



AMERICAS

TOURISM INDUSTRY CONFERENCE (TIC) 2023



Passion
Made
Possible



Singapore
TOURISM
BOARD

AGENDA

1
STB
AMERICAS

2
TRAVEL
RECOVERY
IN 2022

3
TRAVEL
OUTLOOK &
TRENDS

4
LOOKING
AHEAD:
2023
FOCUS
AREAS

STB AMERICAS



Rachel Loh
Senior Vice President, Americas
rachel_loh@stb.gov.sg

STB San Francisco – West Coast



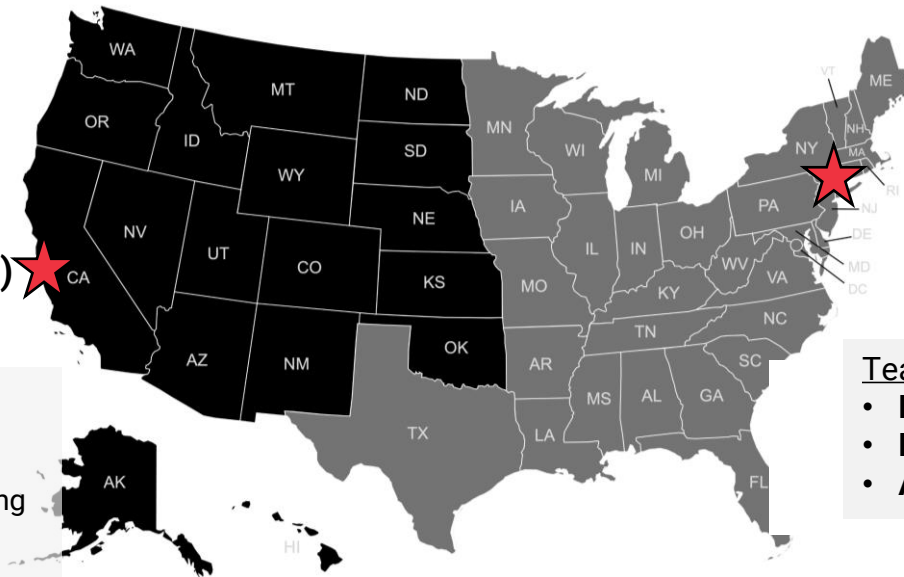
Gregory Yap
Vice President
Meetings & Leisure Trade (WC)
gregory_yap@stb.gov.sg

- MICE (U.S., Canada, LATAM)
- Leisure Trade (West Coast U.S. & Canada)

Team members:

- **Mariana Awad Zaher**, Senior Manager MICE East Coast
- **Ambrose Tham**, MICE Rep West Coast
- **Jayne Yeo**, Manager WC Leisure Trade & MICE Marketing
- **Simone Wang**, Manager WC Leisure & Finance

CANADA



LATAM

STB New York – East Coast



Gina Ng
Vice President
Marketing & Leisure Trade (EC)
gina_ng@stb.gov.sg

- Brand, PR & Comms, Digital Marketing
- Leisure Trade (East Coast U.S. & LATAM)

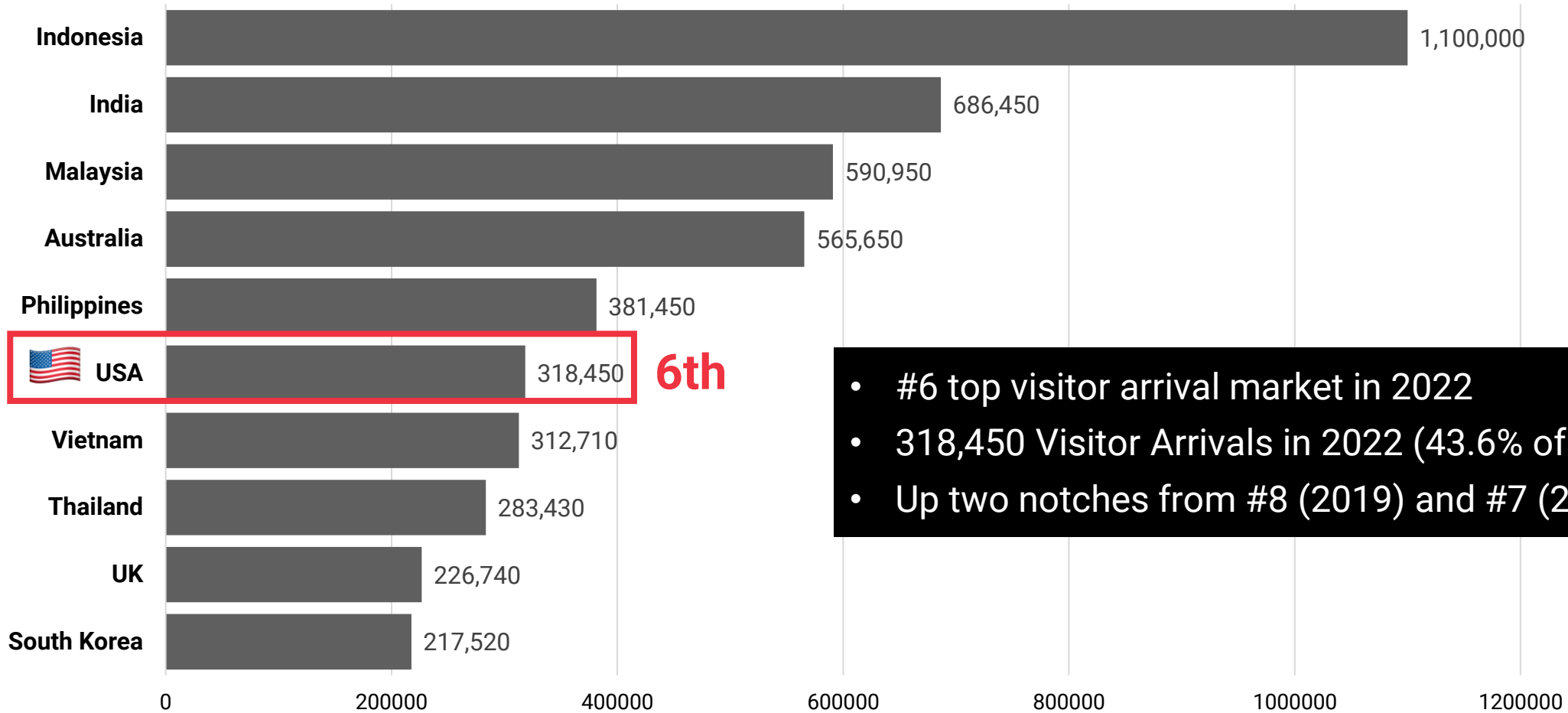
Team members:

- **Britt Ulrich**, Senior Manager, EC Leisure Trade
- **Marissa Castro**, Manager, Digital Marketing
- **Anna Sharp**, Asst Manager, Finance & Admin, Marketing

Correct as of 6 March 2023

TRAVEL RECOVERY IN 2022

USA IS NOW THE 6TH TOP VISITOR ARRIVAL MARKET (UP TWO NOTCHES FROM 2019)



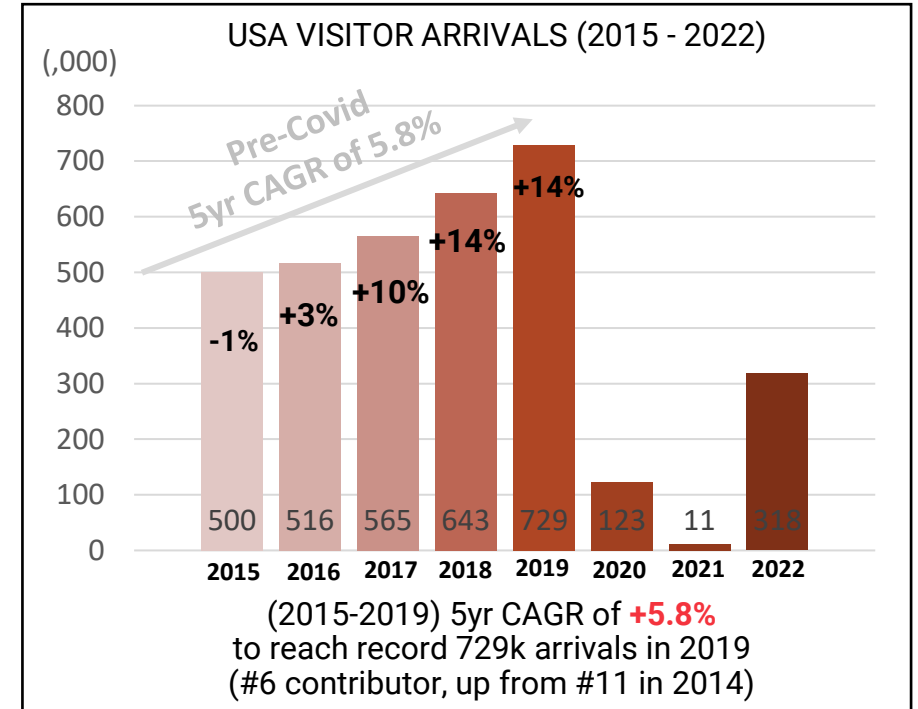
- #6 top visitor arrival market in 2022
- 318,450 Visitor Arrivals in 2022 (43.6% of 2019)
- Up two notches from #8 (2019) and #7 (2021)

* Canada - #22 (previously #20 in 2019), 55,000 visitor arrivals in 2022

IN 2022, USA SHOWED **STRONG TRAVEL REBOUND** TO SINGAPORE, RECOVERING FASTER THAN THE GLOBAL AVERAGE

- In 2022, U.S. International Visitor Arrivals (IVA) recovered **43.6%** of 2019
- In the month of December, IVA recovered **70.5%** of December 2019
- Average Length of Stay (ALOS) increased to **4.78 days** in 2022 vs 2019
- Q1-Q3'22 Tourism Receipts (TR) have recovered **89%** vs 2019 (same period)

Year	IVA	ALOS	TR (% of 2019)
2019	729,000 (#8)	3.57 days	S\$885m (100%)
2020	123,182 (#8)	4.10 days	S\$148.84m (17%)
2021	10,957 (#7)	19.28 days	S\$72.07m (8%)
2022	318,450 (#6)	4.78 days	S\$561m (89% of Q1-Q3 2019)



Visitor Arrivals: 2022 vs 2019

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
United States	3.4%	6.7%	8.3%	22.1%	38.4%	46.2%	54.8%	62.9%	69.7%	72.1%	70.5%	70.5%
All Countries	4%	6%	10%	24%	36%	43%	53%	58%	67%	66%	65%	70%

FLIGHT SEAT CAPACITY: AS OF MAR '23, AMERICAS HAS MORE FLIGHT SEAT CAPACITY (112%) COMPARED TO PRE-COVID

7
Gateways

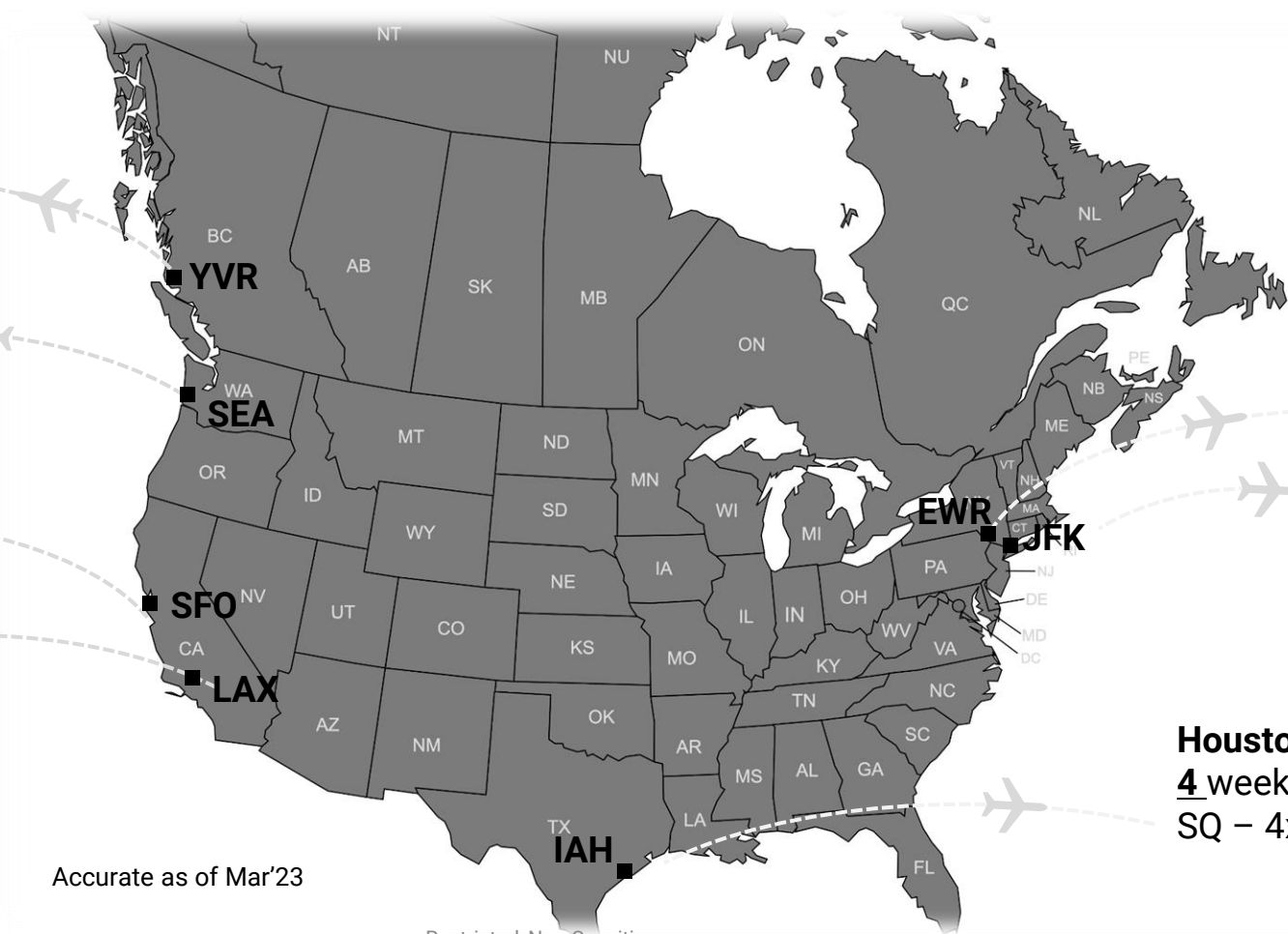
80
Weekly Direct Flights

Vancouver, Canada
3 weekly direct flights**
SQ – 3x a week

Seattle, WA
3 weekly direct flights
SQ – 3x a week

San Francisco, CA
27 weekly direct flights
SQ – 13x a week
UA – 14x a week

Los Angeles, CA
21 weekly direct flights
SQ – 21x a week^



*includes SQ25/26 that has a transit in FRA (Frankfurt)
**SQ will cease Canada flights from 1 Oct 2023
^includes SQ12/11 that has a transit in NRT (Tokyo-Narita)
~SQ 51/52 that has a transit in MAN (Manchester, UK)

Newark, NJ
7 weekly direct flights
SQ – 7x a week

New York, NY
14 weekly direct flights
SQ – 14x a week*

Houston, TX
4 weekly direct flights
SQ – 4x a week~

Accurate as of Mar'23

Restricted, Non-Sensitive

These slides are property of STB and shall not be reproduced or distributed without STB's written permission.



2022 AMERICAS HIGHLIGHTS: PR & COMMS

ENGAGING FANS TO STRENGTHEN SG BRAND AFFINITY AND DRIVE CONVERSIONS

SINGLISH MASTERS (MAR'22)

Singlish Masters: Leveraging the popularity of learning languages and slangs on TikTok, STB Americas worked with influencers to promote the destination through an online contest. (March 2022). A winner was selected and crowned **Singapore's First Singlish Masters Ambassador** and won an all-inclusive grand prize of a 5-day trip in Singapore.



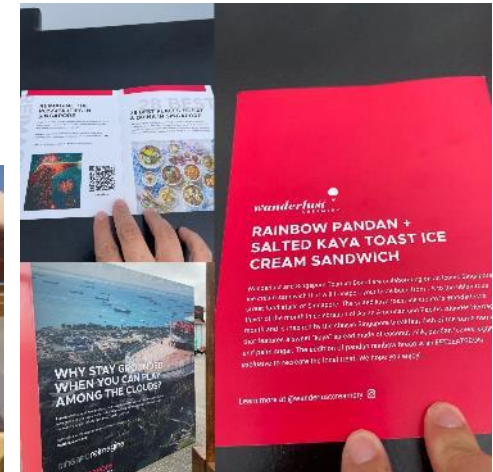
SG X LA TIMES GAGGAN POP UP (APR'22)

STB together with SIA partnered with media heavyweight LA Times to bring **Chef Gaggan Anand to LA for the annual LA Times Food Bowl and showcase Singapore as a foodie haven.** Gaggan delved into Singapore's multi-dimensional food culture with a captive crowd, allowing guests to both learn and sample Singapore cuisine. This event was open to the public and **400 tickets, priced at >USD100 were sold out in 2 days.**



EEEEEEATSCON LA (MAY'22)

STB partnered **influential US foodie community – The Infatuation** – and collaborated with cult-favourite ice-cream brand in Los Angeles – **Wanderlust Creamery**, to participate in STB's first ever **EEEEEEATSCON LA, the ultimate food festival** in May 2022. Over 6,000 people attended the 2-day festival, and many flocked to enjoy both the featured salted kaya toast ice cream on a rainbow bread and the Explorer photo booth.

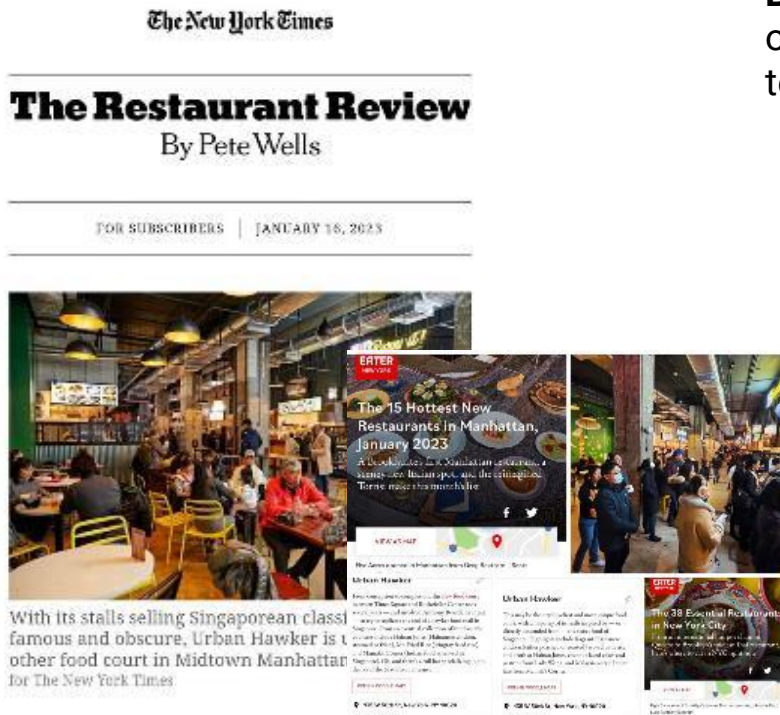


2022 AMERICAS HIGHLIGHTS: PR & COMMS

ENGAGING FANS TO STRENGTHEN SG BRAND AFFINITY AND DRIVE CONVERSIONS

URBAN HAWKER NYC OPENING (FALL 2022)

STB collaborated with government agencies to support the **launch of Urban Hawker in NYC**. STB pitched to key U.S. media and also collaborated on VIP invites for the opening event.



PITCHING AND SECURING INTERVIEWS WITH TOP-TIER US MEDIA

To signal Singapore's reopening and travel recovery, STB pitched to top-tier US media across the year. Highlights include a **live interview for CE STB with CNN's Richard Quest on "Quest Means Business"** that created an unscripted surprise of Quest tearing up outdated notes as he finds out Singapore no longer required Covid tests for entry!



2022 AMERICAS HIGHLIGHTS: PR & COMMS

ENGAGING FANS TO STRENGTHEN SG BRAND AFFINITY AND DRIVE CONVERSIONS

EARNED MEDIA WITH TOP-TIER US TRAVEL & LIFESTYLE MEDIA

Throughout the year, STB pitched SingapoReimagine's offerings to top-tier travel & lifestyle media Highlights include coverage by **CNN Travel, Conde Nast Traveler, Rolling Stone** and many more



Reunited and it feels so good: Perks for reunion trips in Singapore

By Travel Weekly Asia | Aug 01, 2022



| A+ A-



In Singapore, a Culture of Service... and Surprises

The charming country has a lot to offer in terms of culture and conveniences, in a friendly environment that's the perfect way to ease back into travel

BY TIM CHAN
DECEMBER 8, 2022



SINGAPORE TOURISM BOARD

Condé Nast Traveler

On a Trip to Singapore, Continuing a New Era of Adventures with My Father

By CHRIS SCHALKX
June 9, 2022 6:20 PM



Chris Schalkx/Getty

THE PANDEMIC INTERRUPTED A SPECIAL PHASE IN OUR RELATIONSHIP, DURING WHICH I HAD BEGUN BRINGING MY FATHER ON MY FAR-FLUNG



Where to go this summer: 11 top destinations Singapore

One of the world's smallest and most densely populated countries, Singapore is made up of one main island and over 60 smaller ones off the coast of the Malay Peninsula.

Don't let its size deter you - myriad activities await. The city is home to the island of Pulau Ubin, where diverse habitats and a variety of wildlife can be explored; and the Southern Ridges, a 6.2-mile stretch of green open spaces that span the hills of Singapore's most popular parks and gardens.



See a Different Side of Singapore by Night

By Ren Benzel
August 2022

Restricted, Non-Sensitive

TB and shall not be reproduced or distributed without STB's written permission.

Bloomberg Businessweek

Where To Go in 2022

An optimistic peek at trips you'll want to plan this year, all with an eye toward places you can enjoy with your loved ones

TREK THROUGH FORESTS IN... SINGAPORE?

2022 AMERICAS HIGHLIGHTS: LEISURE TRAVEL

DEEPENING ENGAGEMENT WITH PREMIUM & LUXURY TRADE PARTNERS

SINGAPORE UNIONS CAMPAIGN (JUL'22 – MAR'23)

Leveraging the insight that friends and loved ones were looking to reunite after 2+ years of separation, STB created a **PR campaign in partnership with 14 hotels and 5 hotel groups** such as Far East Hospitality, Capitol Kempinski, Pan Pacific Hotel Group, Fairmont & Swissotel Singapore, and Shangri-La to create exclusive hotel packages and thematic tours to **drive conversion and ALOS for both leisure and business travellers.**



VIRTUOSO TRAVEL WEEK (AUG'22)

STB participated in Virtuoso, a leading international travel consortium specializing in luxury and experiential travel for **outreach to luxury tour operators and agents in the US.** Singapore was the only Asian destination profiled as a culinary destination under the Globetrotting event. STB also flew in Singaporean chefs to delight participants with Singaporean food and **hosted a panel discussion about Singapore's culinary scene.**



Virtuoso Community Globetrotting – Culinary
STB Americas' Booth



Virtuoso Welcome Reception



US TOUR OPERATORS ASSOCIATION ENGAGEMENTS (SEP/DEC'22)

In celebration of USTOA's 50th anniversary and close partnership with Singapore, a series of events were planned to engage their members. **With a focus on tourism sustainability,** President and CEO of USTOA planted a tree in Singapore as part of their "50 trees for 50 years". At their flagship conference in the US, STB also threw a reception party to celebrate Merlion's 50th birthday and the 50th Anniversary of USTOA.



2022 AMERICAS HIGHLIGHTS: LEISURE TRAVEL

DEEPENING ENGAGEMENT WITH PREMIUM & LUXURY TRADE PARTNERS

ASIANOW - CANADA INTEGRATED MARKETING CAMPAIGN (JUL – DEC'22)

To outreach to the Canadian travel market, STB embarked on a joint **B2B/B2C marketing campaign with Asian Destination Marketing Organisations (DMOs)** including Korea, Taiwan, and the Philippines. Events included B2B in-person events and consumer shows in Toronto and Vancouver, participation at a International Travel Expo, trade newsletters and a Canadian influencer FAM tour to all 4 destinations.



SEATRADE CRUISE GLOBAL CONFERENCE – MIAMI (APR'22)

SEATRADE Cruise Global is the largest annual cruise industry gathering. STB organised a **Singapore Pavilion to meet with key stakeholders and cruise operators**. Singapore also participated in an **ASEAN Travel Agent Networking Event** to promote cruising in Asia to the US market.



CELEBRITY CRUISES NYC EVENT (AUG'22)

To **signal the resumption of Cruising in Southeast Asia**, STB partnered with Celebrity Cruises under their **“Rooftop Garden Cinema”** series in Manhattan. STB engaged over 60 **travel advisors that sell premium cruises and Asian packages**. Guests were treated to a screening of **Crazy Rich Asians** and specially paired dinner/drinks menu curated to the theme of the movie.



Restricted, Non-Sensitive

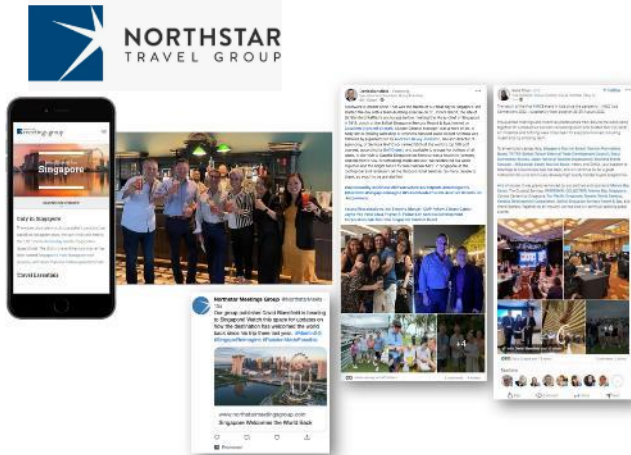
These slides are property of STB and shall not be reproduced or distributed without STB's written permission.

2022 AMERICAS HIGHLIGHTS: MICE

ENGAGING U.S. ASSOCIATIONS & MEETING PLANNERS TO POSITION SINGAPORE AS ASIA'S PREFERRED MICE DESTINATION

MICE KEY OPINION LEADER (KOL) CAMPAIGN WITH NORTHSTAR (AUG'22)

STB embarked on a **social editorial FAM and campaign with an influential leader in the U.S Meeting Industry** – David Blansfield, Northstar Travel Group's EVP with the goal of enhancing the visibility of Singapore as an attractive meetings destination and educating U.S meeting planners on the destination. David "live-blogged" his experience in Singapore. Updates and reflections of his trip was posted extensively on Northstar and other social platforms – LinkedIn, Facebook and Twitter.



AMERICAN SOCIETY OF ASSOCIATION EXECUTIVES, WASHINGTON DC (AUG/SEP'22)

STB hosted a Regional Global Associations Day for **senior U.S. association leaders** from the American Society of Association Executives (ASAE) with a panel on Sustainability. Ambassador Mirpuri also hosted a Singapore Reception at the Embassy complete with Singaporean cuisine and drinks.



IMEX AMERICA TRADESHOW (OCT'22)

STB participated in the largest MICE tradeshow in the Americas together with 17 MICE industry partners from Singapore. **2022 marked our largest pavilion and delegation in recent years** and a Singapore reception including inviting a Singapore Bartender – Vijay Mudaliar of Native Bar to convey Singapore's sustainability messaging through a show-and-tell of his bar.



PCMA CONVENING LEADERS (JAN'23)

For the **first time in our 10 year partnership** with the Professional Conference Management Association (PCMA), Singapore **secured the coveted mainstage opportunity to showcase Singapore as a sustainable business events destination to over 3,300 attendees.**



Restricted, Non-Sensitive

These slides are property of STB and shall not be reproduced or distributed without STB's written permission.

TRAVEL OUTLOOK & TRENDS

U.S. OUTLOOK FOR TRAVEL REMAINS STRONG IN 2023 ESPECIALLY FOR THE HIGH-YIELD PREMIUM AND LUXURY SEGMENT

- Analysts predict **U.S outlook for travel remains strong***, despite the recent series of banking crises in March 2023 and a likelihood of a recession in 2023 which would typically imply a fall in travel:
 - Strong US dollar makes outbound travel more affordable
 - Low household debt
 - Pent-up demand and prioritization of travel in the new-normal of hybrid/remote work
- American **International travel in 2023 expected to exceed 2019 levels*** (3.8 international vacations in the next 12 months, up from 2.2 in 2019)*
- **Sentiment to spend more for travel is highest in the Americas** where almost three quarters plan to spend more^

"There's been a permanent structural change in leisure demand because of the flexibility that hybrid work allows. This is not pent-up demand. It's the new normal."

United Airlines earnings call, October 19, 2022

"While we are mindful of macroeconomic headwinds, the travel industry is experiencing a countercyclical recovery. Global demand is continuing to ramp as consumers shift spend to experiences, businesses return to travel, and international markets continue to reopen."

Delta CEO Ed Bastian, October 13, 2022

*Source: Tourism Economics, MMGY Global's 2022 Portrait of American International Travelers

^ Source: AMEX ILTM Luxury Report Edition#2 Buzz vs Reality



Restricted, Non-Sensitive
These slides are property of STB and shall not be reproduced or distributed without STB's written permission.

AMERICANS ARE PRIORITIZING SUSTAINABILITY AND SPLURGING ON VALUE-ADDED SERVICES

TOP 5 TRENDS

*Source: AMEX ILTM Luxury Report Edition#2 Buzz vs Reality

1

SUSTAINABILITY REMAINS A TOP PRIORITY

Travelers are willing to pay more to travel sustainability and are committed to more purposeful travel

2

WELLNESS IS A KEY DRIVER IN TRAVEL PLANNING

73% of Americans say it is now a big factor in planning a trip

3

WILLING TO SPLURGE ON VALUE-ADDED SERVICES LIKE A GOOD TRAVEL ADVISOR

Even Millennials and Gen Zers are turning to travel advisors for assurance

4

BACK TO PLANNING AHEAD

Compared to 2019, US travelers are back to planning in advance, up to 58 days for domestic trips and 80 days for international trips.

5

TOP REASONS AMERICAS TRAVEL FOR: FOOD, CULTURE AND PEOPLE

Restricted, Non-Sensitive

These slides are property of STB and shall not be reproduced or distributed without STB's written permission.

LOOKING AHEAD: 2023 FOCUS AREAS

(AND HOW YOU CAN SUPPORT OUR EFFORTS)

2023 FOCUS: PR, BRAND AND COMMS

SUPPORT OUR MARCOMM EFFORTS BY PROFILING YOUR PRODUCT OFFERINGS

AREAS OF INDUSTRY COLLABORATION

1 Support our media & fam trips to profile Singapore's offerings to top-tier US media and social influencers

2 Share your latest product updates for us to feature in our campaigns and engagements

Engaging fans to strengthen SG brand affinity and drive conversions

- STB will pitch destination messaging of **sustainability and wellness**, along with deeper stories of **Singapore's food, cocktail and cultural scenes**, to top-tier U.S. media and social influencers
- STB will stage on-trend and creative consumer activations to position Singapore as a preferred travel destination in Asia

The New York Times

Los Angeles Times

TRAVEL+
LEISURE

Condé Nast
Traveler

Partner key travel and lifestyle media targeting the premium / luxury segments

- STB will identify partnerships with **key media channels for digital and media campaigns** to engage Americans for both awareness and consideration of travel to Singapore

Smithsonian
MAGAZINE

EST. **AWA** 2017
ACCIDENTALLY WES ANDERSON

M | MARTINI

 **TALES**
OF THE COCKTAIL

TRAVELZOO[®]

TAKE
YOUR
SEAT

2023 FOCUS: LEISURE TRAVEL

ENGAGE THE US TRAVEL TRADE BY JOINING US AT TRADE EVENTS & SUPPORTING OUR FAM TRIPS

AREAS OF INDUSTRY COLLABORATION

- 1 Join us at **Virtuoso (Aug 12-18)** and **USTOA (Dec 2-6)**. These key trade events' marketplaces provide 1-to-1 meetings with key US travel trade
- 2 Support our **leisure trade fams and market hackathon (Jun'23)** to engage key US travel trade

Deepen engagement with OTAs and premium Tour Operators to increase consideration of Singapore

- STB will continue **participation at key travel trade association and consortia events** to increase Destination Singapore awareness, and length-of-stay of visitors
- STB will identify product-market fit for American travelers through a **market hackathon**
- STB will engage and support OTAs and tour operators to sell Singapore and refresh their product offerings through **Fams and co-ops**, including Canadian travel trade in tandem with air-link developments



Partner travel trade and airlines to position Singapore as a gateway to Asia

- STB will work with American/Asian Airlines and **position Singapore as a beyond destination and gateway for a Asia holiday**
- STB will collaborate with Asian DMOs and Tour Operators to **target Asian-Americans** and position Singapore as a twinning destination



2023 FOCUS: BTMICE

ENGAGE THE US TRAVEL TRADE BY JOINING US AT TRADE EVENTS & SUPPORTING OUR FAM TRIPS

AREAS OF INDUSTRY COLLABORATION

- 1 Support the **ASAE Leadership Summit Singapore (Jul 25-29)**
- 2 Join under the Singapore Pavilion at **IMEX America (Oct 17-19)**
- 3 Support **MICE Trade Fams (date TBC)**
- 4 Participate in **PCMA Convening Leaders, San Diego (Jan 7-10, 2024)**

Scale up participation at MICE platforms and sales calls

- STB will **intensify engagements to reach U.S meeting planners and 3rd-party intermediaries** (Conference Direct, CVENT Connect, HelmsBriscoe APN) and organize a MICE Trade Fam
- STB will continue to **participate at IMEX America** – America’s largest MICE tradeshow for awareness and lead generation for US MICE market
- Key Focus: **Corporate Meetings & Incentives (M&I) with U.S. companies** - Industry Clusters: Direct Selling, Consultancy, Insurance, Pharma, ICT

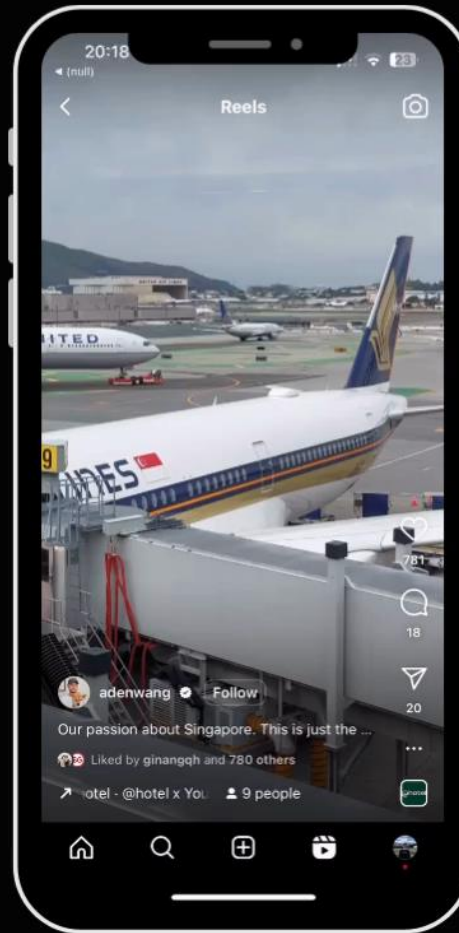
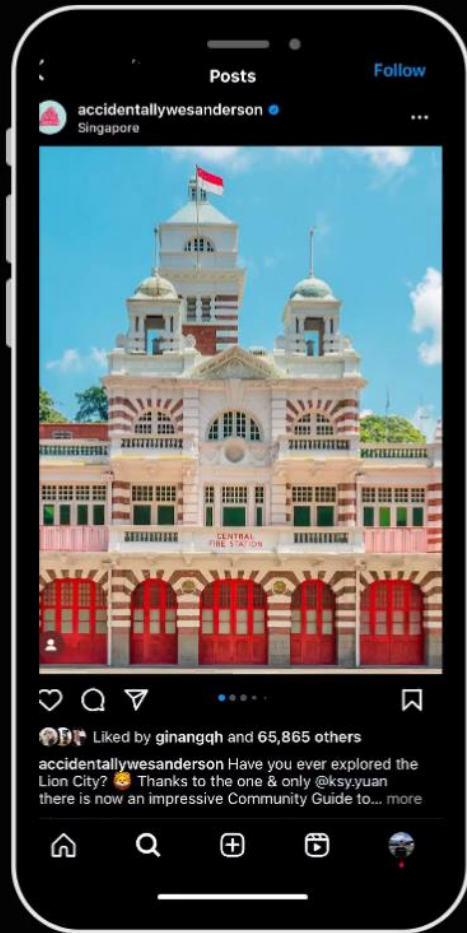


Profile Singapore as a thought leader in the Events Industry

- STB will pursue opportunities to **showcase Singapore to the U.S./Intl MICE community.** (e.g. ASAE Leadership Summit, ASAE Annual Meeting and PCMA Convening Leaders)
- STB will **profile Singapore as a thought leader in MICE** through speaking engagements and knowledge exchange at relevant trade and business platforms



WE STARTED 2023 WITH EFFECTIVE MARKETING CAMPAIGNS WITH STORYTELLING AND VISUAL ELEMENTS...



FOOD & WINE

WHALEBONE

Smithsonian
MAGAZINE

TRAVEL + LEISURE

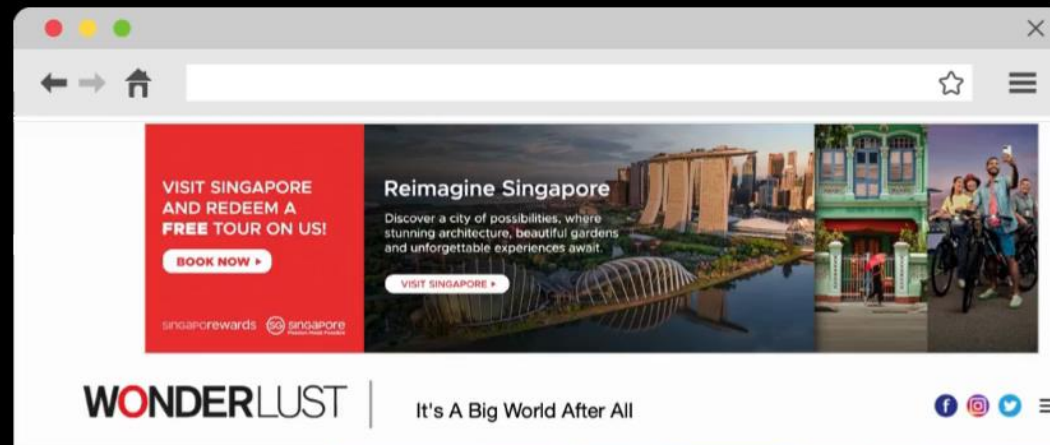


TO DRIVE STRONG DESIRE TO TRAVEL TO SINGAPORE!

Takeover of over 100 digital screens
at NY Times Square Subway



Strategic digital ads
U.S luxury/top-tier media titles



REACH OUT TO US IF YOU ARE KEEN TO BE PART OF OUR TRADE & MEDIA EVENTS

	Q1 2023 JAN – MAR	Q2 2023 APR - JUN	Q3 2023 JUL - SEP	Q4 2023 OCT - DEC	Q1 2024 JAN - MAR	
LEISURE TRADE	<p>Seatrade Miami (Mar 25-30)</p> <p>Trade Roadshow LA, SF, NY, Houston (Mar)</p>	<p>Trade Hackathon Singapore (June)</p> <p>Trade Event Nashville, TN (May 8-11)</p>	<p>ILTM Americas Bahamas (Sep 18-21)</p> <p>Virtuoso Travel Week Las Vegas, NV (Aug 12-18)</p>	<p>Leisure Fam Singapore (Oct)</p> <p>Canada Trade Events TBC (Sep-Oct)</p> <p>Cruiseworld Miami, FL (Nov 1-3)</p>	<p>USTOA Annual Los Angeles, CA (Dec 2-6)</p>	
Flight Centre Partnership (US/CAN)						
MICE TRADE	<p>PCMA CL Columbus OH (Jan 8-11)</p> <p>MICE Trade Event Louisville, KY (Mar 26-29)</p>	<p>MICE Event NYC (Apr 27)</p> <p>MICE Event Las Vegas (Jun 1-3)</p> <p>MICE Event Denver, CO (May 3-5)</p>	<p>MICE Event Las Vegas, NV (Jul 24-27)</p> <p>Assn Event Singapore (Jul 25-29)</p>	<p>ASAE Annual Atlanta, GA (Aug 5-8)</p> <p>IMEX AMERICA Las Vegas, NV (Oct 17-19)</p>	<p>MICE Fam Singapore (Q4 TBC)</p> <p>PCMA CL San Diego (Jan 7-10)</p>	
MEDIA/ BRAND	<p>Media Buy Campaigns in US & Canada</p>	<p>AAPI Month Activation (May)</p>	<p>Influencer Fam Singapore (Jun)</p>	<p>F&B Activation New Orleans (July 23-28)</p> <p>Singapore Food Fest – US Edition NY, LA, TX (Aug-Sep)</p>	<p>Brand Campaign & Activations</p>	
Tripartite Campaign						
Media Fams						

IN SUMMARY

1

TRAVEL OUTLOOK FOR THE U.S. REMAINS STRONG

Continue to invest in this market, especially for the premium/luxury segment

2

AMERICANS ARE HIGH-YIELD TRAVELERS

They spend 2.5x that of the average visitor and spend 4.81 days in Singapore on average*

3

JOIN US FOR OUR TRADE & MEDIA ACTIVITIES

- *Media Activations & Trade Fam Trips*
- *Virtuoso Travel Week (Aug'23)*
- *IMEX America (Oct'23)*
- *USTOA Conference (Dec'23)*
- *PCMA Convening Leaders (Jan'24)*

*USA visitor Per Capital Expenditure (PCE) from Q1-Q3 2022 was S\$2,689 vis-à-vis the total average of S\$1,129



THANK YOU



SINGAPORE
Passion Made Possible