

Developing and regulating casinos: The case of Singapore

Joan C Henderson

Nanyang Technological University, Singapore

Tourism and Hospitality Research
12(3) 139–146
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sagepub.co.uk/journalsPermissions.nav
DOI: 10.1177/1467358412467642
thr.sagepub.com



Abstract

This paper discusses selected attributes of casinos and their role as visitor attractions within the context of Singapore. The reasons behind the recent introduction of casinos there as components of large-scale integrated resort projects, the consequences of the move and attempts to manage adverse social impacts are explained. A case study approach is employed, making use of data in the public domain. Information provided by commercial enterprises, official agencies and media reports is supplemented by personal observation. There is evidence of the commercial success of the casinos and integrated resorts as a whole, indicative of the achievement of desired economic returns. Concerns about the costs to society persist and government has put in place a system of regulation in an attempt to limit damage, the efficacy of which is still being tested. The study illuminates the dictates, processes and parties involved in setting up and operating casino facilities, expectations of them and their various effects. It also provides insights into endeavours to promote responsible gambling.

Keywords

Casinos, integrated resorts, responsible gambling, Singapore

Introduction

This paper explores some key features of casinos and their function as visitor attractions with specific reference to the city state of Singapore where two large-scale integrated resort complexes, in which casinos are a central element, opened in 2010. It examines the factors that have driven development of the projects and some of the outcomes. Particular attention is given to undesirable social consequences and efforts at their management by the government. The experiences recounted indicate the powerful economic arguments in favour of the introduction of casinos, including their contribution to tourism, but also highlight dilemmas to resolve pertaining to negative repercussions for society. The Singapore model of addressing the challenges reflects the defining characteristics of the city state, but some general conclusions can be derived from conditions there about the problems and opportunities accompanying this distinct tourism business. A case study methodology (Yin, 2009) was deemed most appropriate for the purposes of the exercise. Findings are based on

material published in conventional print and electronic format by government and its agencies, semi-official bodies and companies. Media reporting and fieldwork visits to the casinos yielded additional insights and inform the analysis.

Casinos as visitor attractions

The subject of casinos has proved of interest to researchers from various disciplines who have dealt with a range of questions (Eadington, 2009). Core themes that emerge are legal and regulatory matters; economic, social, political and other impacts; consumer behaviour and management and marketing issues (Kwon and Back, 2009). The contribution of casinos to tourism is a key underlying thread, entailing assessment of their actual and potential tourist appeal and role as a catalyst of tourism development. Studies

Corresponding author:

Joan C Henderson, Nanyang Business School, Nanyang Technological University, Nanyang Avenue 639798, Singapore
Email: ahenderson@ntu.edu.sg

have traditionally focussed on North America (MacLaurin and Wolstenholme, 2008; Zemke and Shoemaker, 2009), but examination of cases in Asia (Hong and Jang, 2004) and other regions of the world (Israeli and Mehrez, 2000) is becoming more common as the gambling industry extends its reach.

Casinos are revealed to be a distinctive and controversial type of visitor attraction (Bowen, 2009), inspiring sometimes heated debate about their appropriateness (Hsu, 1999). They may be welcomed by private enterprise as a great opportunity and by governments for their capacity to generate taxation revenue, investment and jobs (Alexander and Paterline, 2005; Eadington, 1999). Casinos can also be a tool in strategies to diversify the attractions base of a destination and revitalise its tourism (Stansfield, 1978). Many authorities seek to emulate the examples and earnings of Las Vegas in its heyday (Schwartz, 2003) and Macau (Zheng, 2004) with centres that combine casinos and other amenities for leisure and business travellers. Hannigan (2007) writes about the modern phenomenon of casino cities where the three commercial spheres of luxury goods and services, gambling and international tourism intersect. The marriage of entertainment and gambling has not always been successful, however, and requisite management strategies may be divergent and conflicting (Christiansen and Brinkerhoff-Jacobs, 1995). There is a chance that the anticipated patronage of casinos by tourists will not be forthcoming and domestic betting can represent the recycling of money already within the economy, not the hoped for new spending (Beeton and Pinge, 2003; Eadington, 1999).

While there are economic costs to consider, the adverse social and personal effects of casino gambling incite greater criticism. Crimes associated with casinos include money laundering, drug trafficking and prostitution (Pizam and Pokela, 1985) in which criminal gangs are often involved. It can be argued that gambling has acquired respectability as a pastime (Euromonitor International, 2010a) and this message underlies the use of the word gaming by providers (d'Hautesserre, 2000). Nevertheless, opponents contend that the habit is morally wrong and the industry exploits human frailty. One outcome is problem gambling which is of universal relevance (Abbott and Volberg, 1999) and there are higher incidences of bankruptcy, suicide, divorce, alcoholism and crime amongst addicts. Pathological or compulsive gambling can thus ruin the lives of individuals and their families, necessitating medical treatments (Castellani, 2000; Ladoucer, 2002; Raylu and Oei, 2002), which are a hidden cost. Negative connotations may engender hostility towards casinos in their neighbourhoods by residents who do

not directly benefit (Kang et al., 1996; Perdue et al., 1999; Roehl, 1999), although opinions can be revised over time (Lee and Back, 2003 and 2006). Building casinos in less-developed countries with the intention of enticing gamblers from more prosperous nations has been particularly censured for encouraging dependency and reinforcing divisions between tourists and residents (Wellings and Crush, 1983).

The special qualities of casinos lead to government involvement in their regulation and operation. Regulatory regimes vary globally, but have tended to be fairly restrictive (Euromonitor International, 2010a) in ways that reflect mixed popular and political feelings about casinos. Casino operators have also been urged to help protect those at risk and many have reacted with protestations about responsible gaming (Chen McCain et al., 2010). The American Gaming Association, for example, devised a code of conduct in 2003 with pledges to employees, patrons and the public concerning staff education, underage gambling, the serving of alcohol, advertising, research and oversight and review (American Gaming Association, 2003). The strength of the commitment and efficacy of steps undertaken has been questioned (Chabara, 2008; Chen McCain et al., 2009) and there are clearly tensions between the pursuit of corporate revenue and profits and the curbing of participation in the interests of individuals and society as a whole. These contradictions have yet to be resolved and may, indeed, be irreconcilable. There are also cross-cultural differences to take into account regarding what constitutes unacceptable gambling behaviour and suitable responses to problems (Binde, 2005).

Despite the drawbacks of casinos, there are pressures for and a trend towards the relaxation of existing restrictions. The movement is striking in Asia Pacific (Agrusa et al., 2008; Hsu, 2006) where leaders in terms of the numbers of casinos are Australia, South Korea, The Philippines and Macau (Gamingfloor.com, 2010). Prohibition is being reassessed where casinos remain illegal as demonstrated by proposals for their construction in Japan, Taiwan and Thailand (Chabara, 2008). There is appreciation of a large and lucrative market in which the Chinese, who have a strongly rooted cultural tradition of gambling (Euromonitor International, 2008; The Economist, 2010a), are often dominant. Economic advances in Mainland China have engendered an ever-growing prosperous middle class and wealthy elite, many of whom are avid gamblers. Neighbouring countries are keen to take advantage of this proclivity and the presence of illicit gambling in East Asia cannot be ignored. Several casinos in the border areas of Myanmar, Cambodia and Laos have acquired a reputation for criminality which embraces

corrupt officials (New Frontiers, 2003). It is the images and realities of sleaze and flouting of the law concomitant with some casino betting which authorities in Singapore have been striving to avoid since the decision was taken to legalise casinos there in 2005.

The casino decision, integrated resorts and reactions in Singapore

Casinos had been banned in Singapore since the city state became an independent republic in 1965 and occasional requests to develop them were firmly rejected. It was first disclosed in Parliament in April 2004 that the stance was being reconsidered, precipitating considerable discussion within government which centred on economic returns and socio-cultural hazards (Ministry of Trade and Industry, 2010). Formal visits to several casinos around the world followed in order to gather information and scrutinise their functioning and alternative regulatory mechanisms. The term integrated resort was employed to underline the point that any project would be more than just a casino and incorporate accommodation and an array of leisure and business amenities in pleasing surroundings. Consultants were appointed to assist in calling for concept bids from potential developers and Cabinet approval for two integrated resorts was announced in April 2005 (Henderson, 2006).

One of the resorts was to be in Marina Bay, a very large tract of reclaimed land adjacent to Singapore's Central Business District, which is being transformed into a new downtown zone. The second site was on the small offshore island of Sentosa, which has been devoted to recreation since the 1970s and is connected to the main island by road and light railway. A highly organised process of competitive tendering ensued, culminating in the selection of developers and operators in 2006 (Henderson, 2007). Evaluation criteria were tourism appeal and contribution, architectural concept and design, development investment and strength of the consortium and partners; these were allocated respective weights of 40%, 30%, 20% and 10% in the case of Marina Bay and 45%, 25%, 20% and 10% for Sentosa (STB, 2006a and 2006b). The former was to be directed primarily at business and convention travellers and the latter at the leisure market, particularly families.

The decision to proceed with the integrated resorts constituted a paradigm shift for Singapore society, requiring a 'significant modification of the core belief system,' which held that gambling was something to be resisted, not sanctioned, by government (Ting, 2008: 39). The reversal was justified by the economic pragmatism which defines the republic and

the Prime Minister, one of the second generation of politicians and son of the first leader, spoke of a changing environment. Singapore was losing competitiveness as a destination for tourism and other businesses because of perceptions that it was somewhere rather dull and unexciting. Cities around the world were 'reinventing themselves' and it was imperative for Singapore to do the same if it was to be seen as a 'vibrant and dynamic' 'cosmopolitan hub' (Lee, 2005). The resorts would further help in achieving targets of 17 million international tourist arrivals and S\$30 (US\$24) billion in tourist spending by 2015 (STB, 2005) and counter stagnation in tourist volumes and a decline in spending, whereby tourism's share of GDP had fallen from 6% to 3% between 1993 and 2002 (Ministry of Trade and Industry, 2010). There would be new jobs and a part of the S\$1.5 (US\$1.2) billion currently spent by Singaporeans gambling abroad would be retained within the national economy.

Although there have been some delays to the completion of the resorts, both casinos were operating by 2010. Marina Bay Sands (MBS) occupies 15.5 hectares and has a gross floor area of 581,400 square metres, less than 3% of which is taken up with the casino. Other elements are a 55-storey triple tower luxury hotel with 2561 rooms and suites, convention facilities, designer label shops, celebrity chef and other restaurants, a museum and two theatres. Considerable stress was placed by officials and developers on a structure which would be 'iconic' and symbolic of the remaking of Singapore. The resort cost US\$5.5 billion, inclusive of the land, and MBS is a subsidiary of Las Vegas Sands Corporation which has properties in Macau as well as in the USA (MBS, 2010a). The first phase of the opening was in April 2010, two months after that of RWS. RWS covers 47 hectares and comprises a Universal Studios theme park, theatre, a marine park, museum, meetings and conference facilities, shops and restaurants plus the casino which fills 5% of the total floor space. Its four hotels have a combined inventory of 1350 rooms and two more are planned which will add 500 rooms. Development costs were S\$6.6 (US\$5.2) billion and RWS is a wholly owned subsidiary of the leisure and gaming company Genting PLC, which is a part of Malaysia's Genting Group, that country's sole casino operator (RWS, 2010a).

As suggested above, the notion of a casino prompted public debate of an extent unusual in Singapore where civil society is weak and there is reluctance to publicly query the government (Lyons and Gomez, 2005). Reservations were expressed by individuals and religious and social groups worried about the temptations afforded by a local casino and the damage gambling there could inflict on

individuals, families and the community. Spokespersons of the major faiths of Buddhism, Christianity, Hinduism and Islam all voiced their anxieties and it should be recalled that Islamic strictures forbid Muslims from casino betting. Officials were mindful of the strength of these sentiments and there was some nervousness about allowing casinos into a country renowned for being very well ordered, safe and carefully controlled (Taylor, 2008). There was also awareness of the propensity to gamble amongst Singaporeans, especially by ethnic Chinese, which has been a long-standing concern.

Prior to the legalisation of casinos, certain sorts of gambling were permitted in Singapore and annual expenditure was calculated to be around S\$6 (US\$4.7) million. Most of this was accounted for by horse racing, national lotteries and club slot machines. Casino cruises have traditionally been popular, ships sailing into international waters outside the jurisdiction of onshore laws, as have trips to the Genting Highlands casino resort in Malaysia (Henderson, 2006). Gambling is often regarded as an innocuous leisure pursuit amongst non-Muslim Singaporeans, but an official agency estimates that 1.1% to 2.2% of the adult population can be classed as pathological gamblers (Time, 2010). A survey conducted in 2006 found that almost 60% of respondents aged between 15 and 75 had gambled in the past year and 10% of these admitted that their gambling was a source of difficulties (National Council on Problem Gambling; NCPG, 2006). The proportion of Chinese who gambled was 69% compared to 51% for Indians and 9% for Malays who make up 75%, 14% and 9%, respectively, of Singapore's population of over four million (Singapore Statistics, 2009).

The regulatory regime

Opposition to casinos and fears about problem gambling were acknowledged at an early stage by the government which proposed a National Framework on Gambling in 2005, budgeting S\$20 (US\$16) million for setting up the machinery and S\$40 (US\$31) million annually for its running (EIU, 2005). The Casino Control Act was passed in 2006 (Republic of Singapore, 2006) and founded the Casino Regulatory Authority (CRA), a statutory body with responsibility for casino licensing and regulating. The CRA began work in 2008 and its stated 'twin objectives' are 'keeping crime out of casinos and ensuring the integrity of gaming, whilst providing a conducive environment for the casino business to succeed in Singapore' (CRA, 2010: 2). It conducts probity checks on operators and collaborates with the specially formed Casino Crime Investigation Branch (CCIB) of the Singapore Police

Force as well as the police Commercial Affairs Department (CAD). The government prides itself on being free from the corruption endemic across much of South East Asia and a crime rate that is comparatively low for a capital city, standing at 684 per 100,000 of the population in 2008 (Singapore Police Force, 2009). A priority is therefore to maintain Singapore's law-abiding reputation, of relevance to both visitors and investors, and ensure that it is not tarnished by unwelcome incidents and publicity linked to the casinos.

The Casino Control Act is also intended to contain the casinos' 'potential for harm to minors, vulnerable persons and society at large' (Ministry of Home Affairs, 2010) and the CRA liaises with the Ministry of Community Development, Youth and Sports (MCYS) to try and protect those deemed in danger. Amongst the social safeguards is the compulsory payment by Singapore citizens and Permanent Residents of a casino entrance fee of S\$100 (US\$79) for a day's visit or S\$2,000 (US\$1600) for a year's membership; other residents and foreign tourists are exempt. The casinos are prevented from advertising directly to locals and those under the age of 21 are barred (Lim, 2009a). Casinos and junket organisers cannot offer credit to citizens and permanent residents, except for those termed 'premium players' who have casino accounts of at least S\$100,000 (US\$79,000). Junket operators in general, frequently suspected of and found to be complicit in money laundering, regularly lend to the casino players whose trips they arrange and receive a payment from the casino determined by the size of the bets placed. The CRA stipulates that junketers and their representatives are licensed and undergo scrutiny similar to that for the casino operators. They must keep records of all clients, commissions, rebates and financial statements and inform the CRA about any agreements they have with the casinos (The Business Times, 2010).

The new framework encompassed an NCPG, appointed in 2005. It cooperates with various partners in what is acknowledged to be the formidable task of engaging with the industry to promote and raise the standards of 'responsible gambling practices' (NCPG, 2009: 2). The Council comprises 20 members chosen by the MYCS and its functions are to advise the Ministry, heighten awareness of problem gambling and decide on funding for preventive and rehabilitative programmes. Of the almost S\$2.5 (US\$2) million spent on public education in 2008/2009, over 75% was devoted to mass media campaigns and the remainder to publications, community initiatives and research. Other Council activities are the operating of a telephone hotline and website about problem gambling (NCPG, 2010), the formation of and consultations with an international advisory panel,

partnering a local television station in a drama about the perils of gambling and initiating community counselling services (Lim, 2009b). The Council also has powers to issue and revoke exclusion orders (NCPG, 2009) which can be sought by individuals and families. Un-discharged bankrupts and those on government social assistance schemes are automatically banned. Another agency is the National Addictions Management Service (NAMS) which planned self-help manuals for those in need of assistance but reluctant to come forward (Channel News Asia, 2011).

MBS and RWS profess their backing of the official stance, stating dual aims of ensuring an enjoyable gambling experience and ameliorating problem gambling. They claim to have responsible gaming programmes which cover staff trained in recognising and aiding those affected and the option of setting a limit on the amount to be gambled, administered by the casino (MBS, 2010b; RWS, 2010b). RWS has a counselling service for those in need and the two casinos have on-site literature about addiction; for example, a leaflet entitled 'Play Responsibly' is displayed in restrooms on the gambling floor of MBS alongside cards from the NCPG with details of its hotline and exclusion orders. Such information also features on the websites of both resorts. Company positions on the subject are depicted as a dimension of wider policies of corporate social responsibility dedicated to 'care for the community' (RWS, 2010c) and 'meeting Singapore's social needs' (MBS, 2010c).

Government and its agencies monitored the casinos closely after opening and the news that Singaporeans made over a million visits, or an estimated third to a half of the total, in the first seven months of operation was met with disquiet (The Straits Times, 2010a). The figure was higher than anticipated and also suggested that the entrance fee was less of a deterrent than intended. A cross-ministry committee, headed by the Senior Minister for Trade and Industry, was therefore convened to review this and other casino issues. The MCYS intervened to terminate the bus services initially run by the resorts to the 'heartlands' of Housing Development Board estates where most of the population live. Transport was free or paid for with tickets, the value of which was redeemable at resort food and beverage outlets. The defence that the buses improved public access to the resorts in their entirety was dismissed as it was evident that the casinos were the main motivation for most passengers, many of whom were retired and elderly. Promotion of a rewards programme in heartland shopping malls and media releases about casino winnings were also judged to contravene regulations and immediately stopped. It was made clear that the embargo on marketing to citizens would be strictly enforced and tightened

should this be warranted by circumstances (MCYS, 2010b). Another mark of official concern was the sponsoring of a survey at the end of 2010 to investigate the gambling habits of Singaporeans aged over 55, with a second study of younger adults planned.

Social concerns

In addition to the more vulnerable amongst the Singaporeans visiting the casinos, the republic's low income migrant labourers from less-developed Asian countries also appeared at risk. Small groups were seen to gather there at weekends and stories of individuals at the gambling tables losing earnings and savings, usually remitted to dependents at home, prompted action to facilitate self-exclusion. While endorsed by the official Migrant Worker Centre and casinos, there were doubts about the aptness and effectiveness of the move. There had already been criticisms of the exclusion order system, particularly the speed of handling (which had been reduced to about four weeks by early 2011) and the ruling that the gambler must attend a mandatory hearing for family-initiated orders. As of November 2010, 2500 voluntary self-exclusion and 194 family exclusion orders had been applied for. About 35,000 third party orders were in force (MCYS, 2010a) and 3500 convicted criminals had been excluded by the police (Bloomberg, 2010).

Discussion of the social repercussions of the casinos spread to neighbouring Malaysia, from which Singapore can be easily reached across a causeway and road bridge. Politicians and leaders of the ethnic Chinese community in the nearest state of Johor Bahru in particular complained about the number of Malaysians gambling in Singapore (The Sunday Times, 2010). In return for a commission from the resorts, bus companies were transporting passengers from as far away as the north-west state of Penang and some offered free food and transport in exchange for the purchase of casino chips worth a minimum of S\$100 (US\$79). An RWS spokesperson replied to queries about these practices by referring to cross-border tourism and collaboration with travel partners to realise its potential (The Straits Times, 2010b). There were later allegations that loan sharks were at work on the casino floors, targeting Malaysian visitors (The Straits Times, 2010c).

By late 2010, a rise in problem gamblers seeking medical treatment had been recorded by the NAMS (The Straits Times, 2010a). The police started to log casino-related crimes such as evading entry payments, cheating and stealing chips and personal belongings. Convictions numbered 112 in the year following the first casino opening, mainly for petty crimes, and Singaporeans and permanent residents made up 40%

of culprits. There were also fears that addicts were resorting to theft in order to finance their gambling and pay off debts (The Straits Times, 2011a). Escort services were believed to be intensifying their advertising, provoking speculation about a burgeoning of the sex trade in Singapore (Bloomberg, 2010) where public solicitation, pimping, living of prostitute earnings and maintaining a brothel are illegal even though prostitution itself is not. The city state has therefore not been immune from the detrimental effects of casinos. As in other instances, the harm caused evades precise quantification and proponents of legalisation have highlighted compensatory economic impacts.

An economic perspective

While conscious of the actual and potential damaging ramifications for society of the casinos, the integrated resorts were hailed as a commercial success by both government and private enterprise. Fourth quarter results led to estimates of a market worth US\$4 (US\$3.1) billion based on annualised revenues (The Straits Times, 2011b), such an achievement due largely to casino earnings.

Public finances benefited accordingly from S\$420 (US\$330) million paid in company and goods and services taxes, casino duties and entrance levies in the seven months to November 2010 (Reuters, 2011). Jobs were also boosted and about 7400 were employed by MBS on opening, over 70% of whom were Singaporeans (MBS, 2010a), while around 10,000 were said to be working at RWS (RWS, 2010d). MBS sought to fill 1000 vacancies in a job fair at the end of 2010 when RWS stated that it aimed to hire a further 3000 staff in the period up until 2013 (The Straits Times, 2010d). There were additional tourism gains, although the restoration of confidence in the region after the uncertainties of 2008 and 2009 exerted a strong influence on the upturn in 2010 which cannot be attributed solely to the resorts. Inbound arrivals exceeded one million in July, a monthly record, and the annual numbers of 11.6 million were 20% greater than in 2010. Receipts increased by 50% to S\$18.8 (US\$14.8) billion whereby tourism contributed 4% of GDP. Over 75% of business came from Asia and Australia (STB, 2011) and leading markets of Indonesia, China and Malaysia were reportedly especially drawn to the casinos (The Straits Times, 2011c). Completion of outstanding integrated resort facilities in 2011 was expected to again boost tourist arrivals and spending (TTG, 2010).

The overall economic consequences of the resorts are captured in the 'other services' component of the national accounts which grew by 16% and 18% in the second and third quarters of 2010, respectively, in

contrast to an average early increase of 4.4% from 2006 to 2009 (The Straits Times, 2010e). Analysts predicted further growth in 2011 and thereafter (Bloomberg, 2010; Euromonitor International, 2010b; PricewaterhouseCoopers, 2010; The Economist, 2010b; The Wall Street Journal, 2010). Singapore's integrated resorts, critical ingredients of which are the casinos, thus have had a promising commercial beginning. Nevertheless and despite optimistic forecasts, there are some questions about the future. Attaining a satisfactory mix of local and overseas gamblers is essential, but there may be scope for disagreement between companies and officials. The casinos seem interested in cultivating a stable domestic market, reducing dependence on the vagaries of international tourism. However, the government is keen on confining local participation in conformity with both the original vision of luring high-spending gamblers from abroad and its social welfare agenda. Too close an association with casinos and any unflattering news stories on the subject could also undermine the republic's attractiveness to the financial services industry and other investors, as well as tourists, enticed by its reputed probity and good governance (Channel News Asia, 2011).

Conclusion

The case of Singapore recounted in this paper confirms that casinos are a contentious form of visitor attraction, the merits of which are debatable. Development may be justified on the grounds of high demand, lucrative revenues, employment generation and tourism destination enhancement. At the same time, there can be heavy social and personal costs. Such circumstances explain government interest and intervention to regulate business activity and safeguard citizens. There are also possibilities of economic losses and negative political implications when policies on casino gambling are unpopular.

The Singapore authorities have acknowledged the challenges attendant on casino and undertaken action to meet them, but formal control measures are still being tested. The strategy has not prevented early undesirable outcomes linked to crime and problem gambling, although to expect their eradication would be unrealistic. Officials must strive to minimise harm while permitting the legitimate pursuit of commercial opportunities by the casino industry and leisure activities by citizens. Whether the desired balance will be secured in Singapore remains to be seen and the situation there calls for further study as the gambling sector matures, official responses are refined and personal behaviour and opinions adapt to the new circumstances.

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Author Biography

Joan C. Henderson is an Associate Professor at Nanyang Business School, Nanyang Technological University, in Singapore where she teaches on the Tourism and Hospitality Management programme. Prior to moving to Singapore, she lectured in Travel and Tourism in the United Kingdom after periods of employment in the public and private tourism sectors there.