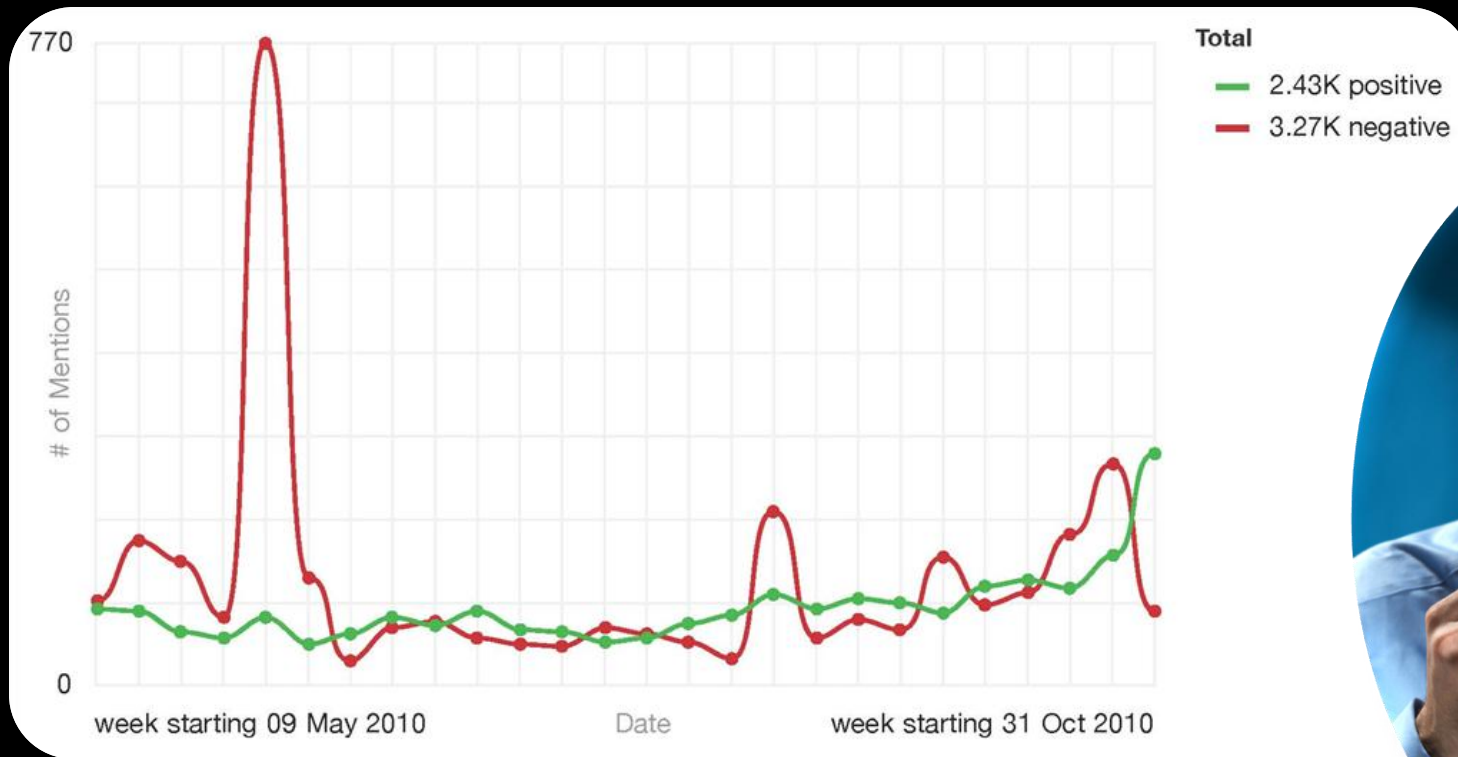
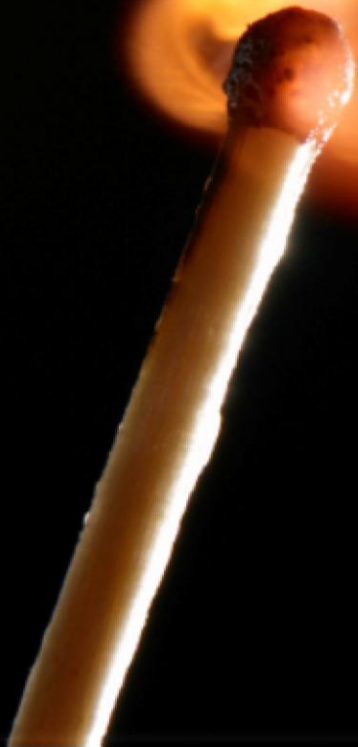# Brand Dubai "Share of Voice" Analysis (Last 6 Months)

👍 *Blog sites appear to be generally positive on Dubai indicating a strong brand following on the "social web" vs. the general negative sentiment from mainstream media*

Media Channel: Sentiment about Dubai on Blog Sites

Total
- 25.8K positive
- 6.99K negative
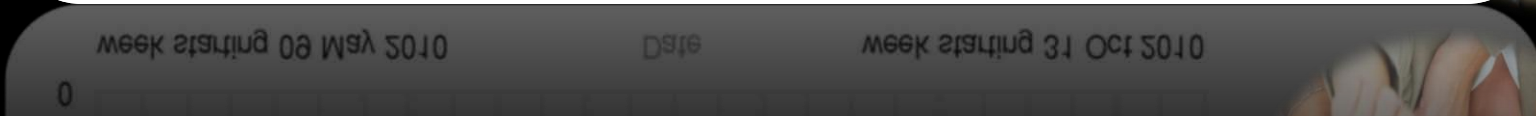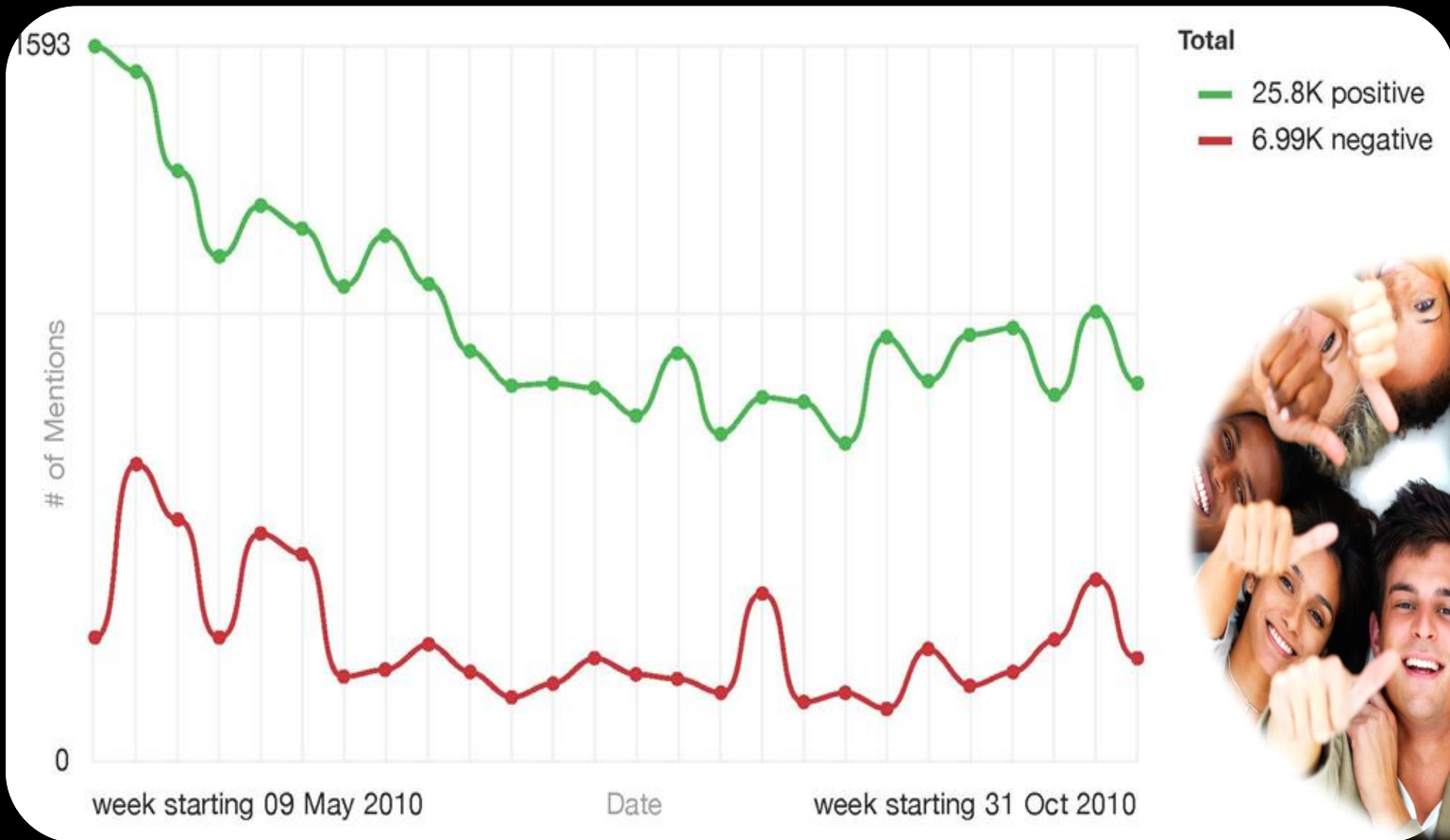
Brand Dubai Key Analytics

Hot Topic Analysis

Brand Dubai "Hot Topic" Analysis – HH Sheikh Mohammed

👍 *His Highness enjoys strong positive support across all media channels*

Sentiment for all - Positive and Negative: Sheikh Mohammed
6 Month sample of most active mentions (Jul 2010 – Dec 2010)

29

# of Mentions

0

Total
— 212 positive
— 6 negative

So what does all this mean?

"Brand Dubai" Pulse Report

- **Key Findings**
  - Dubai has recovered much of its positive sentiment since the crisis event in Q4 2009
  - However some worrisome negative associations with Dubai still remain that may hamper recovery to past standings
  - The volume of postings and levels of positive sentiment about Dubai on the "social web" far exceeds that of mainstream news media
  - His Highness Sheikh Mohammed remains a well-respected role model amongst the global community

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- Implications & Recommendations
  - Dubai has a strong supportive following on the "social web" that the authorities could leverage to:
    - thwart "Dubai bashing" news sources
    - clarify misconceptions
    - help to spread important communications and positioning from official sources
    - effect desired changes is perception and opinion
  - Dubai should look to educate its residents, citizens, and friends on how to participate in online discussions affecting Dubai and raise awareness on key topics impacting Dubai

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- Implications & Recommendations
  - The authorities in Dubai would benefit in developing core social media capabilities to :
    - track and listen in on all online conversations regarding Dubai
    - develop a "Brand Dubai" sentiment index to clearly measure and manage Dubai's online reputation
    - identify & respond to negative sentiment so as to change unwanted perceptions about Dubai
    - identify & engage with top influencers on the Net to spread and reinforce Dubai's message
    - educate public officials to converse directly with citizens, residents, and the global community through approved social media channels

DIGITAL DAYA

DIGITAL DAYA MANAGEMENT CONSULTANCIES
Emirates Towers
Sheikh Zayed Road, Level 41
Dubai POBox 31303
United Arab Emirates
T: + 971 4 313 2086
F: + 971 4 313 2881

THE DIGITAL POLICY COUNCIL

The Willard
1455 Pennsylvania Avenue, NW
Suite 400
Washington, DC 20004
United States of America
T/F: +1 202 379 4787

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