

TRAVEL

TRAVEL AGENT ROADMAP

designers of travel
experience



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TRAVEL

IMAGINE THE TRAVEL AGENTS OF THE FUTURE...

Travel agents can offer much more beyond fulfilling transactions for consumers. A dream holiday, an experience of a lifetime, or an important business conference require experts that consumers and business travellers can turn to. Someone they can trust to curate their different travel needs with ease, someone they can rely on to have a memorable and enjoyable experience.

Travel agents can be the one consumers and business travellers go to – experts with professionalism and knowledge of the most relevant and appealing travel products, experts in the art of holiday-making and skilled at understanding their customers' needs and wants, experts in designing their travel experiences.

And as an industry, travel agents will provide high-value jobs for Singaporeans and be known as a sector of constant innovation and creativity.

**Make a difference to how people travel, what they see
and how they feel.**

TRAVEL AGENTS CAN BE DESIGNERS OF TRAVEL EXPERIENCE

Experts that
consumers turn to
in the curation of
their travel

A workforce that
is professional,
creative and always
up-to-date

A high-value
economic
contributor and
jobs creator



LET'S LOOK AT OUR OPERATING ENVIRONMENT TODAY

Travel Has Changed

1. The Consumer Journey is Increasingly Digital

The digital revolution has changed the way consumers shop for holidays. Consumers can now browse and compare numerous travel products, and also have the power to share experiences and influence others.¹

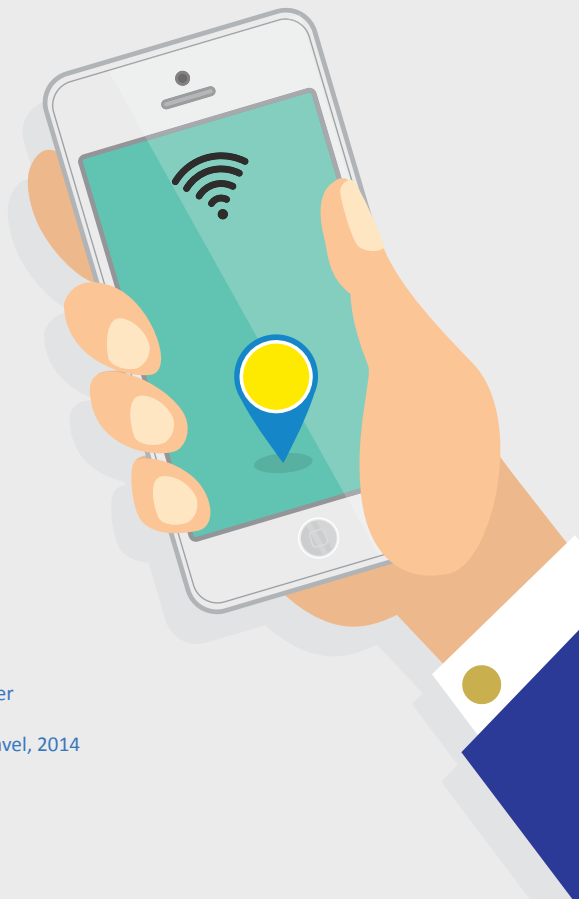
2. Consumers Increasingly Demand Experiential Travel

People travel based on interests and not necessarily to check off a to-do list of must-see sights. Across all age groups, consumers are asking for travel that is more immersive, local and authentic.²

3. Consumers Expect Personalisation

Consumers would like to receive travel options catered to their personal travel history and preferences. Personalisation enables them to make purchasing decisions easier.³

**Businesses must also change in order to survive.
And thrive.**



¹ Deloitte, Travel Consumer 2015: Engaging the Empowered Holidaymaker

² Peak + Skift, The Rise of Experiential Travel, 2014

³ Amadeus + Skift, 5 Reasons Why You Can't Ignore Personalization in Travel, 2014



HOW ARE WE COPING?

Travel agents in Singapore are facing numerous challenges, not only from competition, but also in leveraging technology and attracting skilled manpower. Macroeconomic headwinds and Singapore's manpower constraints also mean that the future can continue to be uncertain.

Business Challenges

- Competition from online travel agents (OTAs)
- Suppliers going direct
- Consumers expecting more



Weaker economic outlook will see slower traffic growth to and from Singapore. Expectations for future inbound and outbound growth capped at 4%. The number of inbound visitors to Singapore on free and easy or packaged tours grew less than 2% in 2014.

Disintermediation is also affecting travel agents as more consumers and suppliers choose to bypass them

Manpower

- Difficulty in hiring
- Poor perception of sector
- High turn-over
- Poorly trained staff



Decrease in manpower supply nationwide will mean fewer job seekers. Growth is capped at 2% till 2020.

There is job mismatch as industry provides fewer Professional, Managerial and Executive (PME) jobs which are sought after by Singaporeans. The travel agent industry reported fewer than 40% PME jobs in 2014

Technology

- Lack knowledge
- Lack financial resources
- Lack in-house IT team
- Lack support from staff



Low technology adoption will affect productivity of travel agents and inhibit their ability to meet the needs of today's consumers. Only 1/4 of travel agents actively plan for technology in their business.

There is reason for industry, association and government to come together to address today's difficulties and position ourselves for the future.



HERE ARE SOME OPPORTUNITIES TO CONSIDER

There are areas where travel agents continue to provide value to consumers.

Optimising the customer's time

Holiday-makers may spend up to 30 hours researching online before booking a trip.



Time-sensitive corporate travellers, families or those on luxury trips with little time for research

Giving exclusive access

Offering special experiences that consumers cannot easily get on their own



Travellers looking for unique experiences that are not widely available

Providing expert advice and care

Unique itineraries, visas and aid in contingencies



Travellers on speciality trips such as mountain-climbing, or those travelling with young children and seniors

Travel agents may seize such opportunities and more, and commit to become Designers of Travel Experience.



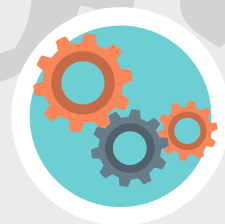
TRAVEL AGENT ROADMAP

The Travel Agent Roadmap is a shared plan amongst industry (travel agents), the industry association (NATAS) and government (STB). It outlines a suite of initiatives that can guide and support travel agents in their journey to become designers of travel experience.

The three pillars, Business Transformation, Technology and Manpower, map back to the key challenges faced by the travel agent industry today, and outline the journey to better meet what our consumers need and want.



BUSINESS TRANSFORMATION



Sitting still may be a luxury that can cost a company's survival when innovative companies are disrupting the travel sector every day. While breaking away from the typical to embrace the exceptional does take much courage and effort, it is a journey that may help one to survive today in order to thrive tomorrow.

This pillar will provide opportunities where travel agent leaders can learn from best practices, from one another, travel agents overseas or other industries. It will also focus on availing and developing resources that the industry can tap on, including facilitation and funding support.

1. Drive Thought-Leadership Sharing



Annual Industry Forum
Share ideas and engage
C-suite leaders in conversation



Study Trips and Case Studies
Showcase relevant learning
experiences for the industry

2. Support Business and Job Redesign



**NATAS Business
Transformation Committee**
Focus on business remodelling
opportunities for industry



Business Transformation Playbook
Provide step-by-step guide for
change management



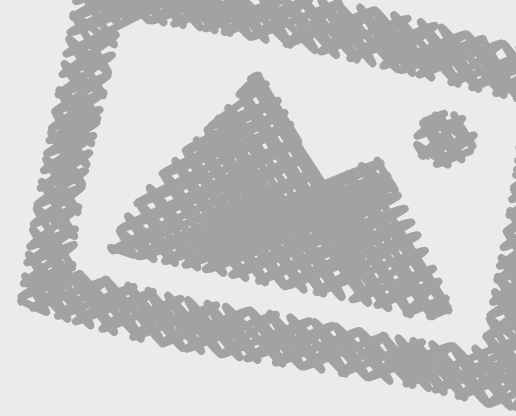
Assistance schemes
Business Improvement
Fund (BIF) from STB

How may I be part of this ?

Funding: Travel Agents that are ready with a business or job redesign plan may seek funding support from STB.

Participation: The Business Transformation Playbook will be launched by end-2017 and made available to the industry. Travel agents may also nominate themselves to be considered for participation in industry forums and study trips.

TECHNOLOGY



Technology can provide significant upsides to the travel agent business, by making processes cheaper, better and faster today, and by transforming one's business for tomorrow. There are different solutions available that may help a travel agent meet customer needs, whether they require expert advice and special arrangements, a once-in-a-lifetime experience, or simply affordable travel.

This pillar outlines the journey for travel agents to move from adoption of ready products, to developing customised technologies, and to innovating first-mover technologies that can give the travel agent a global competitive edge.

1. Encourage Technology Adoption e.g. customer relationship management, eCommerce



Technology Showcase and Guidebook

Showcase relevant technology solutions for travel agents



Software-as-a-Service (SaaS) Solutions

Aggregate industry demand for shared service solutions

2. Fund Technology Development e.g. front-to-back integration, operations management.



IT Matching Services

Leverage available services to help travel agents customise technology solutions



Assistance schemes

Business Improvement
Fund from STB

3. Support Innovative Prototypes e.g. data analytics, visitor experience

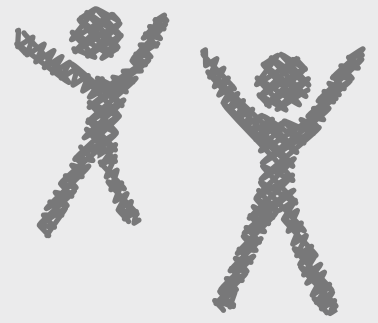


Technology Talks and Experiences

Provide opportunities such as study trips and engagement sessions for C-suite leaders to learn about emerging technologies for test-bedding

How may I be part of this?

1. **Funding:** Travel agents with ready plans to adopt or develop technology solutions may seek funding support from STB.
2. **Participation:** Travel agents are encouraged to participate in the Technology Showcase, which will be organised regularly by NATAS and STB. Travel agents may also nominate themselves to be considered for participation in study trips and engagement platforms.
3. **Feedback:** Travel agents interested in SaaS solutions can provide feedback to NATAS.



MANPOWER

Optimising manpower is important within Singapore's context of manpower constraints. It also provides higher value jobs to meet rising aspirations of Singaporeans. For the company, good manpower management increases profitability and efficiency.

This pillar highlights how travel agents can better attract, develop and retain talent within their companies through better industry outreach, customised training and recognition programmes, and strengthening of HR practices.

1. Drive Talent Recruitment



Talent Recruitment Strategy

Engage educators and students through enhanced internships and industry profiling

2. Encourage Up-Skilling



Curriculum and 'Work & Learn' Programme

Offer suite of 29 WSQ courses and flexible work arrangements

Assistance schemes
Training Industry
Professionals in
Tourism grant (TIP-iT)
by STB for training and
HR consultancy



Enhanced Accreditation for Travel Professionals

Recognise skills and professionalism through personal accreditation

3. Enhance Talent Management



HR Excellence

Enhance HR practices through government resources and NATAS-led seminars

Onboarding Materials

Develop plug-and-play materials for the industry to induct new rank-and-file hires

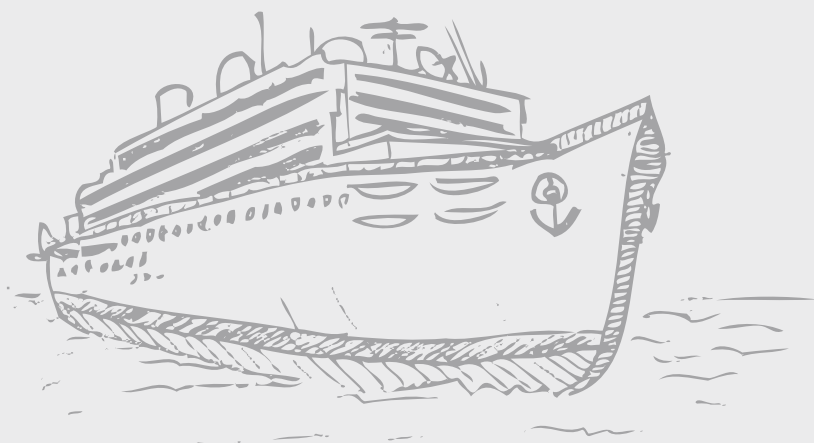
How may I be part of this?

- Funding:** Travel agents may encourage staff to up-skill. Funding support may be sought from STB
- Participation:** Travel agents may indicate interest in becoming one of the hosting companies for the 'Work and Learn' programme, or involvement in engagements with the schools. Travel agents may also sign up for the annual HR seminars organised by NATAS, and refer to the 'Resources' page at the end of this handbook for HR toolkits.

WHERE DO I GO FROM HERE?

We hope that this handbook on the Travel Agent Roadmap has provided a thought-starter on how you can better meet your business needs and be future-ready. Here is a summary on how you may consider putting some of your ideas into action:

How Can I Embark on the Roadmap?	Programmes	Contact
Initiate Business Improvement Projects	Leverage STB Business Improvement Fund (BIF) for: <ul style="list-style-type: none"> • Business transformation projects • Technology projects • HR improvement projects 	STB_TID@stb.gov.sg
Sign Up Your Staff for Up-skilling	<ul style="list-style-type: none"> • 'Work & Learn' Programme • WSQ Tour & Travel Services Courses 	industry.affairs@natas.travel
Participate in Recruitment Initiatives	<ul style="list-style-type: none"> • Talent recruitment talks and roadshows 	industry.affairs@natas.travel
Register Your Interest to Attend Events with STB or NATAS	<ul style="list-style-type: none"> • Technology Showcases • HR Seminars • Study trips 	STB_tid@stb.gov.sg and/or industry.affairs@natas.travel
Give Feedback on Upcoming Roadmap Initiatives	<ul style="list-style-type: none"> • Software-as-a-Service Solutions • Onboarding Materials • Business Transformation 'Playbook' • Enhanced Accreditation for Travel Professionals 	STB_tid@stb.gov.sg and/or industry.affairs@natas.travel





RESOURCES

Grants	STB Business Improvement Fund (BIF)	Financial assistance to encourage technology innovation and adoption, redesign of business models and processes in the tourism sector to improve productivity and competitiveness.
	STB Training Industry Professionals in Tourism grant (TIP-iT)	Financial assistance to support tourism companies in employee upgrading, and talent and leadership development.
	STB Experience Step-Up Fund (ESF)	Financial assistance to support experience development projects that enhance attractiveness of Singapore and/or its products, hence improving visitors' experience and satisfaction during their stay in Singapore.
	SPRING Capability Development Grant (CDG)	Financial assistance to build capabilities across 10 key business areas, ranging from raising service standards, adopting technology to staff training and overseas expansion. Simplified application process for grant support of S\$30,000 or less.
	WDA P-Max	Financial assistance to help SMEs to better recruit, train, manage and retain their newly-hired PMETs by developing human resource capabilities in SMEs, and help to place job-seeking PMETs into suitable SME jobs.
	WDA Reskilling for Jobs Programme (RJP)	Helps strengthen the employability of locals, particularly the rank-and-file through a short-term (40 hours to 80 hours) on-the-job training (OJT) with a host company and at the same time provide employers with the opportunity to assess job seeker's job fit before offering employment.
Advisory Services and Toolkits	SME Centres	The one-stop SME Centres provide services including toolkits, business diagnosis, advisory on government schemes and capability workshops. SMEs can visit any of the SME Centres for assistance.
	SiTF MatchIT Service	The MatchIT programme is run by the Singapore Infocomm Technology Federation (SiTF). It is a free web service that matches your business IT requests with SiTF's network of solution providers.
	SPRING HR Diagnostic Tool	The HR Diagnostic tool aims to help SMEs understand their current state of HR maturity and identify gaps for improvement, across 11 HR functional areas such as recruitment, training and development, performance management, talent management and employee engagement. It is provided at no cost to SMEs.
	SPRING HR Capability Toolkit	A toolkit that addresses HR gaps and promotes good HR practices over 8 key areas from manpower planning to employee relations.



www.stb.gov.sg



www.natas.travel