



MARKETING STRATEGY:

OF STORIES, FANS AND CHANNELS

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Singapore Tourism Board, Corporate Communications

stb-comms@stb.gov.sg

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Executive Summary

Marketing for the Future

Destination Singapore faces a very challenging marketing environment today. The consumer is becoming more technologically-savvy, distracted and consequently more demanding. Disruption is fast becoming the millennial norm and yet there is a rapidly growing grey segment, resulting in a dichotomy of worlds and explosion in developments.

Meanwhile, destinations in the region, and around the world, are stepping up their game with new tourism attractions and increased marketing investments. Against this highly competitive scene, Singapore faces a multitude of resource constraints while continuing to battle entrenched misperception issues. There is a greater need for Destination Singapore to sharpen our marketing efforts in order to realise Singapore's ambitions in continuing to grow tourism receipts (TR) and visitor arrivals (VA) in the next few years.

It is clear, however, that traditional marketing is no longer enough to cut through the clutter. Marketing efforts by the Singapore Tourism Board (STB) and Singapore travel industry have evolved over the years in scope, approach and budget. But with challenges and competition arising, we need to evolve our marketing further to better capitalise on fast-changing trends and realise opportunities. Hence, a new holistic and cogent marketing strategy is needed.

To better guide the formulation of our new marketing strategy, we ask ourselves two main questions:

- What do we see as the vision for Destination Singapore in terms of marketing?
- How might we structure our strategic approach to tackle the challenges better?

The vision we have for Destination Singapore is to **build** on our **foundational strengths** to achieve **agile, bold and creative destination marketing** that **inspires** and **delivers results**.

This vision will greatly enhance our resolve in the years ahead to parlay our current strengths into even better destination marketing works, while plugging gaps in systems and capabilities.

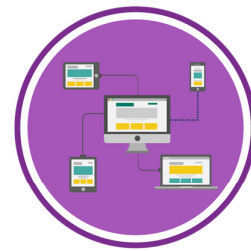
In approaching our marketing strategy, we first looked at how destination marketing has evolved over the years and where our various initiatives and activities are within the consumer journey. Applying additional considerations such as story, substance, simplicity, speed and science (Gordon & Perrey, 2015), we derive 3 strategic thrusts for the marketing of Singapore:



1. TELLING A GREAT SINGAPORE STORY



2. TARGETING THE RIGHT FANS



3. ENHANCING OUR DELIVERY

Strategic Thrust 1: Telling a Great Singapore Story

The first strategic thrust is about telling a great Singapore story. In today's world where consumers have greater control over what information they receive, brands and destinations must be able to tell better stories to reach consumers and get their attention. Hence, we must first have a great story, one that is of Singapore and its unique identity and history, told in endless ways by different people. It is about being confident in who and what we are, and not be everything to everybody. There are three strategies in this first thrust.

Firstly, to tell a great story, we need a great brand. We will review our destination brand and consider how we can adopt a larger perspective beyond the tourism aspects to give us a Singapore brand story that has deeper roots into our cultural and historical identity. Such a brand story will also give us a wider scope to appeal to the more demanding consumers of the future.

The story of Singapore is also best told by people who know it in its myriad aspects; STB alone cannot carry the story. As the story of a multi-faceted Singapore goes beyond tourism, and in order to tell it in its entirety, we will look to increase our collaborations with relevant government agencies and industry partners to synergise and amplify one another's outreach efforts.

There are two potential collaborative initiatives STB can embark on with various agencies and industry partners. The first is content seeding, through which we will cross-share our content on each other's platforms and marketing activities. The second is a series of experiential showcases and activations between relevant agencies and partners to bring a slice of Singapore to our overseas audience.

To reach discerning consumers, we should also raise awareness and understanding of Singapore by using content that is not tourism-related but yet distinct to the Singapore identity. Some examples include the quiriness of "Singlish", the strengths of our education system and our expertise in cutting-edge technology.

Secondly, we will entrench the brand story through a focused and sustained global campaign over the next few years. For the brand story to take root, substantive investments are required. Also, an extensive global marketing campaign is critical as a bedrock for supporting tactical marketing activities. While the campaign will be global in extent, we will allow for localised nuances and provide freedom within a framework to cater to individual market needs.

Thirdly, we will deepen the brand story with rich content in different forms as its depth and colour cannot be conveyed through a global campaign alone. We will adopt two systematic content frameworks. One is the hero-hub-hygiene (HHH) framework (YouTube), which guides the types and objectives of content that will be created. The other is the create/co-create/curate approach, which governs the origination of content. To up the ante on content creation, we will institute a *Destination Newsroom*, which is a technology-enabled newsroom that generates timely & trend-specific stories.

Strategic Thrust 2: Targeting the Right Fans

Our second strategic thrust is about getting the right fans for the story we would like to tell. To reach the right fans, we need to sharpen our current target audience approach. We have two strategies that centre on fans and markets.

Firstly, we are refining our target audience into global customer segments with distinct personas. Our target audience is currently defined by travel preferences and income levels. With global customer segments, we are moving towards a deeper understanding of the target audience by layering on psychographic and demographic information. This will give us distinct personas that can in turn sharpen how we produce content to get their attention.

By examining past data and assessing future potential, we will explore five distinct customer segments that are broadly classified into the following categories:



- Early careers: single or couples generally aged 25 – 34, employed
- Families with young children aged 12 years and below
- Established careers: single or couples generally aged 40 – 49, employed
- Active silvers: retirees generally aged 55 or above
- Business event visitors

Secondly, we will aim for a more balanced market portfolio by strengthening our base in Asia and diversifying into markets beyond Asia. This will help broaden our visitor sources and build resilience to drive sustainable growth as Singapore currently gets almost 80% of its visitor arrivals from Asia-Pacific. We also need to take into consideration the key sources of the four customer segments.

As a start, we will maintain and expand our Asian stronghold by investing further into top source markets and extracting further growth by scaling up investments in Tier 2 cities of Indonesia, China and India. We will also increase marketing efforts in high-growth Asian markets like South Korea and Vietnam. To buffer ourselves, we will also invest more in the traditional long-haul markets like USA and UK, and diversify into high-growth ones like Russia and Switzerland.

Strategic Thrust 3: Enhancing Our Delivery

With a story in hand and the fans to reach out to, we need to deliver to them better. We need to personalise our marketing to ensure what reaches our target audience is most relevant and compelling. This will in turn generate better leads and enable greater rates of conversion.

Our third strategic thrust is all about enhancing the delivery of the right content and information to the right people, at the right time, and at the right place. Our four strategies under this thrust are centred on building the right eco-system to deliver our stories better.

Firstly, before we deliver well, we must know our fans extremely well and in ways hitherto untapped. By knowing them better than our competitors, we will have a better chance of getting their attention. To do this, we will build a data management & analytics hub to draw insights from multiple data points that will in turn enable us to respond in a highly-personalised fashion. With partnership deals in place, we will be able to respond relevantly to specific targets to develop deeper engagement, generate leads and drive conversions.

Secondly, in an age of hyper-rich content, the issue is not a lack of stories and information but the collection, management and distribution of it. STB, as a neutral party, is in a prime position to build and manage a platform to house destination information and visitor-friendly services. We will create a central hub for information and services that aggregates the latest destination content and services, and enable its distribution and updating seamlessly across partners and platforms.

Thirdly, we must enable fellow Singaporeans and in-market fans to tell their own stories as word-of-mouth (WOM) through friends and family remains the most powerful distribution channel due to a high trust factor. Equipping Singaporeans, residents and in-market fans with the right information, impetus and platforms will work this most powerful and yet elusive of channels to our favour.

Examples of initiatives we can consider implementing: one, through social media takeovers, we can let Singaporeans or fans take over our social media assets for a day to share their stories of Singapore. Two, we can use social-sharing platforms that will allow Singaporeans to connect with visitors and overseas fans through mutual interests and passion points.

Last but not least, we have to continue experimenting boldly with new channels to better market Singapore. To keep up with the latest trends, it is important that there is a culture and mechanism for experimentation. One way to do this is to explore the institution of a marketing innovation fund, through which companies with great ideas can partner us in test-bedding new concepts.

Gearing Up

We would need to track not just the implementation of this marketing strategy but also its success. We will put in place critical resources and processes to ensure the eventual success of our marketing strategy.

To ensure that we closely track the progress of the strategy and various work plans, we will build a dashboard of success measures in three main categories: wallet, mind and heart share. We will use our data management and analytics hub to produce real-time indicators that enable us to be agile in changing course if necessary.

Talent and capability would also be instrumental in conquering new frontiers. There will be a formal marketing training and development programme with the setting up of an *STB Marketing College* to train and track marketing officers in their abilities to carry out various aspects of marketing work. Our industry partners will also benefit through a complementary tourism partner marketing capability programme.

Summary

In summary, STB will embark on three strategic thrusts to share our story with the right fans in a targeted manner.

THE STRATEGIC THRUSTS



Tell a Great Singapore Story

- Brand Review
- Share the Singapore Story
- Global Brand Campaign
- Content-led Storytelling



Target the Right Fans

- Global segments with distinct personas
- Balanced market portfolio for sustained growth



Enhance our Delivery

- Data-Driven marketing
- Content & services distribution hub
- Enable Singaporeans & fans to share stories to drive word-of-mouth advocacy
- Experiment boldly with new channels

Marketing Strategy: Of Stories, Fans and Channels

A World in Flux

The world today is increasingly connected, boosted by the digital revolution that has changed the way we live and consume information. Internet users are on the rise and will continue to do so (The World Bank).



Consumers are becoming more technologically-savvy with the use of multiple devices in their daily lives. As a result, they are frequently distracted by an avalanche of information that provides more choices and options for comparisons, resulting in more discerning minds (Amadeus, 2015). The need for connectivity, convenience and speed have also shaped how we respond to our thoughts and desires (Harvard Business Review Analytic Services Report). As these consumers spend increasingly more time on their mobile devices, especially smart phones, there is added stress on brands and destinations to do more to get a bigger share of the pie.



More users are also turning to their smartphones to search for information and make transactions (Gevlber, 2015), changing drastically the way content is to be shaped, published and distributed. This trend is especially pertinent for Singapore and our regional neighbours as the Asia-Pacific region will account for 57.7 per cent of the world's mobile users by the end of 2016 (APAC rising: why the balance of power in online travel is shifting East in 2015).

Disruption has become the norm in the millennial economy as innovations tilt the balance between demand and supply, and create new user experiences. The sharing economy has since become ubiquitous in our society, with the emergence of platforms and communities that have changed how we purchase, get information, and even start businesses and travel (ITB, 2014). Such disruptions present new opportunities for the travel industry, with some companies jumping onto the bandwagon with initiatives like using messaging apps to reach a broader group of consumers (Ali & Peltier, 2016).

At the same time, a growing silver economy is taking place in tandem. This is creating a dichotomy of worlds where needs and preferences differ greatly between the millennials and the baby-boomer/silver generations. Trends like these are seen even in China, where there is a fast-growing market of older persons with a penchant for travel and a rise in travel companies providing tailored services for them (Zhou, 2015).

As the consumer journey becomes increasingly fragmented, traditional ways of marketing need to be strengthened with new differentiated content and digital-focused strategies to enable us to reach our target audience better.

Battle for the Tourism Dollar

Looking to Singapore, we are facing intense competitive pressure for the tourism dollar as well, both in the region and elsewhere in the world. On the product side, there is a pipeline of attractions coming up in the years ahead, such as Disney Resort in Shanghai, Twentieth Century Fox World in Genting, Malaysia and Legoland in Nagoya, Japan (Johanson, 2016). On the marketing front, more destinations are marketing themselves aggressively through various channels to reach today's multi-screen consumers.

Amidst these competitive pressures, there also continues to be a lack of understanding in some markets of who we are as a nation and destination, with entrenched perceptions that are often dated and not truly reflective our character.

A series of mega developments in Singapore has bolstered our destination attractiveness in recent years. Major developments like Gardens by the Bay and the two integrated resorts and world-class events like the Formula 1® Singapore Airlines Singapore Grand Prix have all attracted international attention. By leveraging our current strong suite of products and experiences, we can continue to attract the right audience by reviewing how we market.

The Evolution of STB's Marketing

In the past decade, what markets do to engage customers has changed almost beyond recognition. With the possible exception of information technology, we can't think of another discipline that has evolved so quickly. Tools and strategies that were cutting-edge a few years ago are fast becoming obsolete and new approaches are appearing every day.

– Harvard Business Review, the Ultimate Marketing Machine, Jul-Aug 2014

Marketing undertaken by STB and industry partners has evolved over the years in terms of scope, approach and budget. From traditional advertising and promotion to today's customer-centric marketing with strategic partnerships, marketing has played an important role in contributing to Singapore's sustainable growth of tourism receipts (TR) and visitor arrivals (VA).

Today, through marketing, we are able to strengthen the Singapore tourism brand and build destination awareness in ways that subtly influence consumers' decision to visit. Marketing also contributes to economic impact by actively triggering and sustaining interest leading to eventual conversions through tactical activities by STB in partnership with a wide range of travel trade stakeholders.

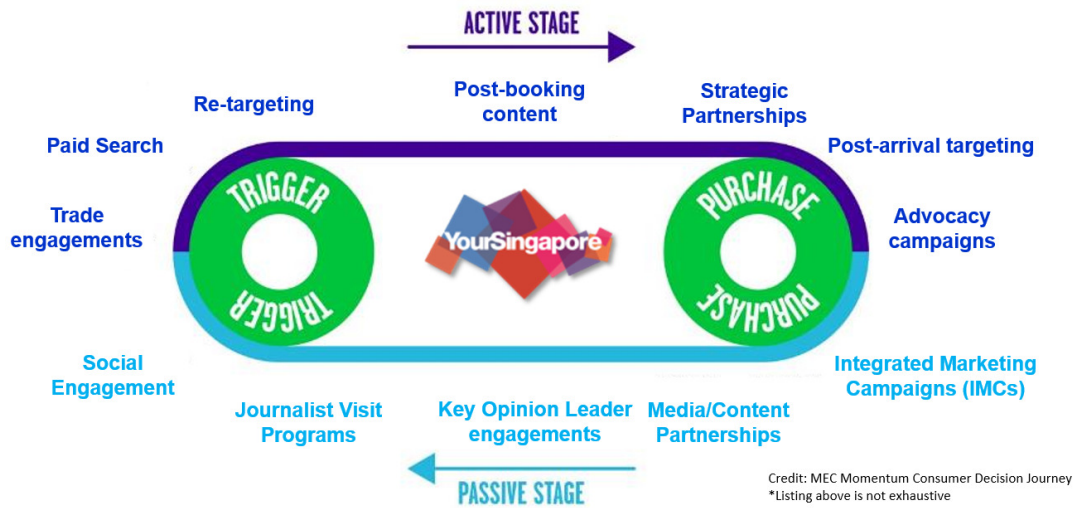


Diagram 1: Destination Marketing Efforts within the Consumer Journey¹

As can be seen from the Consumer Journey in Diagram 1, our current suite of marketing activities and initiatives covers the two main stages.

At the passive stage, activities like marketing campaigns, media and content partnerships and journalist visit programmes serve to shape a more distinct image of Singapore as a possible holiday destination in the minds of consumers. While they might not be deciding on or even considering a destination during the passive stage, the work in this phase is critical as it pre-disposes consumers towards Singapore more favourably in readiness for the active stage.

The active stage is triggered by a host of factors. For example, providing relevant tactical information when they are researching and considering, or through event marketing call-to-action elements. Even after they have booked and arrived in Singapore, there are post-arrival marketing activities to help shape their experiences here.

¹ Consumer journey diagram adapted from MEC Momentum Consumer Decision Journey

The digital age has foisted upon marketing a new set of expectations and challenges, where it calls for a 360 degree view of consumers' travel behaviours (Skift, 2016).

It is very difficult to study history-in-the-making, but what is occurring right now is the most powerful influence on the economy, the consumer and brand marketing since the Industrial Revolution. We are witnessing The Great Marketing Revolution. Our job is to be aware of it, its patten and its destination so that we can take sure, methodical steps to capitalize on it.

– William T Moran, 1956

With headwinds facing the travel industry ahead and for Singapore as a destination, we need more efficient, impactful and relevant ways to reach our consumers and position Singapore as a top-of-mind destination. This will in turn enable us to sustain TR and VA growth. To counter these challenges, we need a new marketing strategy.

Our Marketing Strategy Vision

To guide the marketing strategy formulation, and shape its intended outcomes, we formulated a vision for Destination Singapore that we hope to see realised in the next few years.

Destination Marketing Vision

**Agile, bold and creative destination marketing
that inspires and delivers results**

We are setting the bar high with our vision. With years of destination marketing experience, both in Singapore and overseas, we believe STB and the travel industry are well-poised to take it a few steps further with systemic agility in reacting to fast-changing trends, boldness in conceiving and executing projects of high impact, and creativity in how we would approach tourism marketing as a category.

We also want to bear in mind the critical need to focus on results as an integral part of our marketing strategy execution. At the same time, it is important that we are able to translate bold ideas and concepts into creative executions that inspire and make emotive connections with our audience.

The Approach

We approached the formulation of our marketing strategy in two main ways. First, we took stock of how our marketing efforts have evolved within the frame of the consumer journey (Diagram 1). Second, we delved into the key considerations that can best bolster our efforts to achieve the results we need for the next few years. The considerations that we looked into are story, substance, simplicity, speed and science (Gordon & Perrey, 2015).

Marketers are boosting their precision, broadening their scope, moving more quickly, and telling better stories.

- Jonathan Gordon & Jesko Perrey, The Dawn of Marketing's New Golden Age

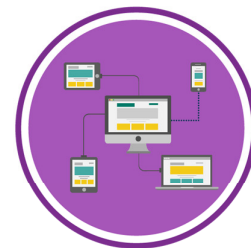
From these two areas, we derived three main thrusts that underpin our Marketing Strategy from 2016 to 2020.



**1. TELLING A GREAT
SINGAPORE STORY**



**2. TARGETING
THE RIGHT FANS**



**3. ENHANCING
OUR DELIVERY**

We expound on each thrust in greater detail in the next few sections.

STRATEGIC THRUST 1

TELLING A GREAT SINGAPORE STORY

Meet John – he is your digitally savvy, progressive and responsible citizen of the global society. At ease with the internet of all things, connectivity is the backbone of his social life. Brands adore how he is active on all major social networking sites. Every day John is exposed to more than 3,000 advertising messages per day, but probably less than 200 of them will get his attention (Media Dynamics, Inc, 2014).

From the simple example above, we see that what marketers need to know in today's environment is not the prevalence of advertising channels, but the increasing power of consumers in making choices. Avoiding irrelevant advertising is a simple act of a few finger taps. Addressing this issue, and to deliver marketing messages that are on target, has thus become a major preoccupation for today's marketers.

Numerous schools of thought have surfaced to frame this challenge of advertising relevance. It is common to hear terms like "native advertising", "content marketing" or even a "living brand narrative" as the way forward in cutting through the noise to get consumers' attention. But in essence, the underlying thread is the act of story-telling.

... (as marketers our) stories move minds, and revolutionise society...

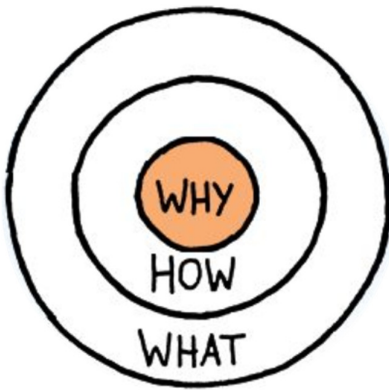
- Jonah Sachs, CEO, Free Range Studios

In his book *Winning the Story Wars*, Jonah Sachs (Sachs, 2012) delves into the role of story-telling and outlines how marketers have the responsibility to tell meaningful stories. Marketing messages have the power to do more than sell products; they address moral values, set social norms, and guide self and societal improvement. It is about building relatable connections and meaningful narratives to win the trust of consumers.

If consumer brands were to think of their marketing within the context of telling stories, what more for destinations with their far richer and deeper reach into what makes for a compelling story? Hence, the first order for our marketing strategy is on the telling of a great story.

The Storytelling Model

The way brands tell stories can be broadly classified into 3 categories (Sponder, 2016):



1. The **What** – Stories that describe what the product is. These often just provide entertainment value that helps with recall of what the product is.
2. The **How** – Stories that describe how the product benefits the consumers and help them achieve something. These can be entertaining, dramatic or inspirational in nature. It is an attempt at showing how the Brand can connect with consumers.
3. The **Why** – Stories that describe why the Brand exists and why they do the things they do. These are about vision, values and purpose. It is the most conceptual, but it is also what builds trust and authenticity most with consumers.

All three methods of storytelling have a place and value in a marketing plan. They each guide consumers towards different actions critical to business results. The **What** helps consumers with product recall. The **How** helps drive purchase preference. The **Why** helps build Brand loyalty and advocacy.

For Singapore, the stories we can tell run the gamut from the prosaic to the whimsical, and all equally rooted in what we have become as a nation. It is thus opportune that we chase our own stories and share them in a way that will better bring Singapore alive in the minds of potential visitors out there.

The Strategies

The Singapore Story: Branding Beyond a Tourism Destination

Beyond Destination Singapore: Reviewing Our Brand

The story of Destination Singapore has evolved over the years. From 'Surprising Singapore' to 'Uniquely Singapore', our stories have been within the ambit of tourism products and experiences (the **What**). We have built on our traditional strengths in multi-culturalism, safety, integrity and ease of travel to showcase Singapore as a unique blend of the East and West.

The evolution towards the current YourSingapore brand story was our first strike at being more visitor-centric (Singapore Tourism Board, 2013), and connecting us with consumers directly and in a personalised way. Acknowledging the shift towards consumer empowerment with the proliferation of digital media, we have been communicating how Singapore benefits consumers by empowering them with the ability to personalise (the **How**). Travellers across markets can tailor their experiences to suit their individual and cultural preferences, all within easy reach in Singapore. However, our story still focuses on Singapore as a tourist destination.



Diagram 2: Evolution of Destination Singapore Brand

In our exploration and review to enhance our story-telling, however, we begin to face questions of authenticity and values. Hence, we need to ensure that we do not come across as a destination that is “everything to everybody”.

Amidst the celebratory events of SG50 in 2015, we explored the possibilities of a larger narrative, one that is brought into being by the maturity of Singapore’s cultural and historical identity. Translating this into a story of Singapore and our people, beyond just a tourism destination, will give us more scope to appeal to consumers (the **Why**).

As a first step towards telling a great Singapore story, we would need a brand that is more multi-faceted and with higher aspirations than just the tourism aspects. We will therefore review the destination brand in this light within the next year or so.

A tableau of storytellers

A story that is meant to go beyond a tourism destination cannot be told by STB alone. The story of Singapore, our people and the way we do things, needs to be carried by different stakeholder groups in order to be authentic. Marketing communications across tourism, investments and other categories should build towards the same Singapore story we want to convey. As a start, to facilitate this joint effort, we will reach out to relevant government agencies and industry partners to align and amplify our respective overseas outreach efforts.

Beyond alignment and amplification, we conceived two potential collaborative initiatives that we would like to explore with relevant government agencies:

<u>Cross-Seeding Content</u>	<u>“Singapore Alive”</u>
<p>In this initiative, we propose to cross-promote marketing content across our platforms and channels to optimise reach and resource efficiency. Through this, partners will have a chance to amplify their content to overseas audiences.</p>	<p>This is an initiative where relevant agencies and industry partners can come together to support or even co-organise pop-up events, activities and experiential showcase in selected overseas markets. Through such a collaboration, we hope to bring different aspects of the Singapore story closer to our potential consumers, fans and friends.</p>

Soft-Selling Singapore

In the pursuit of stories beyond a tourism destination, we will avail ourselves of the abundant opportunities to profile lesser known perspectives of Singapore. Take for example the can-do-spirit of our local businesses, the dedication of our athletes to their sports and the national “hobby” of culinary indulgence. All these are stories that add depth and colour to the Singapore narrative, a lot of which are actually unknown and often surprising to many people.

The essence of the storytelling approach towards our brand is to give voice to as many of our partners as possible, and enable them to weave their own vignettes into the Singapore story. This is how the Singapore voice can be built up and heard more effectively and quickly over time.

One Brand One Campaign

Entrenching the Brand Story

As part of our visitor-centric approach, STB has been implementing campaigns that are customised specifically to each of our top markets. Supported by visitor statistics and in-market research to identify market-relevant consumer insights, we have been crafting our campaigns in terms of what Singapore offers, marketing messages and even creative works to suit the in-market preferences of our target audience in the various markets.



Diagram 3: STB’s individual market-customised campaigns across Australia, India, China, Indonesia, the Philippines, Malaysia, Thailand and Vietnam.

As seen in Diagram 3, each market has its own set of campaign taglines, key visuals and messages. However, as part of our shift towards storytelling, we need to focus our marketing campaigns efforts on a great Singapore story. Hence, moving forward, we will be rolling out a focused and sustained global marketing campaign with a singular brand.

This shift from individual market-customised campaigns is to give greater prominence to our larger story of Singapore. Our emphasis on visitor centricity and consumer insights is not lost, however. Market nuances and consumer needs will still be accounted for through activities, choice of media channels and other forms of programming on the ground. A global campaign will achieve two main objectives:

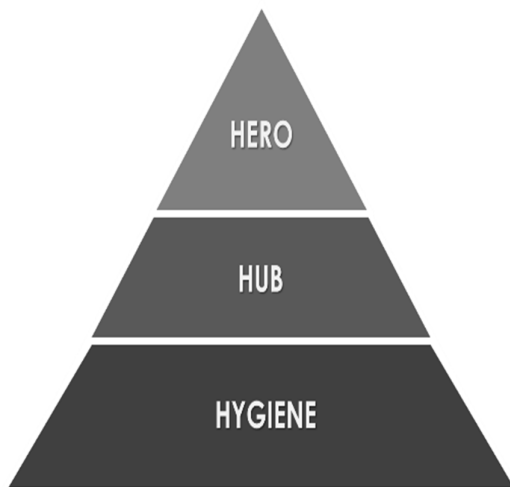
- It will help entrench the Singapore story more firmly and quickly, shaping a distinct image in the minds of potential visitors overseas.
- A focused and extensive campaign will serve as a bedrock for supporting tactical promotions and activities to be undertaken with our partners across the globe.

Destination Tapestry: Deepening the Brand Story with Rich Content

A Systematic Approach to Content Creation

While the global campaign will help entrench the Singapore brand story, it alone cannot convey the richness and depth of the destination. To support the telling of our stories, we will be adopting two frameworks to guide the creation and classification of content from various sources.

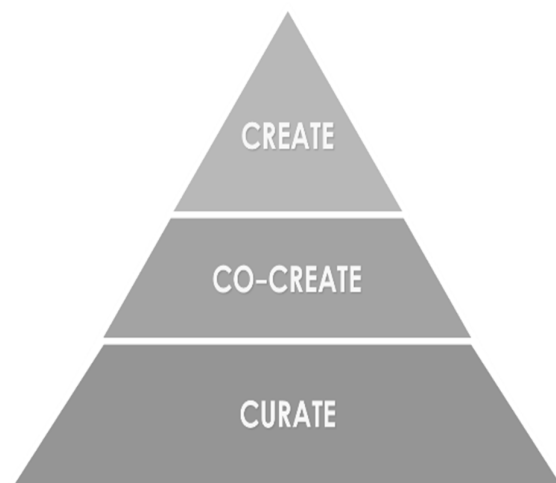
Hero, Hub, Hygiene (YouTube): Classifying Content by Type & Objectives



1. **HERO** – The type of content with the objective of inspiring the uninterested. This is the high investment ‘tent-pole’ content meant to get viewership numbers and public awareness.
2. **HUB** – The type of content with the objective of engaging the main prospects or consumers who are already interested. This will focus on the most relevant topics of the time.
3. **HYGIENE** – The type of content with the objective to pull in those already searching for information on Singapore. This tend to be functional and ‘ever-green’.

Create, Co-create, Curate: Classifying Content by Source

1. **CREATE** – Content created by STB. These are the stories fronted by the board unique to Singapore.
2. **CO-CREATE** – Content created in partnership with media titles and channels or key influencers. These are stories from other categories delivered through the words of the respective subject matter experts.
3. **CURATE** – Existing content aggregated from the general public. These are stories generated by fans and encompass the full depth of Singapore.



Together, the two content frameworks will provide greater clarity on the objectives, roles and the support that need to be provided to enrich the content we can put out there. The intent is also to ensure that willing partners and stakeholders can collaborate with us in telling the story of Singapore in a consistent and systematic fashion, guided by the overall Singapore story arc.

The Destination Newsroom Initiative: Riding the Conversation Wave

To up the ante in the way we create content, as well as our marketing agility, we are instituting a new process that is rooted in the tradition of a newsroom but upgraded for today’s environment.

Known as a *Destination Newsroom*, this is both a system and process through which conversations are constantly monitored to identify topics and trends that could prove suitable or relevant for a slice of the Singapore story to be told. Once a topic or trend has been identified, a team will then translate it into creative and relevant content to place Singapore into the conversation, all within a short time span.

The *Destination Newsroom* can also incorporate deals and promotions from suitable parties, sourced through a series of partnerships.



Diagram 4: Destination News Room Flow²

Here is how the Destination Newsroom could work. If the topic of “weekend reward” is trending in target regional markets close to “Mother’s Day”, Destination Newsroom teams can immediately develop and push out content around “Mothers’ Weekend Rewards” to target audiences in the same markets. At the same time, we can drive them to our partners as business leads or work with relevant trade partners to package experiences around “Mothers’ Weekend Rewards”.

² Flow adapted from Edelman Singapore’s Creative Newsroom

Summary

In summary, the first strategic thrust is about creating emotive connection with our target audience through storytelling. This calls for a compelling and authentic brand that goes beyond a destination sell, with its range and depth extended through other voices and a wide spectrum of non-tourism topics. A global campaign and a host of rich content will bolster further the brand story.

With a great story in hand, we now turn our attention to the readers or fans whom we can tell it to, which is our next strategic thrust.

STRATEGIC THRUST 2

TARGETING THE RIGHT FANS

In a highly competitive global tourism landscape and an increasingly cluttered communications environment, we need to sharpen our target audience approach so that we can effectively reach and attract the right fans.

STB has implemented a visitor-centric approach in the past few years. As part of this approach, we have defined a target audience for each of our top markets, derived from in-depth visitor statistics and market research that give us insights into their travel behaviour, needs and preferences.

As consumers become more distracted and demanding, and their consumption patterns shift due to technological advances, we need to deepen our understanding of whom our visitors are and how they might look like in the years ahead. Hence, there is a need to re-define our target audience.

The Strategies

Define global customer segments with distinct personas for sharper targeting

In line with the yield driven approach under Quality Tourism, we want to continue to target visitors who will deliver higher returns for our marketing investments, recognising the growing constraints in manpower and resources that Singapore and the industry face.

Segmenting Our Target Audience

We have defined our current target audience by travel preferences, needs and income levels. To deepen our understanding of our target audience, we are layering on psychographic and demographic information to define a set of global customer segments, each with a distinct persona. Through these distinct personas, we would be able to create the most relevant and motivating content that speaks to the segment's needs.

In defining the global customer segments, we considered three key questions:

- Whom are we already attracting?
 - Analysing our past performance to determine the types of visitors that we have been attracting, and who have delivered higher yield than the rest.
- Where are the growth segments?
 - Layering on secondary research on growth trends in the travel industry to identify segments that show future growth potential.
- Which segments do we have a right to win in?
 - Evaluating the potential customer segment to establish if Destination Singapore can meet their needs.

With these three considerations, we arrived at five proposed customer segments that exhibit good growth potential and whose needs Singapore can address well. They are broadly classified into the following categories:





Early-Careers

Singles or couples, generally aged 25 – 34, employed

By 2020, 320 million international trips are expected to be made by the segment each year, a 47 per cent increase from 217 million in 2013 (WYSE Travel Confederation, 2014). Within Asia, travellers of this age group account for almost 35 per cent of the \$600 billion that Asians spend on international travel. Driven by income growth, their spend on international travel is expected to increase by 1.6 times to S\$340 billion by 2020. Within our key source markets, markets with high proportions of travellers of this age group amongst its total leisure outbound travellers include the Philippines, China, Indonesia and South Korea (Euromonitor International, 2014).

Early-Career travellers made up 21 per cent of our 2015 leisure VA and spent more than the average leisure visitor, registering a per capita expenditure (PCE) of S\$716 against the average 2015 leisure PCE of \$651.

Early-Career travellers travel to take a break from their daily life while broadening their horizons. They seek authentic experiences that allow them to get a taste of the local culture and are more open to novel experiences compared to other segments. These travellers value autonomy over travel experience and being extremely savvy with technology, they thrive on being connected and having information at their fingertips.

Singapore's vibrant cultural precincts and local neighbourhoods provide immersive experiences for millennial travellers to experience different cultures and taste a variety of local cuisine. Our lively nightlife and entertainment scene provides many options for them to enjoy and opportunities for them to meet new people and connect with locals.

With one in five of our leisure VA in 2015 being an Early-Career, we have built a good base of this segment and should continue to grow our share of this high-yielding segment in our source markets. The focus on early careers will also groom the pipeline of our segments as this group progresses in life to become the future family, established-career or silver travellers.



Families with young children

Adults travelling with children aged 12 years and below

Globally, family travel is a growing segment. In Asia Pacific, an estimated 44 million people travel on family holidays and spend US\$29 billion every year (Turner Media Solutions , 2012). Key source markets with high proportions of the family segment amongst its total leisure outbound travellers include India, Vietnam, Malaysia and Thailand (Euromonitor International, 2014).

In 2015, 24 per cent of visitors to Singapore travelled as a family unit and registered a per capita expenditure of S\$693. This group is showing fast growth at a rate of 9 per cent from 2012 to 2015.

For the family traveller, holidays are viewed as time to bond with children and create shared memories. Travelling to a new destination is also an opportunity for the children to learn and be exposed to new experiences. While our research in key markets have shown that much of the planning and decisions are made by the mother, the children’s interests greatly influence her decisions.

Singapore is well poised to attract families with young children. 66 per cent of visitors from our top 14 markets to Singapore surveyed by STB stated that we are a suitable destination for families. Our multicultural heritage and wide range of edutainment experiences provide the enrichment and exposure that parents seek when planning travel with children. The ease and convenience of Singapore also holds great appeal to the family segment, who value the ability by all members of the family to enjoy experiences in close proximity. With a large and growing market and strong destination proposition, we need to seize the opportunity to grow our share of family travellers.



Established-Careers

Singles or couples, generally aged 40 - 49, employed

The Established-Careers segment is a valuable segment due to higher disposable incomes from having been in the workforce for a longer period of time. Globally, this age group is a fast-growing segment for luxury travel (Coza, 2014). Having travelled quite extensively, the Established Career travellers tend to seek out quality and unique experiences different from what they have seen in their previous travels (Maneval, 2016).

In 2015, 10 per cent of leisure visitors to Singapore fell in the Established-Career segment. While this segment is relatively smaller in terms of visitor arrival numbers, they are the highest yielding leisure segment, recording a per capita expenditure of \$824.

This segment shows strong yield potential. Hence, we need to grow it further to help drive growth in overall tourism receipts.



Active Silvers

Retirees, generally aged 55 or above

By 2020, global spending power of the silver segment will reach S\$15 trillion (Daneshku, 2014). In the travel category, the Asia Pacific region is set to see an increase of over 250 million silver travellers over the next decade, particularly from China and India. Today, silver travellers are already accounting for over 20 per cent

of total leisure travellers from Australia and Japan (Amadeus, 2013)³. Key source markets with high proportion of silvers amongst its total leisure outbound travellers include mature markets like Japan, Germany, UK, Australia, USA and Hong Kong (Euromonitor International, 2014).

Travellers aged 55 years and above made up 23 per cent of our leisure VA in 2015. This group of travellers also registered a significant growth rate of 4 per cent from 2012 to 2015. While we are seeing growth in volume, we have yet to fully unlock the economic potential of this age segment, especially considering that higher spends are recorded by the more mature silver markets of the United States, Germany and United Kingdom.

With clear growth potential for the silver travel segment, more work needs to be done to understand the needs of the active silver segment in order to meet their needs and attract them to visit Destination Singapore.



Business Event Visitors

Business event visitors are a valuable segment for the Singapore tourism industry. 1 in 5 visitors to Singapore were here for business in 2014, and spent an average PCE of \$1,195, almost twice that of a leisure visitor. Business event visitors to Singapore tend to be solo male travellers aged 30 – 49 years old, with a majority travelling to Singapore as a mono-destination.

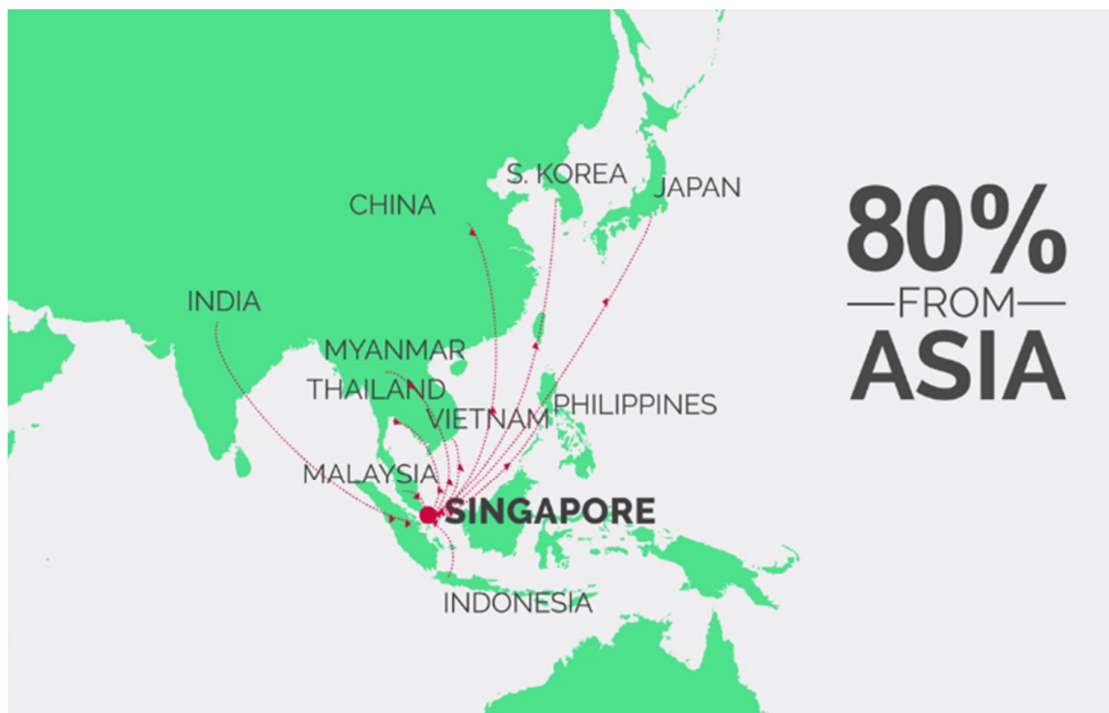
The new wave of business event visitors desire more autonomy in the planning of their business trips. While the destination choice is beyond their control, 9 out of 10 business travellers now enjoy 'bleisure', mixing leisure into every business trip they take (Skift, 2016). This segment values convenience and service, expecting things to work seamlessly.

Singapore has long been a choice business destination, building on our established business infrastructure and the ease and convenience that enables business travellers to get where they want whenever they need to. The rise of “bleisure” presents an opportunity for Singapore to entice business event visitors to enjoy our exciting tourism products beyond their daily business engagements.

We will continue to gather insights and strengthen our understanding of these five proposed global customer segments. Insights to these segments will not only guide our marketing efforts, but also shape experience development over the next few years.

Protect and diversify market portfolio to drive sustained growth

Today, almost 80 per cent of Singapore’s visitor arrivals come from the Asia Pacific region. Hence, we need to build a more balanced market portfolio to drive sustainable growth and build resilience. With the four potential global customer segments in mind, our market choices also need to consider the segment potential in each market.



Looking into the future, we approached our market portfolio with two key questions:

- What is the growth potential for our current and potential markets?
 - Evaluating macroeconomic factors, international connectivity and outbound travel trends in each market to determine future potential.
- What is the market’s consumer readiness for travel to Singapore?
 - Looking at connectivity to Singapore, outbound travel trends to Singapore, and geographical proximity to determine a market’s readiness to travel to Singapore.

This guided the development of the following focus areas within our market portfolio approach for the next five years.

Protecting our Asian Stronghold

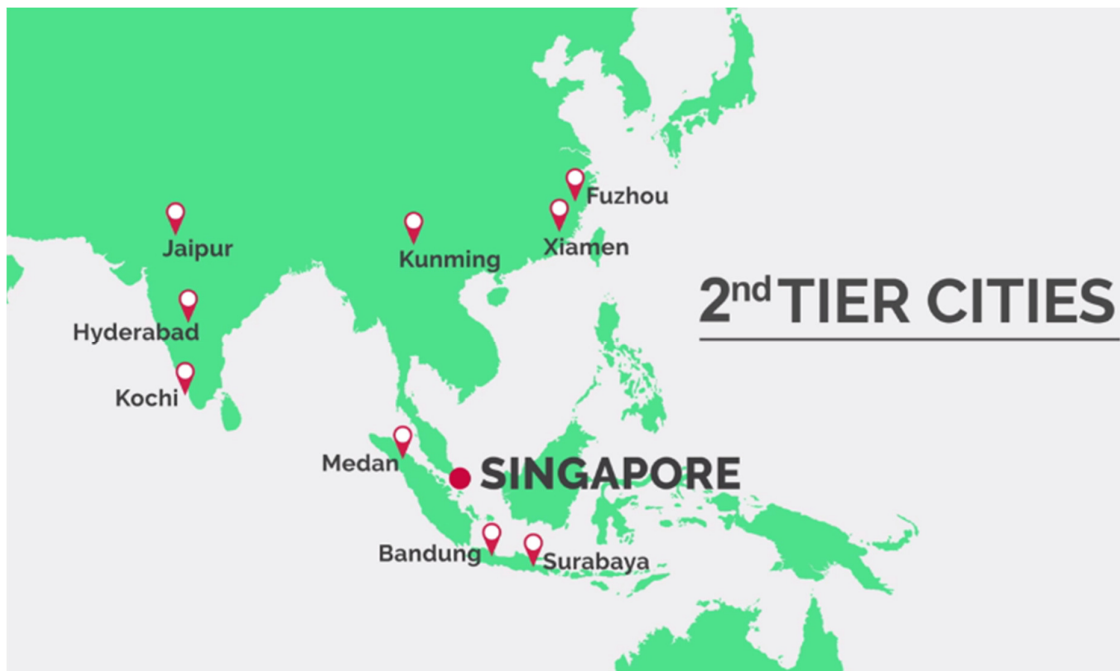
In the next five years, we will keep Asia as our focus to protect our existing top source markets within this region.

- a. Growth through Tier 2 cities: We will continue driving demand in Tier 1 cities from traditional source markets like China, Indonesia, Malaysia, India, Australia and Japan. We will also scale up investments to expand into the Tier 2 cities of China, Indonesia and India that have shown strong VA growth over the past few years (Table 1):

Table 1: Tier 2 cities in top markets

Market	Tier 2 cities	4 year VA CAGR (2011 – 2014)
China	Changsha, Chongqing, Fuzhou, Haikou, Jinan, Kunming, Nanjing, Nanning, Ningbo, Qingdao, Shenyang, Tianjin, Wuhan, Xiamen, Xian, Zhengzhou	23%
Indonesia	Surabaya, Bandung, Medan, Semarang	10%
India	Ahmedabad, Chandigarh, Hyderabad, Jaipur, Kochi, Kolkata, Lucknow, Pune	4.5%

Source: Singapore Tourism Board



- b. Increasing investments in high growth markets: South Korea, Taiwan, Hong Kong, Vietnam, and Myanmar have shown high growth to Singapore over the past years and we will invest more in these countries to leverage this growth trend.

Diversifying beyond Asia

To build resilience, we would need to broaden our visitor base by diversifying our market portfolio beyond Asia.

- c. Deepen penetration in long haul markets: Markets like United States, United Kingdom, Germany and France have shown stable growth over the past few years despite the socio-political situation in Europe in recent years.
- d. Develop pipeline markets with high VA growth: We will be scaling up investments over the next five years in markets like Russia and Switzerland (Table 2).

Table 2: Pipeline markets outside of Asia

Market	Evaluation	4 year VA CAGR (2011 – 2014)
Switzerland	<ul style="list-style-type: none"> • Stable currency • Good connectivity to Singapore – 14x weekly flights • Frequent travellers – takes at least two trips per year 	8.6%
Russia	<ul style="list-style-type: none"> • Strong outbound travel numbers 	13.3%

Source: Singapore Tourism Board



Summary

With these shifts in mind, the aim is to achieve a more balanced market portfolio in the next five years to maintain sustainable growth for Singapore.

We now turn our attention to the channels that can best deliver the Singapore stories to the fans in the key markets.

STRATEGIC THRUST 3

ENHANCING OUR DELIVERY

With a strong Singapore story and knowledge of the right target audience, we need to ensure that we deliver our stories and content in an efficient and effective manner. We need to personalise our content to ensure its relevance and impact for our target audience, which in turn will generate better leads and enable greater rates of conversion in choosing Singapore as a destination.

The Strategies

Hyper-Targeting: Implementing Data-driven Marketing

Generating better engagements, leads and conversions

Before we deliver well, we must get to know our fans better at a level hitherto untapped. By knowing them better than our competitors, we will have an edge in getting their attention.

To do this, we need a tightly-woven data management system that enables cross-analysis and sharing of multiple data sources. Hence, we will build a data management and analytics system that aggregates and analyses consumer data to draw unique insights about our consumers. STB already has an existing trove of rich data such as arrival statistics and visitor expenditure. By working closely with partners to exchange and share data, we can layer on more details that will lead to deeper insights.

Once these insights are derived, STB can:

- Cross-refer and generate new leads for the destination
- Work with relevant content partners to respond with highly-personalised content
- Work with relevant industry stakeholders to serve up customised promotional deals to drive conversion/spend

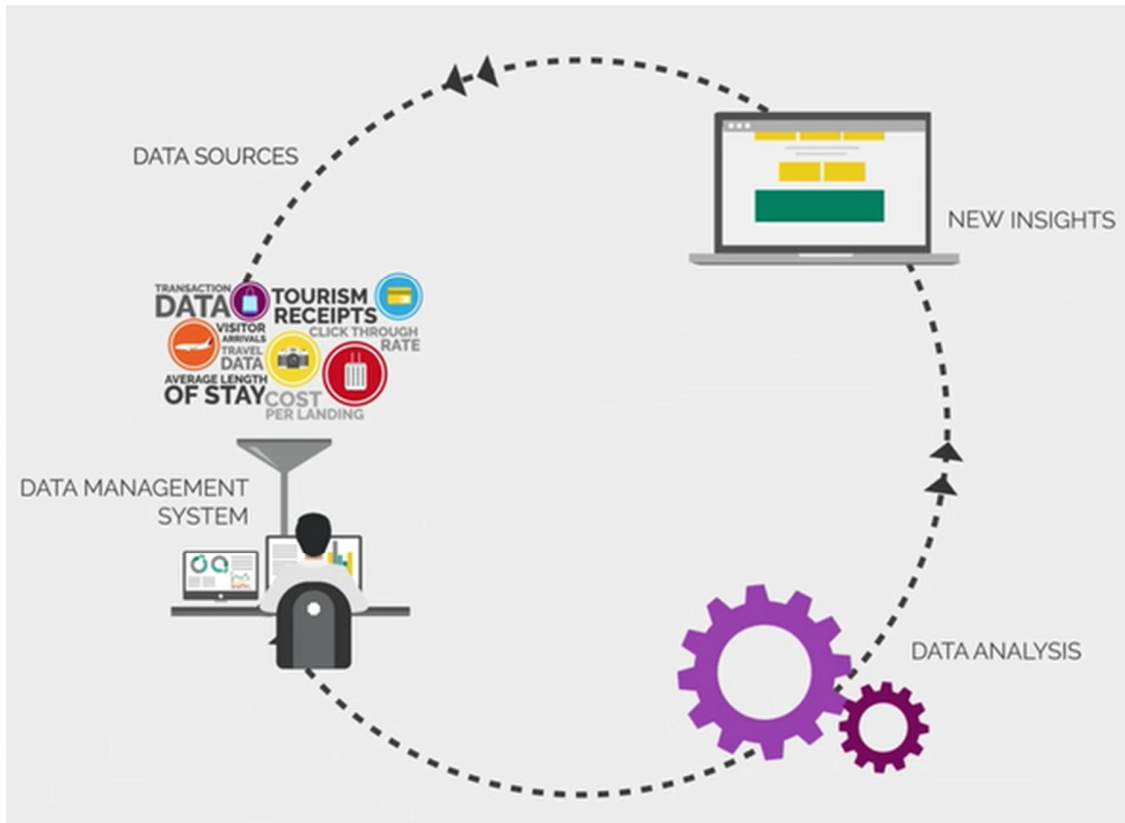


Diagram 5: The harnessing of data and insights through a Data Management System

As more leads are fulfilled, more consumer data can be collected, leading to a virtuous cycle where more data is fed back into the data management system. In this way, we can not only build a sharper profile of our consumer segments, but also understand in a more scientific way the behavioural traits and inclinations of specific individuals, enabling us to better focus on and cater to their needs.

Central Hub for Destination Singapore information and services

Information and Services at Your Fingertips

In an age of rich content, there is no shortage of good stories and information. Rather, the larger challenge is in the collection, management and distribution of these assets. Beyond STB providing content to our partners, there is a larger role that STB can play in enabling the cross-feeding of content amongst our industry partners in an efficient and consistent manner.

With this in mind, STB will create a central hub for integrated destination information and services that will allow both STB and industry to contribute and benefit from each other's content.

Through this platform, STB will allow the aggregation and distribution of destination content from a variety of internal and external sources, enabling seamless cross-sharing across partners and platforms, whether local or overseas. To further raise the utility of this Hub, service functions such as ticketing and itinerary planning, will also be incorporated.

As the platform is essentially a back-end one, information and service functions will be channelled to the front-end user (i.e. consumers and visitors) through a variety of interfaces such as websites, apps and service kiosks. When launched, industry partners will be able to leverage both the destination content and service functions with the flexibility to determine the interface that best suits their business intents.

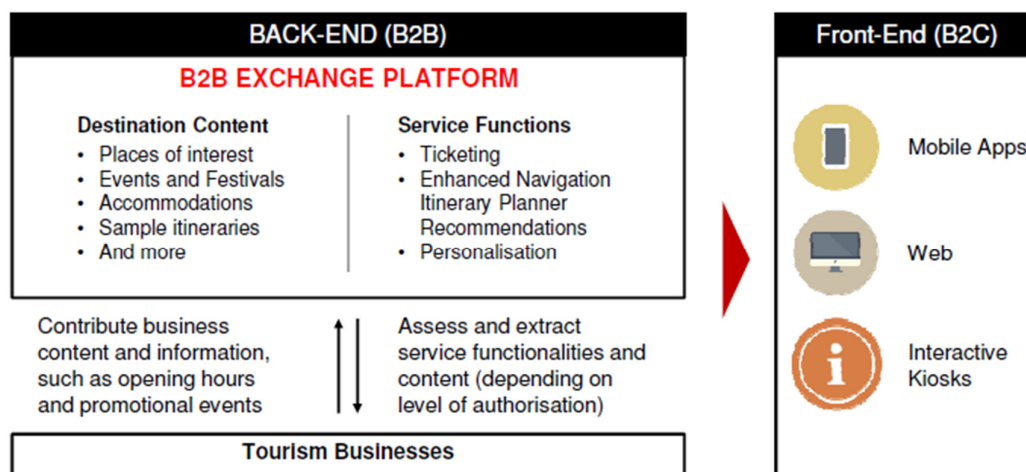


Diagram 6: Destination Information and Services B2B platform

With the Central Hub for Information and Services, we aim to enable richer and consistent content and service facilities to be shared across STB and the industry. Its beauty is in empowerment – any tourism partner with content and/or services can plug and play with minimal fuss.

Word-of-Mouth Advocacy: Enable Singaporeans & in-market fans to share their stories

Tapping the Most Powerful Channel of Them All

Word-of-mouth from friends and family remains one of the most powerful channels (O'Connor, 2011). Equipping Singaporeans, residents & in-market fans with the right information and impetus to tell their stories will empower and enhance this most powerful and yet elusive of channels.

STB will make a more concerted effort in providing our fans with a stronger voice in telling their authentic stories. Two potential initiatives we can explore experimenting are:

Social media takeovers	Live Like A Local
<p>The idea is to allow ordinary Singaporeans, residents and fans who have compelling, man-on-the-street stories to engage with our target audience, providing a different and personable perspective of Singapore.</p> <p>This can be achieved by allowing them to take over our social media assets for a day. This allows us to infuse our content mix with that beyond STB-created, co-created and curated content.</p>	<p>The idea is to profile relevant players of the social sharing economy for visitors to connect with Singaporeans with similar passions, through digital platforms such as Meetup.com.</p> <p>Not only does this enhance the post-arrival experience of a visitor, the cross-border friendships formed are also likely to build longer-term advocates and repeat visits.</p>

Experiment boldly with new channels to better market Singapore

Staying Ahead of the Curve

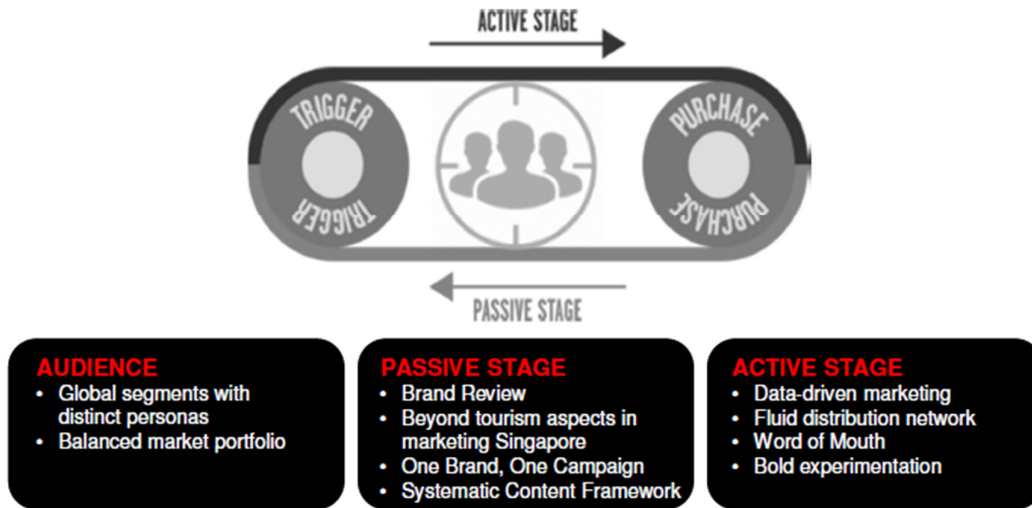
To keep up with the latest marketing trends and stay ahead of the curve, it is important that there is a culture and mechanism for experimentation, especially in terms of delivery.

To instil such a culture, and keep us nimble, we will explore instituting a marketing innovation fund geared specifically at encouraging experimentation with new ways of marketing to reach our fans. The parameters of this fund will be announced at a later stage.

Bringing It All Together

MEC Consumer Journey

The shifts will help us reach out to our Target Audience at every stage across the Consumer Journey



Source: MEC Momentum Consumer Decision

Gearing Up

Formulating the strategy is only a very small part of meeting our challenges; it is nothing without execution.

Five per cent of the challenge is strategy. Ninety-five per cent is the execution.

- Carlos Ghosn, CEO Renault-Nissan

To ensure the smooth execution and implementation of the three strategic thrusts and the various strategies, we need to put in place critical resources, track results efficiently and upgrade our existing capabilities.

Tracking: Implementing a dashboard of success measures

There is a need to monitor and assess the outcomes of our various marketing shifts to stay the course of our marketing strategy. We will refine our current success metrics to determine the level of awareness (Mind Share), track conversion and spend (Wallet Share) and measure the level of advocacy/visitor experience (Heart Share) to help us achieve better business outcomes.

The way our marketing efforts are measured can be broadly classified into 3 categories:

- **Mind Share - Awareness**
 - In a tourism context, mind share relates to the development of consumer awareness or popularity of Singapore and is one of our key measures in determining the success of our marketing efforts.

- **Wallet Share - Conversion/Spend**
 - Wallet share in tourism refers to consumer spend in goods and services.

- **Heart Share – Visitor Experience and Advocacy**
 - Heart share refers to the degree a consumer relates to their experience in Singapore.

Your brand advocates are more valuable than any advertisement you could ever buy.

– Dave Kerpen, Founder & CEO of Likeable Local, NY Times Best-Selling Author & Speaker

- **Real-time Marketing Dashboard Tracking**
 - STB will set up a real-time marketing dashboard that will draw data from our Tourism Data Hub, allowing for social media listening, real time monitoring, and sentiment analysis of responses to our campaigns. This will allow us to draw up to speed information to refine our messaging and optimise our performance.

Training: Marketing College

STB will also set up a *Marketing College* to continually upgrade marketing skills and knowledge. The syllabus will cut across different disciplines and focus on key capabilities needed for the execution of the marketing strategy.

There will also be an external component in this college to raise capabilities for our tourism and travel industry partners. STB has been running the well-received Tourism Marketing Lab, an external training and capabilities seminar, for the past two years. This Marketing Lab will now be part of the Marketing College with a more formal curriculum so that marketing skills and capabilities can be instilled on a regular basis. The eventual goal is to empower not just STB marketing officers but also our travel partners so that we can be more agile, bold and creative over time.

Rolling Out

The roll out of Marketing Strategy will be carried in three different phases:

- Phase 1 (2016): Piloting of systems
 - As we move towards a data driven marketing approach, this initial phase will see the piloting of new data management systems that would support and form the bedrock of our marketing capabilities in the near future.

- Phase 2 (2017 – 2018): Scaling up marketing capabilities
 - With these marketing infrastructures and systems in place, better targeting of consumers with sharper and more nuanced marketing messages and deals will be in place. The next 2 years will then be focused on scaling up these initiatives and expanding our marketing capability programme beyond HQ to our regional offices.

- Phase 3 (2019-2020): Sustaining growth
 - Post 2018, our marketing efforts will be focused on sustaining growth. By then, we aim to have established a self-sustaining ecosystem where industry members are able to share and cross feed data amongst each other. Through this ecosystem, the industry will see a strong network of partnerships whose business impact is greater than the sum of its parts. The leads generated will also bring about more visitor arrivals and tourism receipts to Singapore

Acknowledgements

We consulted widely in the formulation of our marketing strategy, benefiting from a wide range of views and input. However, there is a panel of marketing experts whose contribution we would like to acknowledge specifically.



Build relationships with your consumers, **draw insights** from them, **integrate the data** into your entire marketing system."

Mark Read, CEO, WPP Digital



"Let the **brand speak with the authenticity of Singapore**. We're not everything to everybody. Our nation's voice should be heard."

Professor T.C. Chang, National University of Singapore



"Effective sales is effective marketing. **Embrace your trade and partners** as the extension of your marketing machinery."

Ho Kwon Ping, Executive Chairman, Banyan Tree



"If you can't react to consumers' conversations, you're not going to be relevant. Structure yourself for **fast, meaningful and creative response**."

David Brain, CEO, Edelman Asia Pacific



"How you **deliver your experiences** is how your Brand truly comes to life. Make every moment with consumers count."

Doug Lansky, Travel Writer



"To realise big strategy and visions, you need ownership from everyone - **organisation leaders and the core**. It's an exercise in change management."

Professor Baba Shiv, Stanford Graduate School of Business



"Speak to your target segments, make them your fans. But **ensure that you pay attention to your source of business**."

Aaron Boey, Former EVP and President, Levi Strauss & Co., Asia-Pacific

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Tourism Court
1 Orchard Spring Lane
Singapore 247729