

DBJ REPORT

Tourism21 – New Challenges Ahead

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PREFACE

Travel and tourism industry is considered as the world's largest industry and tourism related services are said to constitute one-third of the world's services. Indeed, travel and tourism affects directly and indirectly several sectors of an economy. It brings in huge revenue, balance payments and increasing the standard of living for most countries. The effects of travel and tourism for a small country like Singapore are as visible.

Travel and tourism contributes about 6% of Singapore's GDP and employs 8% of the workforce. It is a key industry in the development of Singapore's economy. The Singapore Tourism Board, set up by the Government in 1964, oversees the promotion of Singapore as a tourism destination. It is the main drive behind perpetually all of Singapore tourism efforts, spearheading projects, marketing and promoting, as well as assisting local and foreign tourism-related companies in Singapore. In 1996, the STB collaborated with the private sector and other government agencies to come up with a masterplan to ready Singapore for the 21st century and the expanding global tourism industry. Tourism 21 – Vision of a Tourism Capital envisage Singapore turning into a world-class tourist destination, tourism business center, and a tourism hub and gateway. The masterplan intends to realize the vision through redefining tourism, attracting world-class tourism businesses to locate in Singapore their regional headquarters as well as helping local companies to regionalize. The plan also pursues the goal of turning Singapore into a world-class tourism education hub, providing quality, high standard service training, all these without neglecting the needs of Singaporeans.

This report looks into the masterplan Tourism 21, its contents and the progress so far. Examples of tourism efforts performed by the STB and the private sector are also included in one of the chapters. This report will conclude that Singapore, being a small country is vulnerable to the ever changing environment in the increasingly connected world, and competition from countries with lower costs may threaten the goal of becoming a tourism business center. Nonetheless, with a flexible, forward looking and entrepreneurial encouraging Government, plus the many advantages of a good geographical location, political stability, and first class infrastructure, Singapore can overcome the challenges if proceeded the correct way. Most importantly the domestic scene must not be ignored while challenging the global obstacles. The Singaporeans' "local-ness", their heritage, identities and economic benefits must not be traded off for the prospects of making Singapore a world-class tourist destination.

Teo Besey
Researcher

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1. INTRODUCTION

Trends

Over the years, advancement in technology, liberalization of air transport and travel restrictions, increased income and leisure time has led to amazing growth in the travel and tourism industry. It has become the world's largest industry, a GDP contributor for many countries, and tourism-related services is now said to be about one-third of the world trade services. Travel and tourism affects, directly or indirectly, many sectors – hotels, restaurants, exhibitions and conventions, arts and entertainment, cruise and transport, etc. It promotes economic growth, increases the standard of living, is a major source of foreign exchange earnings, helps in the balance of payments, and creates employment opportunities.

Based on 2002 statistics in from the World Tourism Organization, international tourist arrivals reached 714.6 million, growing 3.1% from the previous year. Out of which, Asia and the Pacific had 130.6 million visitors, constituting 18% of the world's market, second to Europe, and have been termed the "destination of the future". Terrorism fears and the Bali bombing in Southeast Asia did not create a major stall in the growth of tourist arrivals than expected. In fact, its average annual growth rate had exceeded the global average growth rate, showing the potential the travel and tourism industry has in the region.

Table 1: International Tourist Arrivals by (sub) Region

	International Arrivals (million)	Tourist	Market Share (%)	Growth Rate (%)	Average Annual Growth (%)
	1990	2002	2002	2002/2001	90-00
World	456.8	714.6	100	3.1	4.3
Asia and the Pacific	57.7	130.6	18.3	7.9	7.2
Southeast Asia	21.5	41.7	5.8	3.9	5.6

Source: World Trade Organization, <http://www.world-tourism.org>

Singapore and Tourism

Similar to most countries, the travel and tourism industry is an important part of the economy for Singapore. In 2002, the travel and tourism industry contributes about 6% of the country's GDP and employs about 8% of the total workforce (MITA, 27 June 2003). Singapore's tourist arrival for the year 2002 grew 2.2% at 7.6 million – the second highest number ever recorded and not inclusive of arrival by land from Malaysia. Asia countries make up the bulk of tourist arrivals, with Indonesia at the top of the ranking, followed by Japan, China, Malaysia and Australia (Singapore Department of Statistics). Overall, tourist arrival from ASEAN countries constituted 2.5 billion (See Table 2). Tourism receipts for the year 2002 totaled S\$8.8 billion,

and revenue from the leisure segment was at around S\$4 billion. Both have declined considerably compared to S\$9.6 billion and S\$5 billion ten years ago, mostly due to the Asian financial crisis, the strong Singapore currency, increase in business costs, and increase in competition from the region (MITA, 27 June 2003).

Table 2: Visitor Arrivals to Singapore By Country of Residence

	1998	1999	2000	2001	2002
<u>Thousand</u>					
Total	6,242.2	6,958.2	7,691.4	7,522.2	7,566.2
Asia	4,223.8	4,797.4	5,320.9	5,224.1	5,325.9
ASEAN	1,887.6	2,224.0	2,427.7	2,522.9	2,532.4
Japan	843.7	860.7	929.9	755.8	723.4
Hong Kong SAR	273.1	260.0	286.0	276.2	265.9
India	243.7	288.4	346.4	339.8	375.6
China	293.3	372.9	434.3	497.4	670.1
Taiwan	362.4	317.5	290.9	222.1	209.3
South Korea	99.3	242.2	354.4	359.1	371.0
Other Countries	220.7	231.7	251.3	250.8	178.2
Australia	427.2	466.1	510.3	550.7	538.4
New Zealand	81.6	86.7	94.3	94.3	94.1
Europe	982.8	1,050.0	1,127.9	1,114.6	1,101.8
America	425.4	444.3	483.0	433.6	416.4
Africa	79.1	90.2	99.5	88.0	72.8
Others & Not Stated	22.3	23.7	55.6	16.9	16.8

Notes: 1 Figures excluded Malaysian arrivals by land

2 The term "ASEAN" stands for "Association of South East Asian Nations" and refers to the ten-country political association comprising Brunei, Cambodia, Indonesia, Philippines, Laos, Malaysia, Myanmar, Singapore, Thailand and Vietnam. However, when used in the statistical tables, the term excludes Singapore.

Source: Economic Survey of Singapore 2002, Department of Statistics

Singapore's success in travel and tourism did not simply happen. In the mid-1960s, just after Singapore's independence, tourism was booming as travelling became easier and cheaper. It provided the young country employment opportunities, and many economic benefits that helped the country to develop. The government subsequently established the Singapore Tourism Promotion Board (STPB), evidently recognizing the potential in the industry. The STPB successfully market and promoted Singapore as an attractive tourist destination through themes such as "Instant Asia" and the creation of the well-known Merlion symbol. The STPB also kept well informed of changing profiles of the tourist arrivals, the economic focus and recognized the need to keep altering its strategies to maintain Singapore's attractiveness. In the 1960s to 1970s, "Instant Asia" was the theme, which portrayed Singapore as a "garden city" with modern infrastructure among the multi-cultural society. In the 1980s, with changing tourist profiles and the rising awareness of loss of heritage and "local-ness", heritage conservation became the focus.

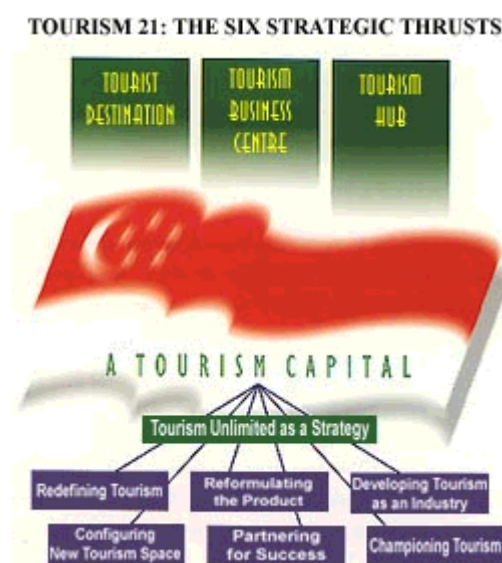
The Tourism Product Development Plan in 1986 proposed for the redevelopment of ethnic areas and historical sites. Chinatown, Little India, Kampong Glam, were born, and the Singapore River, Raffles Hotel and Bugis Street were redeveloped and named as historically significant areas. The plan not only created attractions for the tourists, but also induced a sense of awareness of the local cultures for Singaporeans (Brenda S. A. Yeoh etc, 2001).

In 1996, more changes occurred, economic and politically in the regional area, as well as in consumer preferences. In addition, the challenges to be faced in the coming 21st century as well as the prediction of further growth in travel and tourism for the decades to come prompted a new masterplan to be created. Tourism 21: Vision of a Tourist Capital was thus released by the STPB to reexamine its policies. Subsequently, the Singapore Tourism Promotion Board was renamed to Singapore Tourism Board to redefine its role as not only an agency to promote tourism, but also to transform Singapore into a world class tourist destination, tourism business center and a tourism hub (Brenda S. A. Yeoh etc, 2001).

2. TOURISM UNLIMITED AND TOURISM 21 – VISION OF A TOURIST CAPITAL

(Source: Singapore Tourism Board Website, Christopher Khoo (2001))

Tourism 21: Vision of a Tourism Capital is a strategic master plan created through collaboration between Singapore Tourism Board, several other government agencies, as well as members of the private sector. It provides guidelines to transform Singapore into a Tourism Capital, performing the roles of a tourist destination, tourism business center and a tourism hub for the region. The aim is to achieve 10 million visitors, and earn over S\$16 billion in tourism revenue by 2005. Tourism Unlimited was chosen as the underlying strategy (See Box 1), and through which six strategic thrusts were identified to help achieve the vision of Tourist Capital.



Source: Singapore Tourism Board Website, <http://www.stb.gov.sg>

1. Redefining Tourism

Travel and tourism is no longer simply about the number of international tourist arrivals and the traditional marketing of Singapore as a tourist destination has become too narrow for the tourism industry to grow and compete. There is much more potential in this industry waiting to be exploited. Therefore, it is important to widen the scope of what tourism means. Singapore will strive to become a World-Class Tourist Destination, and in addition, take up the role of a Tourism Business Center – focusing on product innovation and encouraging investments on the industry – and a Tourism Hub – becoming a gateway for regional tourism businesses, encouraging them to base their regional headquarters here.

Box 1. Tourism Unlimited

Tourism Unlimited is a sub-section from the country's economic development policy of Singapore Unlimited, which emphasizes on breaking geographical boundaries. Similarly, Tourism Unlimited focuses on breaking the geographical boundaries of the tourism industry. It is made up of two segments, "Bringing the World to Singapore" and "Bringing Singapore to the World". The former looks into ways to improve Singapore's attractiveness as a tourist destination, as well as to attract tourism investments into Singapore. The latter, "Bringing Singapore to the World", comprises of actively pushing Singapore to partner up with countries in the region in the area of tourism development, thereby creating a border-less free tourism space for Singapore, and to encourage regional franchising and testing of new ideas and products in Singapore. Fundamentally speaking, Tourism Unlimited seeks to enhance the spirit of cooperation while simultaneously competing with each other.

2. Reformulating the Product

The Singapore product will be reformulated emotionally, enhancing its image to appeal and create a memorable experience for its visitors. The new theme, "New Asia-Singapore" will portray Singapore as an energetic, modern city with a unique, multi-cultural society. For examples, several areas within Singapore have been labeled as "thematic zones", in which the areas are linked according to common characteristics and can act as a critical mass of attractions. Experience Guide Plans will be drawn up for the 'softer' aspects of each thematic zone, to develop the zones into an appealing area, providing a memorable experience for the visitors. World-class sports, cultural and arts events can be organized and held at these zones to complement and enhance their appeal to tourists. In terms of providing more convenience, a smart card will be created for tourists to carry out easy transactions. Training for the tour guides and tourism workers to create an awareness of their importance in relating the beauty of Singapore to the visitors will not be ignored as well.

3. Developing Tourism as an Industry

The third thrust focus on developing a Tourism Business Center in Singapore. The STB will work closely with other government agencies as well as members of the industry to promote Singapore as a launch pad for regional investments, as a location to test new ideas and products, as well as encouraging continuous upgrading and promotion of regionalization, developing a pool of skilled workforce for the industry, improving on infrastructure and easing of legal structures, increasing and improving the use of information technology. The STB will also develop a cluster approach to achieve better integration across sectors and optimize the success rate of developing tourism as an industry.



Source: Singapore Tourism Board Website, www.stb.gov.sg/t21/st3.stm

4. Configuring New Tourism Space

Regionalization is the key focus in the fourth strategic thrust. Following Singapore's main economic goals, regionalization of the tourism industry is equally important, especially in transforming Singapore into a Tourism Hub. Working with the Indonesian Islands is one example of how Singapore and the neighboring countries can work together to complement each other as well as to tap the many opportunities available. Although regionalization should be led by the private sector, the STB will help in ways such as forging good relationships with the various governments, implementing tourism agreements, lead in conducting projects and missions, maintaining a close working relationship with the private sector to sniff out key projects, etc.



Source: Singapore Tourism Board website, www.stb.gov.sg/t21/st4.stm

5. Partnering for Success

Partnership is vital at all levels for the vision of Tourism Capital to be realized. STB will take the role of spearheading partnerships at the government level through signing tourism cooperation agreements, which can then allow further partnerships at other levels such as multi-agency for supporting infrastructure, intra-private for collaborative marketing and public-private for software development, etc. STB will also establish a Destination Marketing Council consisting of members of the public and private sectors, to provide marketing and branding help for the Singapore product. Furthermore, it will also hold series of Singapore Tourism Conferences annually, to allow public and private sectors interaction opportunities regarding macro-policy matters, and making new plans for the tourism industry.

6. Championing Tourism

STB will, as a role model, champion for the industry, and implement any initiatives that will make Singapore a Tourist Capital. The Tourism Resource Center will be further enhanced to provide more comprehensive, up-to-date information for the development of industry. More importantly, the STB will work with Singapore Department of Statistics to develop a Tourism Satellite Account, which will act as the standard for accessing tourism industry's contribution to the country and guide STB's future strategies and plannings. Furthermore, a S\$300 million budget will be committed to marketing and branding efforts, to strengthen the Singapore product and enforce our ranking as a top destination for travel, as a tourism business center and a tourism hub.

Ever since the Tourism 21 plans were first established, the STB has implemented many projects over the years. Some have been successfully accomplished, whereas many will take more than a couple of years to complete. Projects within the scope of Tourism 21 have been grouped into phases, taking a period of between one, three, five and even ten years to complete. The following chapter illustrates some of the projects undertaken by the STB as part of the Tourism 21 efforts.

3. SINGAPORE'S TOURISM EFFORTS

A. Chinatown Heritage Conservation

(Source: Singapore Tourism Board website: <http://www.stb.gov.sg>, Chinatown Heritage Center, <http://www.chinatownheritage.com.sg>)

Plans to redevelop Chinatown were part of Singapore Tourism Board's Tourism 21's efforts to revive historically significant districts in Singapore, termed as the STB's Chinatown Experience Guide Plan. Working together with the National Heritage Board, the planning includes extensive discussion, feedback and contribution from stakeholders of Chinatown, former and present residents, the Chinatown Committee of the Citizens' Consultative Committee (Kreta Ayer district), Chinatown Retailers' Pro-team Committee. The public was offered many opportunities and channels to express their opinions towards the redevelopment of Chinatown as well, and many of their suggestions were later incorporated into the redevelopment plans.

After more than three years, the Chinatown Food Street (Smith Street), Telok Ayer Green, and particularly, the Chinatown Heritage Center (CHC) was completed in 2002. The CHC now houses fifteen exhibition galleries depicting the lives of former Chinatown residents, with original



furniture and personal collections donated by clan associations and former residents. It acts not only to preserve and recall the past for the locals, but also serve as an economic purpose – a tourist attraction that lets travelers learn about Singapore in the early times, leaving them with a memorable and educational experience.

In early 2003, after several discussions and proposals by the stakeholders and interest groups of Chinatown, the STB's Thematic Development group decided to pedestrianize three streets in Chinatown and turn them into street markets, holding more than 100 street stalls. This is in addition to the existing Chinatown Food Street. Regular street performances and entertainment programs in Chinese and various dialects will be organized along the Street Market, which will portray Chinatown's diverse cultural heritage. The Chinatown Business Association (CBA) will be running the Street Market, aiming to develop the product mix to appeal to not only the locals, but overseas visitors as well.

Chinatown is only the beginning of more heritage conservation efforts to come. The STB and the National Heritage Board are also planning to carry out other cultural and heritage conservation accordingly, such as for the Malay, Peranakan, Indian and Arab communities.

B. Sentosa Island Redevelopment Plans

(Source: Sentosa Development Corporation <http://www.sentosa.com.sg>)

Sentosa Island is Singapore's premier island getaway for the locals, and a resort destination for tourists. Managed by the Sentosa Development Corporation (SDC), it is viewed as a key tourism asset for Singapore. On average, Sentosa Island received about 4 million visitors a year, earning about S\$190 million in revenue. In 2002, SDC launched a S\$7 billion, 10-year masterplan to redevelop Sentosa into a world-class resort destination, filled with lifestyle and entertainment selections for both the locals and overseas travelers. Its focus is to raise the standard and variety of services Sentosa can offer to visitors and to provide a comprehensive holiday experience for all. When completed, visitor arrivals are projected at 8 million a year, and revenue will reach about S\$900 million a year. The Sentosa Island will be redeveloped into three zones:

- 1) Activity precinct, which will provide entertainment, food and beverage facilities;
- 2) Southern Zone, where three beaches will cater to different groups of beach-goers; and
- 3) The Green Spine, which will house historically significant buildings, a secondary forest, a Tourism Academy, the Rimba Sentosa – an exotic dining-with-wildlife lifestyle attraction, and lavish villas-only, and “tree-tops” resorts.

The Tourism Academy will not only ensure quality service in the tourism industry, but also enforce Singapore's efforts towards becoming a regional tourism hub. Rimba Sentosa, due in mid 2004 and costing at about S\$15 million, will house exotic animals in cage-less concept, for visitors to retreat from the concrete jungle to green forest and wild animals while dining at the restaurant. Many projects have since been completed, including several food and beverage facilities set up across the island, and the S\$4 million pyrotechnic spectacular musical fountain show titled “Magical Sentosa”. The Spa Botanica is also a new addition, featuring Singapore's first garden spa, with exclusive spa facilities (MITA, 3 March 2003). Projects that are ongoing or due to start soon this year includes the “Sentosa Express”, a light train, and Sentosa Cove, a 117-hectare high-end residential and marina development. “Sentosa Express”, which is due to complete in 2006, will transport visitors into Sentosa from the connecting Harbour Front MRT (Mass Rapid Transit) station in Singapore. Launched in October 2003, Sentosa Cove will house 2,600 residential units, some commercial units, a marina and a quayside village.

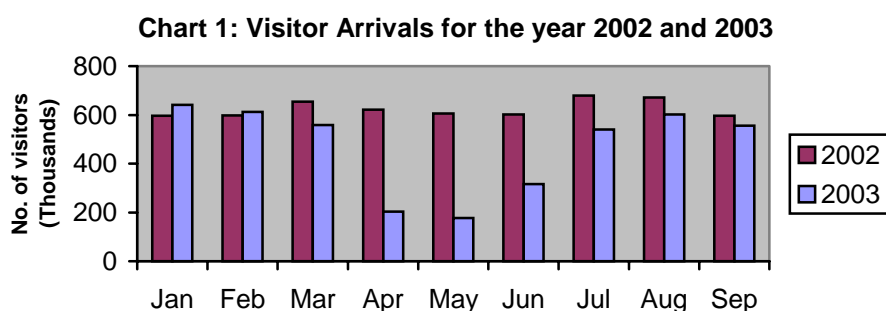
In a recently announced plans for the further rejuvenation of Sentosa, a 110m sky tower and further improving of three existing attractions costing S\$30 million will start in November 2003. The Sky Tower will be ready by beginning of 2004, and will allow visitors spectacular views of the Singapore skyline, the Southern Islands, as well as Malaysia and the Indonesian Islands (The Strait Times, Singapore, 5 November 2003).

C. Singapore Step Out! And Singapore Roars! Campaign

(Source: Singapore Tourism Board Press Release, <http://www.stb.gov.sg>)

The outbreak of the severe acute respiratory syndrome (SARS) in Singapore during March to June 2003 severely affected the level of tourist arrivals. Compared to the previous year, tourist arrival in March, April and May 2003 dropped 14.6%, 67.3% and 70.7% respectively (See Chart 1). Singaporeans were also afraid to go out, and the retail sector suffered considerably as well. In order to make sure the tourism sector do not suffer any further, the Singapore Tourism Board came up with major campaigns backed by the Government. To encourage Singaporeans to step out and spend again, which will in turn send a signal to overseas travelers that Singapore is safe to visit again, the STB organized a two-month Step Out! Singapore campaign costing S\$2 million aimed at stimulating domestic tourism in May. Shopping sale, festival celebrations and street festivals, entertainment events such as concerts and performances were organized and carried out successfully in bringing Singaporeans out of their homes and spending again. About 1.4 million people participated and brought about an increase of approximately S\$100 million in economic spin-offs for tourism-related businesses in the two months.

Following the success of the Step Out! Singapore Campaign, the STB immediately launched another campaign in June 18 2003, aimed at encouraging members of other countries to come to Singapore. Titled "Singapore Roars", the program will last six months, filled with a variety of deals, up to 50% discount for tour, dining, shopping and entertainment packages for the locals and overseas visitors. Arts and music, festival and sporting events are fully lined up to attract more tourists into Singapore such as concerts by famous singers and bands, including starts from Bollywood and the World Wrestling Entertainment. Extensive marketing of Singapore globally in countries such as Malaysia, Indonesia, Thailand, India, United Kingdom, etc will be carried out as well. The schedules in the Meetings, Incentives, Conventions and Exhibitions (MICE) section are also filled with key exhibitions and conventions taking place from June to December. Part of the campaign also include encouraging Singaporeans to act as ambassadors. All households will receive the postcard and can use it to invite their overseas friends and relatives to Singapore. The prize for the chosen postcard includes business class air tickets to Singapore with shopping vouchers for the addressee and shopping vouchers for the sender.



4. CONCLUSION

Aggressive marketing and promotion of Singapore as a tourist destination has enabled the industry to flourish, which benefited the country greatly. The Singapore Tourism Board constantly keeps itself up to date and changes its policies and strategies as fast as possible to cater to the ever changing environment and consumer preferences. From “Instant Asia – Singapore”, a simple campaign to promote Singapore as a tourist destination, to embracing the modern concept of “New Tourism”, a vision of Singapore as a tourism capital and hub, the formulation of Tourism 21 can be considered as one of the most dynamic tourism plans ever. Tourism will be redefined, reformulated and tourism-related businesses will integrate closer into an industry, which will be encouraged to regionalize as much as possible, while simultaneously more global tourism businesses will be attracted to locate their regional headquarters in Singapore. The STB will be actively participating and spearheading as many projects and initiatives as possible, and partnerships with neighboring countries while competing at the same time will help to promote the region itself as a tourist destination.

Tourism 21 is a bold move, and definitely a challenging one as well for STB and the government. The environment is changing ever so fast, and events occurring are threatening the success of Tourism 21. In addition, as the world becomes closer and more interconnected, Singapore as a small country is very vulnerable towards any major shifts in events, especially in the industry of tourism. Competition from neighboring countries will increase as well, in terms of attracting regional headquarters of international companies and tourist arrivals. Singapore is still considerably high in costs for doing businesses compared to her neighbors. If cooperation is not enhanced, while competition is increasing, the fulfilling of “co-opetition” to promote the region as a tourist destination will not be realized. Within the country as well, the push for tourism and turning into a world-class destination must not be at the expense of Singapore’s people. There must be a balance between ensuring that Singaporeans benefit economically and socially, and developing Singapore for tourism purposes.

That is not to say that the chances of success for Tourism 21 are slim. Compared to many other countries, Singapore has advantages such as good geographical location, infrastructure development, and political stability as well, leading to much smoother implementation of policies and strategies as well as successful outcomes of economic development. The Government’s characteristics of proactiveness, forward looking, flexible and encouraging towards innovation and entrepreneurial spirit among its people is also a plus to overcome the obstacles. Although its participation can be found in almost every sectors of the economy, the effect has been positive and will most possibly remain so, as evident in the way tourism is being boosted when it needed

during the SARS period. The Government has also been actively pursuing partnership agreements with countries within the region whether in trade or tourism activities, so as to facilitate regionalization of private local companies as well as attracting tourist to Asia Pacific as a region. To ensure that the local identities, heritage are not traded off for tourist gains, heritage conservation projects are done with close interaction among the public, grassroots leaders and community groups, as can be seen in the project for redeveloping Chinatown. Sentosa's redevelopment plans are not based entirely on attracting foreigners as well, as the main aim is to provide a premier destination getaway for the locals, offering affordable yet quality services and entertainment. Admission rates have been slashed to welcome more locals to visit the island often.

Overall, Tourism 21 is feasible and can be achieved with the strong support of the government, and its ability to look and plan ahead, in particular, flexibly. Singapore must keep pushing for partnerships with other countries, at the same time work towards providing an attracting location for world-class companies to situate their regional headquarters here, providing skilled and qualified labor force. The Tourism Academy must be established to ensure the high quality standard for service in the tourist industry. Last but not least, the sense of locality, its identities and economic needs must always be kept in mind with all the above mention to realize the vision of Singapore – A Tourist Capital, Tourism Business Center and Tourism Hub.

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Map of Tourist Attractions in Singapore

