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EMBARGOED TILL AFTER THE OPENING CEREMONY OF FHA-HORECA, 25 OCTOBER 2022, 1030 HRS

Hotel Industry Transformation Map 2025 to accelerate innovation, drive sustainable growth and build a resilient workforce

Singapore, 25 October 2022 – Minister of State for Trade and Industry and Culture, Community and Youth, Mr Alvin Tan launched the Hotel Industry Transformation Map (ITM) 2025 today at the opening ceremony of international tradeshow FHA-HoReCa (Food & Hotel Asia-Hotel, Restaurant, Café) at Singapore Expo.

2 The Hotel ITM 2025 was developed by the Singapore Tourism Board (STB) in partnership with the Food Drinks and Allied Workers Union (FDAWU), Singapore Hotel Association (SHA), industry players and other government agencies. It was endorsed by the Future Economy Council (FEC)¹ earlier this year.

3 Hotel ITM 2025 aims to create a compelling, innovative, and sustainable hotel industry, supported by a strong local workforce. The roadmap lays out strategies to achieve real value-added growth of 5.9% from 2020 to 2025, as well as create good jobs in emerging areas such as wellness, sustainability, and technology.

Outcomes of first Hotel ITM

4 Since the launch of the first Hotel ITM in 2016, the hotel industry has posted strong growth with record-high average occupancy of 87% and a total workforce of close to 35,000 in 2019. Over 1,400 workers across about 60 hotels benefitted from Workforce Singapore (WSG)'s Career Conversion Programme for Hotel Professionals from March 2020 to August 2022.

¹ [The Future Economy Council \(mti.gov.sg\)](http://mti.gov.sg)

Hotel ITM 2025 strategies

5 While the hotel industry continues to navigate post-pandemic challenges, it is well positioned to recover strongly, tapping on new consumer preferences for sustainable hospitality, digital-enabled experiences, and wellness travel.

6 The Hotel ITM 2025 builds on the success of the first ITM, laying out strategies to support the next phase of growth and transformation.

Strategy 1: Capturing demand with fresh hotel concepts

7 During the pandemic, many hotels used the downtime to launch compelling and differentiated concepts, such as Oasia Resort Sentosa, Far East Hospitality's first foray into the resort and spa category, which was launched in September 2021. The emphasis on anchoring novel and attractive hotel concepts will continue with several distinctive hotels opening in the near future, including renowned design hotel brand The Singapore EDITION, eco-resort Banyan Tree Mandai, Artyzen Singapore, and Singapore's first villa-only hotel Raffles Sentosa Resort & Spa Singapore.

8 Hotel ITM 2025 spurs hotels towards more value creation through cross-sector collaborations and new business models. This is to capture growing demand in areas such as wellness offerings and experiences that go beyond traditional stay-and-dine. Examples include an all-inclusive wellness retreat by Sofitel Singapore City Centre and Virgin Active, and Fairmont Singapore's Razer Gamecation, where guests can stay and play in one of the world's first luxury e-gaming suites.

9 STB will also continue to work with Enterprise Singapore (EnterpriseSG) to help local hotel chains expand internationally, and with the Economic Development Board (EDB) to encourage more global hotel brands to set up regional headquarters in Singapore.

Strategy 2: Driving sustainability as a core strategy

10 In line with the Hotel Sustainability Roadmap² announced in March 2022, STB and SHA will prioritise sustainability as a key differentiating concept. Efforts include piloting and scaling sustainability solutions in focus areas such as energy, water, waste and carbon management, as well as developing sustainable hotel concepts and promoting sustainable choices amongst hotel guests.

11 STB also expanded its Business Improvement Fund (BIF) incentive scheme to include sustainability initiatives from 1 April 2022. Hotels can also tap on WSG's Career Conversion Programme for Sustainability Professionals (CCP-S) to reskill employees to take on new "green roles" and drive transformation. In addition, hotels can access Continuing Education and Training (CET) courses rolled out by the Institutes of Higher Learning (IHLs) and CET Centres (CETCs) like SHATEC and Ascott Centre of Excellence to grow the pipeline of sustainability professionals.

Strategy 3: Gearing up for the next phase of innovation

12 From 2015 to 2020, STB awarded grants to hotels accounting for over 60% of Singapore's hotel room stock to drive technology adoption. Under Hotel ITM 2025, STB aims to increase adoption of proven and impactful technology solutions such as STB's E-Visitor Authentication (EVA)³ system – which uses facial recognition technology to match passport images to that of guests. When integrated with a hotel's self check-in solution, EVA creates a fully contactless check-in experience. Currently, close to 50 hotels use EVA. To encourage greater adoption, STB recently launched the EVA-Ready Programme to match hotels with technology partners with proven solutions that can be integrated with the EVA system.

13 To improve productivity and transform the guest experience, STB will drive adoption of integrated solutions such as seamless front-of-house and back-of-house systems, powered by data analytics. These will help the industry move beyond basic standalone solutions, enabling smarter and leaner operations. Hence, SHA and FHA-

² [Launch of the Hotel Sustainability Roadmap by STB and SHA | STB](#)

³ E-Visitor Authentication (EVA) software automates the checking of guests' stay validity in Singapore as required by the Immigration & Checkpoints Authority (ICA). EVA is integrated with hotels' facial recognition-enabled self check-in solutions to send guest data to ICA to verify the validity of guest stays.

HoReCa organised the inaugural Hotel Innovation Challenge Asia (HICA) 2022, inviting companies to submit solutions that can address critical pain points and capture growth opportunities. Participating companies came up with more than 100 suggestions, and solutions from eight shortlisted finalists were showcased at FHA-HoReCa today. These include solutions such as a voice assistant-enabled service robot and vending machine, as well as a food waste management system that recycles food waste into reusable resources without reducing its nutrient content.

14 STB will continue to grow digital and data capabilities for tourism enterprises, including hotels. This is through resources such as the Tourism Information & Services Hub for companies to access tourism and lifestyle content; the Singapore Tourism Analytics Network (Stan) for companies to visualise, analyse and exchange data; and the Tourism Technology Transformation Cube (Tcube) platform which brings innovative ideas to life by giving companies access to resources and digital initiatives.

Strategy 4: Future-proofing the workforce

15 STB and WSG, SHA, SkillsFuture Singapore (SSG), FDAWU, National Trade Union Congress (NTUC), and the Employment and Employability Institute (e2i) will build on foundation laid from the first Hotel ITM to future-proof the workforce. This will be done through:

i) Job redesign

Hotels will get support to uplift existing roles into higher value jobs and improve labour-intensive roles, while lower-skilled and mature workers will get help to advance their careers. The aim is to uplift rank-and-file wages and improve job satisfaction in the long term.

ii) Upskilling and reskilling for good jobs

Global trends such as digitalisation, wellness and sustainability have led to demand for digital, green and care skills in the hotel sector. Existing job roles will see content change, and new job roles will emerge. Skills such as Digital Marketing Management, Placemaking, and Design Sustainability and Ethics Management are increasingly in demand. STB will work with SSG to

help workers upskill and reskill into emerging new roles such as sustainability manager, digital marketing manager, and data analyst.

iii) Enabling a strong local core

STB will deepen its engagement with education providers to grow a pipeline of local talent and prime students for hospitality careers. Existing STB support schemes are also available to groom local staff to take on more senior roles. Additionally, hotels are encouraged to redesign jobs to continue to tap on mature workers, as well as practise inclusive hiring.

16 “A strong and growing tourism sector needs a vibrant hotel industry. Singapore’s hotels are amongst the best in the world but they can continue to transform and grow so that Singapore’s tourism sector can capture the next phase of growth. The Hotel ITM 2025 charts a clear vision, and we look forward to working closely with our industry partners on this journey,” said Mr. Keith Tan, Chief Executive, Singapore Tourism Board.”

17 Ms. Kwee Wei-Lin, President, Singapore Hotel Association, said: “Despite the pandemic’s impact on the tourism sector, our hotels have demonstrated remarkable resilience and creativity. Taking full advantage of the downtime, they have successfully piloted innovative experiences, pivoted to new business models, enhanced capabilities, and refurbished their infrastructure. We will continue to work with the government to catalyse new ideas and solutions to achieve the goals of the refreshed ITM.”

18 “The Hotel ITM 2025 will speed up business and workforce transformation as well as strengthen the sector’s resilience. The new roadmap aims to future-proof the industry with deeper digital and up-to-date capabilities and well-skilled talents. This will better position our businesses to seize the emerging opportunities from global tourism trends and sustainability. We will encourage greater collaboration within and beyond the sector to create fresh, synergistic and innovative concepts across our hotel, food and retail offerings. This holistic approach will help enhance Singapore’s attraction as a compelling destination for travel, business and leisure,” said Ms. Low

Yen Ling, Minister of State for Trade and Industry and Culture, Community and Youth and FEC Lifestyle Cluster Co-Chair.

19 “We hope hoteliers will tap on the resources available in the Hotel ITM 2025. It was specifically designed as part of the Future Economy Council’s work to support growth and continued transformation in the industry, even as its players seize opportunities in the rapidly evolving operating environment,” said Mr. Andrew Kwan, FEC Lifestyle Cluster Co-Chair from the private sector.

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About the Singapore Tourism Board

The Singapore Tourism Board (STB) is a statutory board under the Ministry of Trade and Industry of Singapore. It champions the development of Singapore's tourism sector, one of the country's key service sectors and economic pillars, and undertakes the marketing and promotion of Singapore as a tourism destination.

Visit www.stb.gov.sg for more information.

About ITM 2025

The Future Economy Council (FEC) was set up in 2017 to support the growth and transformation of Singapore’s economy for the future, including the development and implementation of the Industry Transformation Maps (ITMs). ITMs are sector-specific roadmaps to drive industry transformation, support the growth of our enterprises, and help Singaporeans take up quality jobs and seize opportunities. Co-created by the Government, industry stakeholders, and unions, each ITM covers areas such as productivity, internationalisation, innovation, digitalisation, resilience, sustainability, and jobs & skills. To address the systemic shifts arising from the COVID-19 pandemic and other changes in the global economy, the FEC has embarked on ITM 2025, to refresh all 23 ITMs to address the challenges and opportunities for Singapore, our businesses, and our workers.

ANNEX A

List of Company Examples

Capturing demand with fresh hotel concepts	
Far East Hospitality	The Clan Hotel worked with startup CulturedGen's Re:Qi wellness app on a 'Re:Qi Urban Revival Retreat', where guests are guided through ancient healing traditions and modern wellness practices, allowing for a reset from the stress and fatigue of daily life. The Clan Hotel also partners Singapore makers on tours and experiences that showcase local craftsmen and culture such as a Brewery Culture & Tasting Tour by 1925 Brewing Co, Cultural Culinary Class with The Food Playground and more. The Barracks Hotel Sentosa offers exclusive heritage tours of its conserved buildings and Sentosa, and partners sister property Oasia Resort Sentosa to offer guests wellness workshops and recreational activities as well as leisure partners to offer experiences such as private yacht charters to explore the Southern Islands. Oasia Resort Sentosa is Far East Hospitality first foray into the resort and spa category in September 2021, catering to the growing trend of wellness conscious travellers.
Raffles Hotel & Resorts	Raffles Hotel Singapore worked with hospitality start-up DayAway to curate daytime experiences and generate revenue from underutilised spaces. The hotel also worked with tour operators such as Let's Go Tour Singapore and private Peranakan museum The Intan for its guests; launched Hawker Stories pop-up at Raffles Courtyard from 16 Mar to 29 May 2022 featuring hawkers that shuttered during the pandemic, in collaboration with Makansutra and its founder KF Seetoh; and collaborated with Double Confirm Productions on a virtual interactive play. The hotel also organises Wellness Wednesdays where it conducts yoga, sound healing therapy and meditation sessions for guests and members of the public at the Raffles Lawn. The second Raffles property and Singapore's first villa-only hotel Raffles Sentosa Resort & Spa Singapore will soon open.

Driving sustainability as a core strategy

Pan Pacific Hotels Group	Pan Pacific Hotels Group is strongly committed to sustainability. Opening in May 2023, Pan Pacific Orchard will be Pan Pacific Hotels Group's latest showcase of environmental design in the heart of the city. The 347-room hotel will house four distinct natural terraces, and sustainability features including renewable solar panel technology, an in-room filtered water system, a food waste digester system that transforms food waste into cleaning water. Its PARKROYAL COLLECTION brand is characterised by iconic design, sustainability and wellness lifestyle. PARKROYAL COLLECTION Marina Bay is host to a suite of green features and innovations with its garden-in-a-hotel concept, featuring more than 2,400 indoor plants and shrubbery, an Urban Farm of more than 60 varieties of greens that contribute 20% of its restaurants' vegetables, solar panel technology and more. PARKROYAL COLLECTION Pickering, with lush foliage constituting more than 200% of the total hotel land area, adopts a hotel-in-a-garden concept and incorporates resource-saving features throughout the property. With 15,000 square metres of four-storey tall sky-gardens, reflecting pools, waterfalls, garden terraces and cascading vertical greenery, fed by a rainwater harvesting system that collects 6 million litres of water a year.
Pontiac Land Group	Pontiac Land Group is investing in sustainability across its four Singapore hotels – Capella Singapore, The Ritz-Carlton, Millenia Singapore, Conrad Centennial Singapore and Regent Singapore. The Group signed an MOU with energy IoT startup Evercomm and will embark on a pilot to track their sustainability journey through a common web-based platform that integrates data from various properties. Evercomm is a startup supported by STB's Singapore Tourism Accelerator programme which allows participating start-ups to testbed their solutions with tourism industry partners.

Gearing up for the next phase of innovation

Millennium Hotels and Resorts

Millennium Hotels and Resorts (MHR) has led the way towards a fully-contactless check-in experience by integrating all six of its hotels – The Orchard Hotel Singapore, Grand Copthorne Waterfront Hotel, Copthorne King's Hotel, M Hotel, Studio M Hotel and M Social Singapore – with STB's E-Visitor Authentication.

MHR seeks to drive integration of its hotels' front-of-house and back-of-house systems and use data analytics to develop smarter, more automated and leaner operations. MHR plans to embark on an in-room technology (smart lock set, smart room control unit and in-room sensors) and systems integration project for all of its properties.

At Grand Copthorne Waterfront Hotel, it will integrate 6 hotel systems: (i) online guestroom management system; (ii) housekeeping management system; (iii) engineering management system; (iv) door lock management system; (v) property management system; and (vi) online voice assistant management system. Providing online communications to guestrooms and integrating them with operational systems will allow the hotel to streamline operations for productivity savings and leverage data analytics. The hotel also replaces the usage of thousands of plastic bottles with water dispensers in its sustainability effort.

At Copthorne King's Hotel, there will also be a job re-designation of security, reservations, and call centre into one single role to manage manpower shortages, at the same time incorporating staff re-skilling among its employees.

With the technological upgrades, there is the sustainability portion of being more efficient, providing quality customer services, and reducing carbon emissions, in support of the Singapore Green Plan 2030 and Hotel Sustainability Roadmap.

Future-proofing the workforce

The Fullerton Hotel Singapore and The Fullerton Bay Hotel Singapore

In line with the Hotel ITM 2025 and the Hotel Sustainability Roadmap, The Fullerton Hotel Singapore and The Fullerton Bay Hotel Singapore are tapping into emerging trends to transform the guest experience.

	The hotels have embraced new technology to ensure that guests can enjoy a safe and seamless stay, including contactless interaction such as a digital concierge service, as well as the use of cleaning robots. A range of sustainable practices has also been implemented throughout the hotels' operations in line with their vision to obtain GSTC certification, including replacing single-use plastic with alternative materials, using digital water sub-meters to better monitor water consumption levels, and an LED lighting system to lower energy consumption. The hotels' commitment to sustainability is closely aligned with that of their parent company, Sino Group, which recently received recognition as a Global Listed Sector Leader in the Global Real Estate Sustainability Benchmark (GRESB) for Sino Land in Hong Kong.
Marriott International	Marriott International has a suite of initiatives in place to attract talent to its workforce. 1. Its 'Marriotternship' structured internship programme is designed to create meaningful learning experiences for young talents. 2. It collaborates with Temasek Polytechnic on the Career Accelerator Programme (CAP) designed for students to acquire practical skills and competencies while pursuing their studies so as to accelerate their career opportunities in the hospitality industry. 3. The group continues to position itself as an Employer of Choice with young talents, and offers the 18-month Voyage Global Leadership Development Programme which is a mentored, learning-inspired journey to prepare its management trainees for a successful career. It also continues to invest in the learning and development of its employees with programmes such as the Future Forward Talent programme, where identified employees will be given additional guidance and opportunities for networking through regional/area engagement activities. Employees also have access to the group's learning resource platform, the Marriott International Digital Learning Zone. The Marriott Development Academy is also available and provides structured pathways for all Associates to leverage and focus on their professional development.

InterContinental Hotels Group	InterContinental Hotels Group (IHG) continually invests in its people and community. As a global hospitality company, IHG promotes fulfilling careers that can take you anywhere and have spent years building a reputation as an employer of choice. They are always on the lookout for passionate people with various skill sets and experiences to join IHG, believing in drawing on different ideas and experiences to succeed. The growth and development opportunities available to every individual has consistently been the number one reason for joining IHG. Examples include Journey to GM, a programme for high performing individuals to accelerate their career development to hotel General Managers, and RISE - a leadership mentoring initiative for female hotel leaders. Diversity, equity and inclusion is an integral part of IHG's culture. IHG values and celebrates difference as part of its purpose to deliver True Hospitality For Good. In September 2021, IHG signed a strategic partnership with APSN Singapore (formerly known as Association for Persons with Special Needs) to provide support, jobs and training for APSN students and trainees across all IHG hotels in Singapore. IHG has worked closely with APSN for many years to provide full-time employment opportunities, on-the-job training and internships. They take on roles including public area attendants, kitchen stewards, bellmen and servers, and the average stay of each full-time graduate has reached six years. This is an extension of a strong relationship that the group has had with APSN for many years and champions a diverse culture in IHG where everyone can thrive.
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