



Tourism Sector Performance 2013

17 Feb 2014



Presentation Outline

Singapore's Tourism Sector Performance 2013

1 **Tourism Sector Performance**

2 **Performance of Core Industries**

3 **Other Highlights of 2013**



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2013 Forecast: Recap

Tourism Receipts

S\$23.5-24.5

Billion

(1.6%-6% vs 2012)

International Visitor Arrivals

14.8-15.5

Million

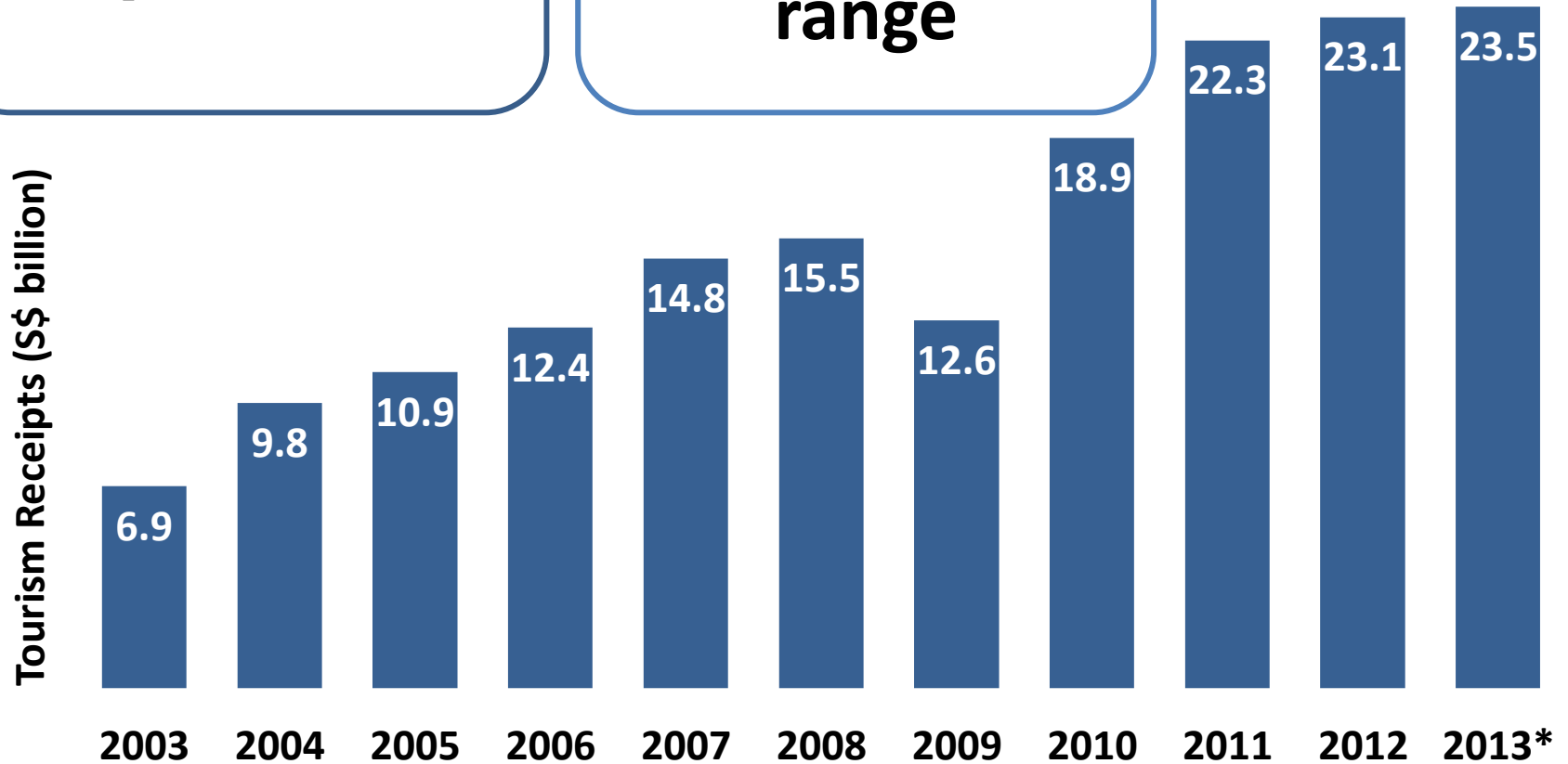
(2.1%-7.2% vs 2012)

2013* Tourism Receipts

S\$23.5 billion

↑ 1.6%

**TR within the
forecasted
range**



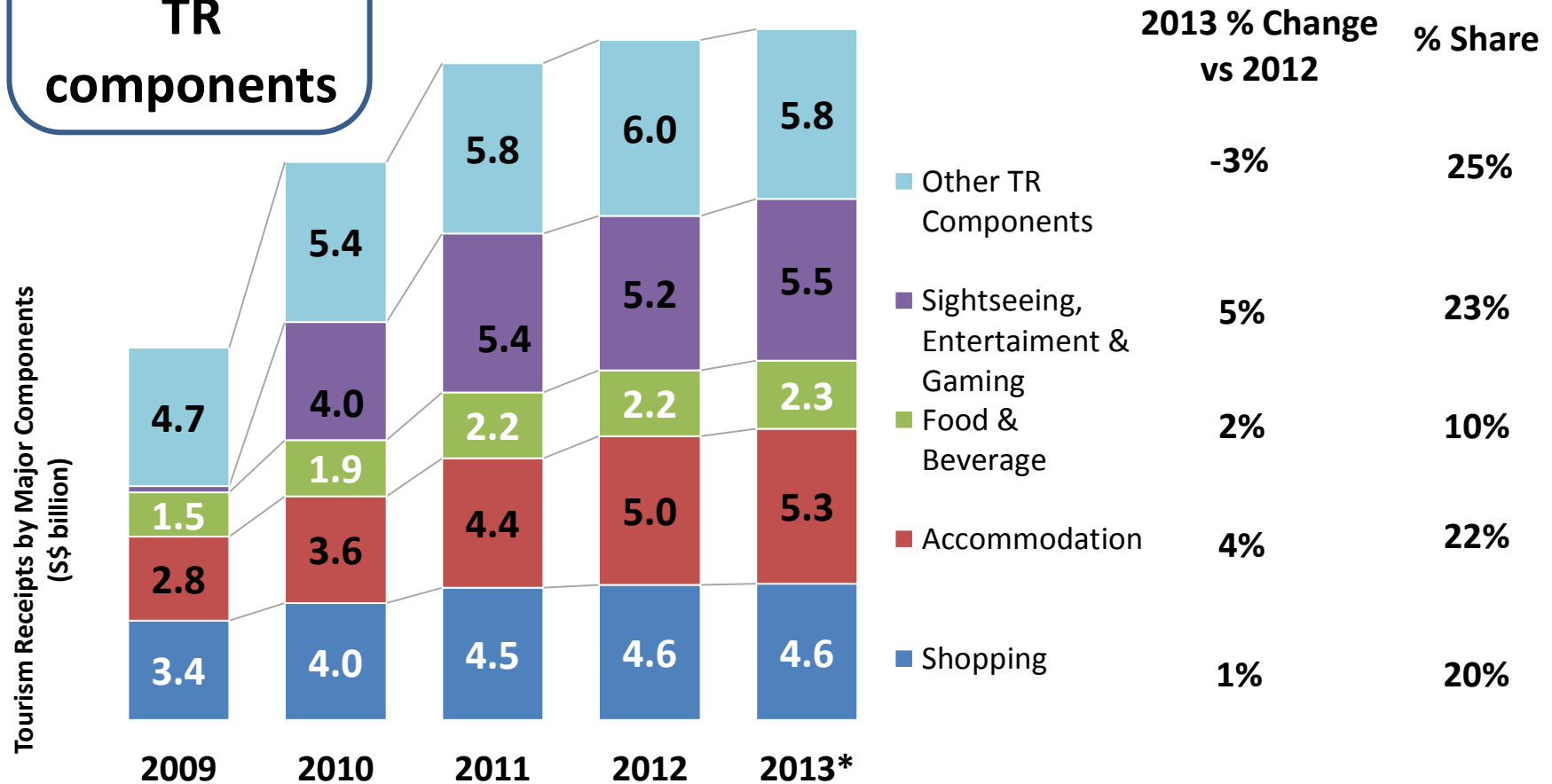
* preliminary estimates

Source: STB

© 2013 Singapore Tourism Board

2013 Tourism Receipts: By Major Items

**Growth
across most
TR
components**



Expenditure is estimated from Overseas Visitor Survey.

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

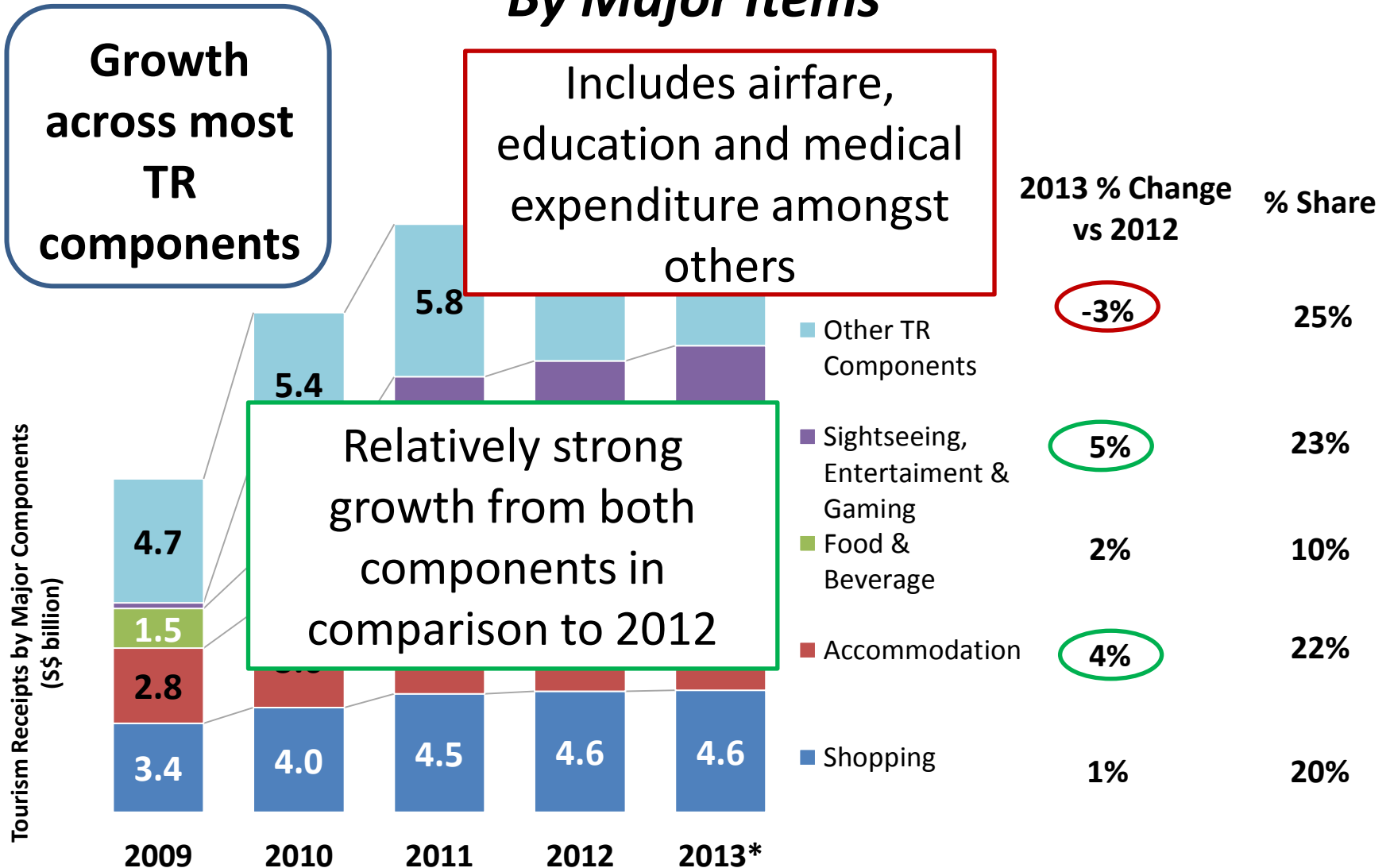
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© 2013 Singapore Tourism Board

Source: STB

2013 Tourism Receipts:

By Major Items



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© 2013 Singapore Tourism Board

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2013 Tourism Receipts*

Purpose of Visit

Leisure TR (YTD 3Q):

↑ 10%

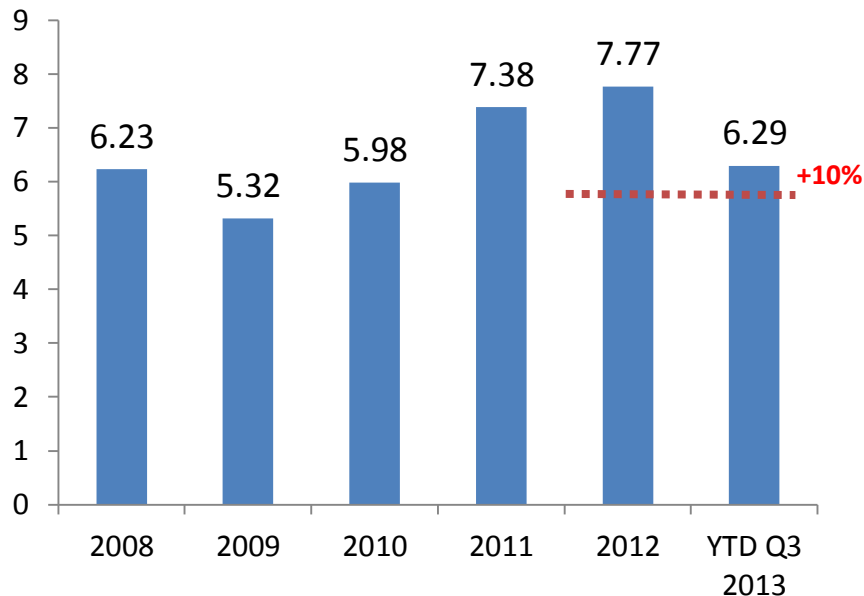
**BTMICE TR
(YTD 3Q):**

↓ 6%

Decline in BTMICE TR due to cutback on travel budgets

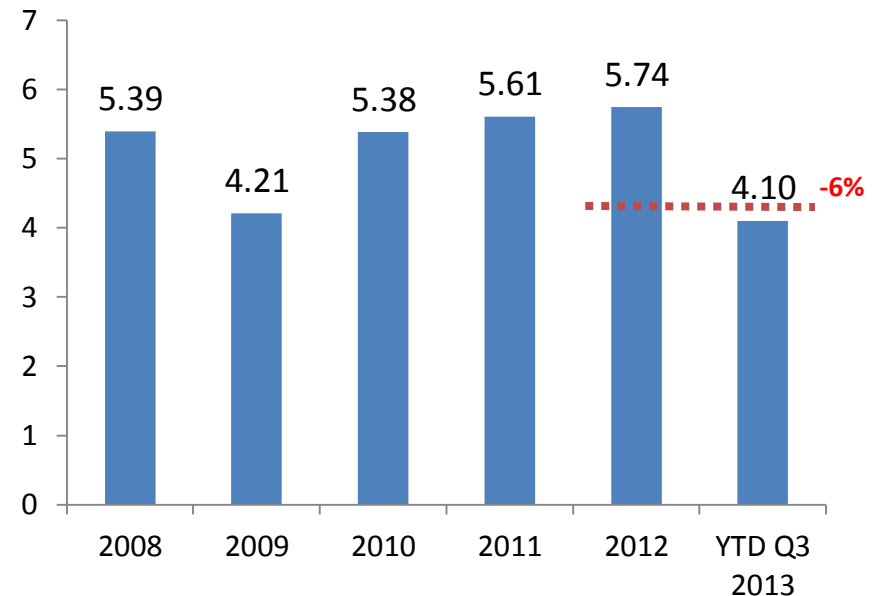
Leisure TR
(in billions)

Leisure TR



BTMICE TR
(in billions)

BTMICE TR



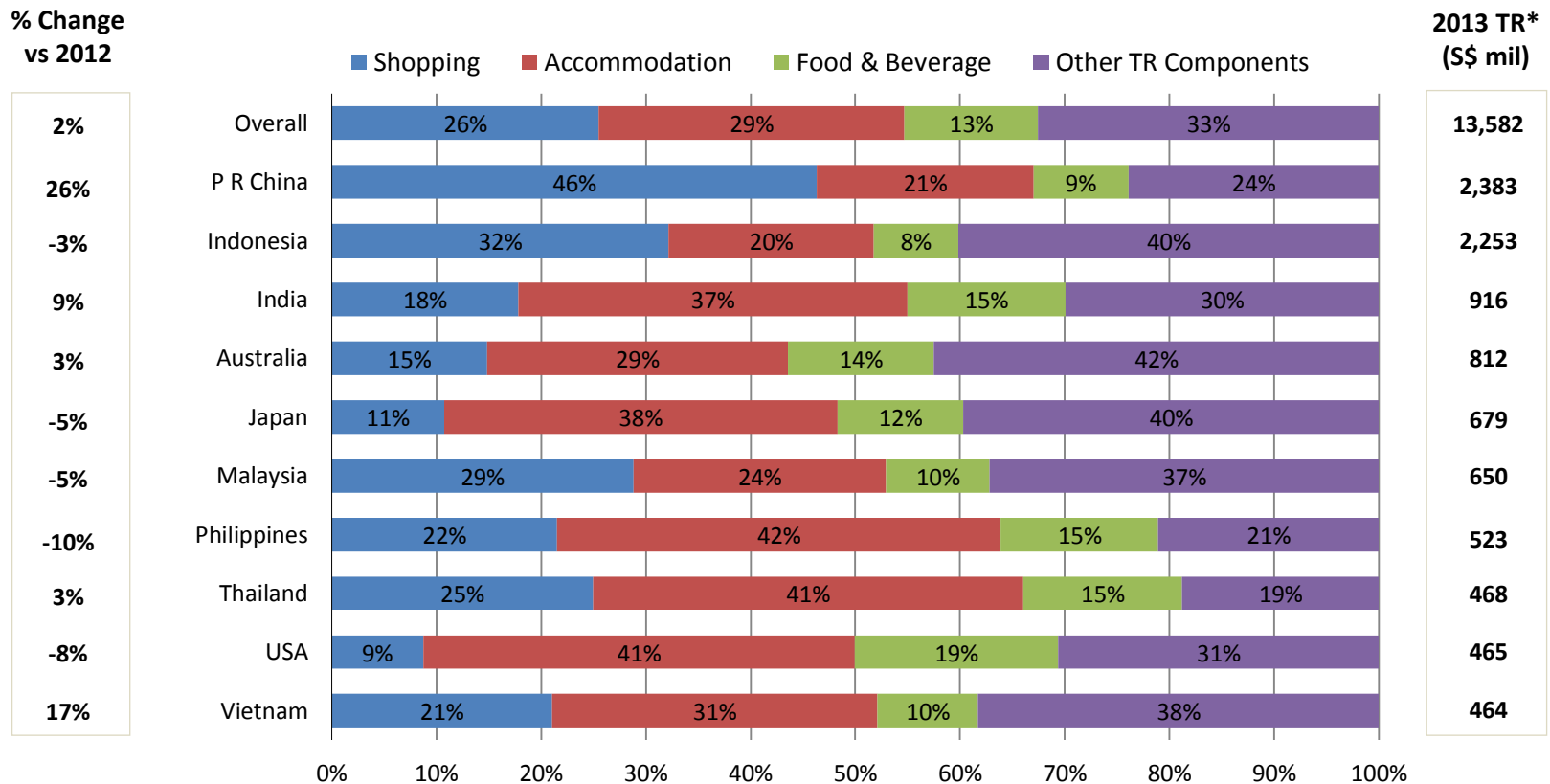
* This figure excludes Sightseeing, Entertainment and Gaming expenditure

YTD 3Q 2013 Tourism Receipts:

By Top 10 Markets (excl. Sightseeing, Entertainment & Gaming)

S\$14 billion Tourism Receipts in Jan-Sep 2013 (+2% vs Jan-Sep 2012)

Tourism Receipts by Major Components, Top 10 Markets, January to September 2013



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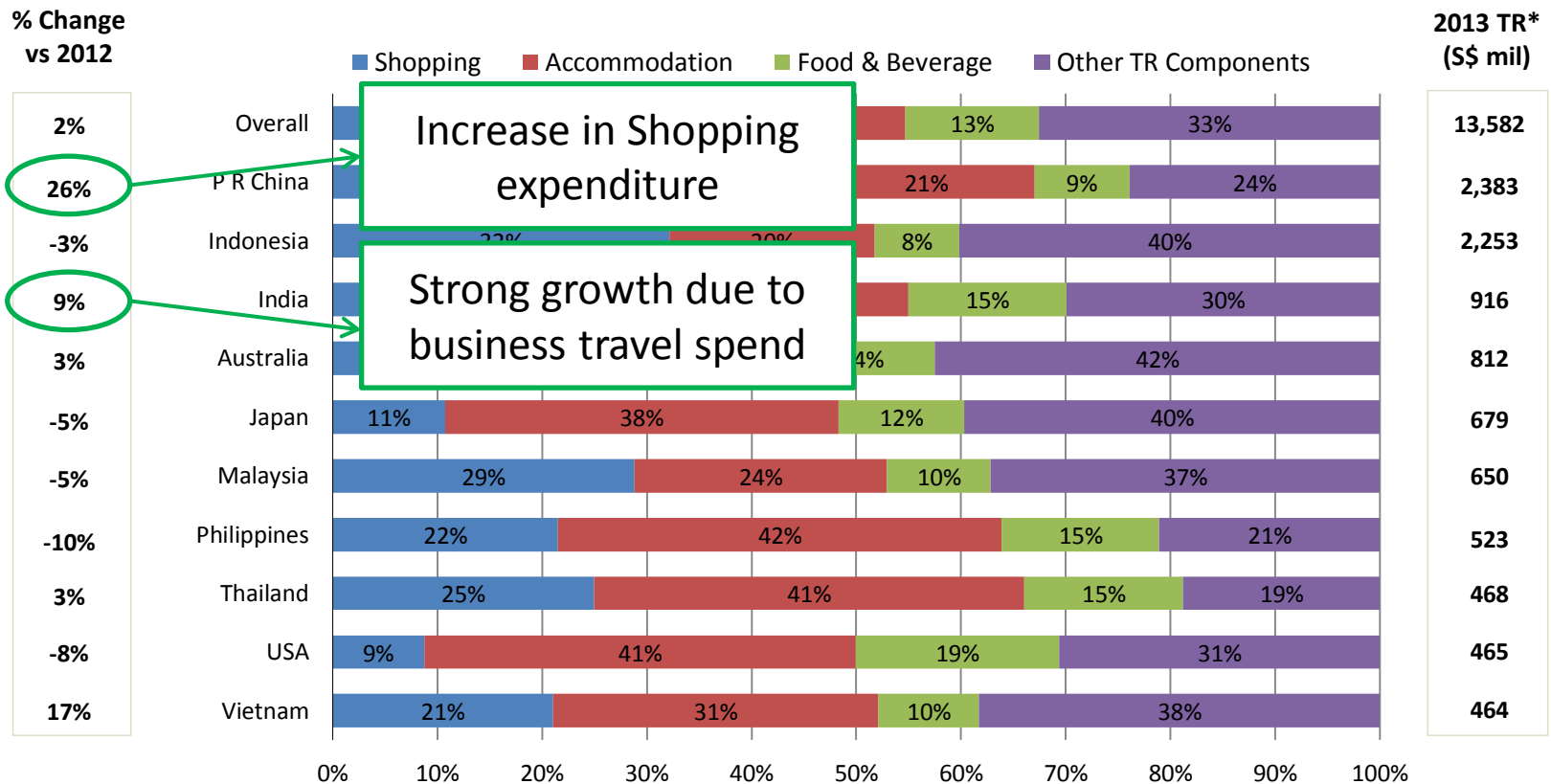
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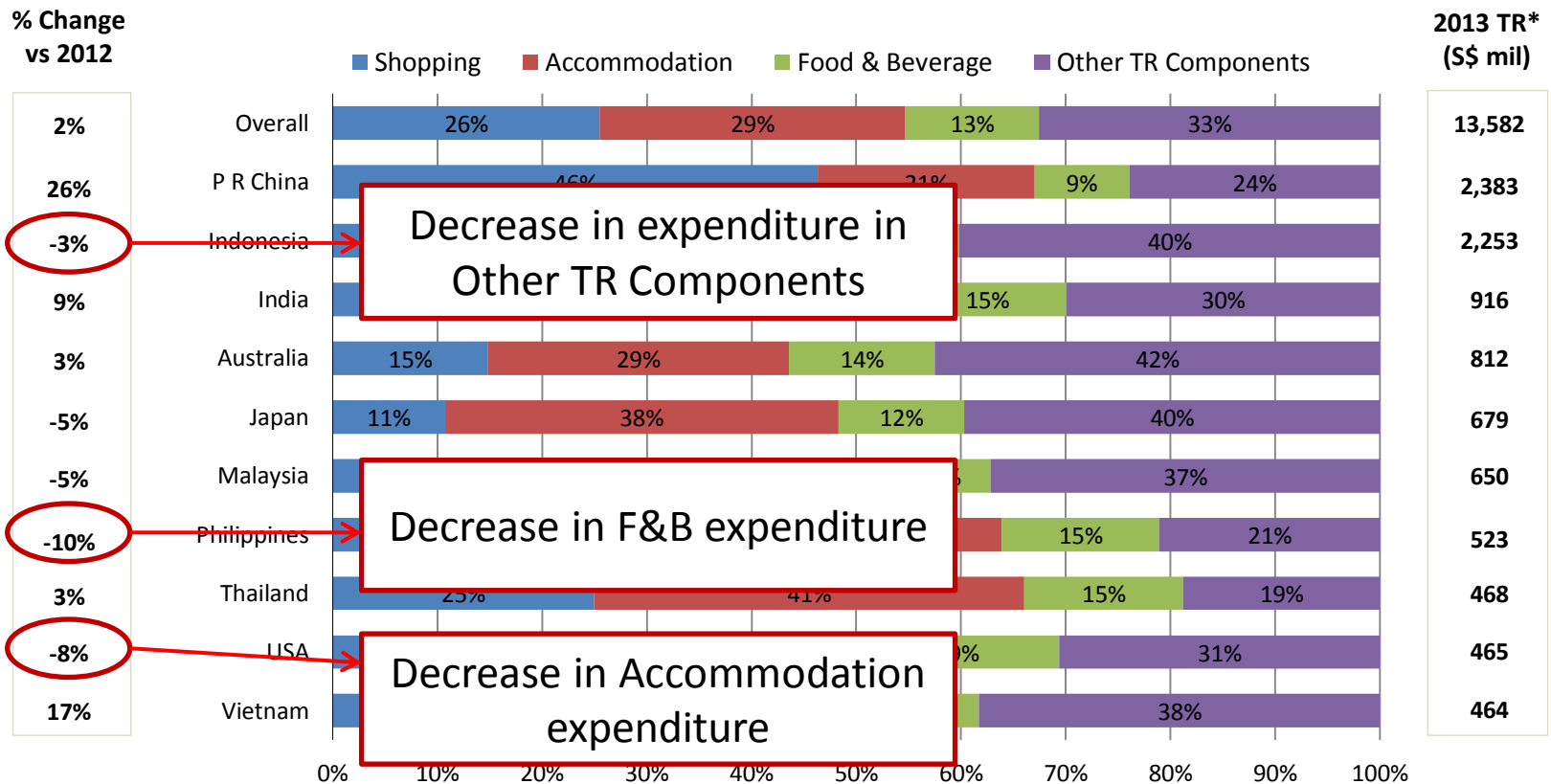
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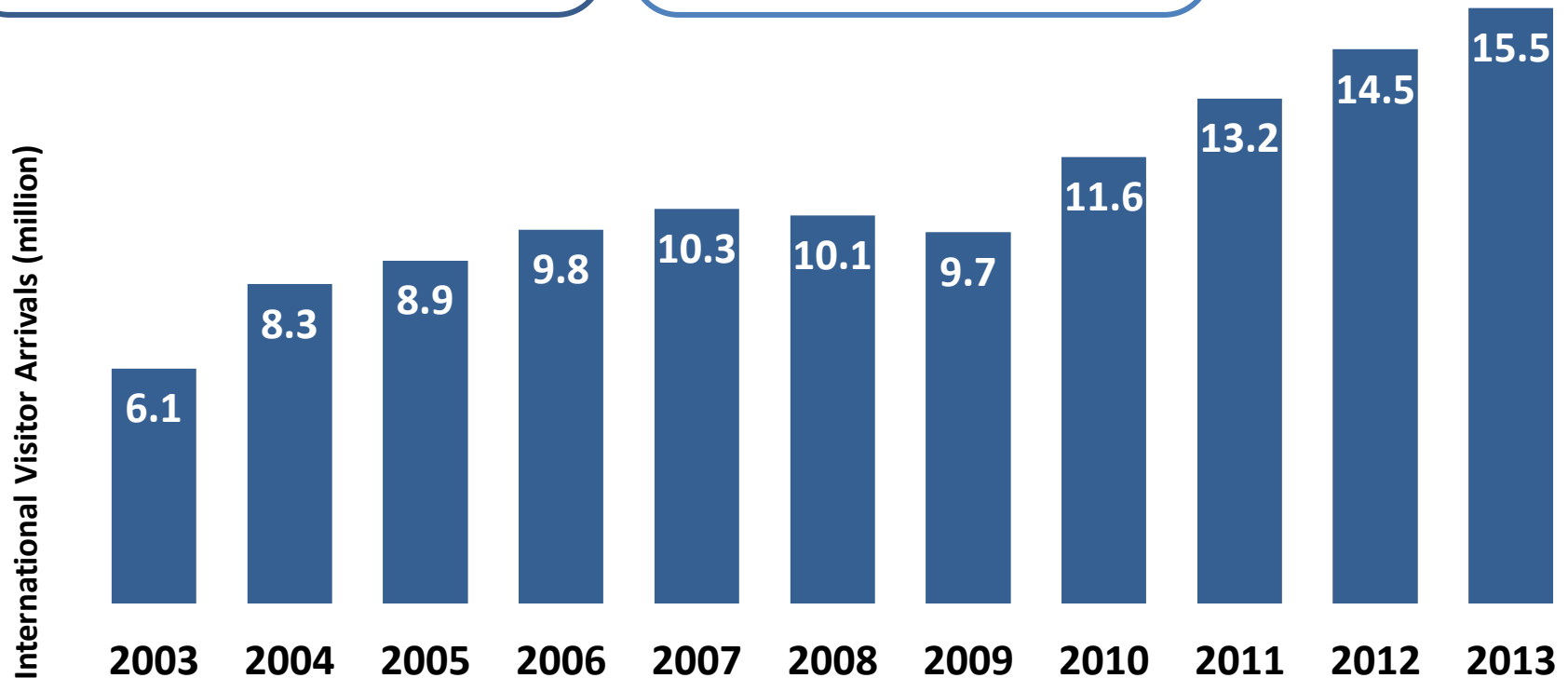
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2013 International Visitor Arrivals

15.5 million

↑ 7.2%

**Singapore remains
attractive as a
destination**



*Preliminary estimates for full year 2013 as Nov – Dec 13 VA is based on ICA topline figures

Source: STB

© 2013 Singapore Tourism Board

2013 International Visitor Arrivals

Purpose of Visit

Leisure IVA (YTD 3Q):

↑ 12%

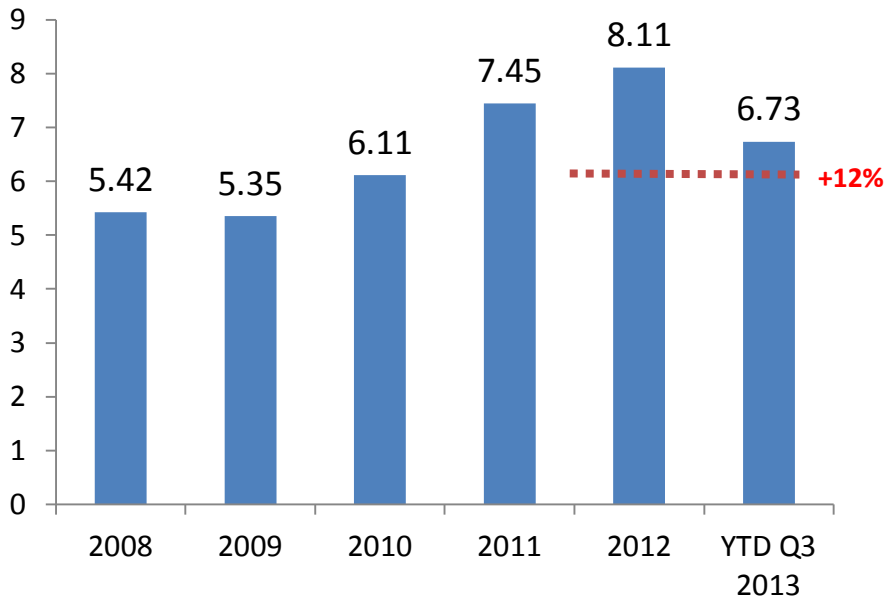
**BTMICE IVA
(YTD 3Q):**

↑ 6%

**Strong growth in
both Leisure and
BTMICE arrivals**

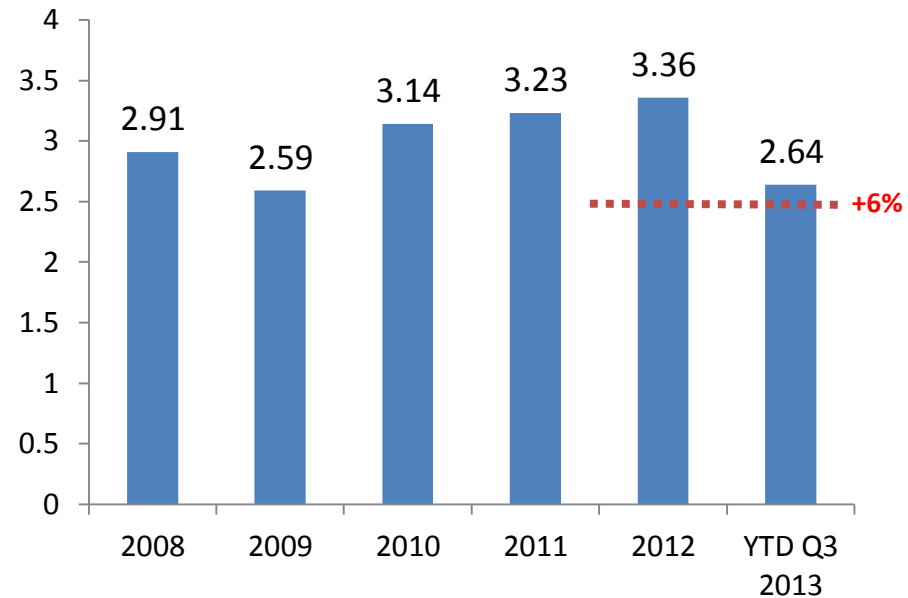
Leisure IVA
(in millions)

Leisure IVA



BTMICE IVA
(in millions)

BTMICE IVA



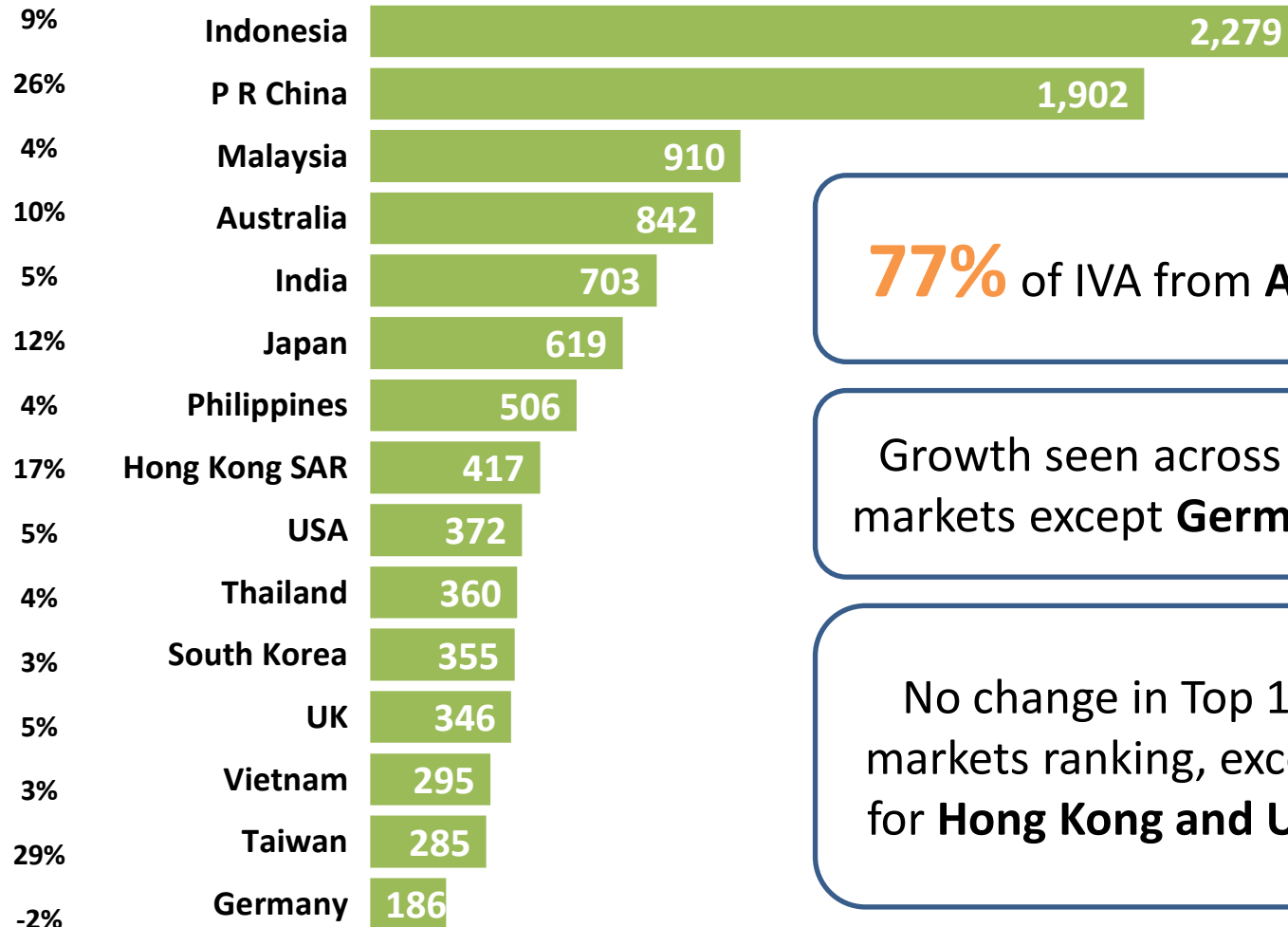
YTD 3Q 2013 International Visitor Arrivals:

Top 15 Markets

11.8 million Visitor Arrivals in Jan-Sep 2013 (+10% vs Jan-Sep 2012)

(YTD 3Q)

% Change vs 2012



77% of IVA from Asia

Growth seen across all markets except **Germany**

No change in Top 15 markets ranking, except for **Hong Kong and USA**

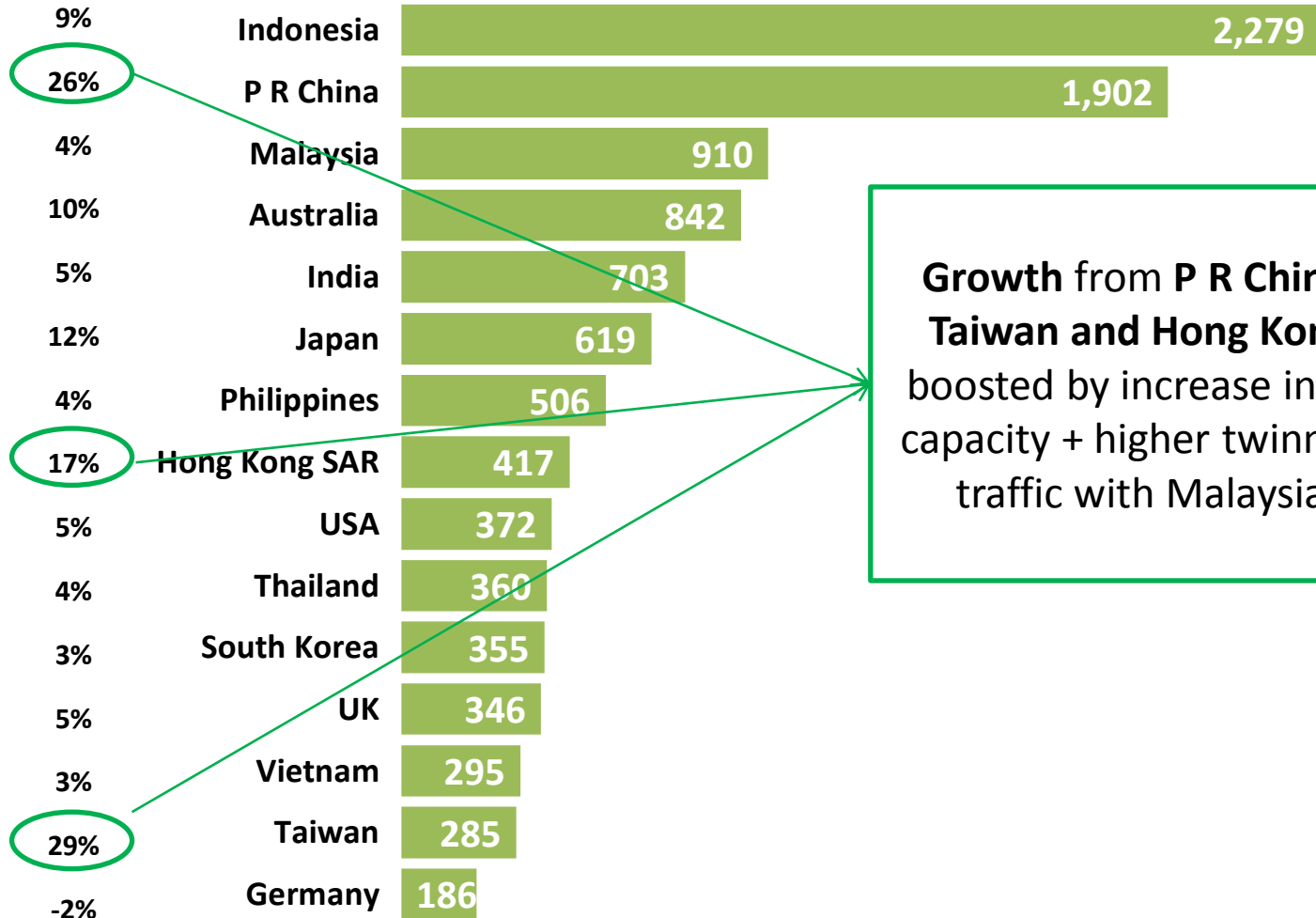
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Growth from P R China, Taiwan and Hong Kong boosted by increase in air capacity + higher twinning traffic with Malaysia

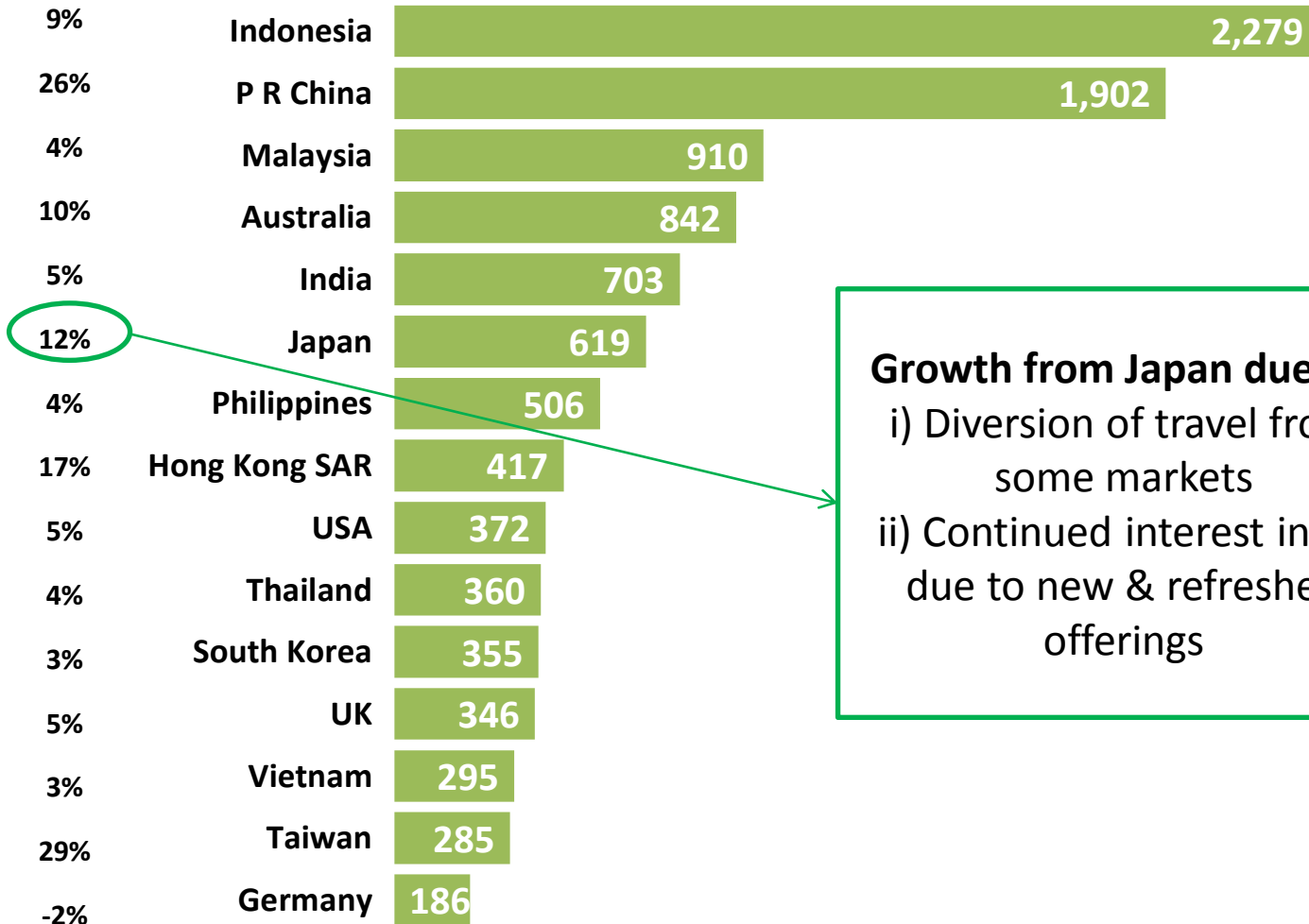
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% Change vs 2012



Growth from Japan due to:
i) Diversion of travel from some markets
ii) Continued interest in SG due to new & refreshed offerings

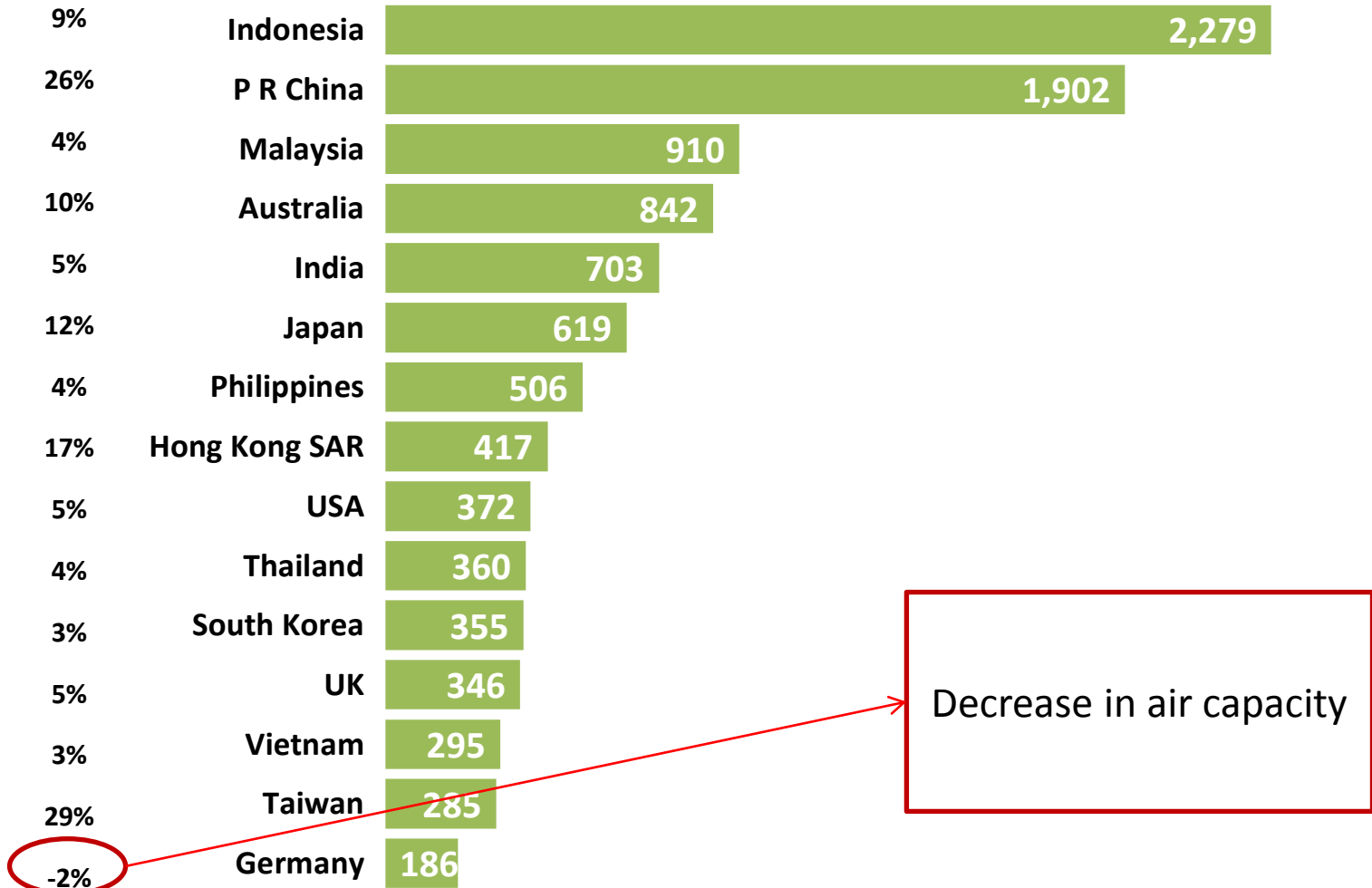
YTD 3Q 2013 International Visitor Arrivals:

Top 15 Markets

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(YTD 3Q)

% Change vs 2012



Decrease in air capacity

2013 Tourism Performance: Key Highlights

Singapore remains attractive as a destination: +7.2% in international visitor arrivals.

Spending grew across most TR components

Growth in BTMICE arrivals offset cutback in business travel spending

Specific Market Trends: Australia

4th largest market
(Jan – Sept 2013)
IVA: 842,000 (+10%)
TR: S\$0.8 billion (+3%)

Marketing campaign (launched
in Mar 2012) has gained good
traction

Leisure IVA: +20%

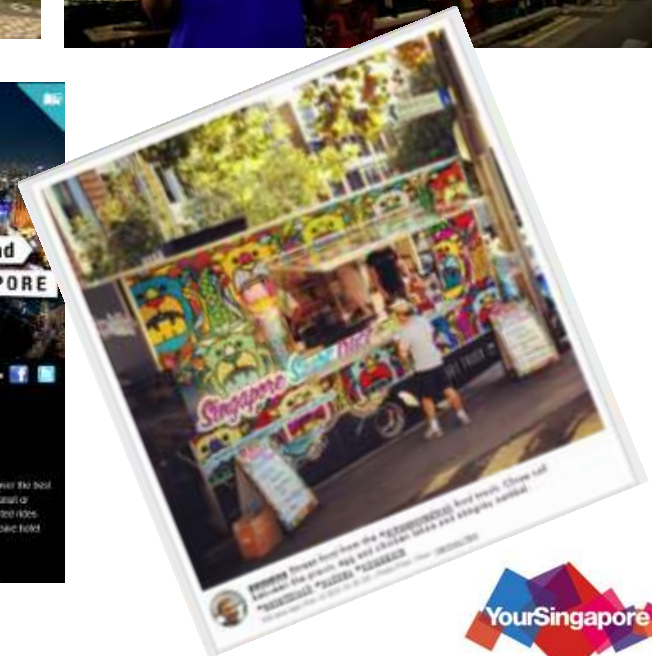
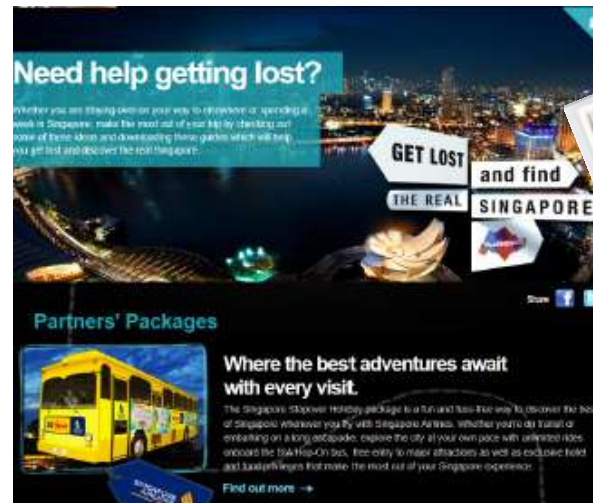
Australians look for **immersive experiences** to gain a better understanding of the people, culture and heritage
e.g. **Little India, Chinatown**

Digital resources are used, significantly more than other markets, to search, plan and book holidays



Australia Marketing Campaign: “Get Lost and Find the Real Singapore”

- Challenge Australians’ perception of Singapore and deepen discovery of the real Singapore



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Australia Marketing Campaign: “Get Lost and Find the Real Singapore”

- Challenge Australians’ perception of Singapore and deepen discovery of the real Singapore

Spike in search interest and 3x increase in traffic to campaign site

97% of survey respondents indicated improved perceptions of Singapore

Travel agent partner saw an increase in Singapore sales during and after the campaign

Specific Market Trends: India

YTD 3Q IVA: 703,000 (+5%)
YTD 3Q TR: S\$0.9 billion (+9%)

Strong outbound business travel from India to Singapore, registering +17% in 2013

Sustained interest from Indian leisure travellers despite depreciation of the rupee

STB with travel trade also **reaching out to Tier 2 cities**, where catchment for middle class is larger and visitors are starting to see travel as a status symbol.



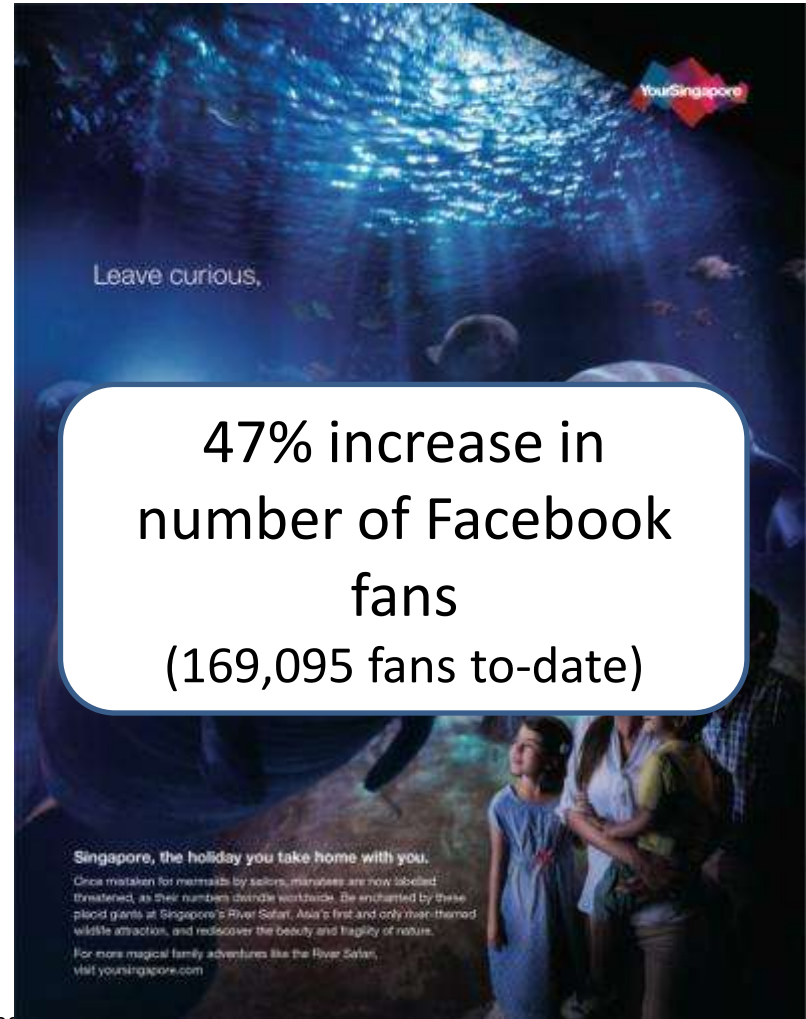
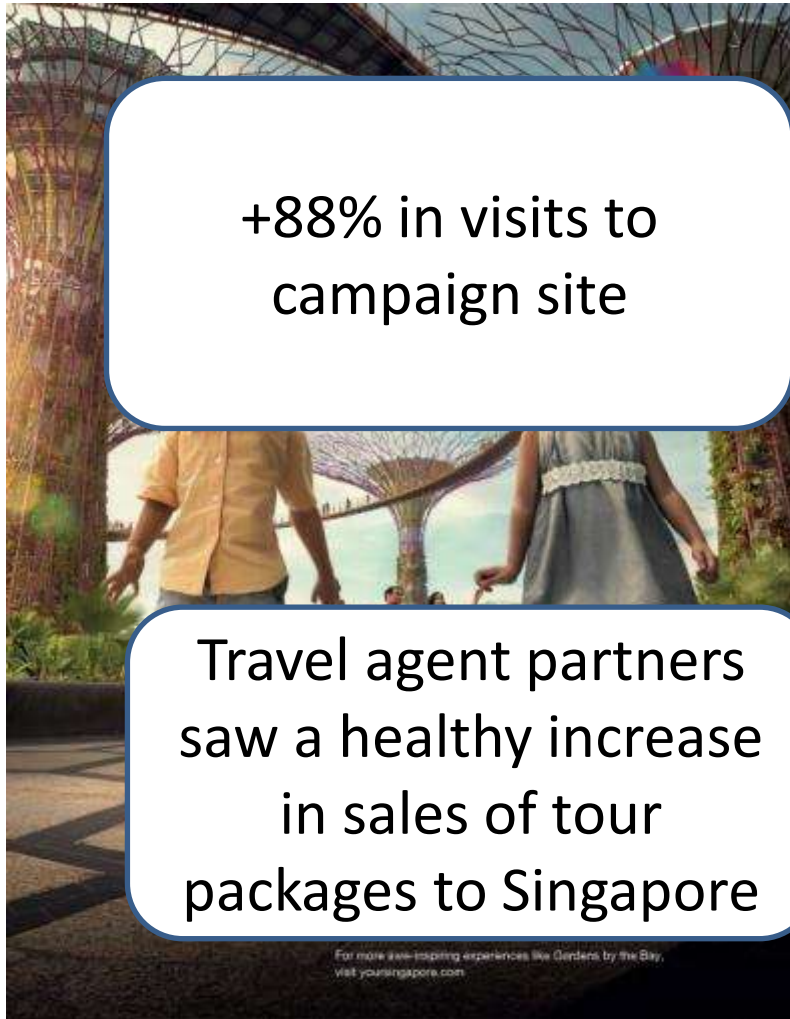
India Marketing Campaign: “Singapore – The Holiday You Take Home With You”

- Highlighting the concentration of world-class experiences that visitors can enjoy with their loved ones in Singapore



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Performance of Core Tourism Industries

Hotels

Travel Services

Attractions

Cruise

BTMICE

Hotels

**Hotel industry performance held steady despite increased supply –
Gazetted Hotel Revenue: S\$2.9 billion (3.9% increase)**

**Good traction on industry's
productivity improvement and
capability upgrading efforts**



Hotels



Greater diversity and individualisation of styles, meeting needs of the discerning travellers



Hotels



**Pan Pacific
Singapore**



**Hotels across different tiers
continue to win
international awards**



**Holiday Inn
Singapore
Atrium**



**Wanderlust
Hotel**



Hotels

Gazetted Hotel Revenue

\$2.9 billion

↑3.9%

Average Occupancy Rate

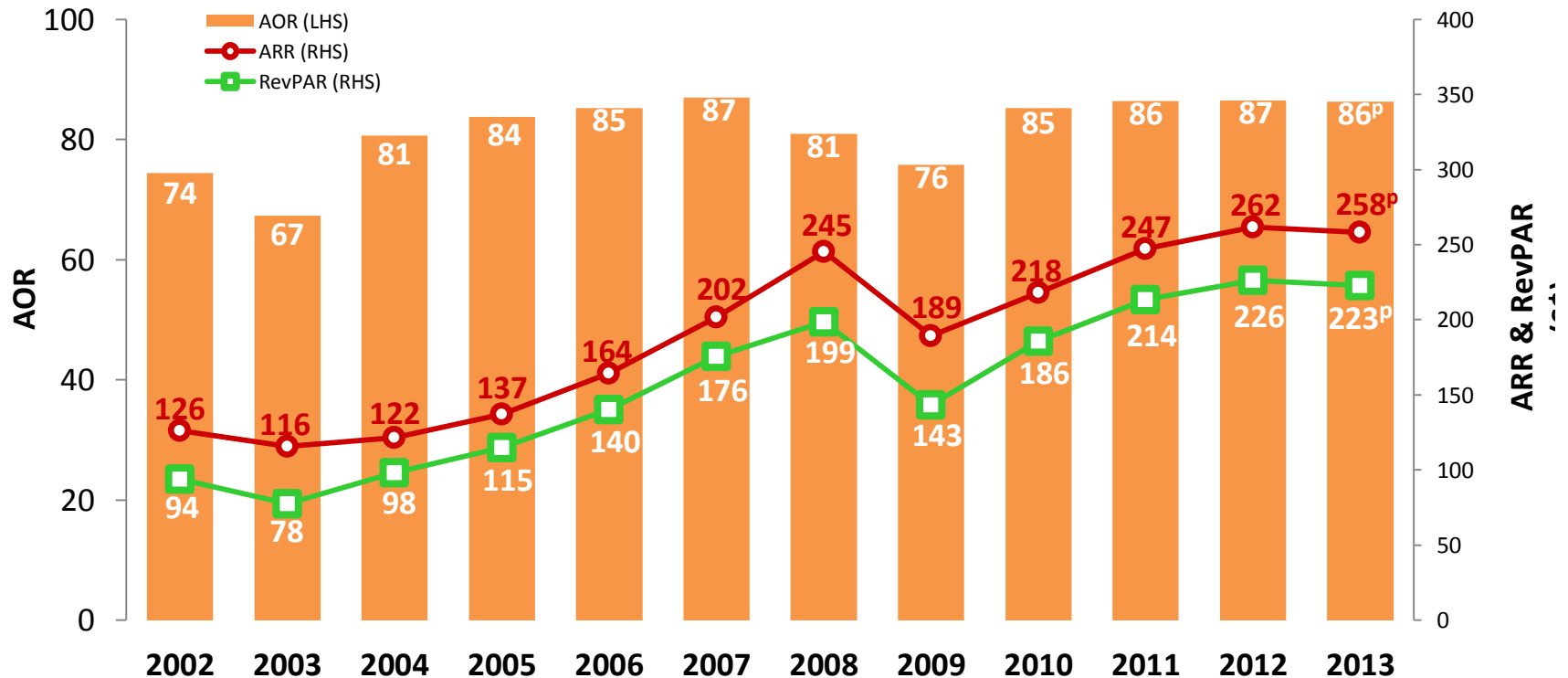
86%

Average Room Rate

\$258

RevPAR

\$223



Source: STB

Source: Monthly Hotel Returns as at 26 Jan 2014

P: preliminary

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Hotels

	2011	2012	2013
No. of Hotels*	304	338	373
No. of Hotel* rooms	49,719	51,622	54,962
Nett Increase in room stock	2,407	1,903	3,340
YOY % increase in room stock	5.1%	3.8%	6.5%

Hotel openings in 2013:

- Holiday Inn Express Orchard
- The Westin Singapore
- Ramada and Days Hotels at Zhongshan Park
- The Amoy

Upcoming Hotels:

- Sofitel So
- Traders Orchardgateway
- One Farrer Hotel & Spa

Source: STB

Number of licensed rooms as at 31 December 2013

**includes hostels with more than 4 rooms*



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Pipeline of hotels in 2014: Approximately 3,000 rooms

Source: STB

Number of licensed rooms as at 31 December 2013

**includes hostels with more than 4 rooms*



Hotel Capability Development

Increased efforts to improve hotel productivity and talent supply

Leverage technology

- Hospitality Technology Education, jointly organized by SHA-IDA-STB
- Call for Collaboration (CFC) for hotel self-service check-in solutions



Upgrade manpower capabilities

- **Job Flexibility Scheme (JFS)**
 - Allowed the hotels more flexibility in the deployment of staff to different job areas when needed
 - Received feedback from employees that wages have increased, and new skills were acquired
 - Success of pilot scheme with hotel industry led to the expansion of JFS to other sectors, including F&B and retail



Develop Tourism Careers

- First-ever Future Leaders 2013 engagement session between educational institutions & industry
- Positive feedback received on how the session helped correct misperceptions about career progression opportunities and remuneration in the industry



Hotel Productivity Case Studies



Holiday Inn Singapore Atrium



What: RFID linen management system

How: Substituted the manpower-intensive practice of manually sorting and counting linen with automated processes

Impact:

- 50% decrease in time and manpower requirements (from 120 to 60 mins)
- Greater accuracy in linen inventory management
- Cost-savings went into upward wage adjustment for employees



Marina Mandarin Singapore



What: OneGuest Mobile Solution for F&B

How: Allowing guests to browse menu and place orders on iPads

Impact:

- Service time decrease by 33% allowing hotel to employ one staff less per shift.
- Staff can refocus their attention to better engage guests

Ramada & Days Hotels Singapore at Zhongshan Park



What: ME LEAP! multi-skilling program

How: Developed new positions called Masters of Experience (“ME”) where employees are trained to be multi-skilled in various facets of hotel operations

Impact:

- As of end Feb 2014, of the 34 MEs hired, 14 have been promoted to ME Executives and other positions
- Increased productivity within and across departments and hotels through multi-skilling and cross-deployment
- Promoted 40% of ME Associates within and across the Hotels’ departments, expanding the hotel’s talent pool
- Enhanced the Ramada and Days Hotel brand in Singapore, driving brand awareness among hospitality professionals and target students
- Managed turnover due to strong employee engagement and through open communication



Performance of Core Tourism Industries

Hotels

Travel Services

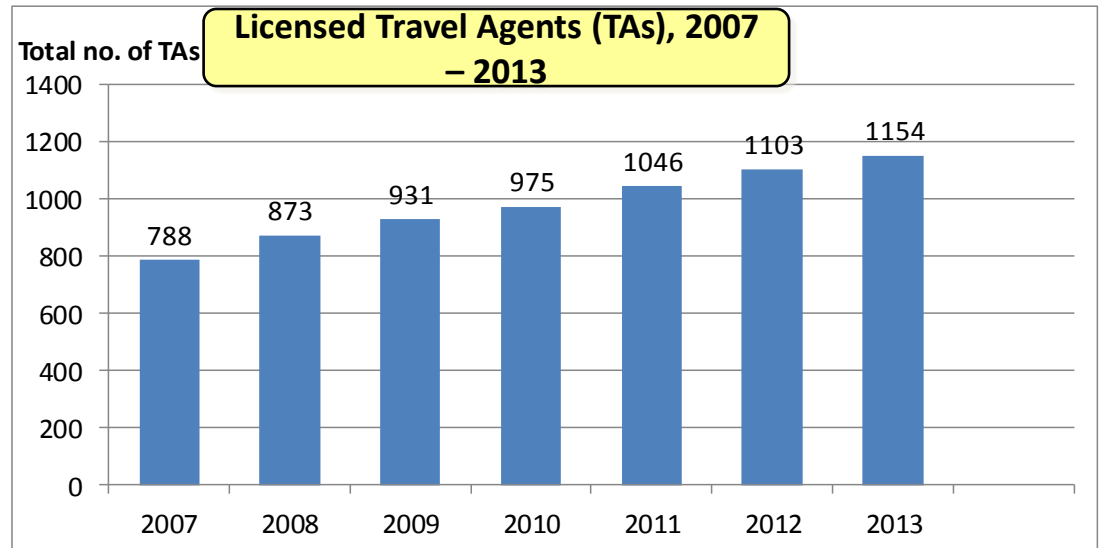
Attractions

Cruise

BTMICE

Travel Agents

- **No. of TAs in 2013:**
1154 (as at 31 Dec 2013)
- **No of ceased TAs: 101**



- **Initiatives undertaken with the TA industry:**
 - Launched Travel Agent Manpower Study (Dec 2013) – To better understand issues faced by the industry and to develop initiatives to address these issues
 - Adoption of innovation and to increase productivity: Call-for-Collaboration jointly organised by STB and IDA
 - Regular engagement sessions with industry to discuss industry trends and developments

Travel Agents

Investment in technology to increase productivity and enhance customers' experience

- **Asiatravel.com:** Demonstrating innovation & new business models
 - Asiatravel.com launched “TACentre.com” – a B2B booking platform which allows smaller TAs instant access and confirmation to Asiatravel.com’s extensive inventory.
 - Recorded 50% increase in revenue since its launch, with a growth forecast of 130% within the next 3 years.
- **Dynasty Travel:** Investing in technology for a seamless experience
 - Launch of iDynasty mobile app for customers to obtain information on-the-go
 - Collaboration with AXS enables customers to make payments at their convenience
 - Both initiatives have contributed to a 15% YOY growth in revenue



iDynasty App download.
Singapore's First Travel Mobile Application by Dynasty Travel.



Travel Agents

Professional skills recognition through the NATAS Accreditation Scheme

The NATAS Accreditation Scheme was launched in Mar 2013 to:

- Increase productivity by equipping employees with the right service mind-sets, skills and knowledge
- Attract and retain talent by giving recognition through professional certification
- Improve industry's professionalism & profitability through upgrading of human resource capabilities
- To date, 196 individuals have participated with another 56 currently undergoing accreditation assessment



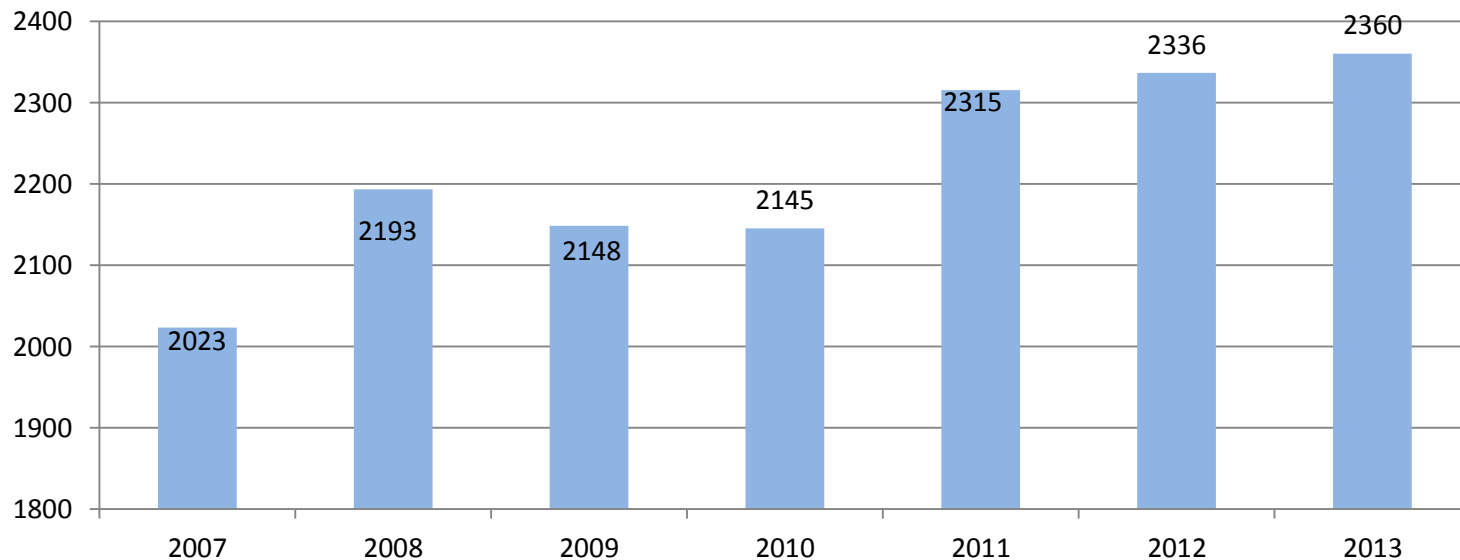
Tourist Guides

2,360 licensed
tourist guides
as of end 2013

139
new
licensees

97%
Singaporeans and
PRs

No. of Licensed Tourist Guides (TGs), 2007 – 2013



Tourist Guides

Continued efforts in raising the professionalism of tourist guides

STB Act and Tourist Guide Regulations Review

- Raising professionalism of tourist guides and quality of tourist guiding
- Public consultation: positive feedback received on proposed amendments
- 1st Reading: 20th January
- 2nd Reading: 17th February

Tourist Guides

Continued efforts in raising the professionalism of tourist guides

Raise professionalism of TGs

- New Professional Development Courses (PDC) titles on new tourism products and skill-based training
- Working with WDA on the review of the WSQ Tour and Travel Competency Roadmap

Continued enforcement checks

- Regular enforcement checks conducted
- Industry affirmed that enforcement efforts were felt on the ground. Travel agents also more cautious to not engage unlicensed tourist guides.



Performance of Core Tourism Industries

Hotels

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Cruise

BTMICE



Attractions

Most visited attractions (in alphabetical order)

Gated Attractions

- MBS Skypark
- Night Safari/Singapore Zoo
- Sentosa
- Singapore Flyer/ Flight Experience
- Universal Studios Singapore

Cultural and lifestyle precincts continue to enjoy healthy patronage by visitors



Universal Studios



Skypark



Sentosa



Singapore Zoo



Merlion Park



Chinatown



Orchard Road



Marina Bay

Attractions

Soft opening of the River Safari in April 2013, followed by the launch of the Amazon River Quest Boat Ride in December 2013

River Safari has further entrenched the Mandai area as a top nature and family attraction, complementing our current range of leisure offerings



Amazon Flooded Forest



Giant Panda Forest



Amazon River Quest

Attractions

Introduction of new offerings at existing Attractions



Shark Encounter



SEA TREK Adventure



Open Ocean Dive

Launch of Marine Life Encounters at Marine Life Park, Resorts World Sentosa (RWS)



Launch of Journey 2: The Mysterious Island at Sentosa 4D AdventureLand



Launch of Sesame Street Spaghetti Space Chase Ride at Universal Studios Singapore

Attractions

Introduction of new offerings at existing Attractions



Launch of Journey 2: The Mysterious Island at Sentosa 4D AdventureLand

- The Sentosa 4D AdventureLand underwent its first-ever rejuvenation since 2006 and now includes the new ride Journey 2: The Mysterious Island at Sentosa 4D AdventureLand.
- The rebrand has helped Sentosa 4D AdventureLand develop a stronger brand identity across its various rides.

Attractions

Introduction of new offerings at existing Attractions



Shark Encounter



SEA TREK Adventure



Open Ocean Dive

Launch of Marine Life Encounters at Marine Life Park, Resorts World Sentosa (RWS)

- The Marine Life Park at RWS, consisting of the S.E.A. Aquarium and Adventure Cove Waterpark, welcomed **more than 3 million visitors** in 2013
- RWS has won the **Best Integrated Resort** at the TTG Travel Awards 2013 for the third consecutive year



Launch of Sesame Street Spaghetti Space Chase Ride at Universal Studios Singapore

Capability Development for Attractions

Attractions Experience Development Series (AEDS)

Enhance capabilities. **Craft** compelling stories.
Deliver **memorable** experiences.
Develop a **dynamic, sustainable** business model.

1 Experience Creation
“Telling & Delivering the Story”



2 Business Sustainability
“The Business Model”



5 seminars **4** Masterclasses
Over **9** months
(Jul'13 - Mar'14)
457 participants to date

Jointly organized by



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“The Business Model”



Local attractions are taking steps to **redesign experiences** and **develop stronger storytelling components**

Jointly organized by



Performance of Core Tourism Industries

Hotels

Travel Services

Attractions

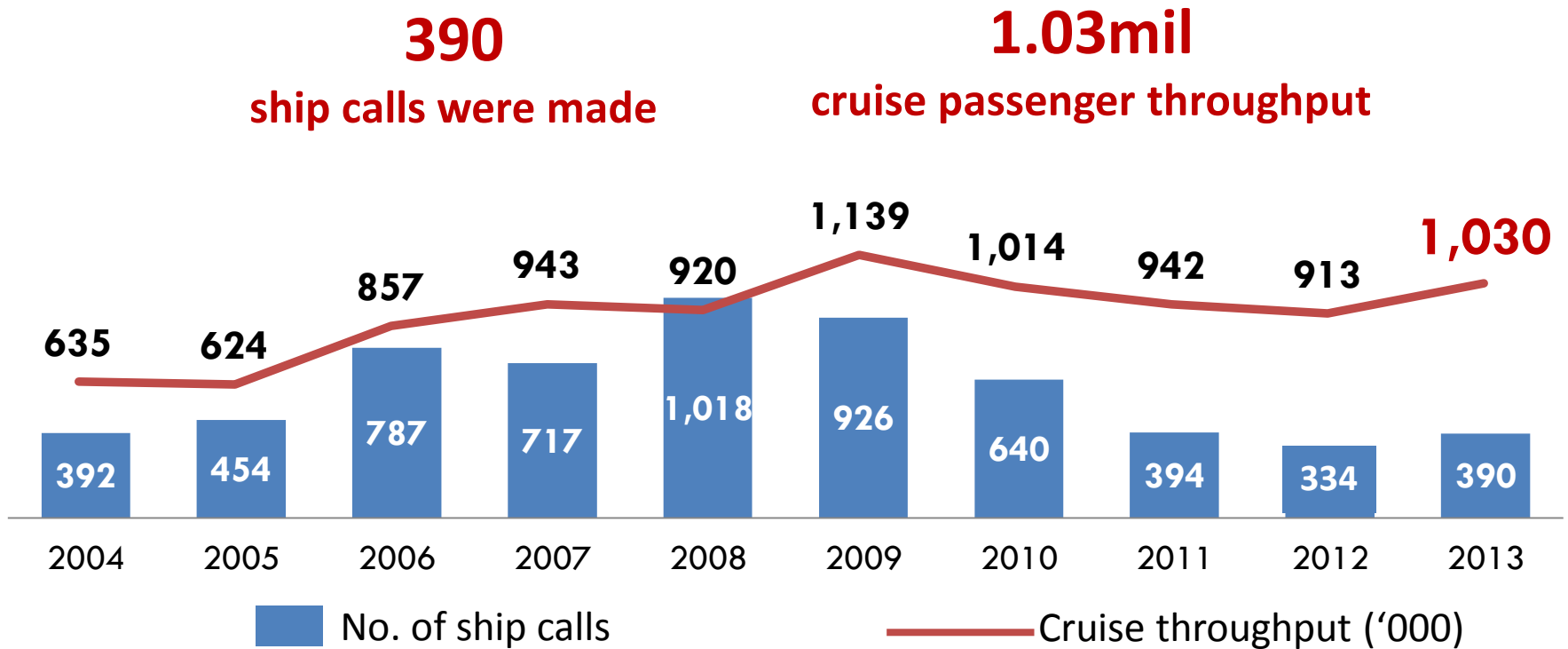
Cruise

BTMICE

Cruise

Throughput crosses 1 million mark

*Cruise passenger throughput grew **13%** from 2012*



Cruise

MARINA BAY CRUISE CENTRE SINGAPORE (MBCCS)



The 12 ships that made maiden calls in 2012 **continue to return** to Singapore **for deployment**

Maiden voyages to Singapore **in 2013** **continue to remain healthy**

SINGAPORE CRUISE CENTRE (SCC)



Cruise

Maiden voyages with large capacity:

- **Costa Atlantica**
- **Sea Princess**
- **Mariner of the Seas**

Mariner of the Seas, 3114pax



Sea Princess, 1950pax



Costa Atlantica, 2,680pax



Columbus II, 824pax



Europa II, 516pax



Le Soleal, 264pax



Caledonian Sky,
114pax



Sea Dream II, 110pax



Cruise

Greater presence of cruise companies

Regional HQ of world's top 3 cruise companies (with 75% of market share) situated in Singapore

3 May 2013, Straits Times

World's largest cruise company opens regional headquarters in Singapore



"the establishment of our regional office in Singapore underscores Carnival Corporations & plc's significant step towards developing Asia's markets" – Pier Foschi

9 October 2013, Celebrity Press Room

Celebrity Cruises Creates Brand-Dedicated Team In Asia

"...will be based out of Singapore, and will oversee the brand's commercial, marketing, trade support and sales in the region."

- Increased operating functions in Singapore

New/ more deployments in Asia & Singapore

Maiden Call (2015/16):



Multiple-deployments:



- More vibrant & diverse cruise landscape
- Source markets expanded

Cruise

Industry growing in tandem with potential



Partnered regional governments to showcase Southeast Asia

10-day inaugural FAM

12 executives, 8 cruise lines

Collaborated with 3 NTOs

(Malaysia, Thailand,

Indonesia)

Refreshed itineraries

Deepened local trade's understanding of cruise lines' needs

Launched Passenger Experience Committee

Consisting of key industry players to address issues related to cruise passenger experience

Frequent conversations on designing ideal experiences

Increased transport connectivity near terminals

Enhanced terminal operations *e.g. signage placements*

Local trade stepping up

Business models evolving to grow cruise business

Sembawang shipyard – secured Princess Cruises as long-term partner

Chan Brothers & CTC Travels – set up dedicated cruise departments

Citystate Travel – acquired ACE Cruise Holidays for cruise expansion into Asia

Performance of Core Tourism Industries

Hotels

Travel Services

Attractions

Cruise

BTMICE

BTMICE

Continued efforts to entrench Singapore's positioning as a leading MICE hub



Winning International Accolades



Vibrant & Impactful Business Events Calendar



Catalysing Partnerships



Setting New Benchmark On Sustainability

BTMICE

International Accolades

MICE



International Congress and Convention Association (ICCA) Global Rankings 2012

Top Convention City in Asia for the 11th consecutive year

Only Asian city in the Top Ten Convention Cities in the World



Union of International Associations (UIA) Global Rankings 2012

Top International Meeting Country for the 2nd consecutive year

Top International Meeting City for the 6th consecutive year



UFI, The Global Association of the Exhibition Industry, The Trade Fair Industry Report 9th edition

Highest Revenue net square meter sold in Asia Pacific in 2012

Business



TTG Travel Awards 2013

Best BT MICE City



Business Traveller Asia-Pacific Travel Awards 2013

Best Business City in Southeast Asia



World Travel Awards 2013

Asia's Leading Meetings & Conference Destination

BTMICE

Vibrant & Impactful Business Events Calendar: Trade Conferences & Exhibitions

Inaugural

Significant & Strategic

Travel



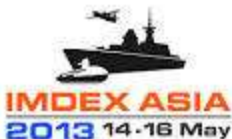
Design



Media & Digital Content



Urban Solutions / Transport



Lifestyle



BTMICE

Vibrant & Impactful Business Events Calendar: Trade Conferences & Exhibitions

Inaugural

Significant & Strategic

Travel



TravelRave: More than 10,800 attendees



Design



ITB Asia: Attracted over 9,000 attendees, 7% YOY growth in visitorship

ATLS: Launch of EDP in Q1 2014

Increase in visitorship

Media & Digital Content



Urban Solutions / Transport



SITCE: Over 1,500 conference delegates and 3,000 trade visitors



Increase in foreign exhibiting companies

Lifestyle



BTMICE

Vibrant & Impactful Business Events Calendar: World Congresses, Meetings And Incentives

Singapore remains strong as a centre for thought-leadership events, hosting 12 World Congresses and several key meetings in 2013. Some key events hosted include:

- World Library and Information Congress IFLA 2013
- CFA Institute Annual Conference 2013
- Regional World Health Summit Asia 2013
- Amway Japan Leadership Achievement Seminar 2013



We continue to build a robust pipeline by securing 204 association conventions (11 of which are world congresses), meetings and incentives* in 2013. Some key events secured include:

- Global Department Store Summit 2014
- Herbalife Asia Extravaganza 2014
- Executive MBA Annual Conference 2015
- Interdisciplinary World Congress on Low Back & Pelvic Pain 2016



Global Department Store Summit 2014

* Refers to events supported/ facilitated by STB. Does not include trade conferences and exhibitions.

BTMICE

Catalysing Partnerships

Partnerships With Local Industry

Launched INSPIRE (In Singapore Incentive & Rewards) to attract the India incentive segment to enjoy the wide range of unique customised incentive experiences in Singapore.



Launched SMAP, the industry's first MICE partnership with SIA and CAG offering one-stop support and incentives for meeting planners and MICE visitors e.g. preferential rates for fares and cargo on SIA and Changi shopping vouchers

SINGAPORE MICE ADVANTAGE PROGRAMME

A comprehensive programme tailored to help you deliver an exceptional event experience

A special collaboration between



Partnerships With International Associations

PROFESSIONAL CONVENTION MANAGEMENT ASSOCIATION (PCMA)

Partnered with the PCMA to leverage their expertise in convention management, for the local meetings industry to learn international standards and best practices.



UNION OF INTERNATIONAL ASSOCIATIONS (UIA)

Hosted the inaugural UIA Associations RoundTable Asia 2013 during TravelRave, to strengthen capabilities of the association sector in the region.



BTMICE

Setting New Benchmark On Sustainability



Launched a set of
Sustainability Guidelines in
Nov 2013



To encourage local MICE
players to meet global
sustainability requirements
so as to strengthen their
business value proposition

Presentation Outline

Singapore's Tourism Sector Performance 2013

1 **Tourism Sector Performance**

2 **Performance of Core Industries**

3 **Other Highlights of 2013**



Differentiated Marketing Campaigns – China “从心发现 现 New Discoveries”

- Provide Chinese visitors with the personalisable, in-depth experiences they are looking for



Differentiated Marketing Campaigns – China

“从心发现” (New Discoveries)

- Provide Chinese visitors with the personalisable, in-depth experiences they are looking for



2.1 million views of the microfilm since August 2013

RMB 20 million worth of media coverage

25,000 new fans acquired on STB Sina Weibo



Differentiated Marketing Campaigns – Malaysia & Indonesia “Only in Singapore, Right Now!”



- Highlighting Singapore’s myriad of experiences beyond what Malaysians and Indonesians already know



Differentiated Marketing Campaigns – Malaysia & Indonesia “Only in Singapore, Right Now!”



Increase in overall engagement with campaign portal

- Highlighting Singapore’s myriad of experiences beyond what Malaysians and Indonesians already know



Formula One Singapore Grand Prix

Grand Prix Season Singapore (GPSS)

- A season of high impact and innovative lifestyle concepts in Singapore's key precincts prior to and around the F1 Singapore Grand Prix
- Significant growth to over 50 promotions and events from Arts, Entertainment, Retail and Dining
- Established platform to encourage innovation and for businesses to test-bed lifestyle concepts



F1 Community Activities



- Concerted efforts to increase community engagement activities such as school visits, "Behind the Scenes" tours, movie screenings, and the first-ever Pit Lane Walk Experience
- Generated positive media coverage of programmes and reached out to >30,000 people

Kickstart Fund

Incentivising untested yet innovative lifestyle events and concepts

Singapore Art Book Fair:

- Collaboration between creative consultancy HIGHER and independent bookstore and publisher BooksActually
- Only art book fair in Southeast Asia specialising in art and design literature
- Ticketed fringe events such as artist talks, film screenings and book launches, to attract visitors beyond the arts community
- Saw over 5,600 visitors, and received positive feedback from its attendees
- Slated to return for a second edition in the later part of 2014



Local Engagement Initiative

Instilling pride in and engendering conversations about Singapore as a leisure destination

#sgshiok

- A social media driven initiative to trigger and stimulate conversation amongst the local community
- Introduced hashtagged version of *Shiok* destination video

Local Engagement Activities

- Say Something Shiok Blogger Event at Singapore Food Trail
- Say Something Shiok Mobile at East Coast Park & Orchard Road
- F1 Pit Lane Walk Experience



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Tourism 2013 Roundup: In Summary

On the journey towards Quality Tourism

New Record

Tourism Performance

TR: \$23.5b (+1.6%)

IVA: 15.5m (+7.2%)

Local enterprises
stepping up innovation
and productivity

Greater local
engagement and
participation

Tourism 2014: Looking Ahead

Considerations

Asia-Pacific
outbound travel
projected to grow
(UNWTO)

Economic
uncertainties
prevail in some
markets

Spend may
moderate, BT in
particular

LCC phenomenon
to continue +
intensifying inter-
airline competition



Thank You





Q & A

