



# Singapore's Tourism Sector Performance for 2012

27 March 2013



# Presentation Outline

## Singapore's Tourism Sector Performance 2012

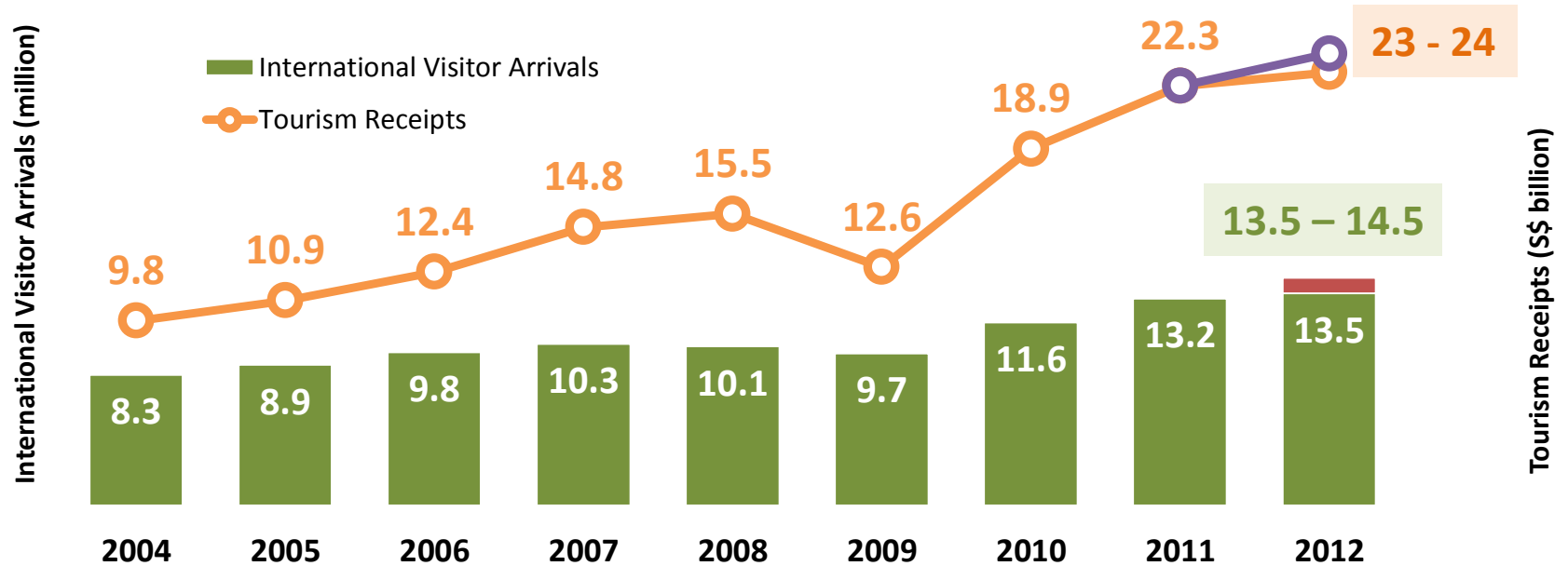
<b>1</b>	<b>Tourism Sector Performance</b>
<b>2</b>	<b>Performance of Core Industries</b>
<b>3</b>	<b>Highlights of 2012</b>
<b>4</b>	<b>2013 Forecast</b>



# 2012 Forecast

**S\$23-24 billion** Tourism Receipts

**13.5-14.5 million** International Visitor Arrivals

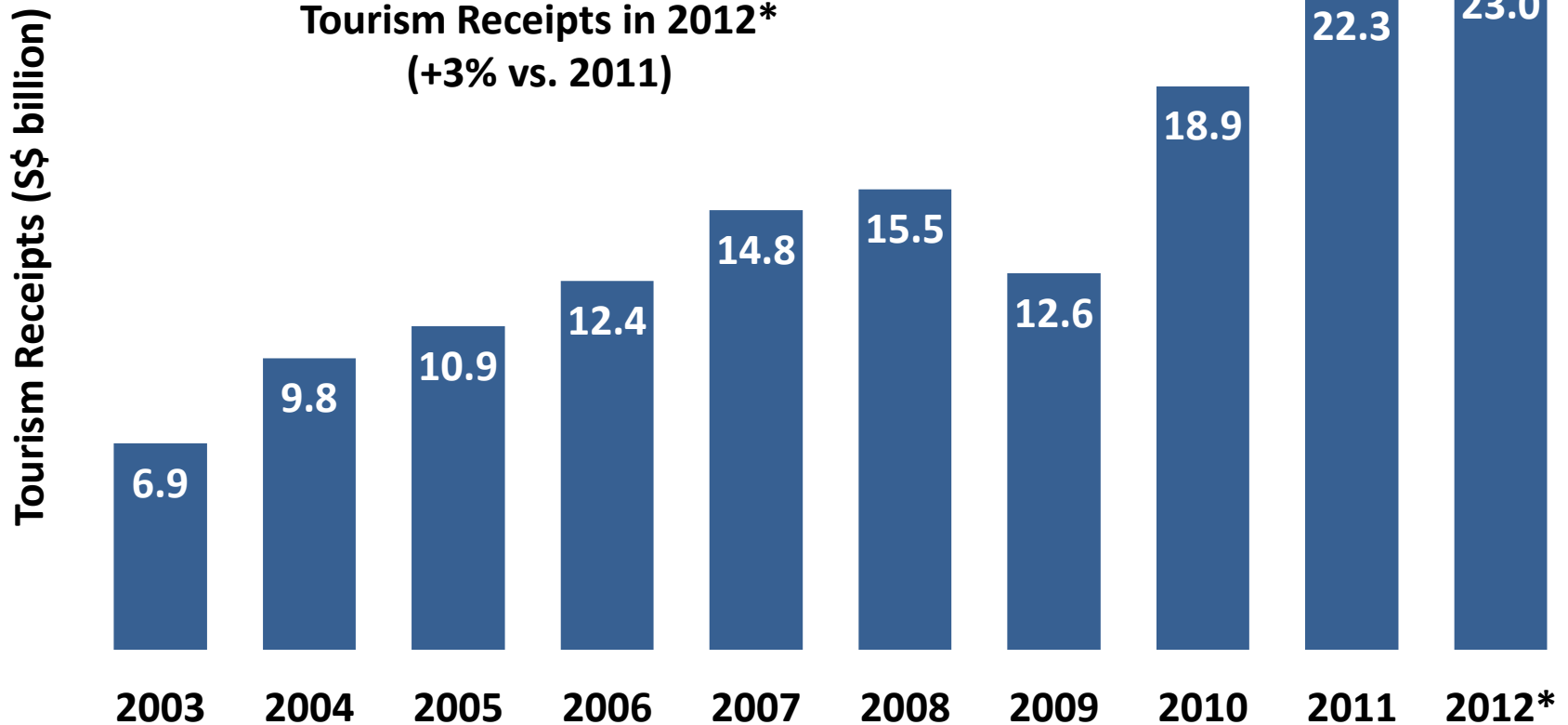


Source: STB

# 2012 Tourism Receipts

**S\$23.0 billion**

**Tourism Receipts in 2012\***  
**(+3% vs. 2011)**



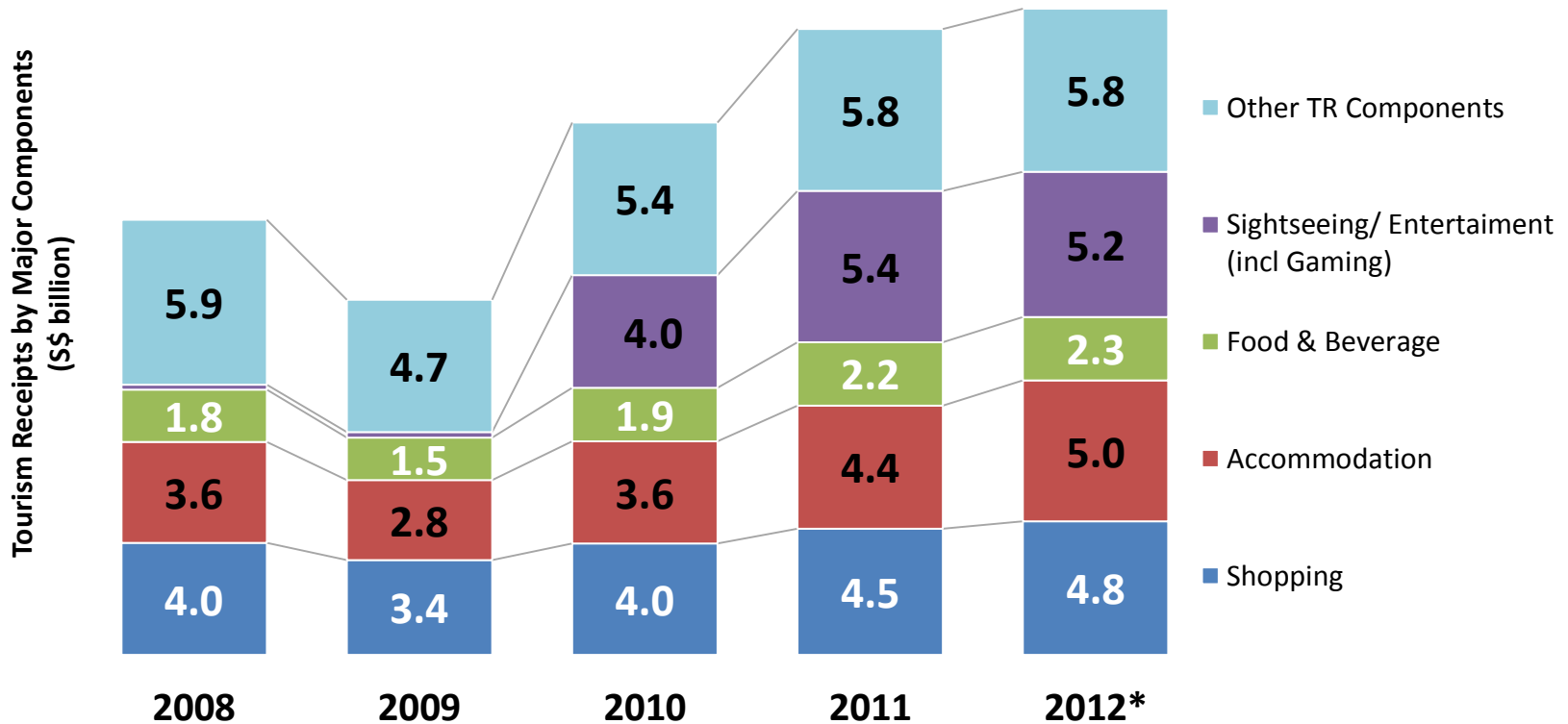
\* preliminary estimates

Source: STB

# 2012 Tourism Receipts:

## By Major Items

**S\$23.0 billion** *Tourism Receipts in 2012\* (+3% vs. 2011)*



Expenditure is estimated from Overseas Visitor Survey.

Other TR components include expenditure on airfares, port taxes, local transportation, business, medical, education and transit visitors.

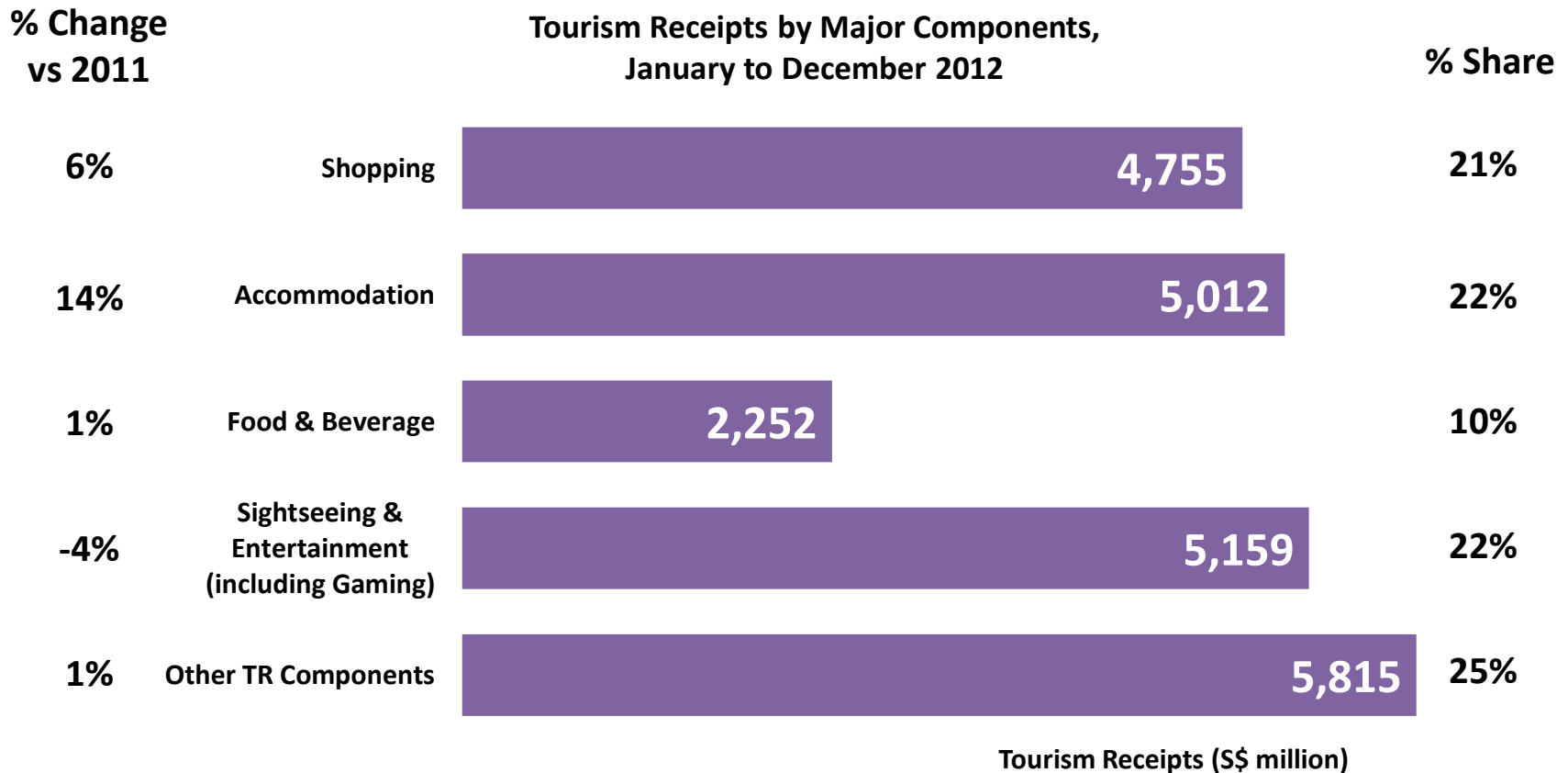
\* preliminary estimates

Source: STB

# 2012 Tourism Receipts:

## *Major Items*

**S\$23.0 billion** *Tourism Receipts in 2012\* (+3% vs. 2011)*



\*preliminary estimates  
Source: STB

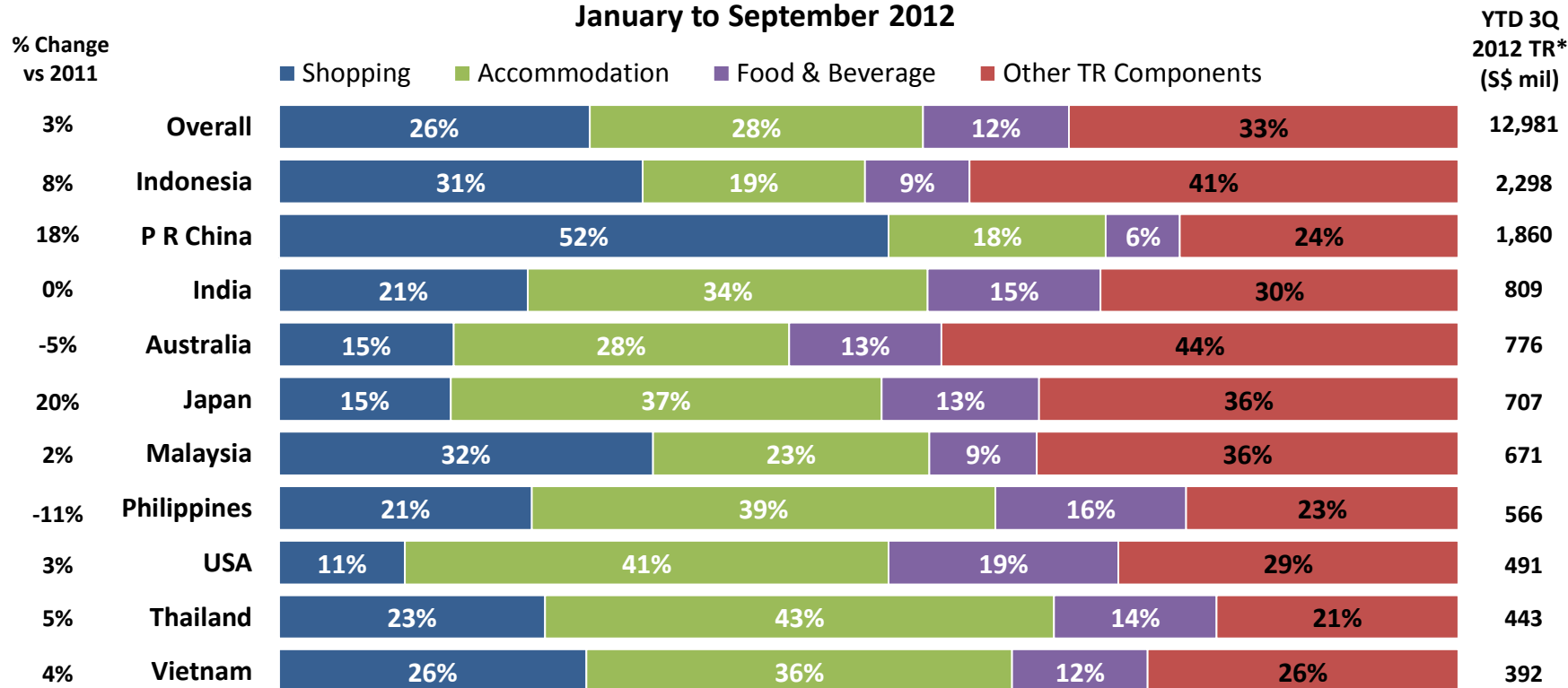
# YTD 3Q 2012 Tourism Receipts:

By Top 10 Markets

(excl. Sightseeing & Entertainment)

**S\$13 billion** Tourism Receipts in Jan-Sep 2012 (+3% vs Jan-Sep 2011)

Tourism Receipts by Major Components, Top 10 Markets,  
January to September 2012



Expenditure is estimated from Overseas Visitor Survey, STB.

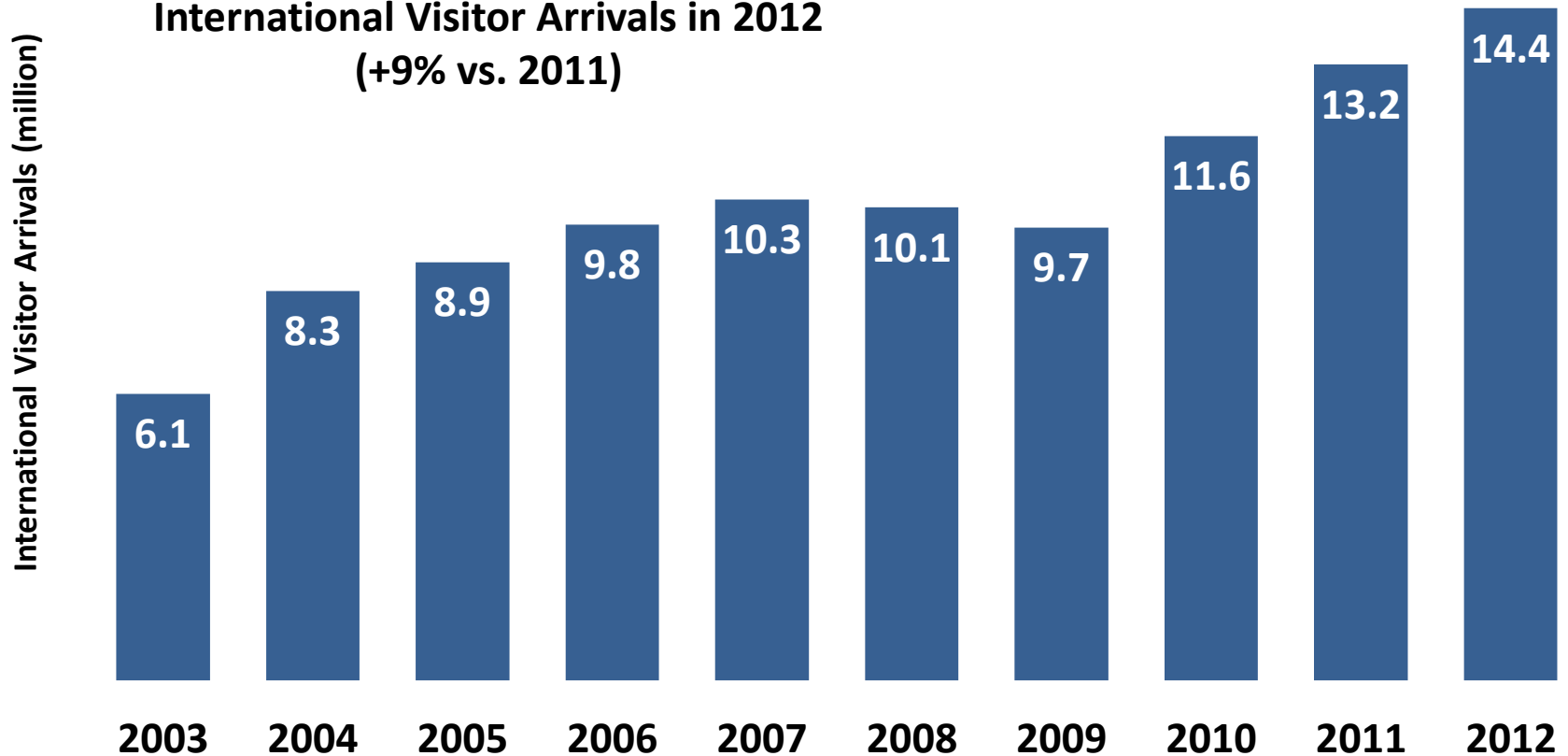
Other TR components include expenditure on airfares, port taxes, local transportation, business, medical, education and transit visitors.

\*Sightseeing & entertainment has been excluded in the country analysis due to commercial sensitivity of information.

# 2012 International Visitor Arrivals

**14.4 million**

International Visitor Arrivals in 2012  
(+9% vs. 2011)



Source: STB



# International Visitor Arrivals: *Top 15*

(YTD 3Q)  
% Change vs  
2011



# Market Trends

## China

- Arrivals from PR China for Jan-Sep 2012 stood at 1.5million (+23%) with a TR (excl S&E) of S\$1.86 billion (+18%)
- Ranked 2nd in terms of both IVA and TR (excl S&E)
- Growth in Chinese arrivals was boosted by an increase in twinning traffic with Malaysia, which represents 57% of the overall Chinese arrivals in Jan-Sep 2012 (as compared to 54% in Jan-Sep 2011).
- Secondary markets led the growth with a 28% increase in arrivals compared to Shanghai, Beijing, Guangzhou and Shenzhen which saw a 18% increase in Jan-Sep 2012 as compared to the same period in 2011.



# Market Trends

## Japan

- Japanese arrivals for Jan-Sep 2012 stood at 554,000 (+17%) with a Tourism Receipts (excl S&E) of S\$0.7 billion (+20%)
- Ranked 6th in terms of IVA and 5th in terms of TR excl S&E.
- Japanese arrivals continued on a trend of double-digit growth for a third consecutive year ever since the opening of the IRs in 2010.
- Based on OVS, 36% of Japanese arrivals visited the IRs from Jan-Sep 2012, up from 22% in 2011.
- Singapore is growing in popularity amongst the Japanese with growth in Singapore arrivals (17%) outpacing the overall outbound growth of 13% during Jan-Sep 2012.
- Majority of Japanese travellers stayed in hotels with strong demand for upscale and luxury hotels resulting in a strong double-digit increase in accommodation spend.



# Presentation Outline

## Singapore's Tourism Sector Performance 2012

1	Tourism Sector Performance
<b>2</b>	<b>Performance of Core Industries</b>
3	Highlights of 2012
4	2013 Forecast



# Performance of Core Tourism Industries

**Hotels**

**Travel Services**

**Attractions**

**Cruise**

**BTMICE**

# Hotels

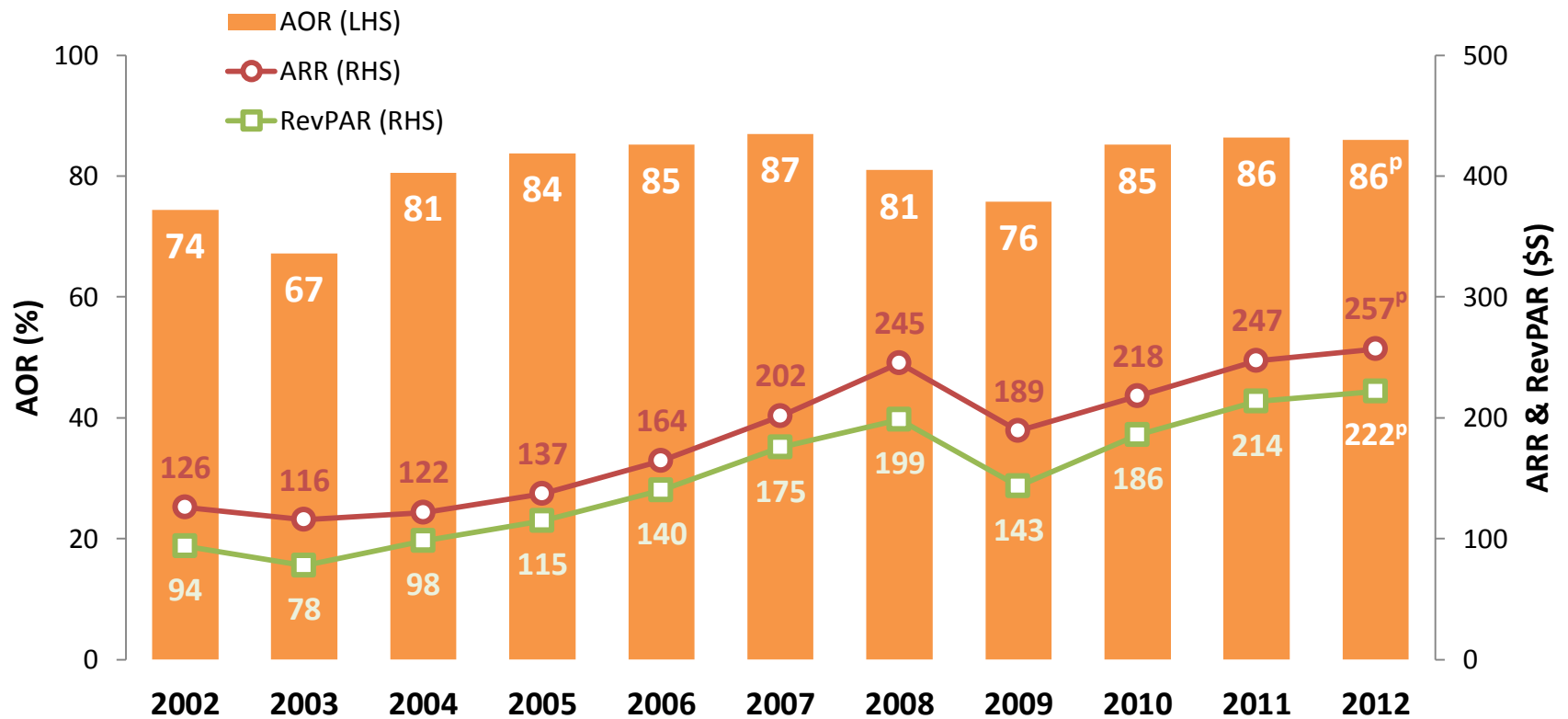
## Robust demand contributed to strong industry performance

- Strong growth in Hotel industry - new levels in room stock, occupancy and revenue generation
- Vibrant landscape - rejuvenation of existing hotels and introduction of new properties
- Hotels step up on productivity efforts



# Hotels

## AOR, ARR & RevPAR



Source: STB

Source: Monthly Hotel Returns as at 13 Mar 2013

P: preliminary



# Hotels

- There were over 51,000 rooms as of end 2012

	2008	2009	2010	2011	2012
<b>No. of Hotels*</b>	243	268	282	304	338
<b>No. of Hotel* rooms</b>	39,376	42,719	47,312	49,719	51,622
<b>Nett Increase in room stock</b>	1,752	3,343	4,593	2,407	1,903
<b>YOY % increase in room stock</b>	4.7%	8.5%	10.8%	5.1%	3.8%

Source: STB

Number of licensed rooms as at 31 December 2012

*\*includes hostels with more than 4 rooms*





# Hotel Productivity

## Approach



1. Redesign systems → drive efficiency

2. Leverage technology → ↑ efficiency & service capabilities



3. Upgrade HR and manpower capabilities



4. Redefine the hospitality service experience



5. Establish platforms and tools to raise awareness of productivity

## Hotel Efforts

*Fairmont*  
SINGAPORE

swissôtel THE STAMFORD  
SINGAPORE

- Housekeeping scheduling system
- Decrease in housekeeping labour hours
- Workforce optimisation and better integration with Front Office

  
CROWNE PLAZA  
CHANGI AIRPORT  
THE PLACE TO MEET.

- Currently rolling out JFP
- 13 foreign workers participating
- 6-12 months training program
- Involves guest relations + hotel lounge + housekeeping
- Incentive bonus given to participating employees

  
PARK HOTEL GROUP

- Started Hotel Operations Specialist Team (H.O.S.T.) program in 2011
- Expanded from 5 recruits to ~20 members
- Salary higher than single-function jobs

  
THE FULLERTON BAY  
HOTEL  
SINGAPORE

- Currently rolling out JFP
- Percentage of operations employees to be groomed as multi-skilled force



THE FULLERTON HOTEL  
SINGAPORE

# Performance of Core Tourism Industries

**Hotels**

**Travel Services**

**Attractions**

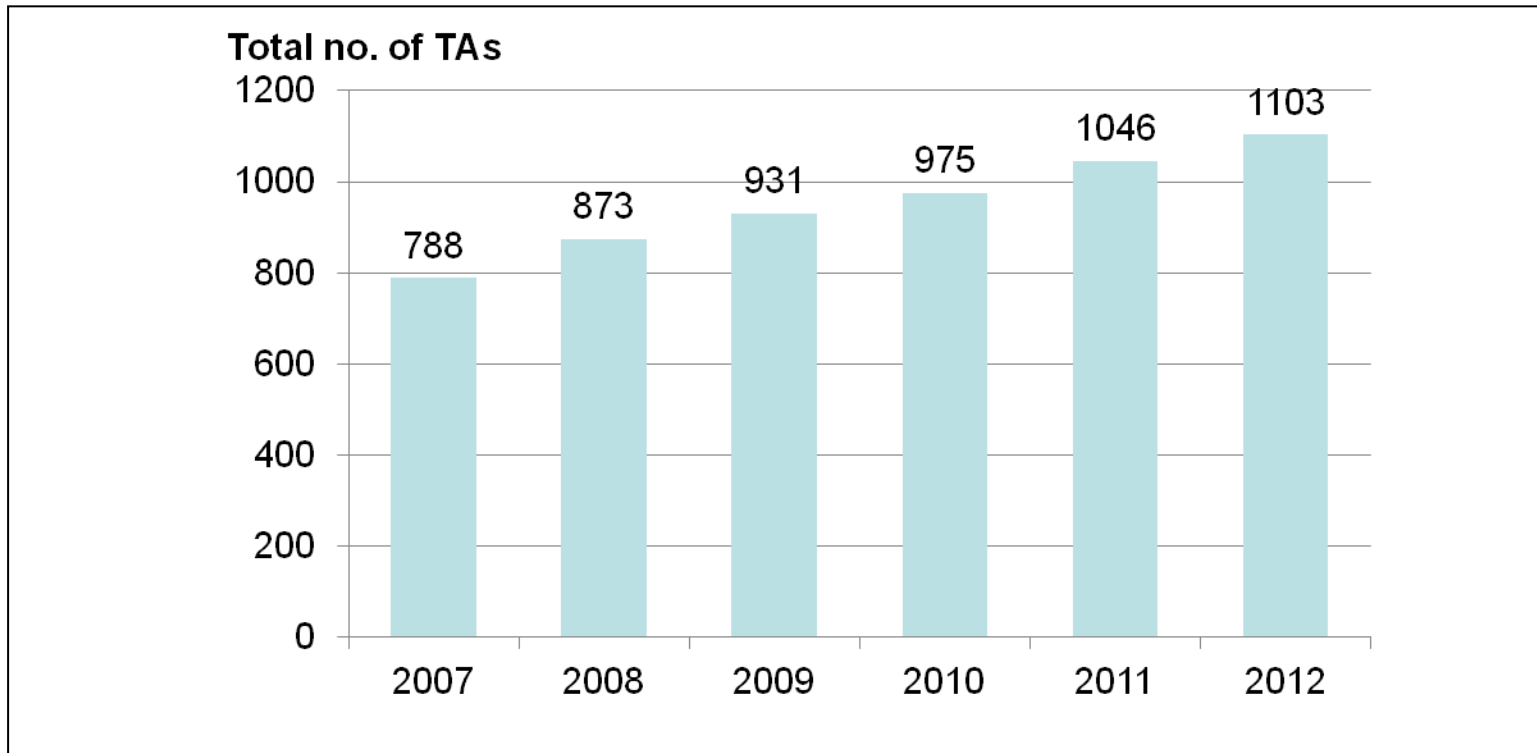
**Cruise**

**BTMICE**

# Travel Agents

**A dynamic tourism sector has resulted in an increase in the number of licensed travel agents**

Licensed Travel Agents (TAs), 2007 – 2012



Source: STB



# Travel Agents

## Local travel agents are evolving to meet the needs of discerning travellers

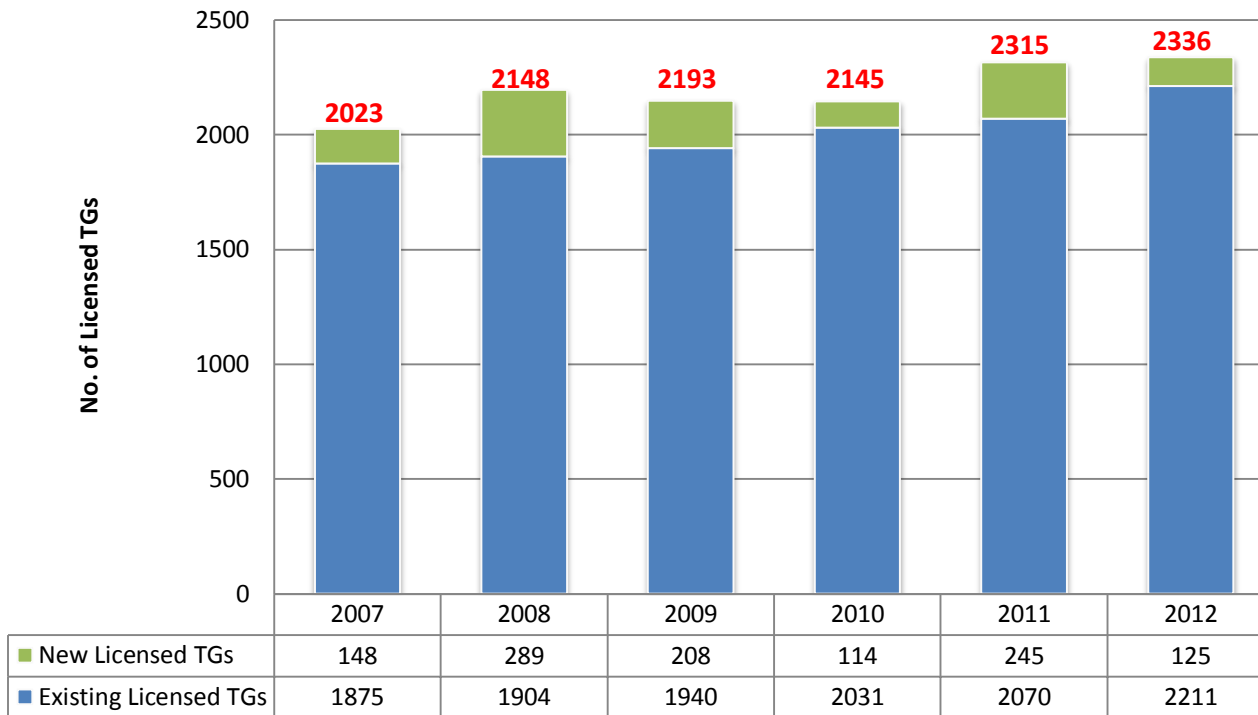
- **Chan Brothers** - Premier Edition and “Little Tots Can Fly”
  - Chan’s Premier Edition - a series of custom-made travel programmes tailored to the discerning palate of the seasoned traveller
  - “Little Tots Can Fly” - crafted around fulfilling the 2-6 year old toddlers’ requirements. Special details include more conducive daytime flights, extended meal duration at kid-friendly restaurants, a more relaxed pace of travel and family photography sessions by professionals
- **CTC – Launch of “Singapore Deep” FIT niche itineraries**
  - Customised higher-yielding niche packages targeted at the well-heeled FIT visitors to Singapore
  - First travel agency to be awarded the Singapore Service Class certification by SPRING Singapore for its Customer-Centric Initiatives
  - CTC also developed other niche outbound packages targeting High Net-worth Individuals, Muslims and Repeat Travellers



# Tourist Guides

Continued increase in the number of licensed tourist guides

Licensed Tourist Guides, 2007 -2012



Source: STB

**Developments to raise professional standards and representation of tourist guides :**

- ✓ 50% y-o-y increase in the number of approved courses with greater diversity in course content and emphasis on skill-based training
- ✓ Official Launch of NTUC TG Chapter
- ✓ 10<sup>th</sup> Anniversary of the Society of Tourist Guides (Singapore)



# Errant Travel Agents & Unlicensed Tourist Guides

## Review of Travel Agents Act and Regulations & Tourist Guide Regulations

Travel Agents	Tourist Guides
<ul style="list-style-type: none"><li>▪ 217 complaints were lodged against Travel Agents.</li><li>▪ Enforcement against errant travel agents</li></ul>	<ul style="list-style-type: none"><li>▪ 122 complaints were lodged against unlicensed Tourist Guides</li><li>▪ Doubling of enforcement drives</li><li>▪ Introduced new watermarked license cards for licensed guides</li></ul>

# Performance of Core Tourism Industries

**Hotels**

**Travel Services**

**Attractions**

**Cruise**

**BTMICE**





# Attractions

Most visited attractions based on STB's Overseas Visitor Surveys

## Paid Attractions

- MBS Skypark
- Night Safari
- Sentosa
- Singapore Flyer
- Universal Studios Singapore

## Free Access Attractions

- Chinatown
- Little India
- Marina Bay
- Merlion Park
- Orchard Road

Source: STB Overseas Visitor Survey, Q1 and Q2 2012





# Attractions

## New attractions in 2012



### Gardens by the Bay

June 2012



### Giant Panda Forest

November 2012

## Marine Life Park



### S.E.A. Aquarium

November 2012



### Adventure Cove

November 2012



# Attractions

Existing attractions evolve to stay competitive



**Port of Lost Wonder (Sentosa)**

March 2012



**Wallaby Trail (Night Safari)**

March 2012

Naracoorte Cave



**Bird Breeding Centre (Jurong Bird Park)** May 2012



**Sesame Street Parade (USS)**

November 2012

# Performance of Core Tourism Industries

**Hotels**

**Travel Services**

**Attractions**

**Cruise**

**BTMICE**

# Cruise

## Singapore's cruise infrastructure: new & revitalised

### Marina Bay Cruise Centre Singapore



- Officially opened in October 2012
- Operated by SATs-Creuers
- Able to accommodate the world's largest cruise ships (i.e. Oasis-Class ships)
- Finger pier with 2 berths
- Total area of 28,000m<sup>2</sup>, with over 80 check-in counters and 27 coach bays

### Singapore Cruise Centre @ Harbourfront



- Opened since 1991
- Finger pier with 2 berths
- Completed a S\$14 million upgrading in June 2012
- The upgrading and retrofitting doubled arrivals immigration and cruise baggage check-in counters and resulted in a 26% increase of overall space for passenger operations within the same total area of 12,800m<sup>2</sup>



# Cruise

## Maiden calls to Singapore more than tripled in 2012

<u>Name of vessel</u>	<u>Maiden call date</u>
Zaandam	08 Jan 12
Seabourn Quest	27 Feb 12
Costa Deliziosa	04 Mar 12
L'Austral	14 Apr 12
Costa Victoria	30 Apr 12
Voyager of the Seas	26 May 12
Celebrity Solstice	23 Nov 12
Aegean Odyssey	08 Dec 12
Celebrity Millennium	08 Dec 12
Azamara Journey	22 Dec 12
Superstar Gemini	28 Dec 12



# Cruise

## Carnival Asia – A major milestone in Singapore’s cruise industry

### Carnival group taps Foschi to lead Asia strategy, set up Singapore office



Foschi - an old Asia hand

Carnival Corp. & plc appointed Costa Crociere chairman Pier Luigi Foschi to oversee its growth strategies within the rapidly expanding Asian region.

In his role as chairman and ceo of the new Carnival Asia unit, Foschi will be responsible for establishing Carnival’s new corporate offices in Singapore and providing guidance and assistance to the organization’s various operating units in pursuing their Asian cruise strategies.

Currently, Carnival Corp. & plc’s Asia operations include two Costa ships based in China and Singapore and Princess Cruises’ Sun Princess, which will launch a series of voyages from Japan next spring.

Foschi, who retired as Costa ceo in July,

will continue to serve in his current role of chairman and a managing director of the Costa group and as a member of Carnival’s board of directors.

- Carnival Corporation, world’s largest cruise company
- Carnival Corporation announced set up of new Carnival Asia unit, with Costa Crociere chairman Mr Pier Luigi Foschi as Chairman & CEO.
- Mr Foschi will be responsible for establishing Carnival Asia’s corporate office in Singapore to oversee Carnival’s growth strategies in Asia.

# Cruise

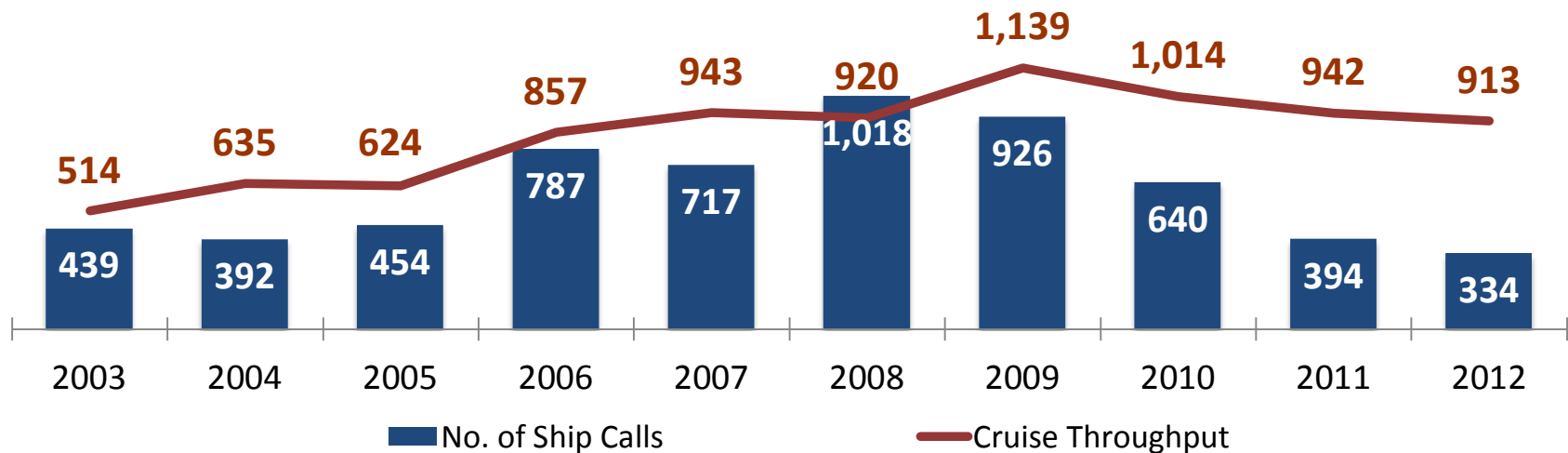
*Cruise passenger throughput for 2003-2012 grew at a compound annual growth rate of 6.5%*

**334**

*ship calls were made*

**913k**

*cruise passenger throughput*



***Decline in ship calls and throughput due to gaming ships terminating operations***

# Performance of Core Tourism Industries

**Hotels**

**Travel Services**

**Attractions**

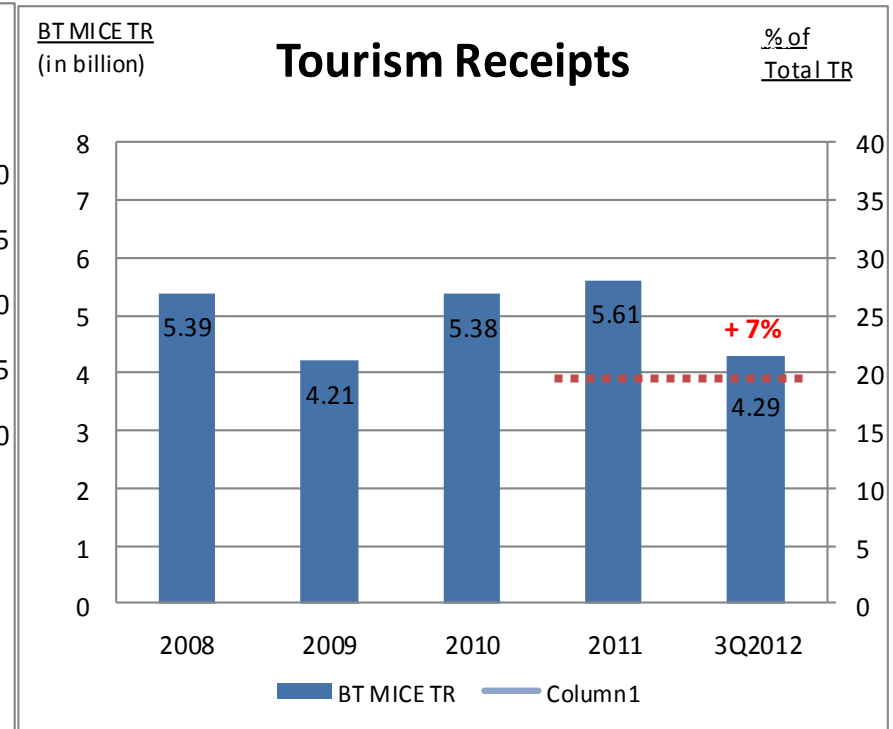
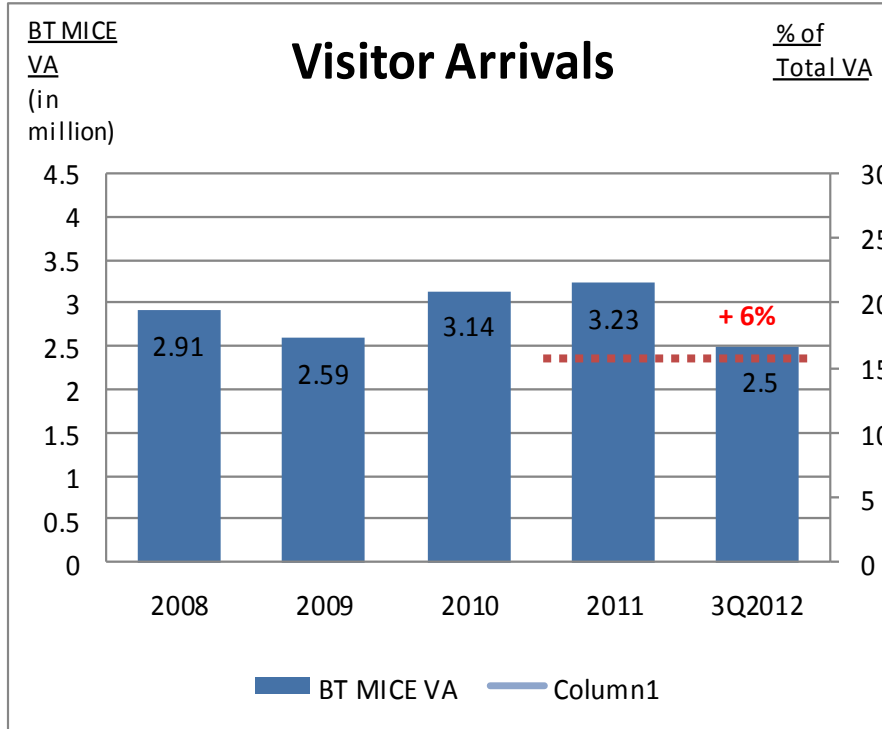
**Cruise**

**BTMICE**



# BTMICE

**BTMICE Visitor Arrivals at 2.5 mil (6% y-o-y) and Tourism Receipts at 4.29 billion (7% y-o-y) for Jan-Sep 2012**



\* This figure excludes Sightseeing and Entertainment expenditure

# BTMICE

## Strengthening Singapore's position as a leading MICE hub

- Singapore's **international appeal, strategic location** and **access to key Asian markets** are key reasons for organisers to move or locate their events in Singapore
- 2012 saw **18 World Congresses**, including a number of **first-in-Asia or Singapore events** such as:
  - Young Presidents' Organisation Global Leadership Conference 2012
  - NAAMBA Global MBA Conference 2012
  - International Association of Gaming Regulators Conference 2012



# BTMICE

## Growing quality content across key industry clusters

Travel



Design



Media & Digital Content



Urban Solutions



104 inaugural events in Singapore with gathering of top thought leaders and industry participants



Key events with significant growth in attendance, exhibition space or content in 2012

# BTMICE

## Key Accolades

### MICE

#### **International Congress and Convention Association (ICCA) Global Rankings 2011**

*Top Convention City in Asia for the 10<sup>th</sup> consecutive year*

*The Fifth Convention City in the World for the 2nd consecutive year*

#### **Union of International Associations (UIA) Global Rankings 2011**

*Top International Meeting Country for the first time*

*Top International Meeting City for the fifth consecutive year*

### Business

#### **TTG Travel Awards 2012**

Best BT MICE City

#### **Business Traveller Asia-Pacific Travel Awards 2012**

Best Business City in Southeast Asia

#### **Business Traveller China Awards 2012**

Favourite Leisure City in the World

#### **CEI Asia Industry Survey 2012**

Best Convention Bureau

Best Convention Bureau Website

#### **Accor Asia-Pacific Business Traveller Research**

Most Popular Business Travel Destination in Asia Pacific 2012

#### **World Travel Awards 2012**

Asia's Leading Meetings & Conference Destination

# Presentation Outline

## Singapore's Tourism Sector Performance 2012

1	Tourism Sector Performance
2	Performance of Core Industries
<b>3</b>	<b>Highlights of 2012</b>
4	2013 Forecast





'Get Lost' campaign in Australia



'The Holiday You Take Home With You' campaign in India

**Achieving new milestones**



**SINGAPORE:  
An Ongoing Journey  
of Innovation &  
Transformation**

**Differentiated marketing  
campaigns**



'New Discoveries' campaign in China

**Enhancing tourism content**

**YourSingapore LIVE**

Only the latest. Only a hop away. Only in YourSingapore.

'Only in Singapore, Right Now!' campaign in Jakarta



Vibrant dining scene



Fashion Steps Out @ Orchard



# Presentation Outline

## Singapore's Tourism Sector Performance 2012

1	Tourism Sector Performance
2	Performance of Core Industries
3	Highlights of 2012
<b>4</b>	<b>2013 Forecast</b>



# 2013 Forecast

**Tourism Receipts**      **\$23.5 – 24.5 billion**  
*(2.2 – 6.5% vs 2012 est.)*

**Visitor Arrivals**      **14.8 – 15.5 million**  
*(2.8 – 7.6% vs 2012 est.)*

## >> **2012 Performance (est.)**

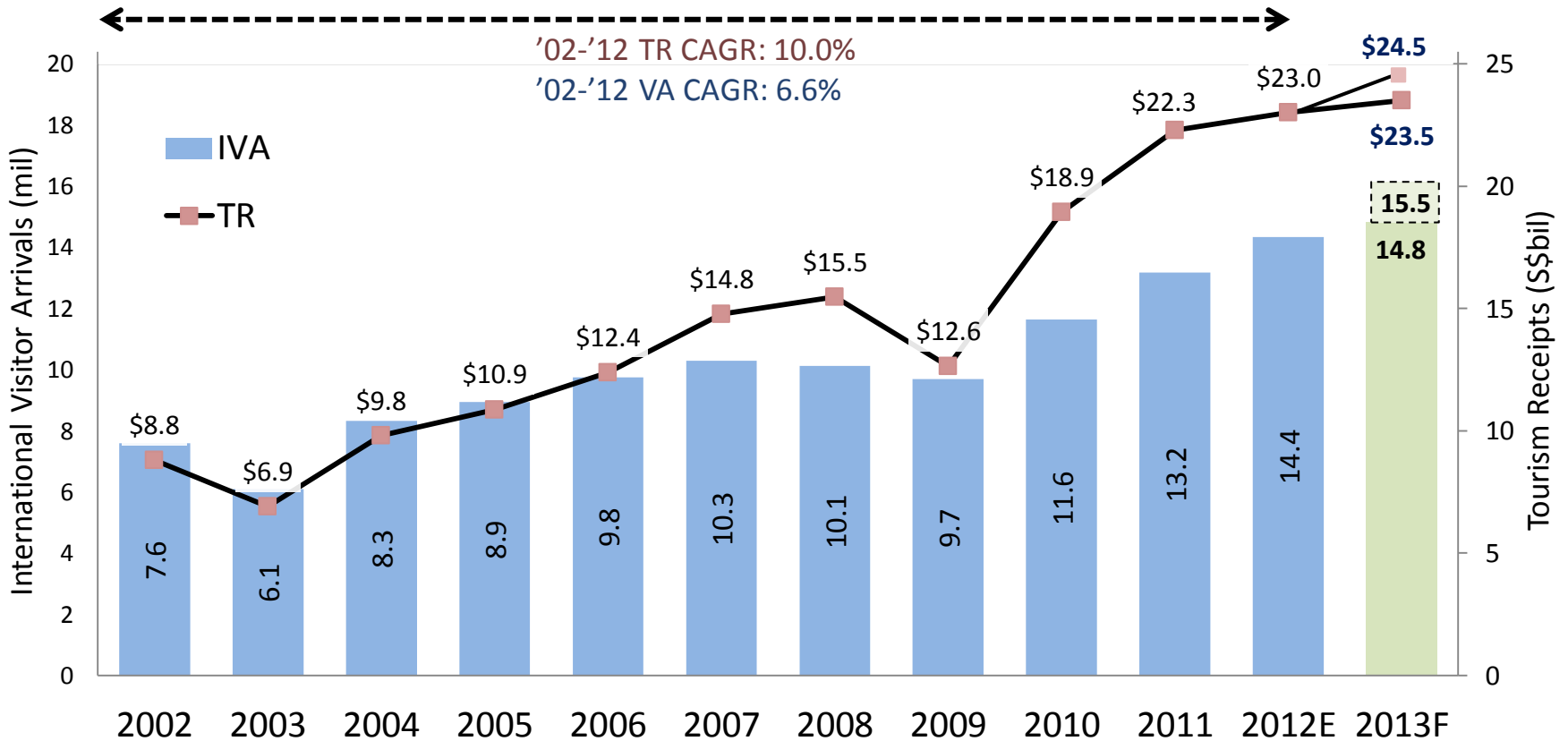
Tourism Receipts    \$23.0 billion

Visitor Arrivals     14.4 million





# 2013 Forecast



***From 2002 to 2012, Tourism Receipts have grown at a CAGR of 10.0%, with a corresponding CAGR of 6.6% in Visitor Arrivals.***

# 2013: What's coming up

## Attractions

### Official opening of River Safari in 2H2013



## BTMICE

Upcoming 2013 key conventions inaugural to Singapore include:

- 79th World Library & Information Congress 2013
- World Engineers Summit 2013
- International Philosophy and Literature Conference 2013



## Hotels

### Opening in 2013:

- Parkroyal on Pickering
- Sofitel So Singapore
- The Westin Singapore
- Holiday Inn Express
- Dorsett Singapore
- Ramada Singapore



The Westin  
Singapore



Sofitel So Singapore

## Travel Agents

### Launch of new accreditation framework

- **NATAS Accreditation** aimed at encouraging tourism professionals to upgrade their skillsets through certified courses
- Raises overall service standards of the travel industry





**Thank You**







# Q & A

