



CHANGING LANDSCAPES

Singapore Tourism Board
Year Book 2002/2003

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Just as the natural landscape transforms with the seasons, so does the global tourism landscape go through unpredictable cycles of change. In the year under review, in the aftermath of Sept 11 has come the war in Afghanistan, the Bali bombings, the war in Iraq and the Severe Acute Respiratory Syndrome (SARS) crisis. The cumulative effect of these unfolding events on the local tourist industry has posed the greatest challenge in its history. But far from dampening our spirits, this demanding period has seen an unprecedented display of solidarity and action.

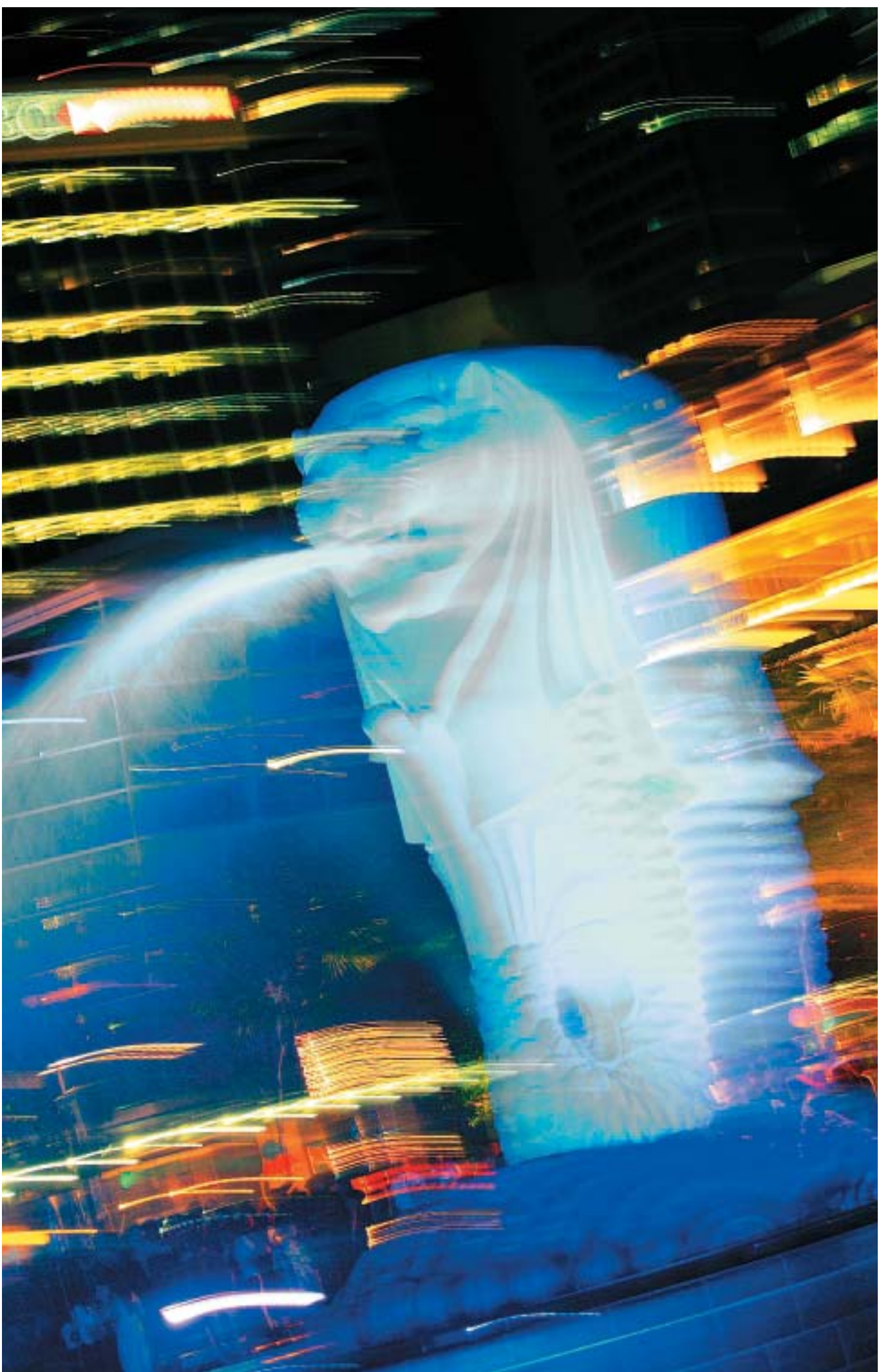
In partnership with the Singapore Tourism Board (STB), the local industry has responded to the challenge with courage, innovation and resilience. We continue with our efforts to maximise opportunities and strengthen Singapore's position as a premier business and leisure destination by creating new and exciting experiences for all our visitors. In this annual report, we share with you the journey we have taken as we adapt to the changing tourism landscape.

Overcoming Challenges through

Change

Economic uncertainty and the rolling effects of terrorism, armed conflict and SARS have profoundly affected the industry, and though Singapore's battle against SARS has been successful, we remain vulnerable to global forces that are often beyond our control. Although Singapore registered its second highest visitor arrivals in 2002, tourism receipts have declined. With visitor arrivals from Asia, especially China and India, steadily increasing in the past few years, new strategies need to be employed to capitalise on this trend.

Faced with these challenges, the time has come to adopt a new approach, to meet change with change. Bold initiatives are required to seize new opportunities, revitalise our existing strengths and provide new engines of growth. Already, a new corporate structure and strategies have been put in place to ensure that the STB can meet these challenges effectively. Mr Lim Neo Chian, our new Deputy Chairman and Chief Executive, succeeded former Chief Executive Mr Yeo Khee Leng in October 2002. Under the new leadership, eight Strategic Tourism Units (STUs) have been formed to be the driving force in tourism, with Education and Healthcare Services identified as new segments to be cultivated. With these internal changes in place, we are ready to confront our challenges with full confidence.





Building Strength through

Resilience

Our recovery from the string of crises that have confronted us over the past five years has consistently demonstrated the resilience of the industry. Despite the continuing economic and political uncertainty in the region, Singapore managed to record its second highest total number of visitor arrivals in 2002, signalling the success of our collective efforts to pull the industry out of adversity. At the STB, we welcome change.

Pushing us beyond our comfort zones, we believe that challenges can present the greatest opportunities, and call for the most innovative responses. So far, our resilience has enabled us to weather the storm. While the residual effects of the SARS outbreak are still lingering, the STB and the industry have once again bounced back with vigour.

Our primary focus is to enhance Singapore's reputation as a choice destination for business and leisure visitors, and a key strategy towards this objective is to forge long-lasting partnerships with industry players globally. We believe these partnerships will maximise business opportunities for Singapore tourism, as we leverage on our core strengths to identify and develop new profitable growth areas to help the industry move forward.

To date, we have formed valuable relationships with travel industry businesses worldwide, and we have plans to expand our network further. Our commitment to partnership was reinforced by the signing of the *ASEAN Tourism Agreement* in Phnom Penh in November 2002, which will boost Singapore's tourism potential through the collaboration of ASEAN Member States in joint tourism initiatives.

Enhancing Tourism through

Partnership



It's been a challenging year at the STB. Of all the industries affected by the string of events beginning with September 11 terrorist attacks and culminating in the Iraq war and the SARS outbreak, the tourism industry has been the hardest hit. The past year has thrown up the biggest challenges the STB has had to face. If nothing else, it is a salutary reminder that we cannot take success for granted, and that the continued growth of the tourism industry is as much dependent on global stability in the economic and political arenas as it is on our own collaborative efforts with industry partners.

However, undeterred by such challenges, we are confident that the resilience and resourcefulness of the industry will continue to see us through these tough times. Fortunately, the evidence is already there. Despite the bleak projected outlook for tourism in 2001 and 2002, we managed to overcome the prevailing setbacks and meet our tourism targets for both years. In 2002, Singapore registered its second highest visitor arrivals of 7.6 million and contributed more than S\$9 billion in tourism receipts.



In retrospect, while SARS has battered our tourism industry, we are glad to say that the industry and Singapore as a whole has emerged stronger from this crisis. Far from damaging Singapore's investment outlook, the government's quick, proactive and transparent handling of the crisis has actually boosted investor confidence and the tourism sector has benefited from the government's decisive actions.

As further endorsement of this restored confidence, we are very pleased that German developer, Melchers Project Management Pte Ltd, has chosen Singapore as the location for the construction of the S\$200 million observation wheel project at Marina Bay. The MOU for this project was signed between Melchers and STB on 27 June 2003. Named the *Singapore Flyer*, this 170-metre tall observation wheel will be one of the world's largest when it is completed by the end of 2005. The project also marks the largest ever foreign direct investment in a Singapore tourism attraction, demonstrating the continuing faith of foreign investors in Singapore's appeal as a leisure destination.

THE CHANGING TOURISM LANDSCAPE

The case for the region to act as one has never been stronger. Globalisation has made it much harder to shield any single country from the impact of political or economic adversity in another country. If the last three years is anything to go by, we can expect that living with periodic crisis will be the new normality for many of us. To survive in these changing times, close collaboration among countries in the region will be crucial for the effective handling of new challenges as they emerge. A resilient tourism sector is what we need, one that not only shows confidence in its ability to handle any crises that the region may be confronted with from time to time, but also emerging trends.

One of the most significant trends to have emerged is the strong growth of tourism in the region, particularly in emerging markets like China and India. As a region, the Asia Pacific has overtaken the Americas as the second largest receiving region in terms of visitor arrivals since 2001. At the same time, there exist segments – such as healthcare and education services – which Singapore is well-positioned to tap into and generate further growth for its economy.

chairman's message

There is also the challenge of increasing the tourist dollar spend in Singapore. Although the tourism industry continues to make a significant contribution to Singapore's GDP, both directly through tourism receipts, and indirectly through collateral spending generated by our world-class facilities and attractions, tourism receipts have not risen in tandem with arrival figures.

In view of these opportunities and challenges, under the leadership of the new Deputy Chairman and Chief Executive, Lim Neo Chian, the STB has reviewed its strategies and organisation, with a view to strengthen Singapore's position as a choice business and leisure destination and ensuring that the tourism industry remains a key engine of growth for Singapore's economy. Among the STB's long-term goals is to grow tourism receipts by 8% per annum. To achieve this, the STB will focus its attention on creating memorable experiences for visitors.

To reinforce Singapore's appeal as a business and leisure destination, effective 1 February 2003, the STB has formed eight Strategic Tourism Units (STUs) at its head office, which will be the driving force behind the creation of memorable and innovative new experiences for the visitors. Apart from the traditional segments such as attractions and sightseeing, tourism shopping, food and beverage, events, business travel and MICE, the new organisation will also actively tap into new segments such as healthcare and education services. To effectively market Singapore overseas, STB's international operations have also been re-organised into seven regions, with more offices opened in the region.

LEADING THE INDUSTRY

The STB is committed to its leadership role in restoring consumer confidence. Catalysing industry recovery, which requires the mobilisation of country-wide resources and a push for greater regional cooperation, is a huge task. However, we could not succeed in building a resilient industry without the staunch support of our industry partners, both locally and overseas. At the country level therefore, the STB will forge closer working ties between the public and private sectors to develop the contingency plans, systems and processes which will enable speedy and effective responses to challenges.

At the regional level, the STB will continue to strengthen its regional partnerships, and share knowledge and experiences to help each other build capabilities to increase effectiveness by proactively managing crisis situations.

ACKNOWLEDGEMENTS

We are confident that the swift measures we have implemented this year to counter the challenges we face will ensure that the industry bounces back with dynamism and confidence, and that the outlook for next year remains optimistic.

I am proud of the progress we have made, and what we have achieved with our industry. My appreciation goes out to all those, both within the STB and in the industry, who have made this possible, in particular to the Board Members of the STB and members of the Cool Team (formed during the SARS crisis) who have spent many hours helping STB tackle the many challenges faced by the industry. To all our partners in Singapore and overseas, thank you for your unwavering support. I would also like to specially thank all our staff and the Union for their unequivocal commitment towards our cause and their invaluable contributions during this trying period.

board of directors



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1. MR WEE EE CHAO

Chairman of UOB-Kay Hian Holdings Limited since August 2000, Mr Wee has been closely involved in the management and growth of UOB-Kay Hian over the past 23 years. Besides his stockbroking involvement in UOB-Kay Hian Holdings Limited, Mr Wee has also been involved in real estate development and was previously Director of Wee Investment Group, Kheng Leong Co. Pte Ltd and Haw Par Corporation at various stages of his career. Mr Wee was appointed Chairman of the Singapore Tourism Board in January 2002.

2. MR LIM NEO CHIAN

Mr Lim was appointed the Deputy Chairman and Chief Executive of the STB in October 2002. He concurrently holds the post of Chairman to JTC Corporation. Mr Lim joined JTC as CEO in 1995, after a distinguished career in the Singapore Armed Forces as the Chief of Army between 1992 and 1995. Mr Lim's other appointments include Board Member of Sentosa Development Corporation and Urban Redevelopment Authority, Board of Director of The Old Parliament House Ltd and the International Hotel Management School Pte Ltd, and Council Member of the National Arts Council.

3. MR ANTHONY CHAN

Mr Chan is the Group Managing Director of Chan Brothers International Pte Ltd, and sits on the board of the Singapore Leisure Industry. Mr Chan was awarded the Young Executive Award by the Travel Gazette and Air New Zealand, and in 1995, Mr Chan was awarded the coveted Tourism Entrepreneur of the Year Award by the then Singapore Tourist Promotion Board.

4. MR ABDUL RAHIM TAHIR

Mr Tahir is the Chief Operating Officer of PT. Repex Perdana International, a Licensee of Federal Express Corporation. Prior to this, Mr Tahir held management positions with the Federal Express Corporation, the last being Managing Director of Supply Chain Services, South Pacific Region. Mr Tahir also sits on the Chartered Institute of Transport's Qualifying Review Board for Certified Professional Logisticians.

5. MS JANET ANG

Ms Ang has been with IBM Singapore for 19 years and she is currently the company's Managing Director. Prior to that, she was Director of Sales Operations for IBM Asia Pacific, responsible for IBM's market coverage strategy and sales management across the region. Before that, she was Director of Marketing, Global Small & Medium Business, IBM Asia Pacific. She has received numerous IBM awards for her achievements, including the Marketing Excellence award four times, and IBM Singapore Managing Director's Award (1993).

6. MR FRANK BROWN

Mr Brown is the President of MTV Networks Asia Pacific. Based in Singapore, he oversees all aspects of MTV Networks' businesses and channel operations in the Asia Pacific region, including 10 MTV Asia channels, five Nickelodeon Asia channels and one VH1 channel. He is also a Board Member of the Media Development Authority.

7. MS CHAN LAI FUNG

Ms Chan is presently the Deputy Secretary, Ministry of the Environment. Prior to this appointment, Ms Chan served in several government organisations such as the Ministry of Health, the Ministry of Finance and the Prime Minister's Office. Ms Chan has held directorships at Singapore Food Industries Pte Ltd, Ang Mo Kio Community Hospital and the International Development & Consultancy Corporation Pte Ltd (INDECO).

8. MS JENNIE CHUA

Ms Chua is the Chairman & CEO of Raffles International Ltd and concurrently President & CEO of Raffles Holdings Ltd. Ms Chua is also a Director of 24 companies, and serves on 18 Government and Community Service Committees, both locally and internationally. Ms Chua has received many accolades over the years including Person of the Year – Asia Pacific (Hotel) by American-based Travel Agent Magazine in January 2003, and was the only Singaporean named as one of Business Week Magazine's 25 Stars of Asia in June 2003.

9. MR HUANG CHENG ENG

Mr Huang joined SIA in 1974 and served in its regional offices in Hong Kong, Taiwan and France. In 1987, he returned to Singapore and managed SIA's cargo business worldwide, and later became Director of Cargo (1992) and Director of Marketing Planning (1996). He is presently the Executive Vice-President of Marketing and the Regions, and is concurrently Chairman of SATS Catering Pte Ltd.

10. MR ANTHONY LEE

Mr Lee is the Chief Executive of American Express, Hong Kong. Having joined the Bank in 1977, he has held various management positions with American Express Bank in Singapore, Hong Kong, Taiwan and New York. Prior to that, he worked with Coopers & Lybrand, one of the big six accounting firms. Mr Lee is a fellow of the Chartered Association of Certified Accountants of United Kingdom and a Public Accountant of Singapore.

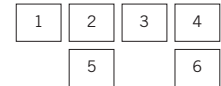
11. MS SAW PHAIK HWA

Ms Saw began her career in DFS in 1978. Following a stint at DFS Hong Kong as Vice-President (Operations), covering Hong Kong, Vietnam and Macau, Ms Saw returned to Singapore as DFS Region President. In December 1999, Ms Saw launched the first ever thematic retail entertainment in Asia, Experiencing Singapura. Before leaving DFS in February 2002, she conceptualised the latest DFS store at Scotts Walk which opened in 2003. She is currently the President and CEO of SMRT.

12. MR SUNIL SREENIVASAN

Mr Sreenivasan is the Country Corporate Officer of Citibank, where he leads the bank's Global Corporate Banking activities in Singapore. His responsibilities cover corporate banking, corporate finance, investment and banking, cash management, global relationship banking, custody and treasury activities. Prior to his posting to Singapore, Mr Sreenivasan was the Country Corporate Officer of Citibank Malaysia.

principal directors



1. MR LIM NEO CHIAN

Deputy Chairman and Chief Executive
Neo Chian was appointed Deputy Chairman and Chief Executive of the STB in October 2002. Under his leadership, a corporate review was initiated in November 2003 with the objective of strengthening Singapore's position as a choice business and leisure destination. A few months into his new role, Neo Chian's leadership was brought to the fore with the outbreak of SARS. Rallying both public and private industry partners together in the fight against SARS, Neo Chian led the tourism industry out of crisis and towards swift recovery through the development and implementation of prompt and effective measures.

2. MRS PAMELIA LEE

Senior Director, STB Consultancy
Pamelia commenced her career with the STB in 1978 as head of Marketing Division and Overseas Offices. In 1984, she established the Tourism Product Development Division and the \$1 billion tourism development plan. Currently, she heads the STB Consultancy Division undertaking the development and preservation of heritage and cultural development projects in Singapore.

3. MR CHARLES LEONG

Senior Director, Office of Deputy Chairman and Chief Executive
A thirty-year veteran in the travel and tourism industry, Charles has held management positions with Singapore International Airlines for 19 years and led the STB's Americas operations for 10 years. In his current capacity, he represents the STB internationally in bilateral and multilateral negotiations and manage the information base to support Government-to-Government communications on international relations issues. In addition, Charles also oversees the work carried out by the World EXPO division.

4. MRS MONICA TOMLIN

Senior Director, Planning
Monica joined the STB in July 2003, heading the Planning Division in areas of plans analysis and integration, strategic funding, and research and statistics. She started her career with the Colombian national airline. She subsequently worked as an international management consultant with McKinsey & Company in New York, SRI International and Arthur D Little in Singapore.

5. DR CHAN TAT HON

Chief, International Operations & Programme Director, Healthcare Services (covering)
Tat Hon was appointed as Chief of International Operations in July 2003. Besides leading STB's market development efforts through its global network of offices, Tat Hon is also concurrently covering as Programme Director for the Healthcare Services Division. A medical doctor by training, Tat Hon had previously spent five years at the Economic Development Board, three of which as the Centre Director in London.

6. MR GERALD LEE

Chief, Business Operations & Director, Business Travel & MICE (covering)
Gerald has been with the STB for 12 years. His previous appointments include heading STB's operations in Canada and Central USA, and a secondment at the Ministry of Trade and Industry. He returned to STB in 2001 to head the Planning Division, while holding a concurrent appointment at the Sentosa Development Corporation. In July 2003, Gerald assumed the position of Chief, Business Operations. He also covers as Director, Business Travel & MICE.

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7. MS MAGDALENE LEE

Director, Education Services

Magdalene has been with the Board for 21 years. Her previous appointments include Director, Destination Marketing and Area Director, Europe. She currently heads the Education Services division, which aims to establish Singapore as a premier education hub within the region, by offering a distinctive and diverse mix of education services.

8. MR CHANG CHEE PEY

Director, Sightseeing & Attractions

Chee Pey joined the Board as Assistant Manager, Hospitality Business in 1997. Preceding this role, he was Assistant Director, Business Travel and Director, South Asia, based in Mumbai. Currently, he oversees the Sight-seeing & Attractions division in areas such as product conceptualisation and development, packaging, distribution, marketing support, investment promotion and industry development.

9. MR OLIVER CHONG

Director, Cruise & Director, Tourism Shopping (covering)

Oliver joined the Board in 1993. From 1996 to 1999, he was based in London, first as Assistant then as Deputy Regional Director, UK, before returning to Singapore in 1999 as an Assistant Director with Events Marketing. As Director of Tourism Shopping and Cruise, he leads both divisions in strengthening Singapore's status as a regional cruise and shopping hub in order to maximise each sector's contribution to tourism receipts.

10. MS MARGARET TEO

Director, Food & Beverage

Margaret has been with the Board for 13 years, and previous positions have included Manager, Corporate Communications and Assistant Director, Events Marketing. Margaret also drove the MillenniaMania campaign and Millennium Swing – Singapore's millennium countdown party at Orchard Road. In 2002, she was appointed Deputy Director, Marketing Services. As Director of Food and Beverage, she leads the division to establish Singapore as an irresistible food paradise and vibrant nightlife destination.

11. MS CHRISTINE KHOR

Director, Lifestyle & Events

Christine was the Institute of Southeast Asian Studies' first Editor and Head of Publications and a veteran Straits Times journalist. She then joined the Economic Development Board where she pioneered the development of the arts industry. As Director of Lifestyle & Events, she leads the division in attracting quality events into Singapore; boosting the events industry's development; and marketing Singapore as a global city for events.

12. MR LIM CHWEE SENG

Director, Resource Development & Director, Travel & Hospitality Business

Chwee Seng's prior designations at the STB include Director, Lifestyle and Director, Events. He is concurrently Director of Resource Development, which oversees the development of infrastructure, manpower, legislation, technology and information management; and Director of Travel & Hospitality Business, which drives and manages industry development, investment promotion and marketing initiatives for the hospitality and travel services sectors.

principal directors

13	14	15	16
17	18	19	20



13. MR JEFFREY ONG

Director, Service Quality

Jeffrey's experience spans business development, sales, training and consultancy in service quality, leadership and organisational development and talent management. In his capacity as a consultant specialising in Service Quality, Jeffrey has helped MNCs such as Hewlett Packard, VISA and Becton Dickinson achieve their goals. Under his leadership, Service Quality division's mandate is to raise service standards within the tourism industry so as to improve visitor's satisfaction, thus increasing tourism receipts.

14. MR KEN LOW

Director, Brand Management

Ken joined the Board in April 2003. Prior to the STB, Ken was Vice-President of Marketing Communications, Citigroup Private Bank. He is an active arts practitioner best known as composer for the musical, Chang & Eng. As Director for Brand Management, he oversees the development of positive brand equity for the STB's destination brands and sub-brands.

15. MS SHIRLEY TAN

Director, Corporate Communications

Shirley has more than 10 years of experience in Corporate Communications. Prior to the STB, she was Vice-President & Head, Corporate

Communications at Singapore Technologies Engineering. In her current role, she oversees the development and execution of communications strategies and ensuring consistent messaging across the STB's internal and global network.

16. MR YONG YEAN CHAU

Chief Financial Officer, Finance & Corporate Services

Yean Chau joined the STB in November 2002. As Chief Financial Officer, Yean Chau's responsibilities include budget control, formulating and implementing financial management policies and investment strategies, and ensuring the delivery of corporate support, legal and administrative services to units in the Board.

17. MS SHIRLEY QUEK

Director, Human Resources & Organisational Change

Shirley joined the Board in October 2002. Under her current portfolio, she drives the Human Resources and Change Management functions. She also champions a number of key change initiatives to transform the organisation.

18. MR LEE LOONG KOON

Director, Emergency Planning

Loong Koon joined the STB in 1988. Prior positions include Director, Asia; Director,

Exhibitions and Conventions; and Director, Cruise. In his current capacity, he leads the Emergency Planning division in developing plans and procedures to proactively deal with crises that affect the tourism industry.

19. MR SOH PECK LIN

Chief Auditor

Peck Lin has been responsible for the Board's financial and investment management since 1991. In 2001, he spearheaded the inauguration of the Board's internal audit competency. As Chief Auditor, he provides leadership assurance on the overall adequacy and effectiveness of the existing control and governance practices that support the Board's operations.

20. MS CHANDRIKA SHANTILAL

Programme Director, World EXPO

Chandrika joined the Board in 1982. She has worked in the Research, Hospitality, Exhibitions & Conventions and International Marketing Divisions. Currently heading the World EXPO division, she is responsible for Singapore's participation at the World EXPO 2005 in Aichi, Japan.

regional directors

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**1. MR ALOYSIUS ARLANDO***Regional Director, ASEAN (Islands)*

Aloysius has been with the Board for 10 years, including a 2½ year secondment to the Ministry of Manpower (MOM). In January 2003, he assumed his present position of Regional Director, ASEAN (Islands), overseeing the markets of Indonesia, the Philippines and Brunei, and formulating strategic marketing initiatives to maximise these markets' contribution to tourism receipts.

2. MR DAYNE LIM*Regional Director, ASEAN (Mainland)*

Dayne joined the Board in 1995. In 1997, he was appointed Country Manager, Indonesia and was subsequently posted to the UK as Marketing Manager, UK & Nordic Countries. Dayne was the Director for Sightseeing and Attractions and now heads ASEAN (Mainland), overseeing strategic planning, business development and marketing management in Malaysia, Thailand and Indochina.

3. MR EDMUND CHUA*Regional Director, Greater China*

Edmund has been with the Board for 12 years and has been involved in managing large-scale infrastructure projects such as the enhancements to Chinatown in his previous capacity as Deputy Director, Thematic Development. Currently the Regional Director of Greater China, he leads the team in intensifying tourism related activities in China.

4. MRS ELSIE CHIA-OZAKU*Regional Director, North Asia*

Elsie has been with the Board for 21 years. She was promoted to Assistant Director, Public Relations in 1982 before leaving to join STB Japan as Assistant Regional Director in 1985. She was appointed Regional Director in 1990 and in 2001 was made Area Director, Japan and Korea. In 2003, Elsie was re-designated to Regional Director, North Asia.

5. MS CHEE LAY HONG*Regional Director, South Asia, Middle East & Africa*

Lay Hong began her career with the Board in 1981. Key appointments at STB have included Director, Marketing; Area Director, Asia; and

Director, Lifestyle. In her current capacity, she heads the region in promoting Singapore as a compelling destination for both business and leisure from these markets.

6. MR CHEW MIN SENG*Senior Vice-President, Americas & Europe*

Min Seng began his career with the STB in 1987 and has since been posted to STB Chicago as Vice-President and headed the STB's office in Toronto, Canada. After returning to Singapore, Min Seng was the Regional Director, Southeast and Southwest Asia and Africa, before taking on the current post as Senior Vice-President for Americas and Europe.

7. MR KEVIN LEONG*Regional Director, Oceania*

Kevin's career with the STB commenced in 1976 and has since included positions such as Vice-President, Eastern USA; Director, Exhibitions & Conventions; and Director, Events Marketing. As Regional Director, Oceania, he spearheads the marketing of Singapore in Australia, New Zealand and the Southwest Pacific islands.

international advisory
council for tourism



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1. DR CHEONG CHOON KONG
2. MR MIKE RUSBRIDGE
3. MR ROBERT PALMER
4. MR LIM NEO CHIAN
5. MR RANJIT MALKANI
6. HON JEFF KENNETT
7. MR WEE EE-CHAO
8. MR KOJI SHINMACHI
9. MS YANG LAN

The International Advisory Council for Tourism (IACT) was established in 1999 to advise the STB on long-term strategic issues in the tourism industry.

Comprising prominent leaders of the global tourism industry representing a spectrum of tourism-related sectors and geographic regions, the IACT met on 10 and 11 October 2002 in Singapore to share with the STB a global perspective on the challenges facing Singapore's tourism industry.

Chaired by Mr Wee Ee-chao, Chairman of the STB, the members of the Council were:

- * Dr Cheong Choong Kong, Deputy Chairman and CEO, Singapore Airlines Ltd, Singapore
- * Mr Rupert Keeley, President and CEO, VISA Asia Pacific
- * The Honourable Jeff Kennett, Past Premier of Victoria, Australia
- * Mr Lim Neo Chian, Deputy Chairman and Chief Executive, Singapore Tourism Board, Singapore
- * Mr Ranjit Malkani, Chairman and CEO, Kuoni Travel India and Asia
- * Mrs Marilyn Carlson Nelson, Chair and Chief Executive Officer, Carlson Companies, Inc, USA
- * Mr Robert Palmer, President and CEO, Palmer/Rae Associates, International Cultural Consultants, Belgium
- * Mr Charles Petruccelli, President, Global Travel Services, American Express
- * Mr Mike Rusbridge, Chairman, Reed Exhibitions, UK
- * Mr Koji Shinmachi, Chairman, Japan Association of Travel Agents, Japan
- * Ms Yang Lan, Chairperson, Sun TV Networks, People's Republic of China

In July 2003, the IACT was expanded from 12 to 15 members. The following new members were appointed:

- * Mr Lim Chin Beng, Chairman, The Ascott Group Limited, Singapore
- * Tan Sri Lim Kok Thay, President and Chief Executive, Star Cruises, Malaysia
- * Professor Xie Shengwu, President, Shanghai Jiao Tong University, People's Republic of China
- * Mr Adrian Zecha, Chairman, Silverlink Holdings Limited, Singapore
- * Mr John Sharpe, Chair, Finance Committee, The Culinary Institute of America, USA

The STB expresses its deep appreciation to Dr Cheong Choong Kong, Former Deputy Chairman and CEO, Singapore Airlines Ltd, Singapore and Mr Robert Palmer, President and CEO, Palmer/Rae Associates, International Cultural Consultants, Belgium, for their invaluable contribution to the IACT over the years.

organisation structure

	CORPORATE DEVELOPMENT	CORPORATE COMMS SHIRLEY TAN * Media Relations * Corporate Relations * Strategic Relations	FINANCE & CORP SCVS YONG YEAN CHAU * Financial Operations * Management Reporting & Budgeting * Corporate Finance & Fund Management * Contracts & Legal * Corporate Services	HUMAN RESOURCES & ORGANISATIONAL CHANGE SHIRLEY QUEK * Human Resource Development * Human Resource Management * Change Management
CHAIRMAN AND BOARD OF DIRECTORS <i>INTERNAL AUDIT</i> <i>SOH PECK LIN</i>	OFFICE OF DEPUTY CHAIRMAN AND CHIEF EXECUTIVE	STB CONSULTANCY PAMELIA LEE	EMERGENCY PLANNING LEE LOONG KOON	INTERNATIONAL RELATIONS CHARLES LEONG
DEPUTY CHAIRMAN AND CHIEF EXECUTIVE (LIM NEO CHIAN)	CHIEF, BUSINESS OPERATIONS (GERALD LEE) <i>STRATEGIC TOURISM UNITS</i>	BUSINESS TRAVEL & MICE GERALD LEE (covering) * Business Travel * Meetings & Incentives * Conventions * Exhibitions	HEALTHCARE SERVICES CHAN TAT HON (covering) * Economic Medical Hub * Clinical Medical Hub * Allied Health, Wellness, Complementary Medicine	EDUCATION SERVICES MAGDALENE LEE * Corporate Education * Basic Education & Higher Learning * Enrichment Courses
	CHIEF, INTERNATIONAL OPERATIONS (CHAN TAT HON) <i>REGIONS</i>	ASEAN (ISLANDS) ALOYSIUS ARLANDO * Western Markets (Medan) * Eastern Indonesia (STB Jakarta) * Philippines & Brunei (Manila)	ASEAN (MAINLAND) DAYNE LIM * Southern Malaysia (Johor) * Northern & Eastern Malaysia (STB Kuala Lumpur) * Thailand & Myanmar (STB Bangkok) * Indochina (STB Ho Chi Minh)	GREATER CHINA EDMUND CHUA * Eastern China (STB Shanghai) * Southern China (STB Hong Kong) * Western China (Chengdu) * Northern China (Beijing) * Taiwan (STB Taipei)
	SECTOR DEVELOPMENT	SERVICE QUALITY JEFFREY ONG * Customer Information & Service * Service Assessment & Feedback * Service Culture	BRAND MANAGEMENT KEN LOW * Brand Development * Destination Communications	RESOURCE DEVELOPMENT LIM CHWEE SENG * Manpower Development * Infrastructure Development * Legislative Framework * Technology Development * Information Systems * Information & Knowledge Management

<p>PLANNING MONICA TOMLIN * Plans Analysis & Integration * Research & Statistics * Strategic Funding</p>				
<p>WORLD EXPO CHARLES LEONG</p>				
<p>SIGHTSEEING & ATTRACTIONS CHANG CHEE PEY * Culture & Heritage (Chinese) * Culture & Heritage (Peranakan, Indian, Malay & Arab) * Singapore Story * Nature & Island Attractions * Leisure Attractions</p>	<p>TOURISM SHOPPING OLIVER CHONG <i>(covering)</i> * Consumer Tech * Fashion * Wellness, Food & Gifts * Jewellery & Collector's Items</p>	<p>FOOD & BEVERAGE MARGARET TEO * Local Fare * International Cuisine * Nightspots & Beverage</p>	<p>LIFESTYLE & EVENTS CHRISTINE KHOR * Arts * Entertainment * Sports</p>	<p>CRUISE OLIVER CHONG * Cruise Marketing Development * Cruise Hub Development</p>
<p>NORTH ASIA ELSIE CHIA-OZAKU * Eastern Japan (STB Tokyo) * Western Japan (STB Osaka) * Korea (STB Seoul)</p>	<p>SOUTH ASIA, MID EAST & AFRICA CHEE LAY HONG * Southern & Eastern India, Sri Lanka & Maldives (STB Chennai) * Northern & Western India (STB Mumbai) * Middle East & Africa (STB Dubai)</p>	<p>WESTERN MARKET CHEW MIN SENG * Northern & Western Europe (STB London) * Central, Southern & Eastern Europe (STB Frankfurt) * Western US, Canada & Central America (STB Los Angeles) * Eastern US & Southern America (STB New York)</p>	<p>OCEANIA KEVIN LEONG * Australia (STB Sydney) * New Zealand</p>	
<p>TRAVEL & HOSPITALITY BUSINESS LIM CHWEE SENG * Hospitality Business * Travel Services</p>				

year in brief



SINGAPORE FOOD FESTIVAL 2002

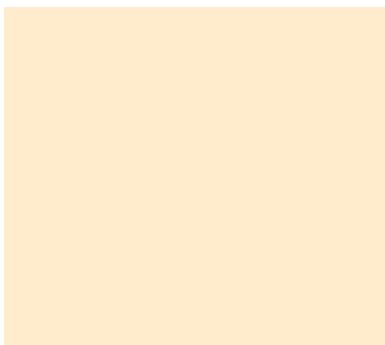
29 March – 30 April 2002

Themed *Feast Your Senses*, the month-long food festival was filled with 55 mouthwatering activities including the inaugural *Chilli Festival*, launch of the Central Singapore Community Development Council's *Food and Heritage Trail*, and a celebration of American culture and food called the *American Jamboree*. Other highlights included themed food events and a variety of culinary workshops hosted at unique venues such as the Asian Civilisations Museum. The festival saw a 45% increase in the total number of events organised, as compared to the previous year.

WORLD GOURMET SUMMIT 2002

7 – 13 April 2002

This week-long gastronomic festival showcased the culinary skills of renowned Masterchefs and winemakers from across four continents. The response to the Wine Master-classes and Masterchef Safaris was overwhelming with tickets sold out in advance. Among the renowned chefs were Marcus Samuelsson of Aquavit, New York; Sergi Arola of La Broche, Madrid; and Zhang Jin Jie of Green Tea House in Beijing. This year also saw the launch of two charity events. A Masterchef Safari was specially prepared for the Society for the Physically Disabled, and the James Beard Foundation Charity Dinner raised a total of S\$273,000 for the Community Chest of Singapore.



IRB SINGAPORE SEVENS

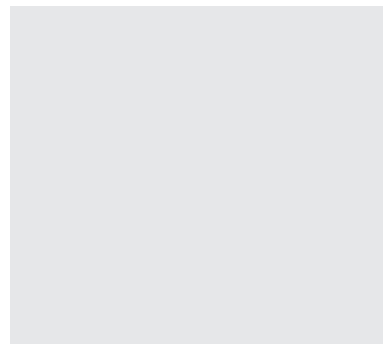
20 & 21 April 2002

Hosted by Singapore for the first time, the *International Rugby Board (IRB) World Seven Series* was an astounding success. 15,000 people attended the inaugural event where 16 national rugby teams, including New Zealand, Fiji, South Africa and Australia, pitched their skills against each other at the Singapore National Stadium. The event enjoyed international media coverage, with tourists making up 11% of the total attendance.

OFFICIAL LAUNCH OF IFEA SINGAPORE CHAPTER

10 May 2002

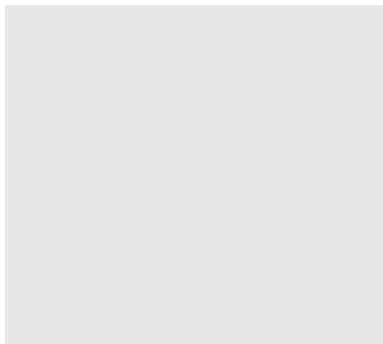
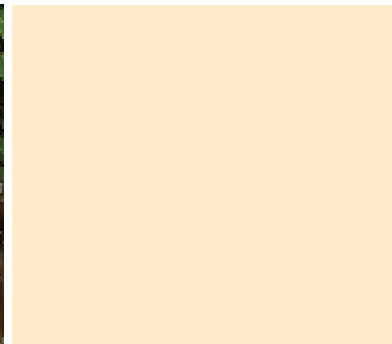
The first in Asia, the formation of the International Festivals & Events Association (IFEA) Singapore chapter was a major step towards raising the professional standards of the events industry. Through publications, seminars, an annual convention and trade show, and ongoing networking, the IFEA has provided cutting-edge professional development and fund-raising ideas to help advance festivals and events throughout the world. In November, Singapore won a record number of 20 awards at the prestigious IFEA Pinnacle Awards in Louisville, Kentucky, USA, for its staging of local events such as the *Singapore River Buskers' Festival*, *Chingay Festival*, and *World Gourmet Summit*, reaffirming Singapore's reputation as a flourishing events capital in Asia.



MORE REASONS TO SHOP

June 2002 – March 2003

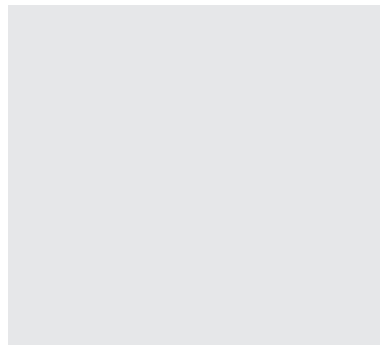
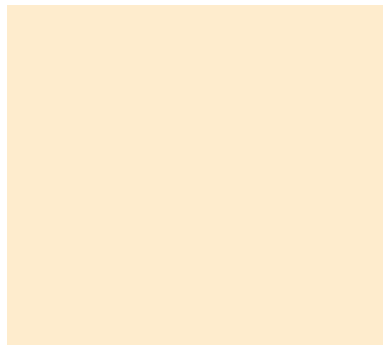
Popular fashion labels made a flamboyant entry into Singapore with Spanish label Zara launching its flagship store in Southeast Asia on 9 October 2002. Hot on the heels of Zara was the launch of Shanghai Tang's flagship boutique on 24 October 2002 at HPL House. The cult brand offers a wide range of home furnishings, accessories, novelty gift items, and a collection of men's, ladies' and children's apparel. Following these labels was the entry of another Spanish label, Women's Secret, in March 2003, offering yet another exciting range of lingerie and accessories.



THE GREENING OF CHINATOWN

21 June & 14 September 2002

Two historic parks at Chinatown, now known as Telok Ayer Green Park and Kreta Ayer Square, were both upgraded to make Chinatown more accessible, scenic, and pleasant for the residents to socialise in. Weaving an element of history and information within the green oases, a unique feature of Telok Ayer Green is a set of three sculptures depicting the lives of early immigrants. Over at Kreta Ayer Square, the main draw card is the trishaw park offering trishaw tours in and about the district.



WATER TRANSPORT SYSTEM

July 2002

The new integrated water transport system, introduced both to improve commuter accessibility and increase tourist activity around the Singapore River, sees the extension of riverboat services from the Marina Bay all the way upstream to Kim Seng Bridge. The alternative transport offers a combination of refurbished bumboats and modern vessels, and the frequency of services – including express, leisure, sightseeing and food & beverage cruises – has been increased, adding much vibrancy to life on and along the river.

CHINATOWN HERITAGE CENTRE

12 July 2002

A joint development between the STB and the National Heritage Board (NHB), the centre represents a key milestone in the STB's efforts to rejuvenate the historical district of Chinatown. The centre is housed in three meticulously restored shophouses on Pagoda Street. Through a series of carefully designed galleries, interactive exhibits and vivid anecdotes from former Chinatown residents, bring to life the rich heritage of Chinatown, reawakening the lifestyles, traditions and rituals of the people who once lived and worked there.

PEOPLE OF THE RIVER

23 July 2002

The *People of the River* sculpture series celebrates the rich heritage of the Singapore River, enhancing its promenades with nostalgic bronze sculptures depicting typical events of river life from the past. In July, the second installation, co-sponsored by Maybank and created by local sculptor Dr Aw Tee Hong, entitled *The River Merchants*, was unveiled. In August, two sculptures, *From Chettians to Financiers* and *A Great Emporium*, co-sponsored by Exxon Mobil and created by Mr Chern Lian Shan and Mr Malcolm Koh respectively, were launched at the Asian Civilisations Museum promenade and an existing sculpture entitled, *Fishing Boy*, located at The Riverwalk was incorporated into the series.



SINGAPORE INTERNATIONAL 24-HOUR ENDURANCE KART RACE

7 & 8 September 2002

Singapore's first street race in more than 30 years took place in Sentosa after a Le Mans style flag-off by Mr Chan Soo Sen, Minister of State for Community Development and Sports. Only the second race in the world to have received official endorsement from the world's highest governing authority in endurance kart racing, Commission Internationale De Karting (CIK), France, the event is the first of a three-part series in Asia. Despite a torrential downpour for most of the 24-hour race, all 25 teams, consisting of both international and local racers, completed the race. This inaugural event attracted international media coverage and positive feedback was received on the quality of the racecourse.

INAUGURATION OF THE NEW MERLION PARK

15 September 2002

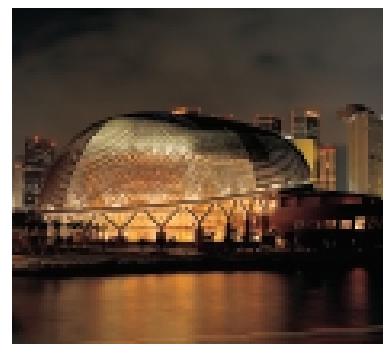
Senior Minister Lee Kuan Yew officially launched the redeveloped Merlion Park in September. Constructed on a reclaimed promontory beside One Fullerton, the park faces Marina Bay, providing a scenic view taking in the Bay area, the Esplanade, Benjamin Sheares Bridge and the new Downtown. The park also boasts a viewing deck offering views of the restored Merlion against the backdrop of the Central Business District. Returned to its former glory, stains have been removed, scales have been repaired with Shanghai plaster, and a new water pump system has been installed to ensure that the spouting Merlion performs with the vigour appropriate for an icon of Singapore.



ESPLANADE – THEATRES ON THE BAY

12 October 2002

The much anticipated launch of the Esplanade – Theatres on the Bay opened to great aplomb, ushering in a new era for Singapore – City for the Arts. With 11 venues offering a diverse range of visual and performing arts, the Esplanade features a 1,600-seat Concert Hall with world-class acoustics, and a 2,000-seat Theatre which renders a modern interpretation from the traditional European opera houses. In conjunction with the celebratory fervour of the opening, the STB organised an intense industry familiarisation and media programme to raise Singapore's Art City profile in key target markets. Attractive tour packages were also developed in partnership with overseas tour operators to attract more visitors to Singapore for arts and entertainment.

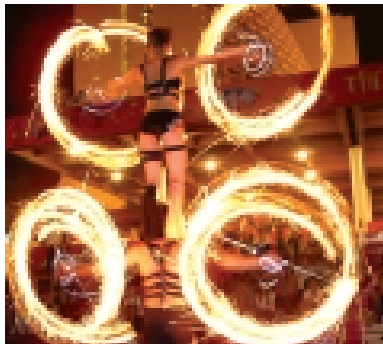




SINGAPORE MILLION DOLLAR DUCK RACE 2002

23 & 24 November 2002

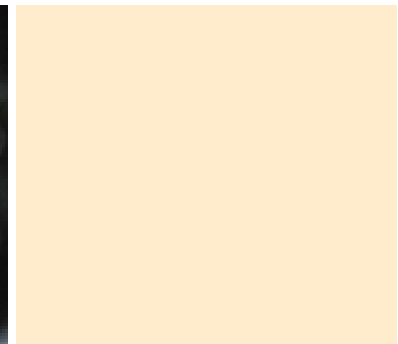
Held at the Singapore River, this popular charity event was expanded to a two-day carnival due to popular demand. In its fifth year, this year saw a record number of ducks raced at 123,500, and S\$1.235 million raised for charity. The four beneficiaries of the duck race were Metta Hospice Care, The Cancer Institute, The Straits Times Pocket Money Fund and TOUCH Community Services.



SINGAPORE RIVER BUSKERS' FESTIVAL 2002

16 - 24 November 2002

Since 1997, the nine-day street festival has added life and colour to the Singapore River district. Providing world-class entertainment through a myriad of street theatre, mime, comedy, magic, juggling and acrobatic performances by both international and local buskers, the annual event is free for all. Now Asia's second largest buskers' festival, the festival attracted more than 450,000 attendees, both local and overseas, and raised S\$350,000 for charity.



MTV ASIA AWARDS 2003

24 January 2003

Asia's largest pan-regional awards show returned for a second time to Singapore, attracting more than 45 international and regional artists such as Avril Lavigne, Jay Chou, Robbie Williams, Missy Elliot, Stefanie Sun, Linkin Park, Suede and MatchBox Twenty, with Shaggy and CoCo Lee helming the show as hosts. The event proved to be a hit and attracted more than 7,000 local and overseas music fans and positioned Singapore as a premier music and entertainment city of this region.



CALTEX SINGAPORE MASTERS

23 - 26 January 2003

For the third consecutive year, Singapore hosted one of the richest golf tournaments in Asia. As part of the Asian PGA Tour, the Masters series offered an impressive US\$900,000 prize catch, drawing world-class golf players such as World No. 2 Ernie Els, and Zhang Lian-Wei to compete at the event. Held at one of the most challenging and pristine golf courses in Singapore, the Laguna National Golf and Country Club, the event drew 18,000 people.

SINGAPORE FASHION FESTIVAL 2003

21 March - 6 April 2003

Even though SARS and the Iraq war affected the attendance of French haute couturier, Azzedine Alaia, the festival went on in definitive style as the Fall-Winter collection of prominent Italian prêt-a-porter designer, Ungaro, was immediately secured to replace the Alaia show. The festival drew more than 80,000 people to its eclectic mix of fashion-related events, up from 60,000 last year, and gained approximately S\$2 million worth of media coverage. Overseas visitors made up more than 10% of attendees.

fighting SARS

Tough times require united action, and fighting Severe Acute Respiratory Syndrome (SARS) has seen unprecedented collaboration within the tourism industry and Singaporeans rallying together as a community in late March 2003 as it combats the unexpected epidemic and endeavours to pick itself up from the crisis. At the onset of SARS, financial relief was extended to the industry, rigorous precautionary measures were implemented, and vigilance and social responsibility in a SARS environment were immediately encouraged and enhanced.

Public and private industry players collaborated in a spirit of determination and enthusiasm never witnessed before, as they worked in unison towards the goal of full industry recovery. In the face of the crisis, the STB, working hand in hand with the industry, implemented a three-tier recovery strategy to reverse the negative effects, once Singapore was taken off the World Health Organization's (WHO) list of SARS-affected countries on 30 May 2003. Those efforts were fruitful and the resilience of the industry demonstrated, as old partnerships were strengthened and new ones were forged in a common commitment to overcome this challenge, no matter how tough the fight.

The outbreak of SARS created much public anxiety, and took a severe toll on businesses across the whole spectrum of the economy. The hardest hit were tourism and transport related industries such as the airlines, cruise operators, hotels, restaurants, travel agents, the retail sector and taxi services. The strain on tourism began to show in the visitor arrivals for March which dropped by 15% followed by a decline of 67% and 71% for April and May consecutively. This sharp fall in inbound travellers caused average hotel occupancy rates to fall to 20-30%. Sales at retail outlets experienced a decline of between 10% and 50%, and taxi drivers' earnings plunged.

DRIVING INDUSTRY RECOVERY

Shortly after the SARS outbreak, on 17 April 2003, the government announced a S\$230 million Relief Package providing immediate assistance to the tourism and transport sectors. Measures included tax rebates, a reduction in the foreign worker levy, and the provision of bridging loans for tourism-related SMEs to help them tide over the difficult period. In the transport sector, taxi drivers were offered diesel tax rebates, and cruise ships benefited from a 50% reduction in port dues.

THE COOL TEAM

Together with the industry, a task force was immediately formed to tackle the crisis. Called The Cool Team, the task force had its first meeting on 29 April 2003. Consisting of representatives from both the private and public sectors, the group works closely with industry players to spearhead and implement SARS-precautionary measures within the industry, oversees relief efforts to assist the industry members ride through the difficult period, and provide guidance for the planning and implementation of the post-SARS recovery efforts.

STEP OUT! SINGAPORE

On 6 May 2003, the STB launched a S\$2 million *Step Out! Singapore* initiative to get Singaporeans to step out of their homes and the mindset of fear; and get back to living life normally. The initiative comprised enticing offers and value-adds to Singapore's various attractions, food and beverage outlets, thematic zones, nightspots and an exciting line up of events. The key message was to educate Singaporeans that it was alright to come out and have fun, that the fear due to SARS was unwarranted given that the situation was well under control in Singapore. This restoration of confidence and vibrancy in the local scene was a necessary precondition for the recovery of the tourism industry and visitor arrivals.

With an estimated 1.4 million participants, *Step Out! Singapore* was considered a huge success, contributing S\$250 million in economic spin-offs in May and June 2003.

SINGAPORE IS COOL

In a bid to give visitors that added assurance, the local tourism industry gave its full support to STB's launch of the Cool Singapore Award, which rewards local tourism related establishments for the implementation of rigorous anti-SARS precautionary measures. The roll out of this award was necessary in rebuilding visitors' confidence, and the priority was to set everyone's minds at ease, so that all could fully enjoy what Singapore has to offer. The campaign reinforced the message that rigorous precautions, even beyond what the Government and the WHO have recommended, were in place at these establishments.

Within three weeks, on 20 May 2003, 97 tourism related establishments received the Gold Standard for Best Practices in implementing SARS precautionary measures from Deputy Prime Minister Lee Hsien Loong in a ceremony at the Changi Airport. Comprising the Singapore Changi Airport, three limousine service companies, three convention and exhibition venues and 90 hotels, the responsiveness clearly demonstrated the industry's commitment towards SARS prevention. Changi Airport was the first airport in the world to have implemented contactless thermal scanner screening for all incoming and outgoing passengers to check for fever.

INTERNATIONAL RECOGNITION

We are proud to say that Singapore's efforts have not gone unnoticed on the world stage. Our measures at containing SARS and the part we have played in preventing a global pandemic resulted in the removal of travel advisories on Singapore by Australia, New Zealand and Canada, the US Center for Disease Control and Prevention, the World Bank and various other corporations.

Finally, on 30 May 2003, Singapore was taken off WHO's list of SARS-affected countries. This de-listing was the boost the industry needed to pick itself up. In the words of Dr David Heymann, Executive Director for Communicable Diseases at WHO, "From the start, Singapore's handling of its SARS outbreak has been exemplary... This is an inspiring victory that should make all of us optimistic that SARS can be contained everywhere." This endorsement by WHO on the effectiveness of SARS containment in Singapore triggered many more companies and organisations worldwide to remove their own travel restrictions to Singapore.

Within days from the de-listing from the WHO's list, the STB launched a global advertising blitz with a series of advertising placements in the main dailies of 14 markets across Asia Pacific, the Middle East, Europe and North America. The same campaign also appeared in three pan-regional publications – International Herald Tribune, Asian Wall Street Journal and Financial Times. The message was simple – Singapore was back in business and ready to welcome visitors back.

The advertisements carried endorsements from key representatives of the Singapore foreign business community. These advertisements were part of the immediate post-SARS confidence-building phase and an important first-step in recovery communications before the launch of the global tactical marketing campaign in June 2003.

SINGAPORE ROARS AGAIN

On 18 June 2003, Senior Minister of State for Trade & Industry and Education Tharman Shanmugaratnam launched "*Singapore Roars!*", the STB's S\$200 million sustainable tourism recovery initiative. With the aim of attracting four million visitors to Singapore between June to December, this campaign includes a line up of attractive deals and exciting events, travel and accommodation packages, roaring 'surprises' for visitors and intensive global print and broadcast advertising. The global recovery programme kicked off with a land and sea party extravaganza called *Singapore Roars!* at the Merlion Park, where the STB played host to over 500 local and international industry players and media.

Close collaboration between the Government and the tourism industry, and rapid implementation of robust measures have resulted in the return of industry and consumer confidence. Singaporeans are going out again, community life has been restored to normalcy, and the economy also began to show signs of recovery.

Despite the grave economic impact of the crisis, SARS has united the STB and the industry as a collective force in battling and confronting such situations. The lessons learnt and the experience gained were invaluable. The tourism industry, as a whole, has emerged stronger, and is definitely more well-placed should the sector be confronted with another crisis. The new spirit of partnership and collaboration will also give us the strength to lift the tourism sector in Singapore to new heights, as we tackle the challenges facing the industry in the coming years.

year in review

In 2002/3, the Singapore Tourism Board (STB) faced perhaps the most challenging year in its history. Far from abating, political and economic uncertainty increased. A little over a year after the devastating effects of September 11, the Bali bomb blasts of October 2002 threatened once again to cripple the recovery of an already weakened industry. The situation was further exacerbated as the Iraq war and the Severe Acute Respiratory Syndrome (SARS) epidemic followed one after the other, each challenge surpassing the other in negative impact. But regardless of the number and the scale of these setbacks, the Singapore tourism industry remained undaunted.

In November 2002, the STB attended the investiture of the ASEAN Tourism Agreement at the 8th Association of Southeast Asian Nations (ASEAN) Summit in Phnom Penh, Cambodia. Prime Minister Goh Chok Tong represented Singapore as the signatory in the Agreement that pledged to strengthen collaboration among ASEAN Member States in the fight against global terrorism and towards the enhancement of regional and international tourism.

At home, the STB curbed any further possible detrimental effects, and worked to bolster confidence in the industry. Resources were channelled towards reassuring trade partners and potential visitors of Singapore's commitment to visitor safety, with the marketing of Singapore as a great destination in which to *'Live it Up!'*. A S\$2 million ASEAN tactical campaign called the *Singapore Visitor Kit* was developed and launched in November 2002, to encourage intra-ASEAN travel. Targeting potential visitors from around the region, each kit was packed with S\$240 worth of vouchers offering freebies and discounts at key Singapore attractions, retail outlets and restaurants to visitors who stayed a minimum of two nights in Singapore.

On yet another collaborative note, the National Tourism Organisations and private sectors of ASEAN collectively developed a joint tourism marketing initiative entitled, *Visit ASEAN Campaign*, to forge closer tourism linkages amongst member states and promote the ASEAN region as one attractive destination. A highlight of the joint activities held in 2002 was the travelling *ASEAN Photo Exhibition*, staged in each of the ASEAN countries to showcase the attractiveness and charms of the various tourism destinations. At the end of 2002,

despite the bleak economic climate, Singapore recorded its second highest visitor arrivals of 7.6 million in its history and the tourism sector contributed S\$9 billion in tourism receipts. These strong numbers attest to the continued attractiveness of Singapore as a destination.

The visitors' demographic profile continues to shift as the number of tourists from Asia increases. Recognising this change as a growth opportunity, the STB channelled resources towards these burgeoning markets to boost the potential of regional tourism. Arrivals from China grew by 34.7%, fuelled by intensive promotions for group travel and the country's stellar economic growth. Likewise, India recorded a 10.5% increase in visitor arrivals. Indonesia, which remains Singapore's largest visitor-generating market, registered modest growth at 2.1% up on the previous year.

Beyond tourism's contribution to the national economy, the industry continued to add value to the overall quality of life in Singapore. The opening of the much anticipated Esplanade – Theatres on the Bay, heralded a new era of culture in Singapore, strengthening its image as a *'City for the Arts'*. With the STB's support, Singaporeans were presented with an eclectic variety of world-class performing arts events, including international productions such as *Fame – The Musical*, *Singin' In The Rain* and *Oliver!*. Homegrown productions such as Wild Rice's *Animal Farm*, Singapore Repertory Theatre's *Honk!* and Action Theatre's *Proof* were given marketing support through the STB's marketing channels.

The visual arts was not to be left behind either. The opening of the Singapore Tyler Print Institute, and the staging of prominent exhibitions featuring world-renowned artists such as Master sculptor, Rodin, and the return of the five-day contemporary Asian art fair, *ARTS Singapore*, raised the profile of Singapore's visual arts scene. Film buffs had their fill of the avant garde when the Singapore *International Film Festival* returned for the 16th year. Showcasing over 350 films from 40 countries, it continued its focus on Asian cinema and Digital films, and attracted 61,600 people.

Not to be outdone, the Singapore retail sector made its own spirited defence. Popular foreign labels continued to multiply, enhancing Singapore as a shopping haven and offering even greater variety. Blazing a trail was popular Spanish label, Zara, making a stylish entry into Takashimaya Shopping Centre in October 2002 and then at Liat Towers in May 2003 soon after. Hot on its heels were another Spanish label, Women's Secret, and Hong Kong cult label, Shanghai Tang, which launched its flagship store of over 6,000 square feet at HPL house. Over at Scotts Walk, DFS launched its 113,000 square feet flagship boutique in January 2003, housing a plethora of international brands.

Once again, the *Great Singapore Sale (GSS)* ignited a shopping frenzy in June. From the bazaars of Clarke Quay and Chinatown to the glitzy designer boutiques of Orchard Road, deal-hungry shoppers were not left disappointed. This was evident in the three-fold jump in the number of GSS tour packages sold, from over 8,000 in 2001 to over 25,000 packages in 2002.

Food continued to be a major draw for visitors to Singapore. The return of two annual events – the *Singapore Food Festival* and the *World Gourmet Summit* – reaffirmed Singapore's position as the undisputed food capital of the world. These gastronomic events which featured demonstrations by renowned Masterchefs, thematic dining, and other food-related events, offered visitors the chance to savour a truly multi-cultural buffet of exquisite flavours. The *World Gourmet Summit* showcased the culinary skills of 13 renowned Masterchefs, four guest chefs and 10 winemakers, and featured for the first time the James Beard Foundation Charity Dinner, raising S\$273,000 for the Community Chest of Singapore. The *Singapore Food Festival* also saw a marked increase of over 45% in the total number of events, with a record number of 55 events organised.

The spa industry achieved a milestone with the opening of The Sentosa Resort & Spa, Singapore's first garden spa. A lush tropical enclave located within the grounds of The Beaufort Singapore on Sentosa, the new concept enhances Singapore's emerging status as a spa destination. To raise the credibility and professionalism of the industry, the Singapore Spa Association, in partnership with the Licensing Division of the Singapore Police Force, launched an accreditation scheme to differentiate spas from massage parlours. All spas seeking membership to the Association must undergo the accreditation scheme, allowing more recognition to be accorded to reputable spas.

In sports, Singapore played host to high-profile international events. The *Caltex Masters Singapore 2003*, presented by Carlsberg, swung its way back into Singapore for a third year, offering one of the highest prize purses in Asia at US\$900,000. Singapore also witnessed its first professional public street race in nearly 30 years, the *Singapore International 24-hour Endurance Kart Race*, held at Sentosa. Adding to the adrenaline-pumping line up was the first *International Rugby Board (IRB) Singapore Sevens*. 16 world-class rugby teams, including South Africa, England and New Zealand, pitted their skills against each other at the National Stadium. The event was attended by 25,000 rugby enthusiasts.

The STB continued to boost Singapore's cruise hub profile by participating in the annual Seatrade Cruise and Shipping Convention held in Miami, USA and co-organising joint trade and consumer promotions with selected cruise lines in the targeted Asia Pacific markets such as China and India. Besides Star Cruises' Superstar Virgo, Singapore also welcomed many other international cruise ships such as the Queen Elizabeth 2 and Regal Princess into our waters.

The enhancement of ethnic zones continued to be an important focus for the STB. The opening of the Chinatown Heritage Centre is a key milestone in the STB's efforts to rejuvenate the historic district of Chinatown. Housed in three painstakingly restored shophouses on Pagoda Street, the centre is a heritage bank of the memories, sights, sounds and smells of Chinatown.

Over at Little India, the ongoing project to install heritage markers at 33 sites of heritage and historical significance is now nearing completion. Led by the STB and in collaboration with the National Heritage Board and the Central Singapore Community Development Council, these markers allow tourists to embark on a trail uncovering the history of Little India, and its rich heritage.

Along the Singapore River, the new integrated water transport system was launched to improve accessibility, boasting extended riverboat services from Marina Bay all the way upstream to Kim Seng Bridge. The river's promenades at Boat Quay were also enlivened with new sculptures, growing the collection of *People of the River* series at the Singapore River from three to five. Another major enhancement to the waterfront was the relocation and redevelopment of the Merlion Park. Decked on a reclaimed promontory beside One Fullerton facing Marina Bay, the park showcases the iconic Merlion restored to its former glory.

Across the continents, the STB continued its aggressive marketing campaign in destination marketing and promotions. STB China embarked on a S\$2.5 million advertising campaign, featuring Singapore's homegrown international star, actress Fann Wong.

STB Korea exploited the hype surrounding *World Cup 2002*, launching concurrently a revamped website and a free-ticket-to-Singapore promotion called *Korea Scores, You Go Singapore*. The drive was an enormous success with over 20,000 registrants attracted to the website and 90 tickets to Singapore given away.

STB Oceania also harnessed technology to its advantage, launching a website specifically tailored for both trade and consumers in Australia and New Zealand. Offering comprehensive information such as itineraries, competitions and announcements for consumers, and special deals for agents, the website attracted more than 35,000 visitors within the first month of its launch, with 1,300 travel agents registering their details, surpassing the initial target of 300 agents.

Promoting Singapore through trade agents remained an important avenue for reaching out to potential business and leisure visitors, and the STB continued to strengthen its relationships with key agents worldwide. In Los Angeles, the *Singapore Specialist*

Programme was launched for frontline travel agents to deepen their knowledge of Singapore, and as a result, sell Singapore more effectively. The online educational programme has attracted more than 1,700 participants and the STB team has been awarded a silver Adrian advertising award by the Hospitality Sales & Marketing Association International (HSMAI) for this innovation.

To boost Singapore's profile overseas further, the STB also participated at the *Internationale Tourismus Bourse (ITB)* in March 2002, the world's largest travel show held in Berlin. Press dinners were held in Munich, Hamburg and Berlin, and the STB team met with journalists to promote the latest developments in Singapore. This was followed by the board's participation at the *World Travel Mart (WTM)* in London. Held in November, pre-WTM functions were also organised in Dublin and Manchester to stimulate interest among local travel agents. Providing an energetic twist to the Manchester function was Addamm Low, previously a resident DJ at ZOUK. His music showcase helped to raise awareness of Singapore's vibrant nightlife.

For the Meetings, Incentives, Conventions & Exhibitions (MICE) segment, the Union of International Associations (UAI) has once again ranked Singapore the 5th Convention City in the world and 1st in Asia for 20 consecutive years. Prestigious meetings, including the IMF/WB (International Monetary Fund/World Bank) Annual Meetings 2006, the 117th Olympic Committee Session 2005, the World Economic Forum East Asia Economic Summit 2003, and the TFWA Asia Pacific Conference and Exhibition were clinched. In addition, the Asian version of the world's biggest textile machinery show ITMA Asia made its first debut in Singapore and attracted almost 30,000 participants and occupied 60,000 square metres of exhibition space. Incentive traffic has also been encouraging, with good growth from emerging markets such as India, China and North Asia, with major groups such as Prudential Korea Incentive Group, totalling 2,800 delegates and the Sansui Dealers India Incentive, attracting 2,000 overseas delegates.

To rev up the tourist experience further in Singapore, the STB supported the introduction of a themed entertainment tour on land and sea called 'Duck Tours'. Enabled by a 'duck-like' amphibious ex-military vehicle, the inaugural route covered the Suntec areas, Nicoll Highway, parts of the Civic District and Kallang Basin.

The STB also facilitated the formation of the Pubs & Clubs Industry Panel to boost the quality and growth of pubs and clubs in Singapore. Comprising key representatives and stakeholders from the industry, the Panel has proven to be a credible representative body for the industry, and has provided invaluable input to the Advisory Panel for Licensing (APL), enabling certain operational constraints on regulations, such as bar top dancing, to be liberalised.

Helping the local tourism industry to upgrade itself and stay competitive is one of the STB's priorities and the Tourism Development Assistance Scheme was developed to enable this. Providing financial assistance to fund improvements in areas such as business infrastructure and Research & Development (R&D), the scheme is open to all Singapore-registered tourism and travel related businesses. In the year under review, a total of S\$21 million was granted to 95 applicants.

The STB also worked with the Urban Redevelopment Authority (URA) in consultation with hotel industry players to review the Hotel Core policy. With effect from 1 September 2002, the Hotel Core Policy was relaxed in line with the government's move towards a pro-business determination of hotel demand and supply. Now, only 29 hotels fronting Orchard Road, Scotts Road, Marina Centre, Singapore River and Havelock Road are safeguarded by the policy, as opposed to 48 previously.

On the technology front, the STB continued to leverage on the latest IT innovations to enhance visitors' experience and to make it as seamless as possible. Visitors to the Peranakan Gallery in the Asian Civilisations Museum, Armenian Street, can now carry a Sennheiser audio guide with them. As visitors approach the exhibits, an animated narration describing the exhibits is triggered. Other services available include the iTrove and TOM PDA-based guides run by consortiums led by HP and NETS/National Computer Services respectively. These guides, available for loan at selected hotels in Singapore, enable visitors to obtain comprehensive tourist information at their fingertips, and allow phone calls and internet access to be made through GPRS. These innovative new private sector services were encouraged by STB, and were given TDAS grants to aid their development.

CHANGING TIMES

As the year under review was entering its last quarter, the STB's organisational structure was overhauled in order to drive future growth in Singapore's tourism industry. Prior to the re-organisation, nine months were spent on examining issues and monitoring challenges facing the tourism industry. Among the STB's concerns were to develop strategies that could aggressively target and tap key and emerging markets; capitalise on the growth of regional tourism; create distinctive tourism products and experiences; develop the industry and channels of distribution; encourage investment promotion; and entrench Singapore as a tourism capital. It was decided that a new structure was necessary to meet these challenges effectively, and this came into effect on 1 February 2003.

During this time of internal transition, the global tourism industry was once again unexpectedly shaken by world events. The Iraq war created further economic uncertainty, but of even greater economic impact was the outbreak of the SARS virus, particularly on the Asian tourism industry. The tourism landscape was again faced with unwelcomed and unexpected change, which nevertheless had to be dealt with decisively.

The STB has taken on the role of rallying the industry to face these challenges. Singapore's ability to bounce back after the crisis once again underscored the collaborative spirit which exists between the public and private sectors, and the collective tenacity of the tourism industry in the face of unparalleled adversity.

The following sections describe how the tourism industry has risen to the challenge of the SARS outbreak, the rationale for the STB's internal restructuring, and resulting from that, the activities initiated in the final quarter of the financial year, which chart the direction for the future.

the call for change

Despite the ups and downs of the industry, over the past decade, Singapore has seen an increase in visitor arrivals of more than 25%. In 2002, Singapore recorded its second highest visitor arrivals, at 7.6 million. Tourism Receipts, however, have not seen a corresponding increase, and the sector's contribution to GDP has declined.

To reverse this decline, a growth target was set. STB targets to increase the tourism sector's contribution to Singapore's economy to S\$20 billion by 2012. To achieve this, tourism receipts must grow by 8% per annum.

The STB believes that such growth is achievable. The changes in the global tourism landscape over the last few years have produced new opportunities for us to exploit. The World Tourism Organization anticipates international tourists arrivals to the East Asia and the Pacific to reach 397 million by 2020, up from 87 million in 1998. Out of this total, 135.8 million (or 35%) people are expected to visit Southeast Asia. This represents an average annual growth rate of 7.8% between the years 2000 and 2010, and 7.4% between 2010 and 2020.

The STB's target of achieving an 8% annual growth is therefore within reach if we can stimulate travel to Singapore through intensification of tourism initiatives and strategic reallocation of resources. ASEAN, China and India, for example, have emerged as key markets, accounting for 47% of visitor arrivals to Singapore in 2002. Simultaneously, there are existing segments such as healthcare and education services, which Singapore is well positioned to tap into and generate growth for its economy. In order for us to maximise such opportunities, we need to respond quickly to strengthen Singapore's appeal as both a business and leisure destination.

Already by the end of 2002/2003's financial year, we have reviewed our strategies and resource allocation, and a new organisational structure is now in place to meet the challenges of 2003/2004 head on. STB's two new core groups, namely, the Strategic Tourism Units and International Operations, are leading the drive for growth.

THE ENGINE FOR GROWTH

Eight Strategic Tourism Units have been established to reflect the core purposes underlying most visitor arrivals. These STUs are: Business Travel & MICE; Education Services; Healthcare Services; Sightseeing & Attractions; Tourism Shopping; Food & Beverage; Lifestyle & Events; and Cruise. With the strategic priority of rejuvenating core segments such as shopping and sightseeing, growing the cruise, events, food and beverage as well as business and MICE segments, and developing emerging healthcare and education segments, the units will work very closely with the industry to develop exciting and innovative experiences to entice more visitors to Singapore.

To boost performance, the STUs now operate like business units in the private sector. Performance targets are set and each unit manages a broad range of tourism activities, including product development, industry development and investment promotion, marketing, as well as channel development to ensure the viability of the tourism sector.

INTERNATIONALISING OUR EFFORTS

To market Singapore effectively overseas, the STB's International Operations have been restructured into seven groups. Apart from its presence in traditional markets such as Japan, Korea, Oceania and the Western Markets, more resources are being committed to tap into the potential of emerging regional markets such as ASEAN, China and India. These extended networks of regional offices undertake an entire range of tourism functions, including tourism marketing and investment promotions. With 16 Regional Offices, 6 Marketing Representatives and 2 VisitSingapore Offices (in China) established around the world, our extensive geographical reach ensures that Singapore remains visible overseas, and continues to be a 'must-visit' destination.

strategic tourism units



BUSINESS TRAVEL & MICE

Vision: To maintain Singapore's market leader position in the Meetings, Incentives, Conventions and Exhibitions (MICE) industry, and to be the top business hub in Asia Pacific.

Leveraging on Singapore's reputation as the premier host destination for international conferences and events, the MICE segment will roll out several key initiatives to increase tourism receipts. Among its strategies include the encouragement of integrated industry marketing efforts. The STB will work with the industry to develop more Asian versions of international tradeshows and to secure more high-profile events for Singapore. More efforts will also go into industry and product development, upgrading the standards of the local industry and strengthening Singapore's competitiveness. Another key initiative in the pipeline is a new global MICE campaign that will engage and involve industry participation.

For Business Travel, plans are in place to enhance the business traveller's experience in Singapore, extend their length of stay and entice them to bring along their families and companions. This will be achieved through better packaging and greater publicity of the value and range of experiences available.



EDUCATION SERVICES

Vision: To establish Singapore as a premier education hub in Asia offering a diverse and distinctive mix of educational services.

As Singapore relies heavily on its human resources to ensure economic prosperity, it has strengthened its education foundation in order to equip its people with the necessary skills to remain globally competitive. These efforts are paying off in terms of increasing interest shown by students and executives, particularly from regional countries, to further their education here.

The launch of *Singapore Education* got off to a good start with an official launch event in August 2003 which was graced by Singapore's Minister of Trade and Industry, Brigadier-General George Yeo. In his speech, he upped the ante by setting the challenge for the total education sector to increase its contribution to the economy from 3.6% to 5% in the next decade.

Education Services hopes to grow its share of the international market with initiatives in marketing, provision of information services and enhancing students' study experience in Singapore. Close collaboration with education services providers will be critical to its success.

Some of the initial efforts of this division include the setting up of the Singapore Education website to provide information on the diverse and distinctive mix of education services available in Singapore. This comprehensive and reliable website will soon feature a variety of languages including Simplified Chinese to reach out to China, one of the key markets. It will also be supported by the release of a video and brochures. A student services hotline was also set up to handle queries from international students.

Education fairs will be a key component in targeting overseas students. The division has and will participate in fairs in countries such as Dubai and Vietnam. It will also participate in the *World Grad School Tour*, which would cover nine cities. Such events are an excellent springboard to showcase Singapore's education services.

Through these promotional efforts, Education Services aims to establish Singapore as a choice venue for education that is safe, cosmopolitan and conducive for studying.



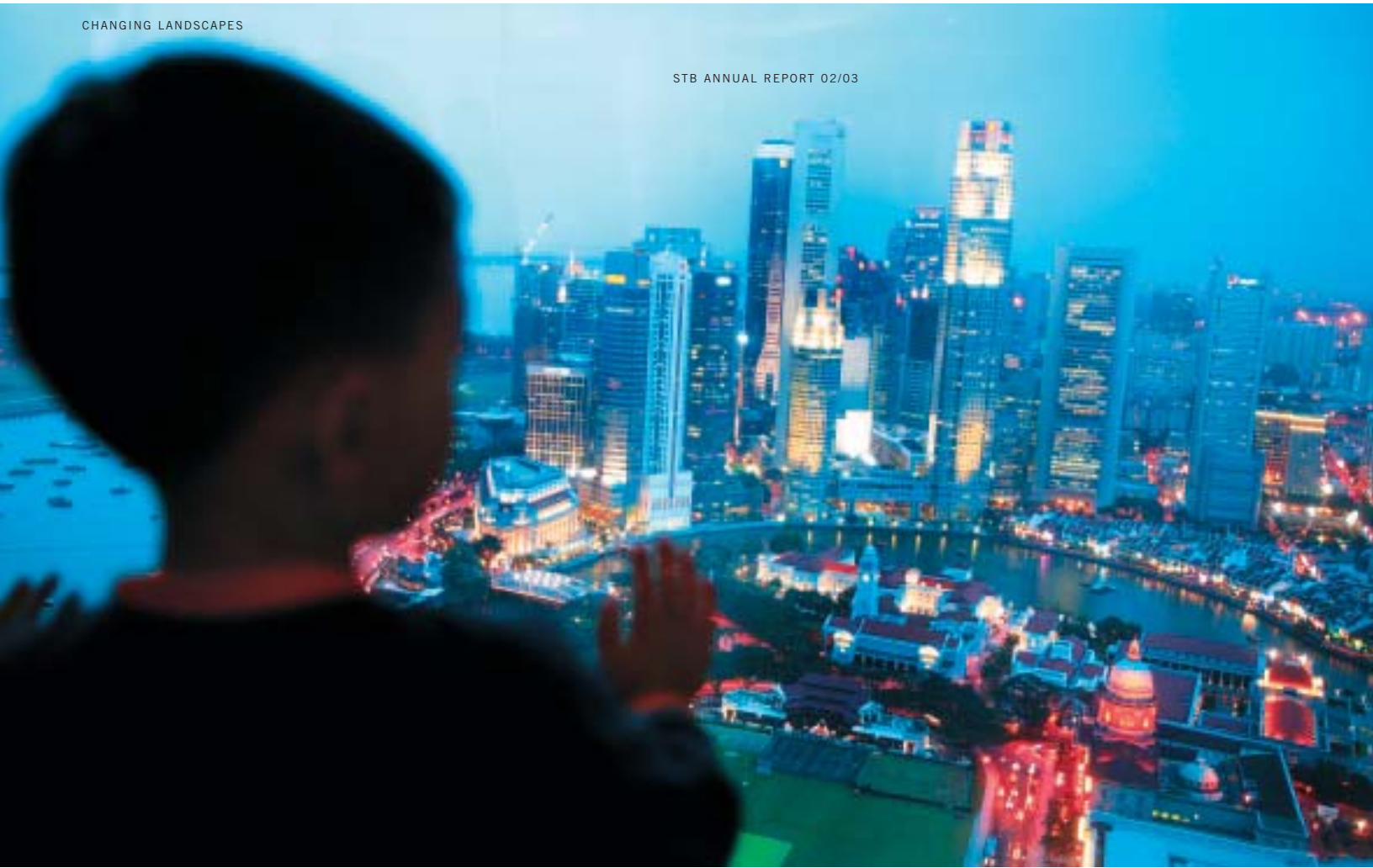
HEALTHCARE SERVICES

Vision: To establish Singapore as Asia's Premier Healthcare Services Hub.

To reinforce and promote Singapore as a healthcare hub for international patients, Healthcare Services is aggressively promoting the *SingaporeMedicine* brand through a national-level marketing initiative to augment the industry's overseas marketing activities. Apart from helping healthcare providers expand their overseas referral channels and cultivating customer segment-specific channels, Healthcare Services is also facilitating the development of innovative healthcare and healthcare-cum-leisure packages to enhance the health visitors' experience.

The Healthcare Services has since embarked on building the branding and marketing infrastructure and this includes the development of the *SingaporeMedicine* website and various marketing collateral. Assistance schemes and incentives have also been developed to raise the level of overseas marketing and business development activities of healthcare providers.

Other upcoming initiatives include the launch of *SingaporeMedicine* information centres at Changi Airport to promote Singapore's healthcare services to passengers; participation in foreign tradeshows and roadshows to heighten the profile of Singapore; and the development of various language versions of the *SingaporeMedicine* website and brochures to reach out to the various target markets such as Indonesia and the Middle East.



SIGHTSEEING & ATTRACTIONS

Vision: To establish Singapore as an epicentre of discovery and lifestyle escapism.

With an eye to the burgeoning potential of Asian markets, the Sightseeing & Attractions division aims to continually reinforce the vibrancy of Singapore as a culturally diverse, must-visit destination. To complement Singapore's allure, linked regional packages are being developed with travel trade partners to promote a holistic and multi-faceted travel experience. Sightseeing & Attractions also seeks to engender greater local patronage of our attractions, so that their business viability will be sustainable, and the overall visitor experience is diverse, exciting and yet culturally rich.

One of the foremost priorities for Sightseeing & Attractions division is to develop unique and experiential storyboards for the various ethnic quarters, attractions, nature and lifestyle offerings around Singapore. Product developments and enhancements, marketing, packaging and conceptualisation of fascinating trails as well as promotion of events are some of the initiatives implemented by the division.

Among the lifestyle and entertainment projects that the STB has embarked on is the development of the *Singapore Flyer*. When completed, it will be one of the world's highest observation wheel. Costing S\$200 million, this marks the largest foreign direct investment in a themed attraction in Singapore. Also in the pipeline is the establishment of a *Merlion Gallery*. Since its inception in 1964, the Merlion has established itself as the tourism icon of Singapore and it is timely to have a dedicated space to tell its story and the various milestones in its history. The coming year will also see the opening of the *Toy Museum*, which will house eclectic collections of international toys from the past and the present.

The Sightseeing & Attractions division will continue to enhance the cultural and heritage thematic zones such as Little India, Chinatown and the Singapore River to enliven and diversify the tourism landscape. Over in Katong, a cluster of shops showcasing the unique Peranakan arts and crafts have opened and Peranakan themed tours are also being developed by travel agents, offering visitors yet another facet of Singapore's multicultural heritage unique to the region. Also on the agenda are plans to develop new nature events such as the *Singapore Orchid Festival*, *Singapore Blooms*, and *Wildlife@Orchard*. Efforts will also be directed towards creating new eco-tourism products, such as new nature walking trails and farm tours, as well as to train more nature guides under the new *Specialist Tourist Guide* programme.



TOURISM SHOPPING

Vision: To be Asia's Premier Tourist Shopping Capital.

The Tourism Shopping division will focus on positioning Singapore as the choice shopping destination of the region, by concentrating on building Singapore's competitive edge in the region, and rejuvenating popular product segments such as beauty and wellness, electronics, fashion, jewellery, watches, antiques and carpets. Through collaborations with industry partners and overseas intermediaries, the Tourism Shopping division will build a tourist shopping image that is of high quality and yet diversely fun, enhancing the overall shopping experience by increasing product range, ensuring quality, enhancing product value, growing and developing shopping events and cultivating an excellent service culture.

Since the inception of the Tourism Shopping division this year, *Fashion Festival 2003* and *Great Singapore Sale 2003* have successfully taken off despite the outbreak of war in Iraq and SARS in Asia. The 10th anniversary *Great Singapore Sale* was launched spectacularly at Orchard Road, and the *Singapore Fashion Festival* opened with the launch of Ungaro's Fall-Winter collection.

In the coming years, the division will focus its efforts on boosting the quality and reputation of events and campaigns such as the *Singapore Fashion Festival*, in order to build international brands that will stimulate foreign interest and increase tourism receipts in the long run.

To ensure quality purchases for every tourist, quality accreditation systems for jewellery and electronics goods will be implemented. Enriching the calendar of shopping events, the Christmas shopping experience on Orchard Road will be hyped up to tie up with the much-celebrated Christmas Light-Up, along with other new events like *Singapore JewelFest*, *SITEX* and *Wine for Asia* in 2003. Shopping guides and niche product brochures will also be launched to make shopping in Singapore even more accessible and enjoyable.



FOOD & BEVERAGE

Vision: To establish Singapore as an irresistible food and nightlife destination offering a myriad of cuisines, unique dining experiences and vibrant nightlife.

Food has always been a passion for Singaporeans. As a cosmopolitan, multi-cultural and multi-ethnic city, Singapore offers unique local fare and is also a congregating point for cuisines from all over the world. Food is therefore a natural strength that Singapore can tap on to draw visitors. As an immediate key initiative, the top 'must-try' Singapore local dishes will be identified. These, together with a whole host of international cuisines, top local chefs, prominent food personalities and gourmet trails will be used to aggressively profile Singapore as a food haven. Signature events such as the *Singapore Food Festival* and the *World Gourmet Summit* are fast gaining world recognition. They will continue to be staged and enhanced, helping to entrench Singapore as the Food Capital of Asia.

Complementing the gourmet landscape is the thriving nightlife in Singapore. Boasting the largest concentration of pubs and clubs in an urban setting, Singapore's watering holes are perfect in energising the brand-building effort of positioning Singapore as an exciting city. World-class events such as *ZoukOut Singapore* will be further cultivated. Singled-out as Southeast Asia's definitive outdoor dance music festival, this event is a power-packed dusk-to-dawn weekend dance event with adrenaline-pumping line up of bands and super-nova DJs, promising high-octane soundtracks and exhilarating good times in Singapore. Regular pub crawls, ferrying visitors to the many different pubs and clubs, will also be developed to heighten the profile of the mind-boggling range of the nightlife products.

Distinct food and nightlife precincts have been carved out for aggressive cultivation and product enhancement. This, coupled with keen product spotting, will add up to the division's effort to evolve Singapore into a pulsating city, with food and nightlife taking centrestage.



LIFESTYLE & EVENTS

Vision: To be the events capital of Asia.

The Lifestyle & Events division has several strategies in place to realise the vision of transforming Singapore into the Events Capital of Asia. Responsible for overseeing the arts, entertainment and sports segments, key strategies include investment promotion, industry development and channel development.

Under investment promotion, the division aims to encourage quality foreign event organisers and talent to base their activities here. This rooting of world-class international companies in Singapore will help to position Singapore as the Asian hub for the events industry. To boost industry development, the division will groom and develop the local events industry into international companies capable of producing world-class events. The division will foster a close working relationship with industry organisations such as the International Festival and Events Association (IFEA) and the Association of Concert and Events Managers Singapore (ACEMS) to ensure a constant flow of quality events. To facilitate channel development, the division will lead in driving events tourism by working with industry partners to create initiatives like events-themed travel packages and other incentives to bring in tourists to attend events in Singapore.

In addition, the Lifestyle & Events division will oversee a calendar of blockbuster events to enhance the tourism landscape. Iconic events will be continually initiated and developed so that Singapore stands out as the choice city for travellers looking to participate in the world's best events.

*ARTS*Singapore, Southeast Asia's largest art fair will make a return for its fourth year in April next year, enhancing the auction seasons of Sotheby's and Indonesian-Dutch auctioneer Larasati-Glerum's. The *MTV Asia Awards* returns for the third time on Valentine's Day, reaffirming Singapore's strength in hosting world-class events and signalling the growing recognition of Asian talent. Providing the best of family entertainment in June 2004 is *Pinocchio on Ice*, and the return of world-class comedians in the *Just For Laughs* series in September will give pleasure to locals and visitors alike. As a festive city, Singapore's events calendar boasts well-loved festivals in the following categories: Arts, Comedy, Children's, Film and Buskers. Offering both participatory and spectator sports events, the Sports Department's highlights include the *F1 Powerboat*, *Standard Chartered Singapore Marathon*, the *International Rugby Board Singapore Sevens*, the *Caltex Masters* as well as the *Passport to SmackDown!* by *World Wrestling Entertainment*.



CRUISE

Vision: To establish Singapore as the premier cruise hub in Asia Pacific.

The Cruise division has several strategies in place to help entrench Singapore's position as a cruise hub. In line with attracting major international cruise operators to base ships and operate cruises out of Singapore, the division is looking into expediting the building of a new cruise terminal at Marina South.

To generate demand and increase spending on cruise products, close partnerships are also being established with our ASEAN neighbours and the travel industry with the aim of offering more exciting cruise packages to generate demand and increase spending on cruise products. To heighten the visibility of Asia in the global cruise industry, the STB is spearheading the region's collective efforts as an up and coming cruise region at *Seatrade Miami 2004*.

A study on Asian cruise markets will also be conducted to convince international cruise operators that there is a healthy demand for Asian cruise products outside of Asia, in particular Singapore. Targeted for completion by the end of 2003, research findings will be shared with major international cruise operators and the division will collaborate closely with them on its marketing strategies.

international operations



ASEAN (ISLANDS)

The main focus for STB ASEAN (Islands) is on the family, but with an increasing number of youths stopping over in Singapore for education or a short holiday, the STB decided to target this market with a key marketing tool. A MTV Coffee Table Book was launched in August 2002, projecting Singapore as a hip and happening destination with a multi-faceted appeal. The book was released in Singapore, Jakarta, Manila, Kuala Lumpur and Bangkok, and features seven MTV Asia VJs enjoying Singapore to the fullest in various settings such as popular nightspots, diverse food outlets and designer boutiques.

The year-end saw the region's air traffic affected by the Bali blast. To boost travel as well as to leverage on intra-regional travel, the *Singapore Visitor Kit* was launched, offering travellers S\$250 worth of vouchers redeemable at retail shops, F&B outlets and attractions. Over 25,000 kits were given away and visitor arrivals from various ASEAN markets rose between 12% and 15%. Following the visitor kit, a *Hong Bao Promotion* was implemented to encourage travel into Singapore during the Chinese New Year. Over 50,000 Hong Baos, containing an exciting mix of vouchers, were given away. Visitor arrivals from Indonesia recorded a robust 20% growth during this period.

Even though the advent of the SARS outbreak sent the tourism industry into a spiral once again, any negative effects were fortunately contained through collaboration with trade partners. Trade seminars and tours were swiftly organised to update tour agents and the media on SARS and Singapore's recovery plans. On the consumer front, attractive discounts were offered to consumers to lift short-term visitor arrivals.

LOOKING AHEAD

The new financial year should see the smooth roll-out of the *Singapore Roars!* recovery campaign, as STB ASEAN (Islands) and its partners collaborate to revitalise the tourism industry through a series of joint promotions, including up to 40% discounts off regular travel packages. To heighten awareness of Singapore in Indonesia and the Philippines, the office will soon develop information networks throughout the markets such as an information centre in Jakarta for the trade and public as well as organise more consumer and trade shows.



ASEAN (MAINLAND)

STB ASEAN (Mainland)'s coverage includes Peninsular and East Malaysia, Thailand, Vietnam and the rest of Indochina markets.

This year, the office continued its aggressive drive to attract more regional visitors. Between the months of October 2002 and February 2003, a four-month tactical campaign was rolled-out through newspapers, radio and television to generate incremental visitor arrivals during the *Celebration Singapore* period. To reinforce Singapore's image as a cosmopolitan, vibrant and exciting holiday destination, the MTV Coffee Table Book was released in August 2002, supported by a launch party at Planet Hollywood in both Kuala Lumpur and Bangkok to generate consumer excitement and media publicity.

In Malaysia, the office ran a promotional campaign, *More Ways to Live it Up!* in Singapore, in The Star, Malaysia's most widely circulated newspaper. Providing weekly updates to Malaysians about the latest happenings in Singapore, the office also ran monthly full-page colour advertisements to promote performing arts events. To promote greater usage of the Causeway and the second Link at Tuas, a consumer promotion was organised at Bintang Square, Kuala Lumpur, to promote driving packages from Malaysia to Singapore.

STB ASEAN (Mainland) also actively participated in consumer and travel trade shows in the region. This includes the organisation of a sales mission to Bangkok and Kuala Lumpur involving 25 Singapore tourism businesses, as well as participation in the Malaysian Travel Agents Associations (MATTA) Travel Fairs in both Kuala Lumpur and Johor Bahru involving 15 Singapore industry organisations.

LOOKING AHEAD

STB ASEAN (Mainland) has several initiatives in the pipeline. It will engage in active channel management to ensure prominent shelf presence, availability and promotion of a diverse range of Singapore packages and products in close collaboration with in-market and Singapore industry partners. The office's integrated destination branding, geared towards marketing Singapore as a vibrant and culturally diverse city with world-class infrastructure, will focus on boosting the leisure, business travel & MICE, healthcare and education segments. To enhance the Singapore visitor experience, the office will launch an integrated service to potential travellers encompassing information support, channel referrals and post-trip feedback mechanisms. This feedback can subsequently be tapped on to improve Singapore as a business and leisure destination. The office will also be expanding its regional outreach by opening new offices in Kuala Lumpur, Johor Bahru and Ho Chi Minh City.



GREATER CHINA

Visitor arrivals from Greater China have been steadily increasing in the last few years, with an increase of 15.1 % in visitor arrivals for Greater China as a whole over the previous year, and total tourism receipts increasing by 4.8%. As China continues to experience healthy economic growth, a steady increase in Chinese holidaying abroad is expected.

STB's Shanghai office is the Regional Head Office for Greater China. In the second half of the year under review, STB Greater China embarked on a S\$2.5 million television and print media campaign. Featuring our homegrown international star, Fann Wong, spearheading the drive, this was the highest amount the STB has ever spent on advertising in China.

To make entry into Singapore easier for Chinese visitors, several measures have been taken to streamline visa applications and procedures, such as the introduction of Multiple-Journey Visa (MJV) for business travellers. A new visa-issuing centre is now also available with the establishment of the Guangzhou Consular Office of the Singapore Consulate-General in Xiamen.

STB Greater China's marketing efforts have not gone unnoticed. It won the Excellent Booth Award and Excellent Organisation Award in the China International Mart 2002 held in Shanghai. It was also awarded Best Booth Design at the Guangzhou International Travel Fair in 2002 and 2003, and at the North China Travel Fair 2003 held in Henan.

LOOKING AHEAD

While the SARS crisis has temporarily hampered STB Greater China's efforts at penetrating the country, it has conversely brought the industry closer together. Working in close collaboration with industry players, STB Greater China will continue to develop creative and high quality products that will appeal to the different regions in Greater China. Efforts will be made to entrench Singapore's image as a premier destination among Chinese consumers, with an emphasis on attributes such as quality shopping venues, vibrant food scene and unique blend of cultures.



NORTH ASIA

Throughout the year, STB North Asia has embarked on aspirational marketing campaigns using Japanese and Korean trendsetters to drive key promotional messages. In Japan, a tactical campaign featuring Office Ladies, *Watashi ni Go Houbi* (Singapore, My Present), was launched through female publications to promote food, hotels and spa & wellness. To mark the opening of the Esplanade and the launch of the new Merlion Park, STB North Asia held a joint promotion with leading female magazine, CREA, and well-known celebrity pianist, Nishimura Yukie, to market the events to Japanese women.

STB North Asia also endorsed a baseball game for the first time. Called *Singapore Go! Go! Nighter*, the game was staged at the Tokyo Dome starring two of Japan's most popular teams, Yomiuri Giants and Hanshin Tigers. 55,000 spectators were given a chance to win on-the-spot lucky draw prizes including tours to Singapore. In addition, the office also conducted a series of seminars targeting school teachers and planners to promote Singapore as a destination for Overseas School Trips. One of Japan's fastest growing segments, a record number of 138 public high schools visited Singapore in 2002.

Over in Korea, STB North Asia leveraged on the hype surrounding the *World Cup* in Korea by launching an interactive online marketing campaign. Called *Korea Scores, You Go Singapore*, 10 tickets to Singapore were up for grabs for every goal scored by the Korean national team. This promotion attracted more than 20,000 new members to STB Korea's website, and 90 trips to Singapore were given away.

LOOKING AHEAD

STB North Asia has plans to intensify direct marketing to consumers through the execution of print media campaigns in both Japan and Korea. With the help of trade partners, the office will co-launch new and creative tour products, and promote a holistic holiday experience including gastronomic food choices, bountiful shopping, world-class events, and diverse culture. STB North Asia is also exploring opportunities to strengthen regional tourism by implementing joint marketing initiatives focusing on the region's attractiveness such as nature, beaches and golf.



SOUTH ASIA, MIDDLE EAST & AFRICA

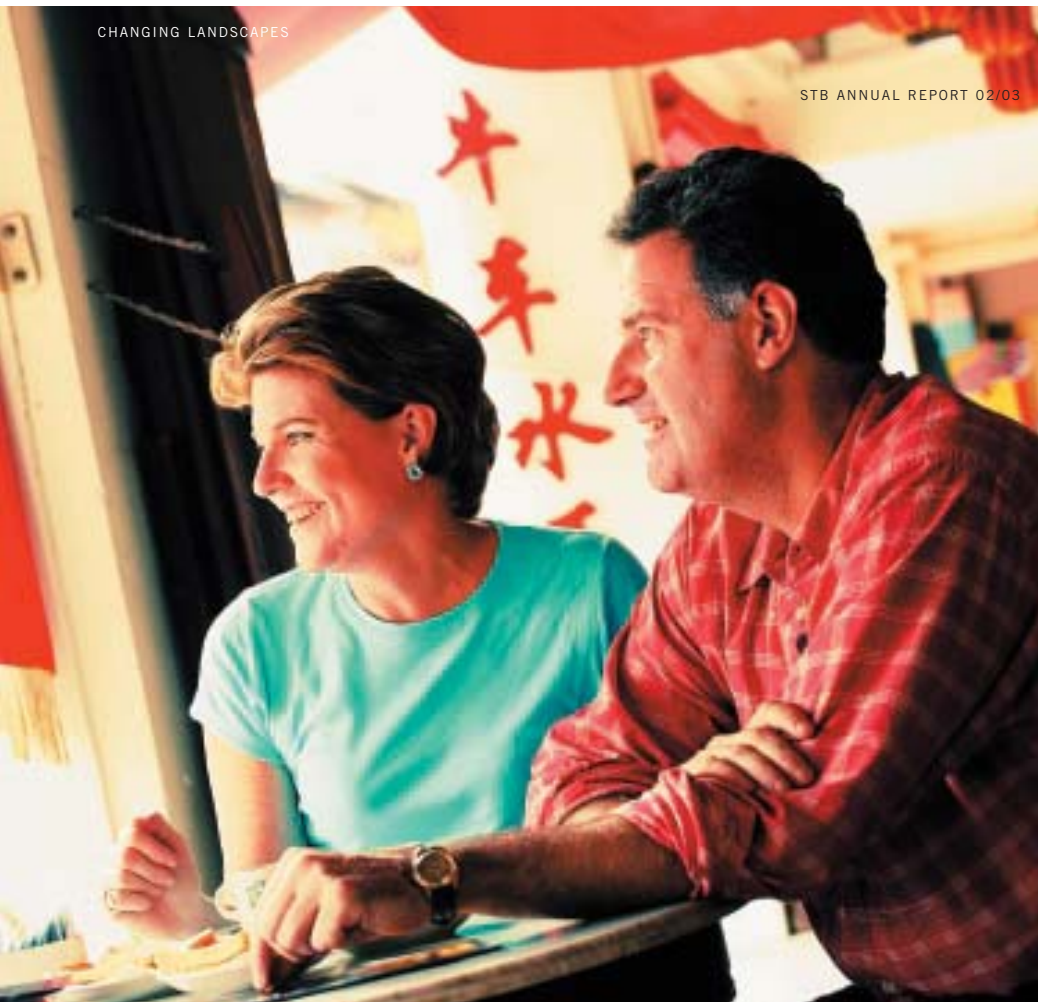
In the year under review, STB South Asia, Middle East & Africa focused its efforts on boosting visitor arrivals from India. Expanding the partnership network and promoting Singapore as an aspirational, value-for-money destination was a major emphasis.

With the family as the main target market, the office pooled resources with industry partners and initiated several multimedia promotional campaigns across India. Focusing on secondary markets such as Jaipur, Indore, Ludhiana, Amritsar and Chandigarh, the STB launched campaigns together with McDonalds, Baskin Robbins and a leading bank, the Industrial Development Bank of India (IDBI). Aggressively promoting new segments including arts and sports, the office's marketing efforts proved fertile as visitor arrivals increased by a healthy 10.5% this year, surpassing the projected increase of 5-7%.

On the MICE front, the STB participated in exhibitions and seminars across various industries including Corporate Incentive, Education and Information Technology. A series of tour agents' seminars were also organised in 10 cities including Bangalore, Jaipur, Ludhiana, Amritsar, Kolkata and Chennai to educate and update tour agents on Singapore.

LOOKING AHEAD

To increase visitor arrivals in the coming financial year, three major thrusts *Up the Visibility Index*, *Up the Desirability Index* and *Working With Our Partners*, have been developed to boost the visibility of Singapore through promotions in malls, universities, healthcare facilities and on Fast Moving Consumer Goods (FMCG) packaging. *Up the Visibility Index* aims to raise the profile of Singapore among consumers, trade and partners, and to communicate the changes that have taken place in Singapore over the past year. *Up the Desirability Index* maps out the STB's commitment to understand the needs of consumers. Through extensive research on trends and consumer perceptions, results will be used to hone marketing and promotional strategies to raise the universal appeal of Singapore. The final thrust, *Working With Our Partners*, will see the office broadening its partnership base as avenues to develop and push new products, both by attracting new partners and by strengthening existing partnerships. The STB will also explore expanding its presence in the region with new offices in order to forge closer ties with our partners.



WESTERN MARKETS

STB Western Markets kicked-start the year by launching a completely revamped North America consumer website with more travel information about Singapore, including an approved list of neighbourhood retail agents and tour packages. Simultaneously, the office developed an industry's first with the *Singapore Partners Programme*, which allows tour agents to update their Singapore-related products unilaterally on the website. A *Singapore Specialist Online Programme* was also created to qualify North America and tour agents as Singapore Tourism Specialists. These web initiatives were extremely successful with over 20 tour wholesalers signing up for the *Singapore Partners Programme*, and more than 1,800 tour agents participating in the *Singapore Tourism Specialist Online Programme*. The specialist programme was awarded an Adrian Advertising Silver Award 2002 by the Hospitality Sales & Marketing Association of the USA.

To stimulate consumer interest, the STB aggressively courted consumers through a *Singapore Food Festival* promotion in New York City at the end of 2002. Featuring appearances by local celebrity chef Violet Oon and a host of dinner workshops at the renowned Institute of Culinary Education and the Culinary Institute of America, this media blitz garnered more than S\$170,000 worth of media value, including exposures in Good Day New York, New York One and Time Out Magazine. This event won a Big Apple Award by the Public Relations Society of America.

Over in Europe, as a result of the STB's assistance in the filming of BBC's *Holiday* programme, Singapore was featured in the Eastern and Orient Express train experience, representing over S\$1.4 million in media exposure.

Efforts were also made to strengthen regional trade partnerships. In collaboration with the Hong Kong Tourism Board, Tourism Authority of Thailand, Malaysia Tourism Promotion Board and five key tour operators in the UK market, the STB executed the *Together In Asia* joint marketing effort, aimed at raising the profile of each destination and to encourage creative packaging of this region.

LOOKING AHEAD

The key task ahead for STB Western Markets will be to maximise the limited resources available to expand trade collaboration and partnerships in America and Europe. The immediate goal is to garner trade support in joint promotions that offer attractively priced Singapore packages. Another strategy is to leverage on regional twinning possibilities to sell Singapore as a must-stop when travelling to Asia. The office will continue to aggressively promote Singapore among general leisure travellers, and will also focus on attracting MICE and niche leisure traffic, such as culinary enthusiasts for tours and educationals. STB Western Markets will also continue to harness the potential of digital technology to promote Singapore as an attractive destination through the Internet and other multimedia channels across the digital platform.



OCEANIA

This year, a significant portion of STB Oceania's resources was channelled towards countering the effects of the Bali bombing and the SARS crisis. In response to a dramatic reduction in visitor arrivals due to the Bali bombing, the STB Oceania launched its *Perfect Days in Singapore* Campaign. A collaborative effort among wholesale, retail, hotel and airline partners, the campaign promoted perfect short breaks in Singapore through advertising and editorial coverage. Then when the SARS scare hit in May 2003, this was countered with a trip-for-two promotion to the *Singapore Arts Festival*. A joint promotion with the Sydney Opera House, the contest received excellent exposure in the daily press and the Nine.msn website, which recorded over 28,000 click throughs, and over two million page impressions from F2 websites.

For the MICE segment, STB Oceania continued to proactively push Singapore as an incentive venue, organising industry functions to update trade representatives and journalists on Singapore. These functions succeeded in rekindling interest among MICE organisers, and as a result, seven familiarisation trips were made to Singapore. STB Oceania was also present at the annual Australian International Meetings Exposition (AIME), the main MICE event for Oceania. Held in Sydney, the office's distinctive stand, which was given an honorary mention by the judges in the Best Multi-stand Award category, helped to further boost Singapore's high profile in the MICE industry. In spite of SARS, the Ricoh Incentive Group confirmed Singapore as its choice of incentive venue for January 2004.

The office's efforts in the past year have seen more wholesalers like Qantas Holidays and Creative Holidays embracing the *Live it Up!* campaign, and offering lifestyle and mini-stay Singapore packages in their brochures. STB Oceania's website also won recognition by being the first Asian National Tourism Organisation with a strategically tailored, locally based website for consumers, as well as being the first to launch a web game consumer promotion in Australia.

LOOKING AHEAD

Recent challenges faced by the industry have underlined the importance of our industry partners in overcoming crises. STB Oceania will continue to establish and leverage on partnerships to develop creative tourism programmes that will rekindle interest in Singapore. STB Oceania will also concentrate on developing the business travel sector further by networking with government agencies and the Australia-Singapore Chamber of Commerce and Industry, as this sector is anticipated to generate higher tourism receipts for the STB in the long run.

STB worldwide

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