

Executive Summary

Introduction

1. Over the past nine months, the Tourism Working Group (TWG) examined issues and challenges facing the tourism industry, and deliberated on practical measures to boost tourism's contribution to the Singapore economy. This report outlines the key thrusts and recommendations made by the TWG to transform the tourism industry and to improve Singapore's overall appeal as a tourist destination.

Background

2. The tourism industry is a significant contributor to the Singapore's economy, spanning across many services sectors that served 7.5 million visitors, generated S\$9.4 billion in tourism receipts, and collectively accounted for 10% of the GDP in 2001. Asia is Singapore's largest source of visitors, and will continue to be so in the next decade with the emergence of major outbound markets like China and India.
3. Singapore's strengths lie in its strong brand name, strategic location, excellent infrastructure and hub status for key tourism-related sectors such as transportation. However, some of our visitor entry requirements, especially for some of the emerging markets, are not as friendly as they should be. In addition, there are several deficiencies or impediments that reduce Singapore's attractiveness and appeal as a vibrant tourist destination. To address some of these issues and to tap on Singapore's strengths and the opportunities, the TWG has put forth the following strategies and recommendations.

Strategies and Recommendations

4. Singapore should aggressively tap both the key and emerging markets such as China, India, Malaysia, Indonesia, Indo-China, the Commonwealth of Independent States (former Soviet Union), and the Middle East. In addition to revamping marketing and product development strategies to serve these markets, it is also important for Singapore to ensure that these visitors are welcomed and have easier and more convenient entry requirements and procedures.
5. In addition, Singapore should make concerted efforts in targeting newer and potentially more lucrative tourism segments such as the education and medical services, for which there is large market potential especially in China and the South East Asia region.
6. In line with the growth of tourism development in the region, Singapore should position itself to be an even more integral part of the extended tourism space. To do so, Singapore should further improve connectivity with the major markets. The Government and the private sector should re-double efforts in collaborating with their regional counterparts in product development and marketing in order to harness the synergies attractions in this region can collectively generate.
7. More emphasis and support should be given to the development of outstanding experiential attractions in Singapore. This is necessary to appeal to visitors from our key markets. Recommendations include major expansion and upgrading of existing promising tourism products such as those under the Wildlife Reserves of Singapore, Singapore Botanical Gardens and Sentosa. Orchard Road should be enhanced to make it a world-class shopping street.
8. Singapore should also improve its operating environment to be even more conducive for local and international tourism businesses based here to grow, create new product concepts and ideas, and thrive. The application of creativity should be greatly encouraged. Policies and supporting framework should be put in place or fine-tuned to induce the development or enhancement of tourism products and services that are unique and relevant to the markets.
9. All the key recommendations above are embodied under the four strategic thrusts of:
 - Aggressively targeting and tapping key and emerging markets;
 - Developing regional tourism;
 - Developing distinctive tourism products and experiences; and

- Developing more breadth and depth in making Singapore a tourism capital

Conclusion

10. In conclusion, a strong Government endorsement and support is necessary to carry out the recommendations proposed by the TWG in order for Singapore to be

"A vibrant and welcoming destination that offers visitors a diverse range of attractions and distinctive experiences drawing on its Asian heritage, and with tourism making an even more significant contribution to the economy."

11. By fulfilling the above vision, the TWG firmly believes that Singapore can double:

- Visitor Arrivals from the present level to 15 million a year; and
- Tourism Receipts from the present level to S\$20 billion a year by the year 2012.

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