WEBINARS FOR THE MUSEUM ROUNDTABLE



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WEBINARS FOR THE MUSEUM ROUNDTABLE



Friday 14 August 2020 | 3pm - 4pm



Business Sustainability for the Arts and Culture Sectors in Times of COVID-19 – Perspectives from SISTIC

Joe Ow Chief Executive Officer SISTIC.com Pte Ltd

ABOUT THE WEBINAR

The COVID-19 pandemic has led to a shift in consumers' behaviours and accelerated the pace of digitalisation in the way consumers interact with the arts and culture sectors, creating a new digital norm where museums, along with arts and cultural groups, are increasingly moving towards online ticketing platforms to provide a more confident and safer experience for their visitors. In this webinar, Mr Joe Ow, CEO of SISTIC, will talk about consumer behaviour in Singapore during COVID-19, and share his experiences in leading his company to adapt to these changes by re-designing SISTIC's digital services, and forming meaningful partnerships with various institutions to create better user experiences. He will share how digital technologies on the SISTIC platform are re-designed to cater to new visitor expectations for the arts and culture sectors, and talk about the digital strategies used to reach out to new and younger segments of consumers.

ABOUT THE SPEAKER

Joe is a Digital Practitioner, Technologist and Business Leader. With over 19 years of experience, he held several leadership positions in management, operations, technology and delivery. His current digital adventure is with SISTIC.com Pte Ltd, where he is transforming one of Singapore's first technology companies. He is re-imagining a new ticketing experience where tickets could be purchased or reserved seamlessly in a world focused on digital and data. He wants to change the way customers discover and consume sports, arts, culture and entertainment activities. Prior to SISTIC, he spent more than 2 years in Accenture Singapore, where he was involved in technology consulting and digital transformation for Fortune 500 companies.







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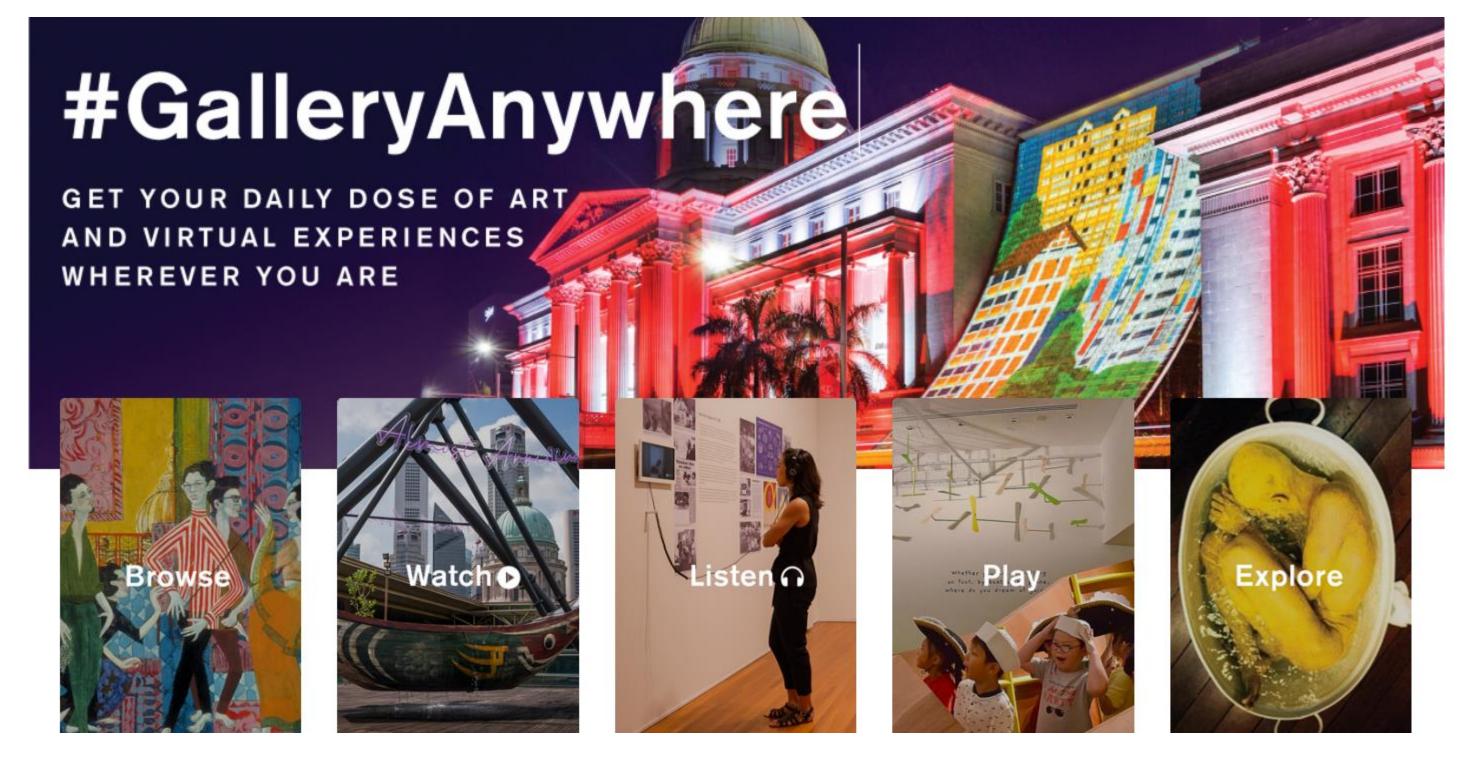




3 in 4 Singaporeans go digital in arts consumption

Stuck at Home? These 12 Famous Museums Offer Virtual Tours You Can Take on Your Couch (Video)

Experience the best museums from London to Seoul in the comfort of your own home.

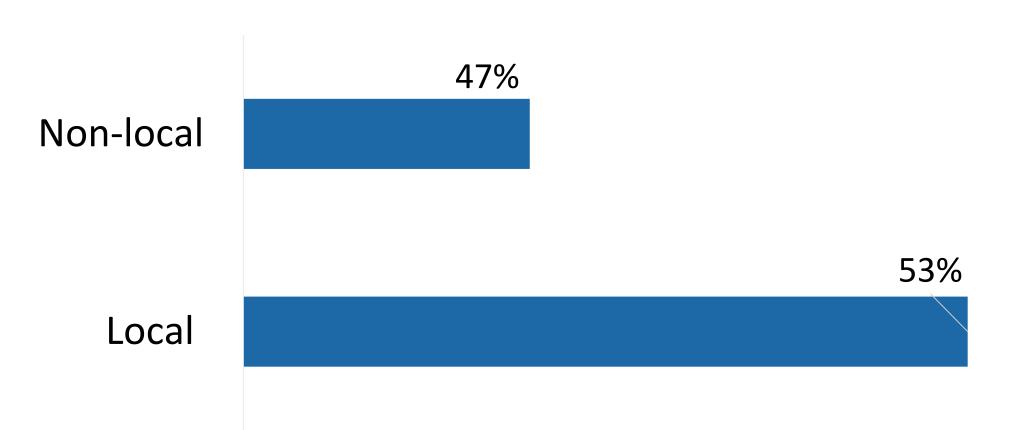


PRE-COVID STATS

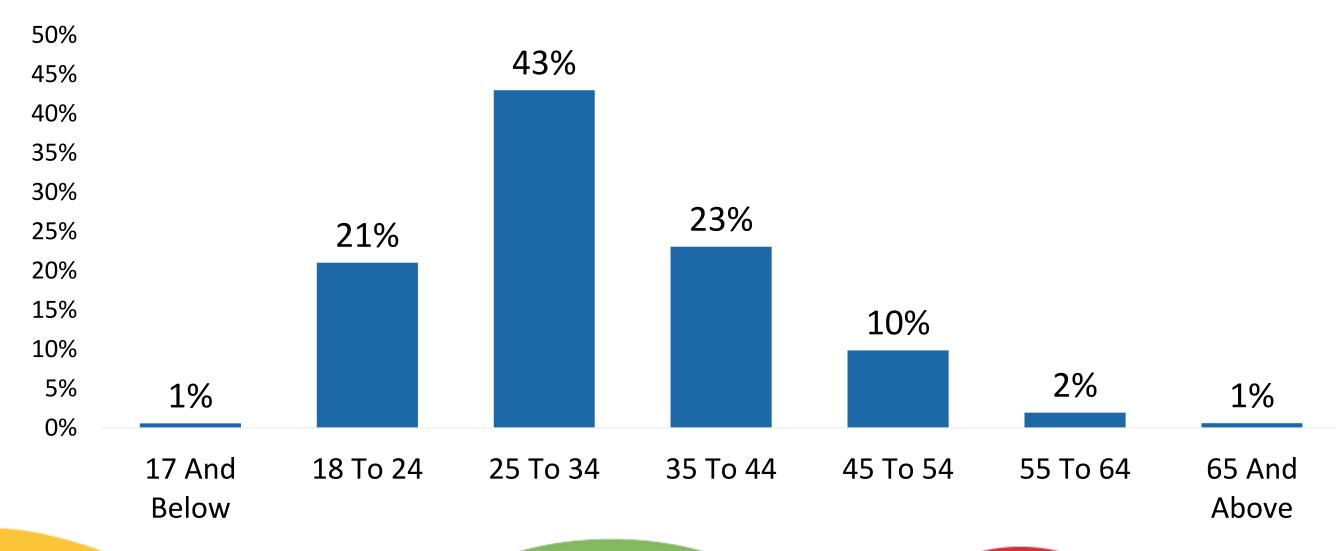


MUSEUMS VISITORS NATIONALITY

(2019) SISTIC Patron Data



VISITORS AGE (2019) SISTIC Patron Data



PREFERRED SALES CHANNELS (% OF AGE GROUP)

SISTIC Annual Patron Survey 2019 18-24 yo We trust desktop most!

<55 yo</p>
We are fine with mobile channels too!

65+ yo
For us, either AA or
hotline will do!

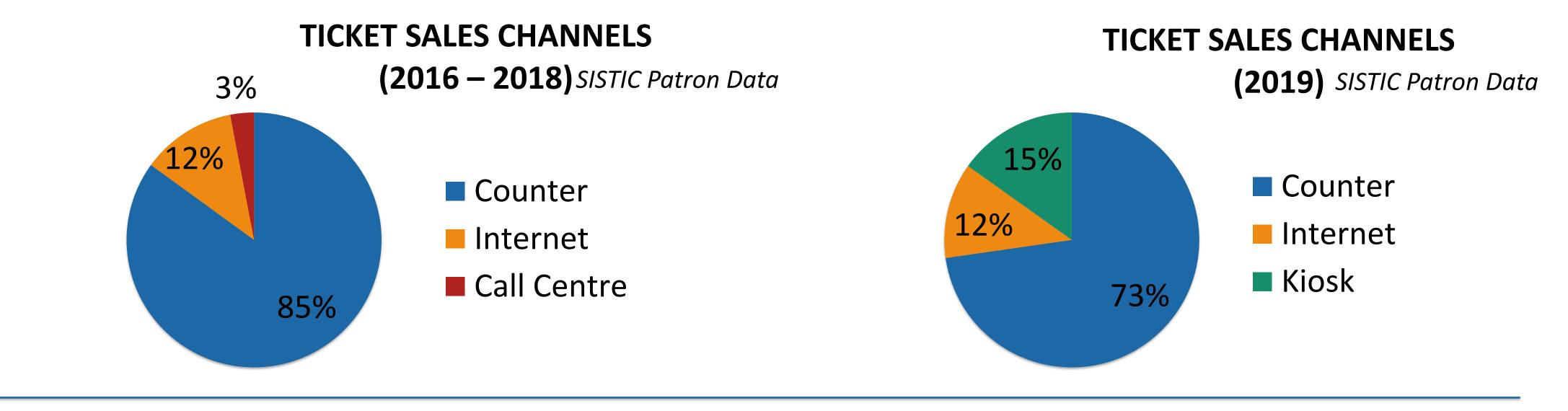
<18yo
Kiosks are already
part and parcel of
our lives!

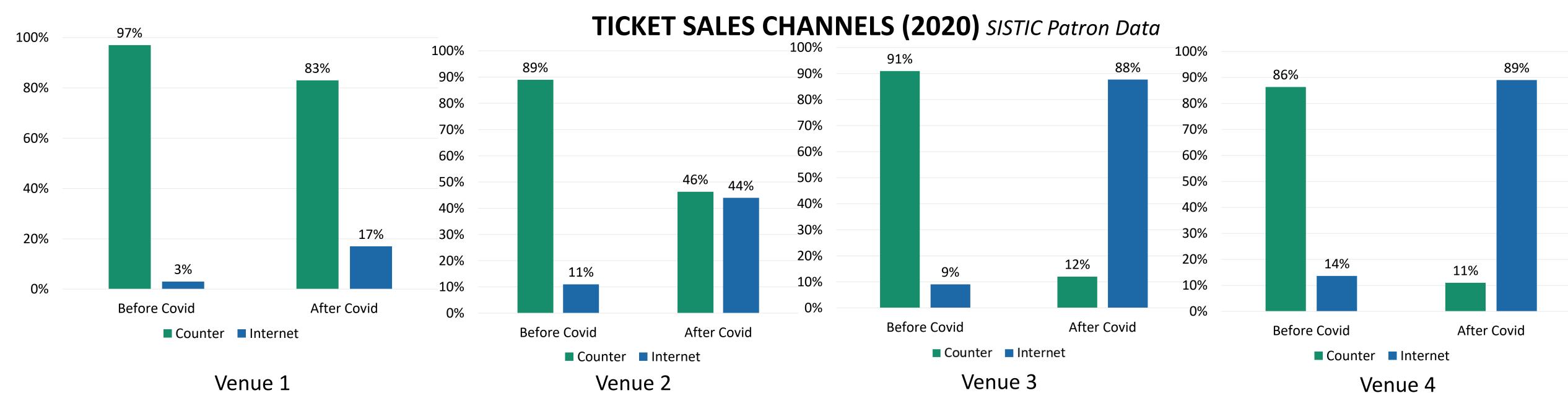
Desktop	Mobile Browser	Mobile App	AA	Hotline	Kiosk
<18: 48.8%	<18: 25.0%	<18: 12.5%	<18: 4.2%	<18: 0%	<18: 8.3%
<mark>18-24: 65.3%</mark>	18-24: 17.1%	18-24: 11.2%	18-24: 4.4%	18-24: 0.2%	18-24: 1.6%
25-34: 56.5%	<mark>25-34: 22.5%</mark>	<mark>25-34: 18.0%</mark>	25-34: 2.0%	25-34: 0.2%	25-34: 0.6%
35-44: 46.6%	<mark>35-44: 26.3%</mark>	<mark>35-44: 23.9%</mark>	35-44: 1.7%	35-44: 0.5%	35-44: 0.8%
45-54: 51.4%	45-54: 23.4%	<mark>45-54: 19.2%</mark>	45-54: 3.9%	45-54: 1.0%	45-54: 0.7%
55-64: 58.3%	55-64: 17.0%	55-64: 14.6%	<mark>55-64: 6.3%</mark>	5 <u>5-64: 1.5%</u>	55-64: 1.5%
65+: 45.8%	65+: 16.7%	65+: 14.6%	65+: 8.3%	65+: 8.3%	65+: 4.3%

6

PRE-COVID STATS







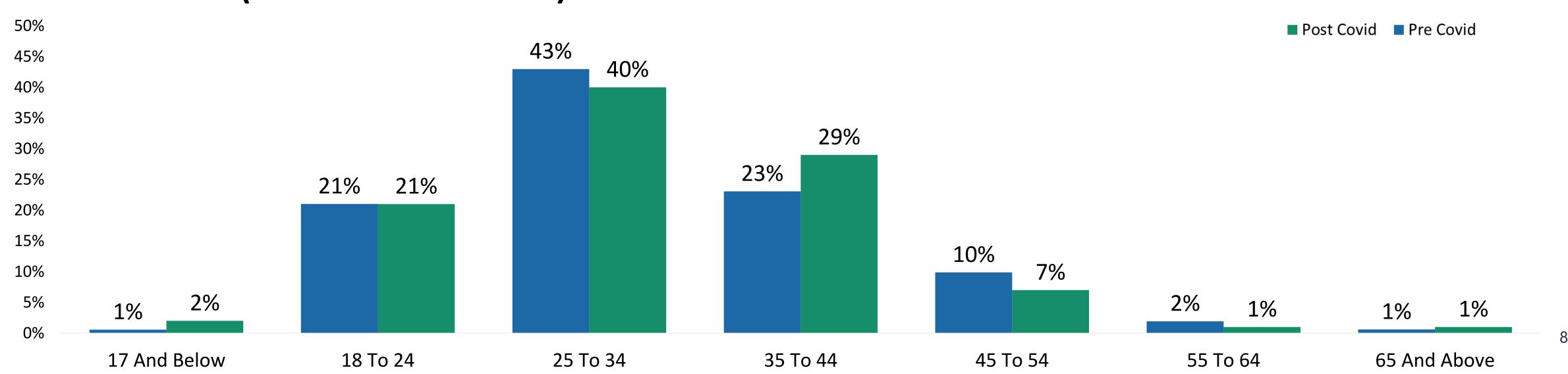


MUSEUMS VISITORS NATIONALITY (Pre and Post COVID)

SISTIC Patron Data



VISITORS AGE (Pre and Post COVID) SISTIC Patron Data





Online shopping intent for nonessential categories is strongest for millennials and high-income earners.

Expected change in online shopping per category over the next 2 weeks1 Net intent²

								< -20 -20 -10	1 10 20+
		US overall		Generati	ional³			Income	
		Net intent ²	Gen Z	Millennials	Gen X	Boomers		\$50K-\$100K	>\$100K
Essential	Groceries	1	-3	9	4	-4	-9	0	14
	Household supplies	O	0	8	3	-6	-9	-2	14
	Personal-care products	1	-5	8	3	-5	-6	-1	12
	Food takeout & delivery	3	15	8	4	-8	-7	0	17
	Snacks	-4	-8	1	-1	-8	-13	-4	8
	OTC medicine	O	-15	0	-4	-8	-10	-7	5
	Vitamins/supplements	0	0	9	7	-9	-7	6	16
	Entertainment at home	16	26	26	20	1	6	14	28
	Books/magazines/newspapers	10	-1	18	16	-4	-9	13	25
	Consumer electronics	-3	-1	12	-1	-20	-22	-1	14
	Tobacco	О	-214	0	3	-74	-16	-4	28
	Non-food child products	7	N/A ⁵	11	9	N/A ⁵	N/A ⁵	2	17
	Skin care & makeup	O	-2	6	4	-12	-10	-4	14
	Alcohol	-7	-344	-4	-3	-10	-20	-12	8
	Fitness & wellness	1	-7	0	9	-16	-21	-8	16
Non-	Footwear	-4	14	6	-2	-17	-19	-2	9
essential	Apparel	3	26	8	-2	-12	-8	3	16

McKinsey & Company **US** Consumer Pulse Survey

Net intent²

¹Q: And where do you expect you'll buy these categories? Tell us if you will shop in the following places more, about the same, or less in the next 2 weeks. Please note, if you don't buy in one of these places today and won't in next 2 weeks, please select "N/A." (Did not ask this question for categories not shown.)

²Net intent is calculated by subtracting the % of respondents stating they expect to decrease online shopping frequency. ³Generational data refers to the weighted average of McKinsey & Company COVID-19 US Consumer Pulse Survey 6/15-6/21/2020, n = 2,006, and 6/1-6/7/2020, n = 1,966. ⁴Low sample (75-100).

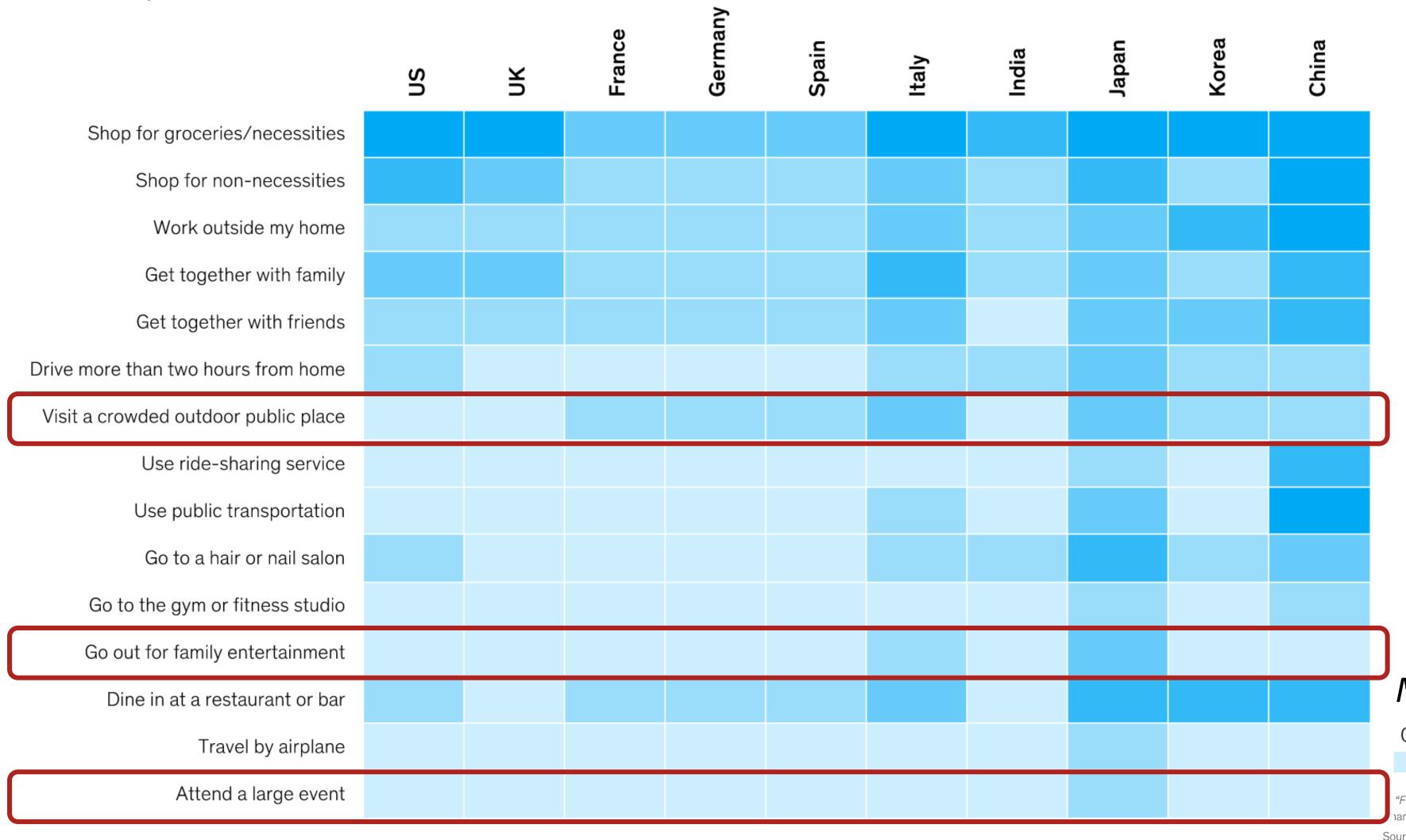
⁵Insufficient sample (<75).



Intent to pursue out-of-home activities varies by category and country.

Intended engagement with activities outside home for the next two weeks1

% of respondents²



McKinsey & Company Survey

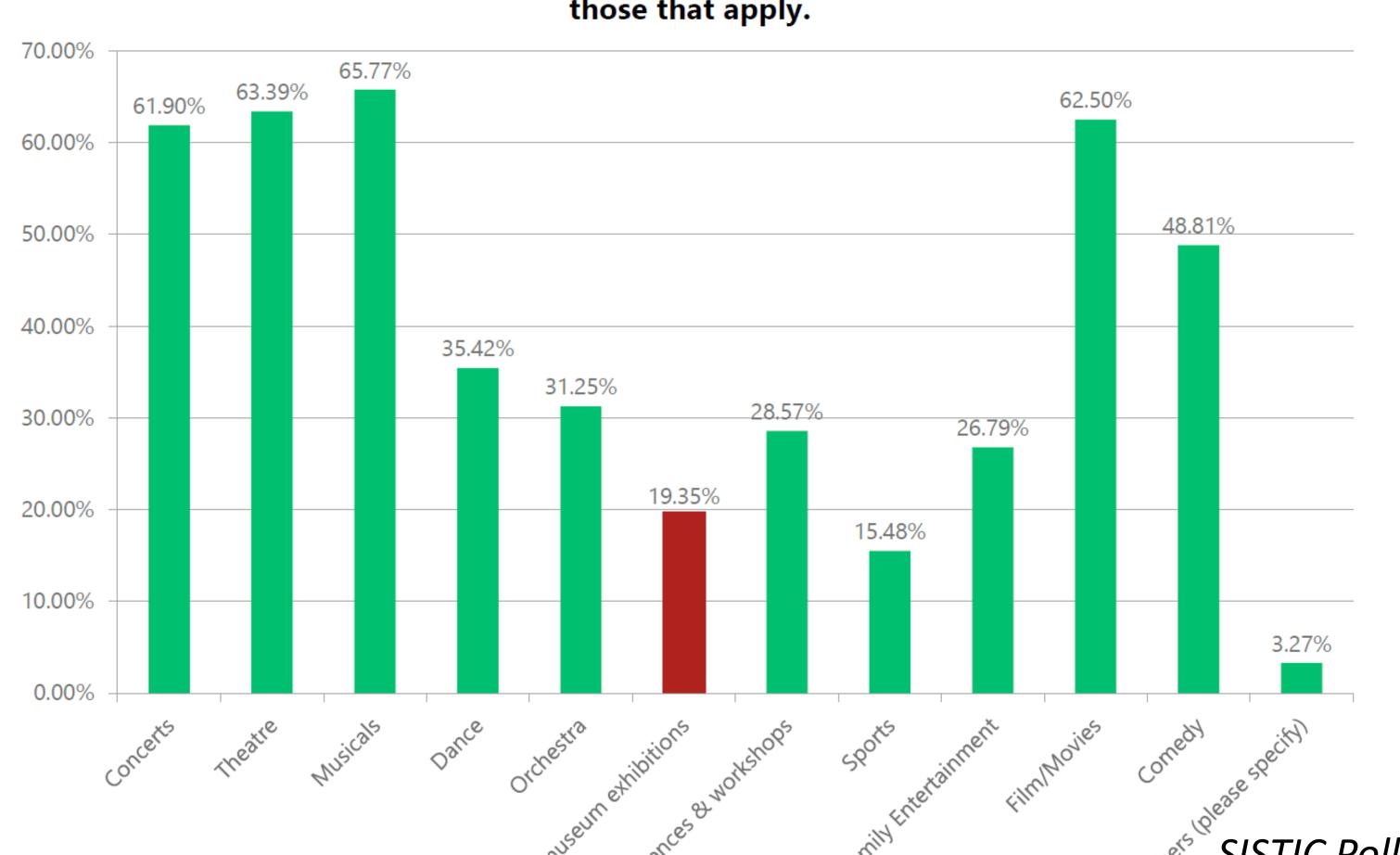
0-19 20-39 40-59 60-79 80+

10

"For which of the following activities do you intend to leave your home to do in the next two weeks?" nart represents percent of respondents who intend to leave their home to do this activity during the next two weeks.



Which type(s) of events are you most likely to watch via live stream? Tick those that apply.

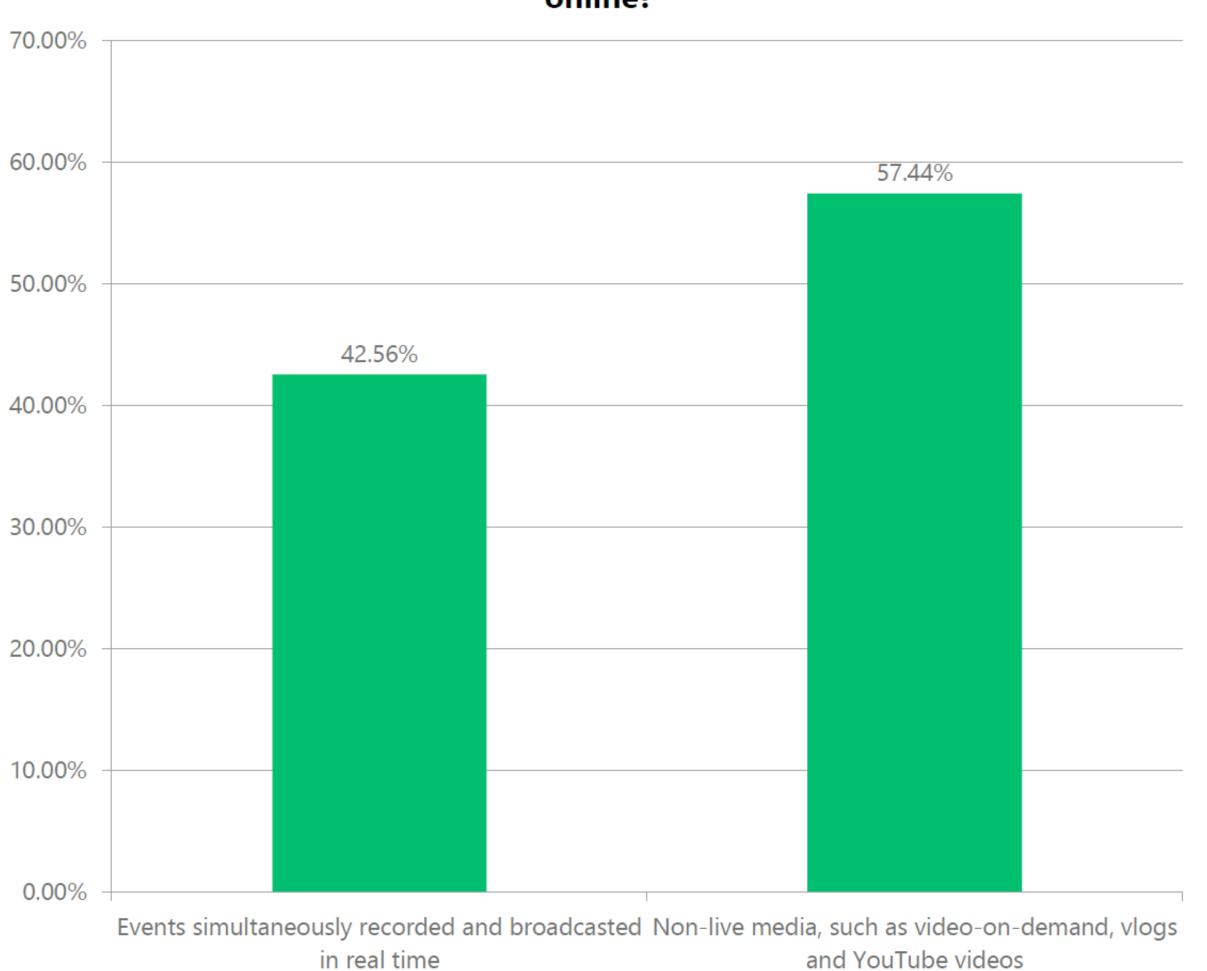


Answer Choices	Respon	ses
Concerts	61.90%	208
Theatre	63.39%	213
Musicals	65.77%	221
Dance	35.42%	119
Orchestra	31.25%	105
Art & museum exhibitions	19.35%	65
Seminars, conferences & workshops	28.57%	96
Sports	15.48%	52
Family Entertainment	26.79%	90
Film/Movies	62.50%	210
Comedy	48.81%	164
Others – Magic shows, opera, news, gaming events	3.27%	11
	Answered	336

SISTIC Poll on Live Streaming and Virtual Events – Apr 2020



What type of content do you generally prefer to watch online?



Answer Choices	Responses		
Events simultaneously recorded and broadcasted in real time	42.56%	143	
Non-live media, such as video-on-demand, vlogs and YouTube videos	57.44%	193	
	Answered	336	

SISTIC Poll on Live Streaming and Virtual Events – Apr 2020







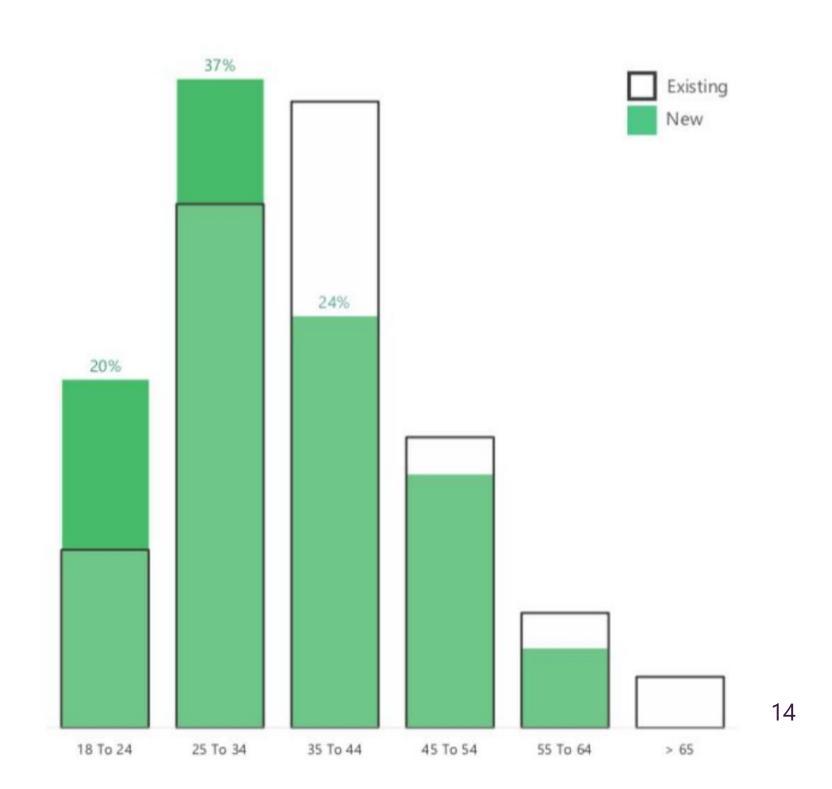
Digital Consumer Survey (by NHB) in May 2020

- 43.5% are new audiences, reached via NHB's digital offering
- 87.4% agreed digital offering made them more interested to visit our Museums
- 79.9% agreed that the digital offerings uplifted their spirits

Our own findings from SISTIC Live, our new Live Streaming service

- 39% are new audiences who have never attended our physical events
- Most of the new audiences were younger segments

Our own stats shows similarity between museums patrons and our patrons for other arts & culture performances

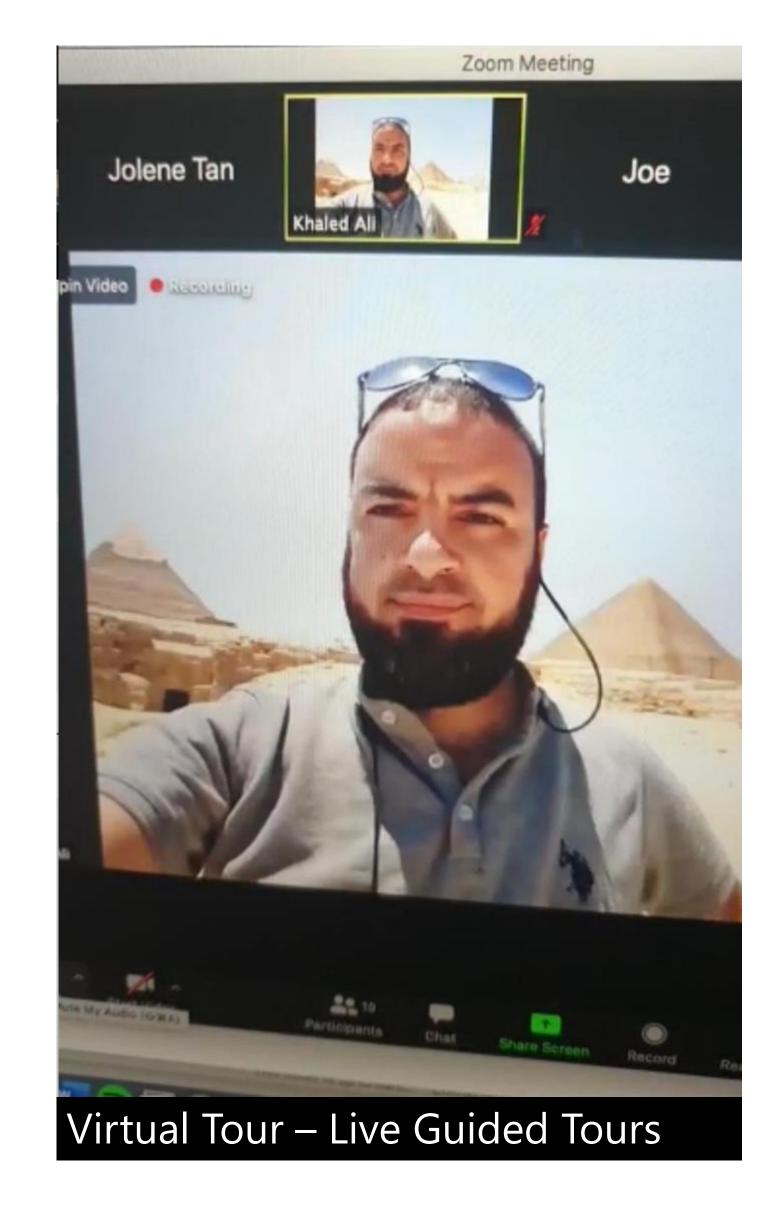


DIGITAL ENGAGEMENTS





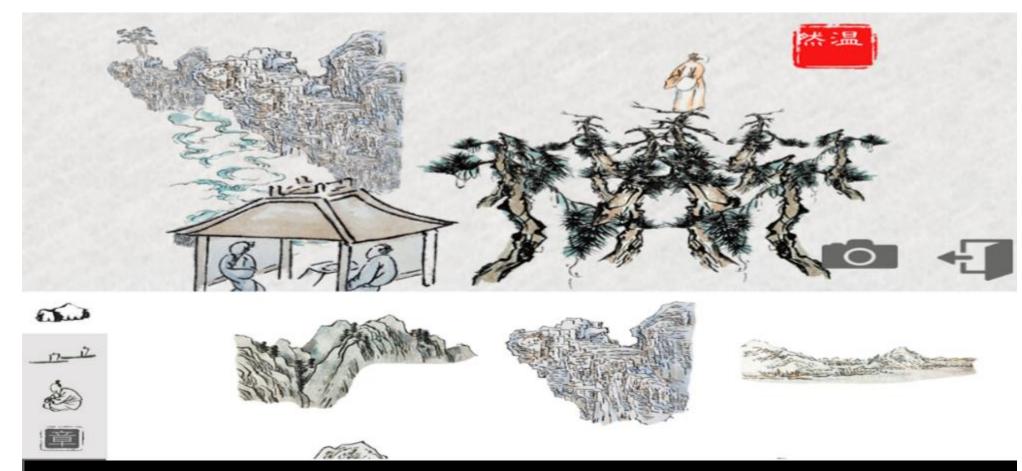




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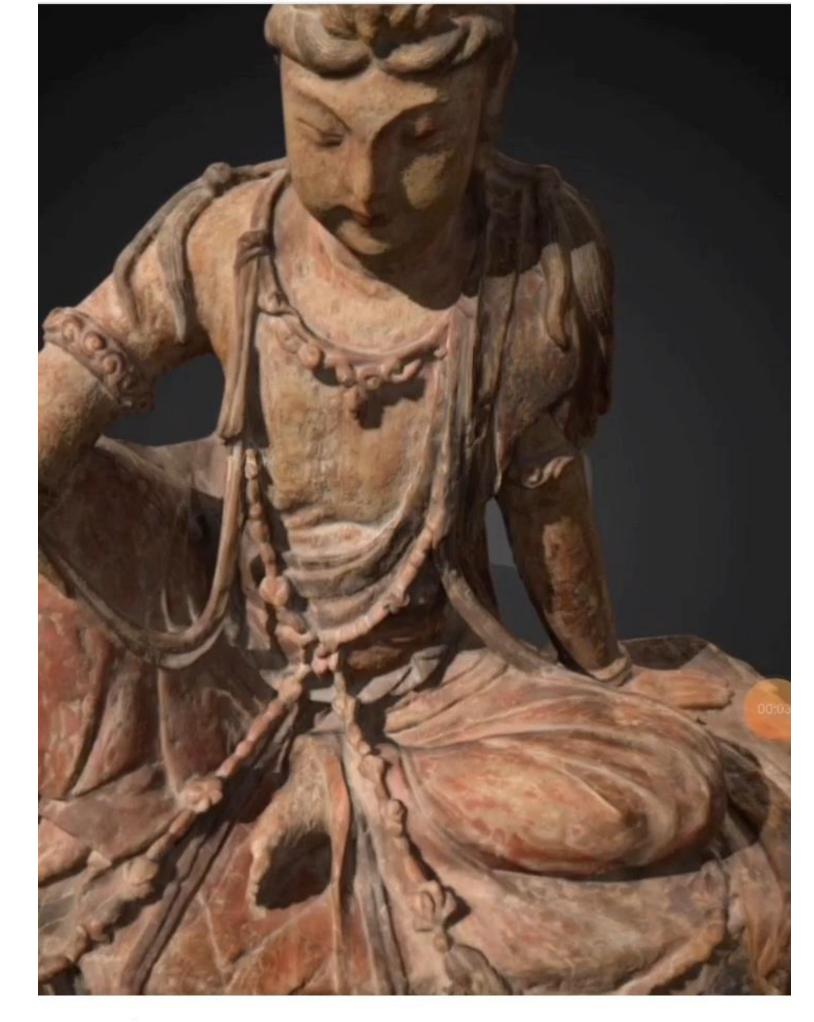
DIGITAL ENGAGEMENTS





Gamifications – DIY Landscape Painting, Suzhou Museum





12th C CE Water-Moon Guanyin

3D Art Exploration - Artsmia

16

DIGITAL ENGAGEMENTS





Supplementary Home Packs – North Carolina, Museum of History

1/

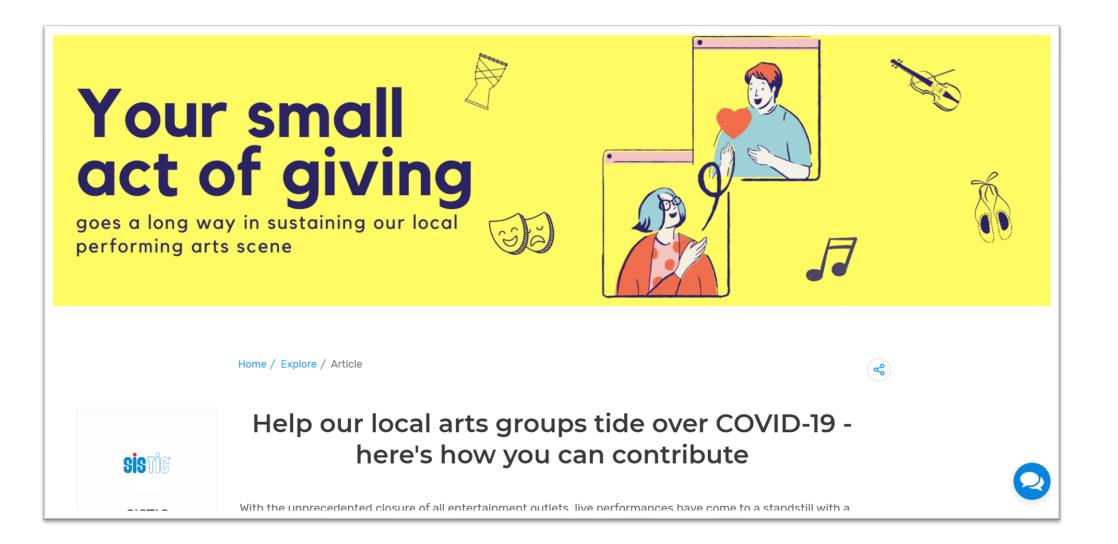
DIGITAL ENGAGEMENTS – SISTIC ENGAGEMENTS



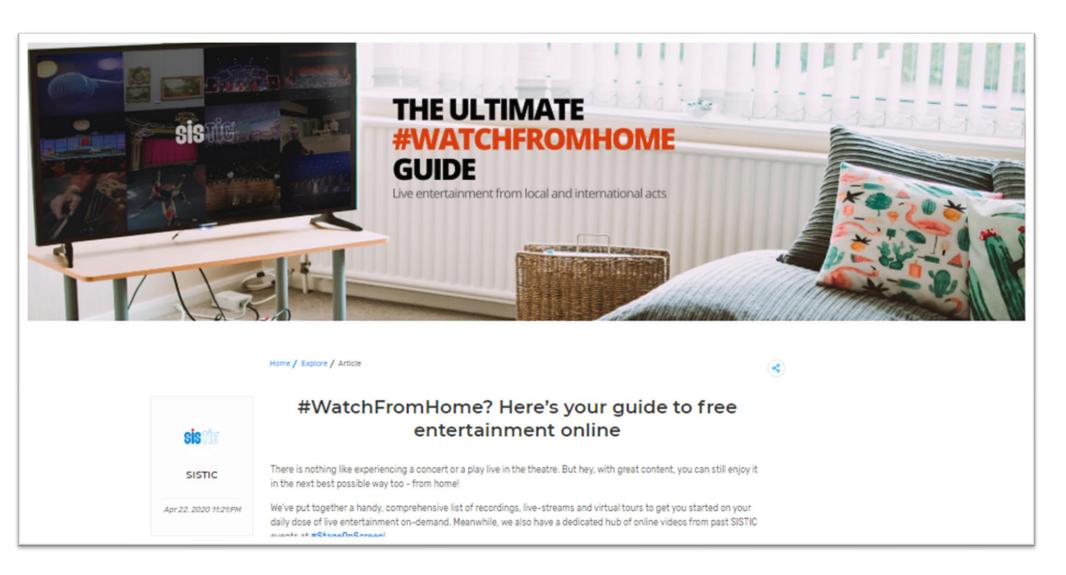
#StageOnScreen – Local Arts & Culture Content



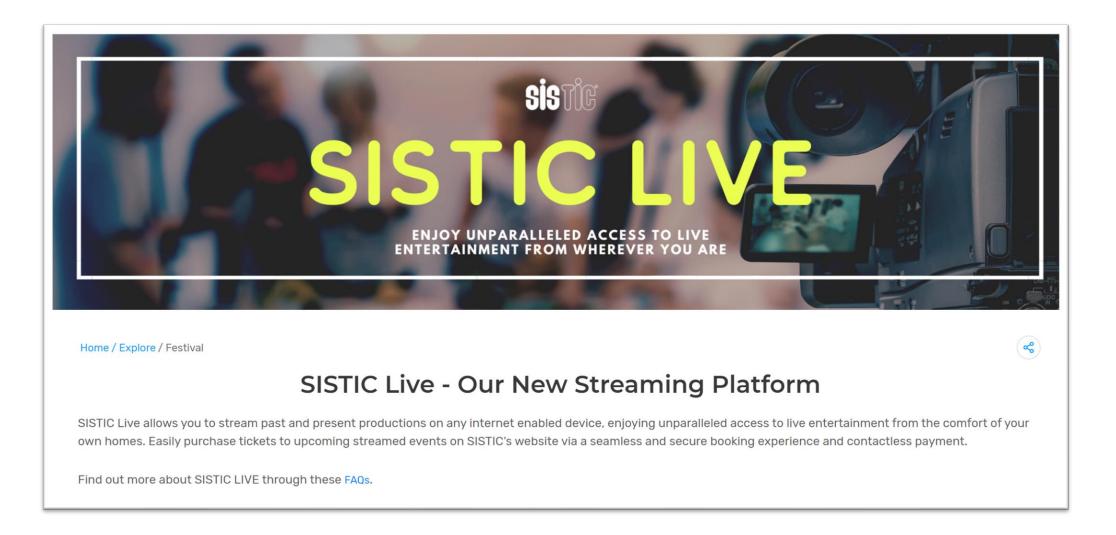
Arts& Culture Donation



#WatchFromHome – External Content

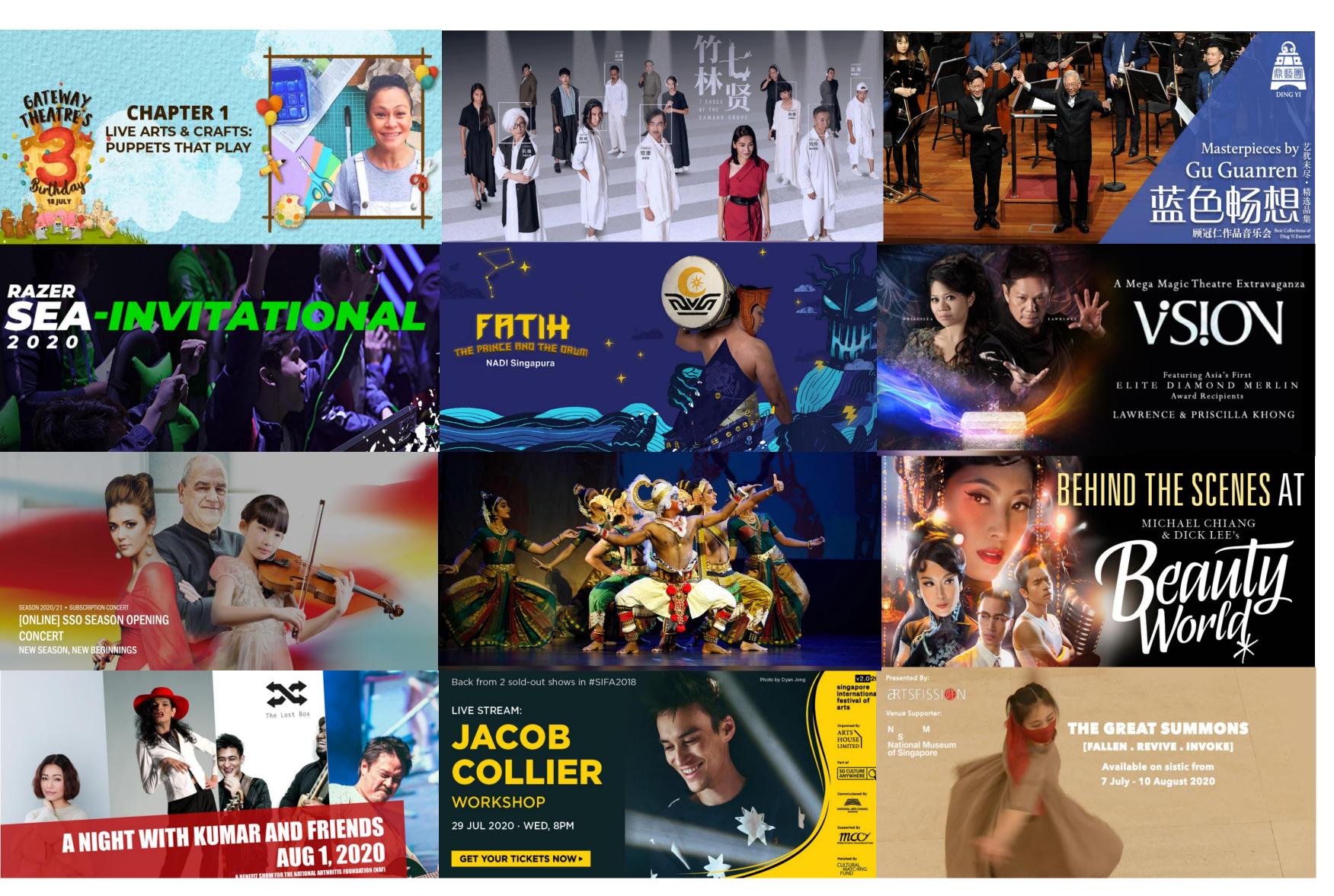


SISTIC Live – Virtual Event Monetisation



DIGITAL ENGAGEMENTS – SISTIC LIVE





Supported >30 events on SISTIC Live since May 2020

20 events on Zoom, Google Meet

Sold ~20000 tickets

Viewers across Singapore, Malaysia, India, USA and UK

Supported

- Live Streaming
- Scheduled broadcast
- Pre-recorded video upload

Monetised via

- Pay to view
- Pay as you wish
- Donations



MUSEUMS SAFE OPENING

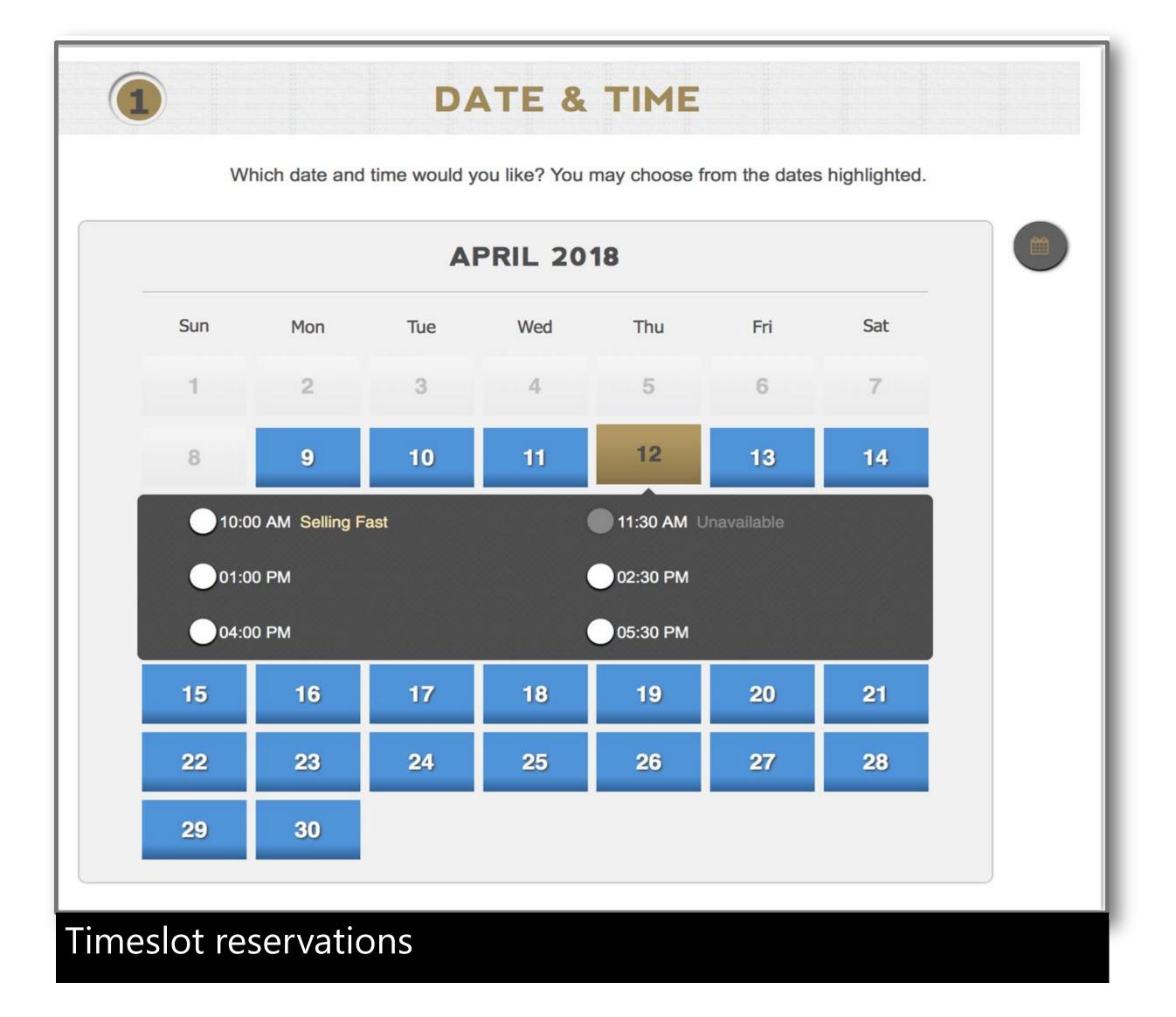


Research by IMPACTS Research & Development

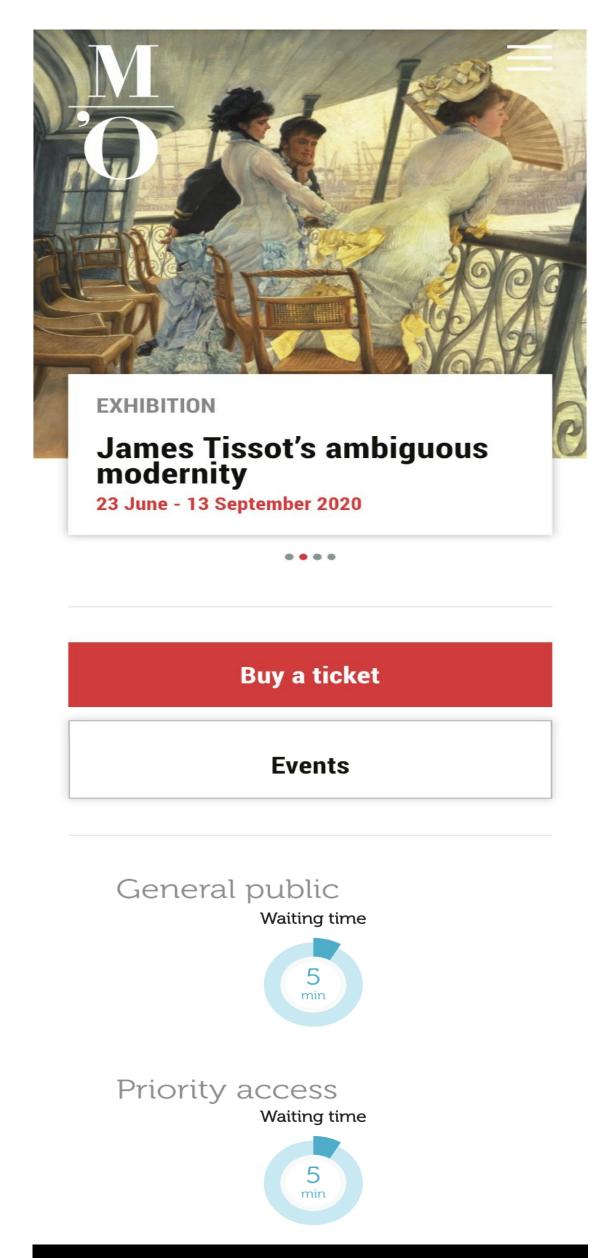
Public is comfortable visiting Museums but not using interactive exhibits and features

Data consolidated for about ~160 museums worldwide that are Opened or Opening Soon (From avoid-crowds.com)

- 148 has stated some form of safety measures (E.g. social distancing, mandatory masks, reduced capacity, timed entry, hand sanitisation stations etc)
- 139 has online ticketing as an option (68 has only online option)

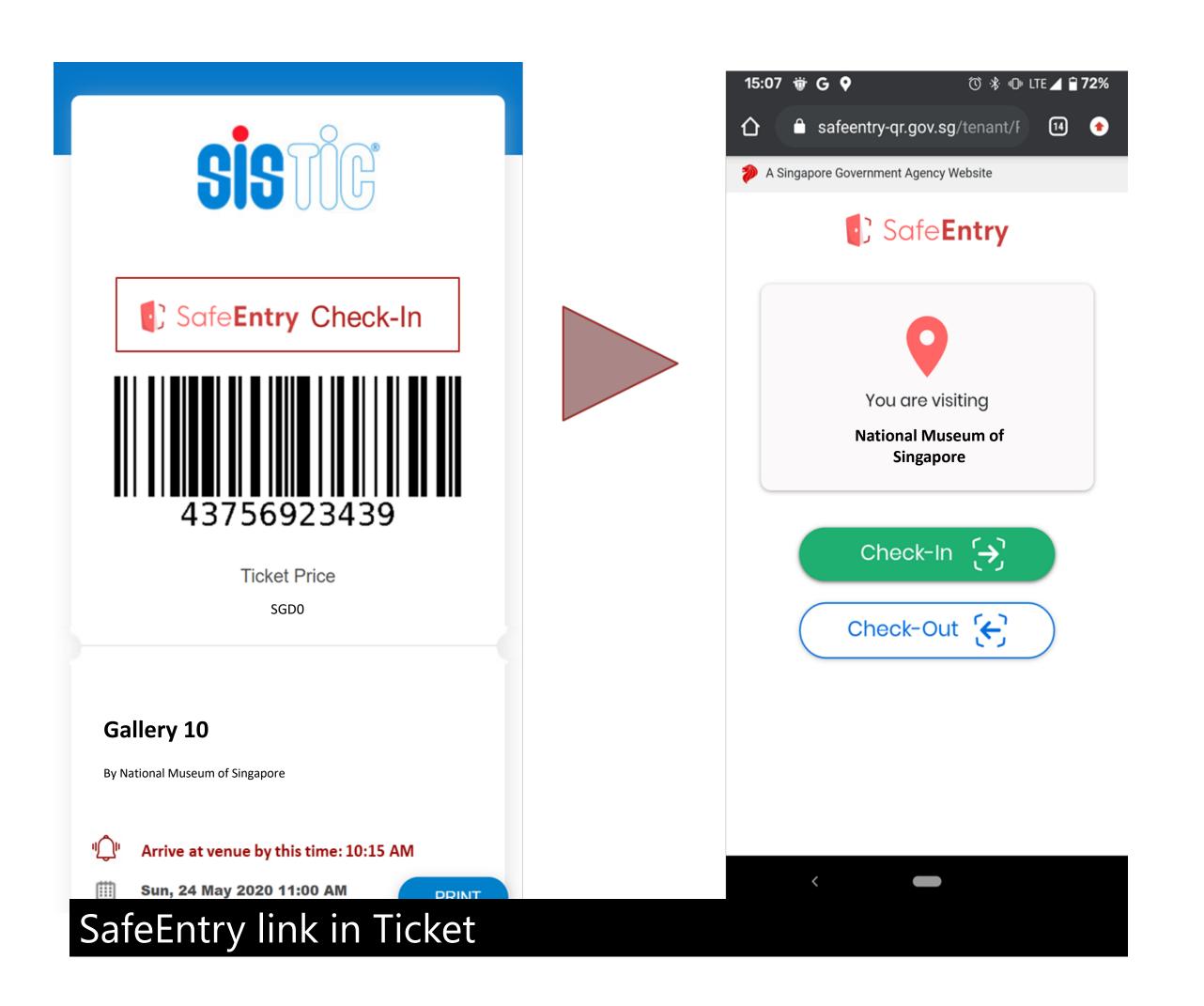


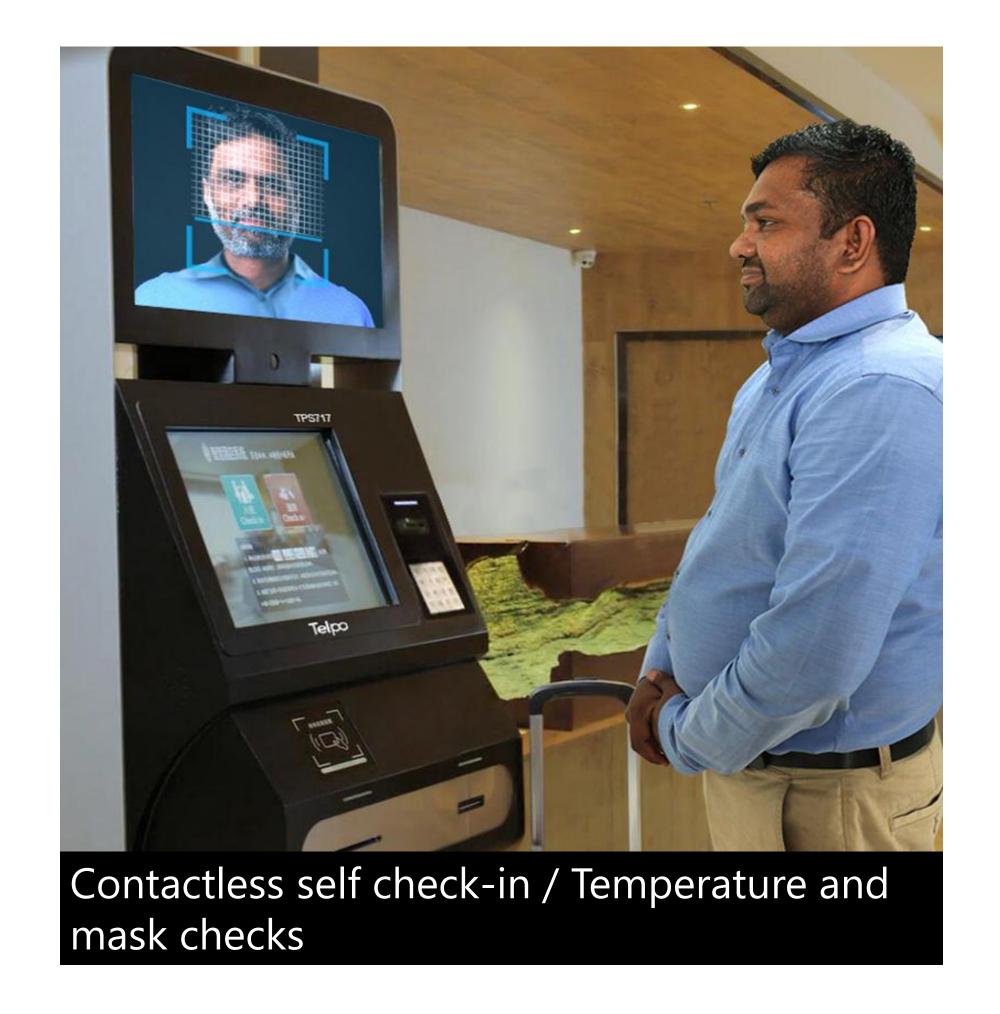




Queue Time on Website & Ticket

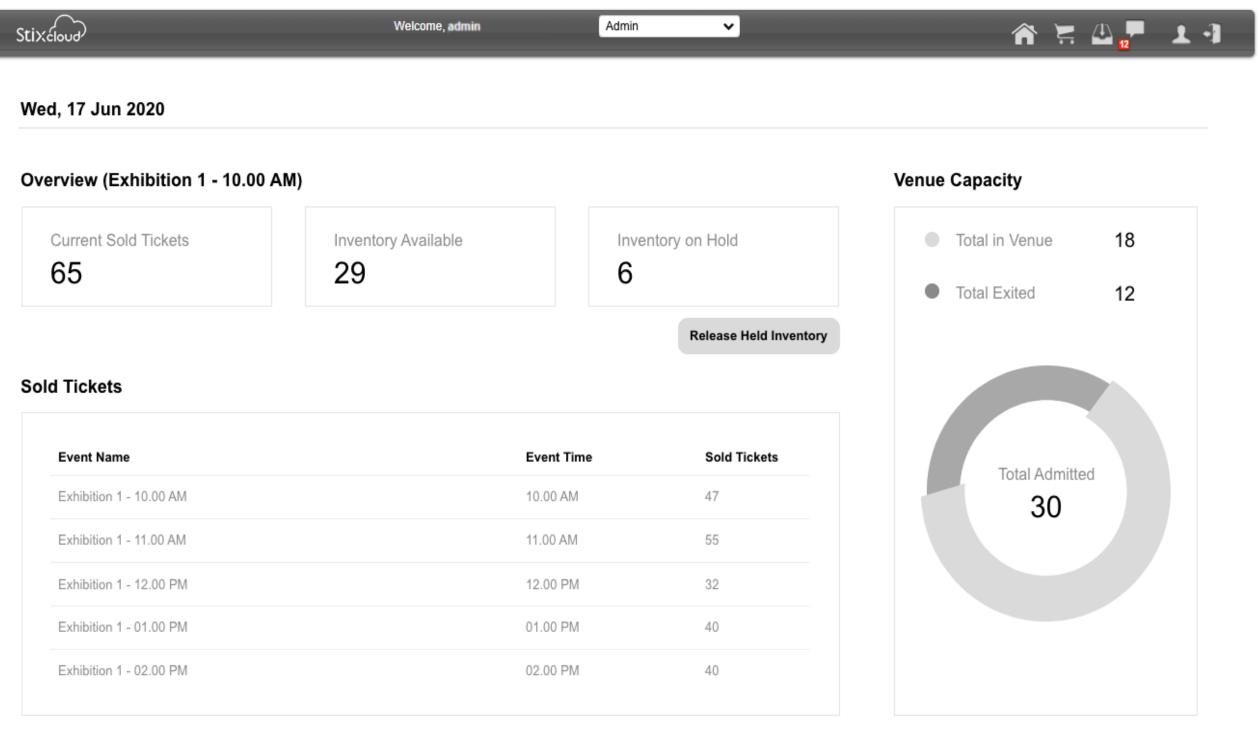












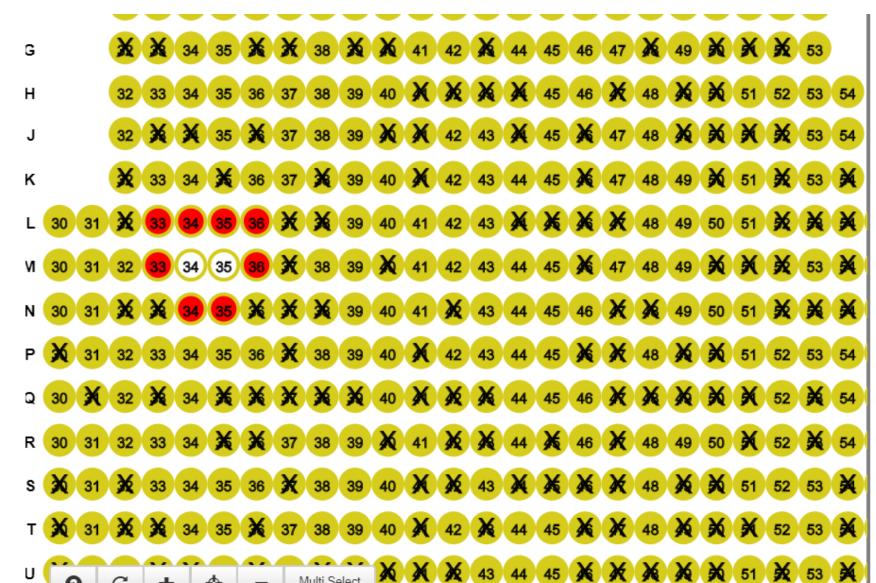
Realtime Patron count in exhibitions – Front Desk



Selection Remove all

Auto Blocking of Seats for Social Distancing

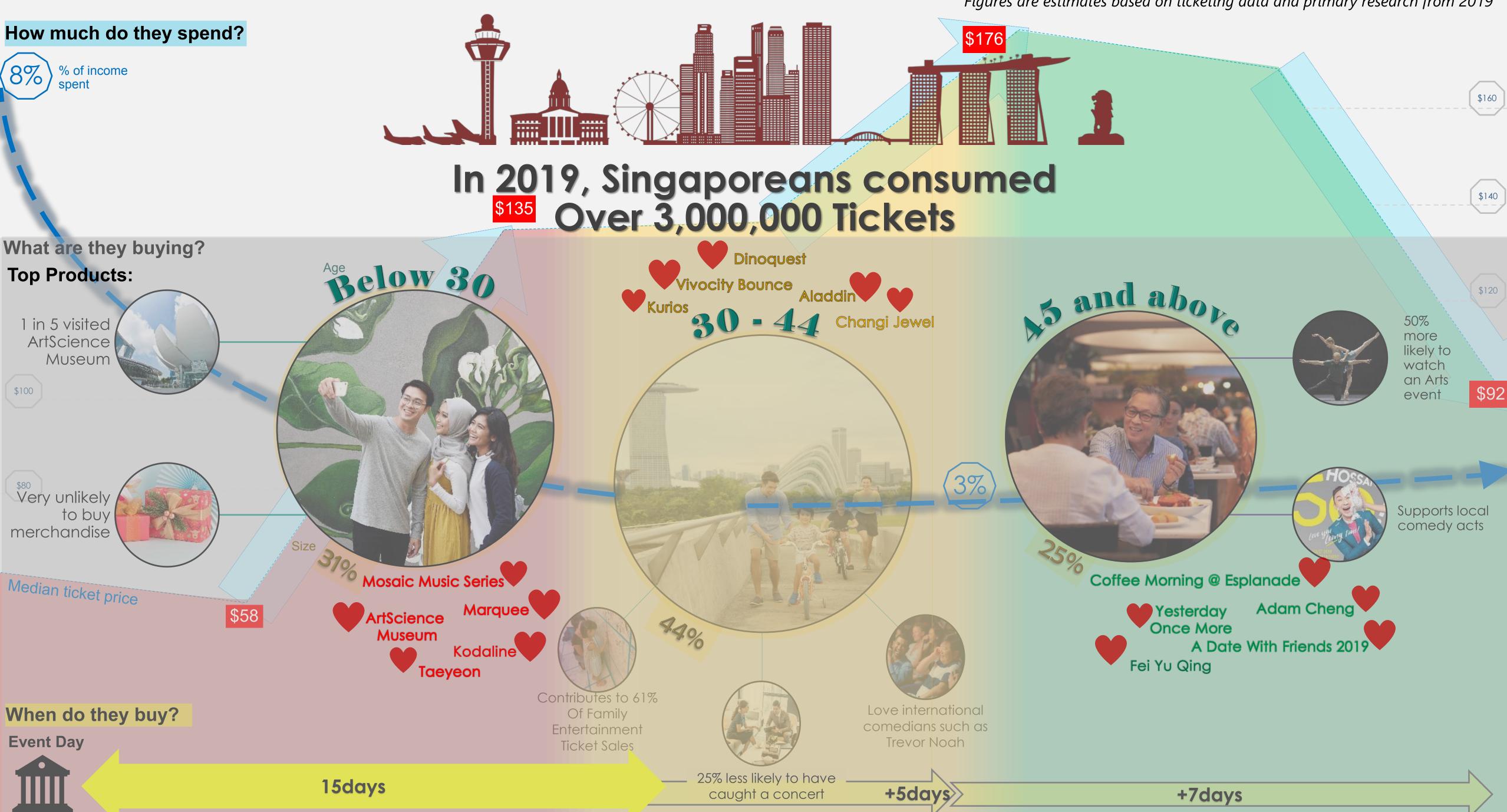
- System will auto-assign the seats based on best-available, in first-come-first-serve
- System will auto-bubble wrap the seats with safe
 distancing in place (auto block off seats in front, behind,
 left and right) distance can be adjusted per venue. E.g. SIS
 might have a 1 seat buffer and NST might have a 2 seat buffer
 setup



- Seats will be sold and held back with SDM-hold codes that are tied to patron account.
- This option will balance social distancing measures with revenue optimisation
- Seats Selection with bubble wrap is possible from consumers' front, but there may be gaps and will not maximise revenue.

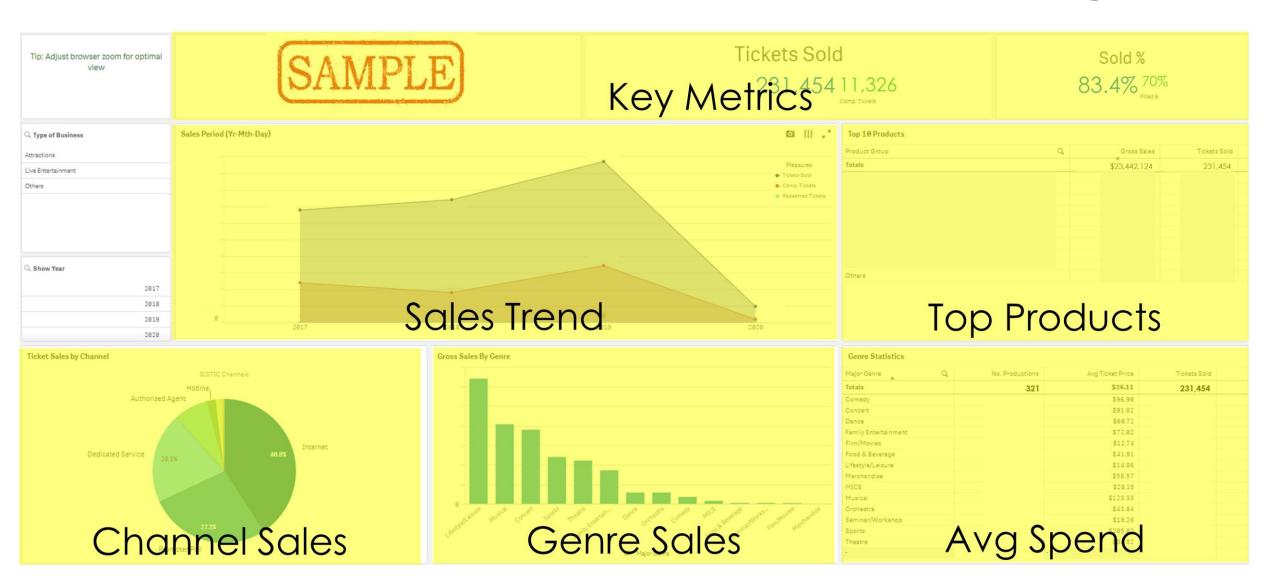


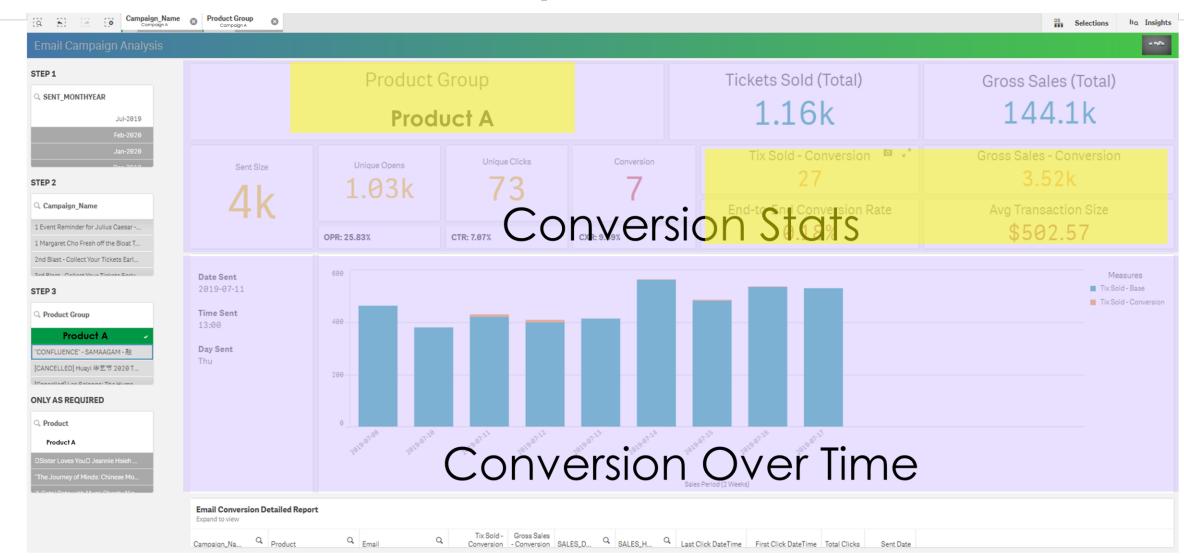




Data Capabilities

Business Intelligence & Data Analytics





Industry Dashboard

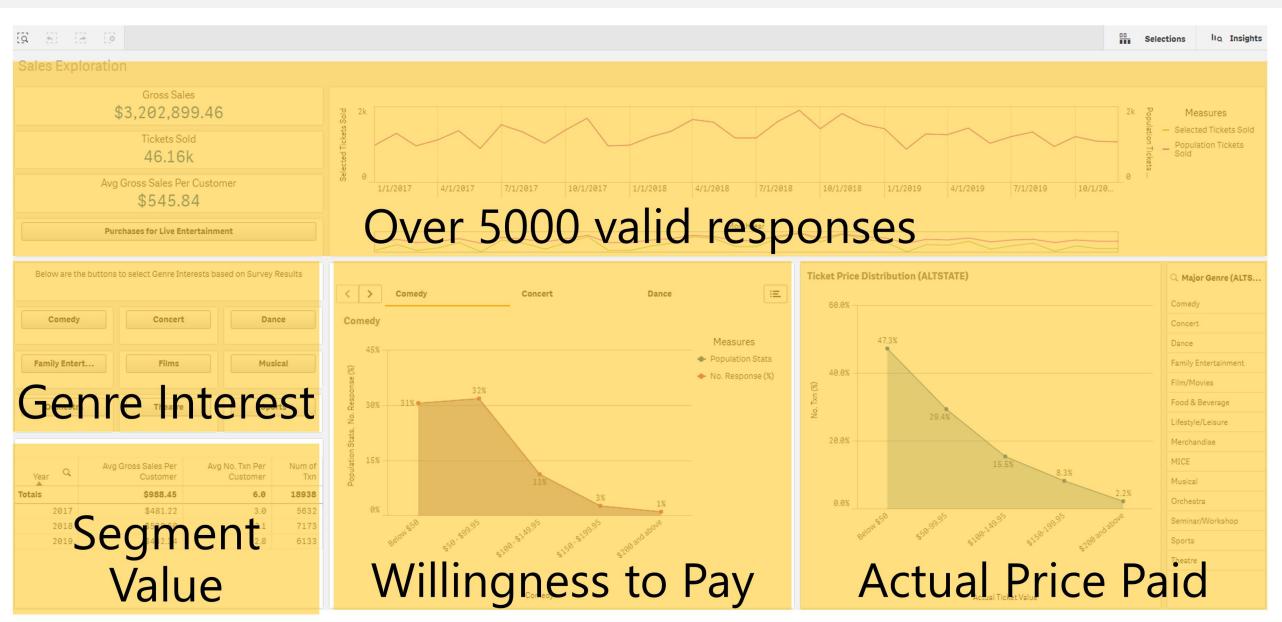
Providing a platform that provides self-service slicing, dicing and visualization of data

Marketing Analytics

Extending our view of the customer journey

Data Capabilities

Data Enrichment & Predictive Analytics



					Affini	ty With				
Genre	Orchestra	Musical	Theatre	Concert	Family Ent	Films	Sports	Festivals (Arts)	Comedy	Dance
High Affinity	Fest. (Arts) Dance	Orchestra Theatre	Films Fest. (Arts) Dance	Orchestra Sports	Sports Comedy	High	ly Ent ms	Films Dance	Films Sports	Orchestra Festivals (Arts)
Low Affinity	Family Ent Comedy	Sports	Concert Family Ent Sports	Theatre Family Ent	Orchestra	Low	sical	Concert	Orchestra	Concert
Orchestra	Prot	abili	56.6%	84.3%	25.1%	32.3%	12.5%	37.3%	36.0%	32.3%
Musical	P _{26.1} % L	papili	Ty _{53.9%}	76.5%	27.7%	26.8%	11.4%	28.0%	43.3%	22.3%
Theatre	26.8%	83.0%	N.A.	75.1%	27.5%	35.1%	12.2%	37.9%	48.3%	28.2%
Concert	23.2%	68.6%	43.7%	N.A.	26.9%	25.8%	14.3%	26.0%	42.1%	19.1%
Family Entertainment	18.7%	67.3%	43.3%	72.9%	N.A.	26.1%	18.0%	27.9%	53.2%	22.7%
Films	27.9%	75.0%	64.0%	80.6%	30.2%	N.A.	20.3%	51.7%	54.7%	25.4%
Sports	20.2%	59.9%	41.9%	83.9%	39.0%	38.1%	N.A.	28.7%	56.1%	20.1%
Festivals (Arts)	31.3%	76.5%	67.3%	79.3%	31.4%	50.4%	14.9%	N.A.	47.0%	33.3%
Comedy	18.4%	72.0%	52.2%	78.1%	36.5%	32.4%	17.7%	28.6%	N.A.	21.0%
Dance	36.2%	81.3%	66.8%	77.6%	34.1%	33.0%	13.9%	44.4%	45.9%	N.A.

Data Enrichment

Understanding the "Whys" behind customer actions

Genre Affinity Maps

Understanding the "Whys" behind customer actions

Data Capabilities

Data Services & Advanced Reports

Product Combination Q	No. Products	No. of Patrons
Totals	5529	1017302
Aladdin The Lion King	2	1141
The Lion King The Phantom Of The Opera	2	677
WINNER 2018 EVERYWHERE TOUR IN SINGAPORE IKON 2018 CONTINUE TOUR IN SINGAPORE	2	662
National Gallery Singapore - All Access Pass (General Admission and YAYOI KUSAMA: Life is the Heart of a Rainbow) National Gallery Singapore - Gallery Insider	2	600
SINGAPORE AIRSHOW 2018 – Adult and Child SINGAPORE AIRSHOW 2020 – Adult / Child	2	595
From Singapore to Singaporean: The Bicentennial Experience The Lion King	2	456
KOOZA The Lion King	2	431
KOOZA KURIOS CABINET OF CURIOSITIES	2	414

Products Bought Q	Number of Accounts	% of Accounts	Avg CLV Per Account	Avg Interval Between Purchases (Days)	Recency
Totals	•	100.0%	\$454	45	486
1		71.0%	\$139	11	545
2		14.1%	\$366	132	418
3		5.7%	\$590	148	339
4		2.9%	\$789	138	290
5		1.7%	\$997	126	252
6		1.1%	\$1,202	115	223
7		0.7%	\$1,368	104	205
8		0.5%	\$1,503	96	187
9		0.4%	\$1,823	88	173
10		0.3%	\$2,099	82	160
11		0.2%	\$2,010	75	155
12		0.2%	\$2,209	71	149
13		0.1%	\$2,273	67	132
14		0.1%	\$3,733	63	136
Others		0.8%	\$21,308	43	102

Year Q Type of Patron Q							
	Totals	New Patron	Repeat Patron				
2017	100,000	50,000	50,000				
2018	110,000	50,000	60,000				
2019	120,000	55,000	65,000				
2020	10,000	4,000	6,000				

Product Grouping

Identify patrons who are interested in visiting museums and watching an arts program.

Creating Segments

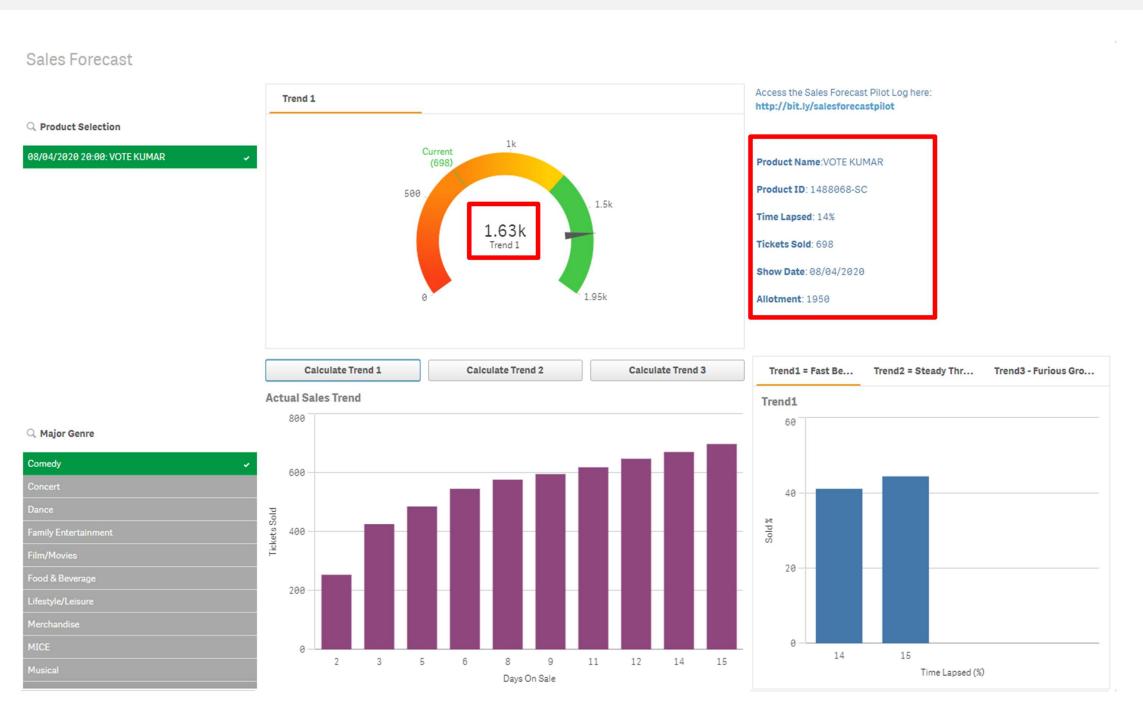
Segment customers and measure each segment via business frameworks such as RFM.

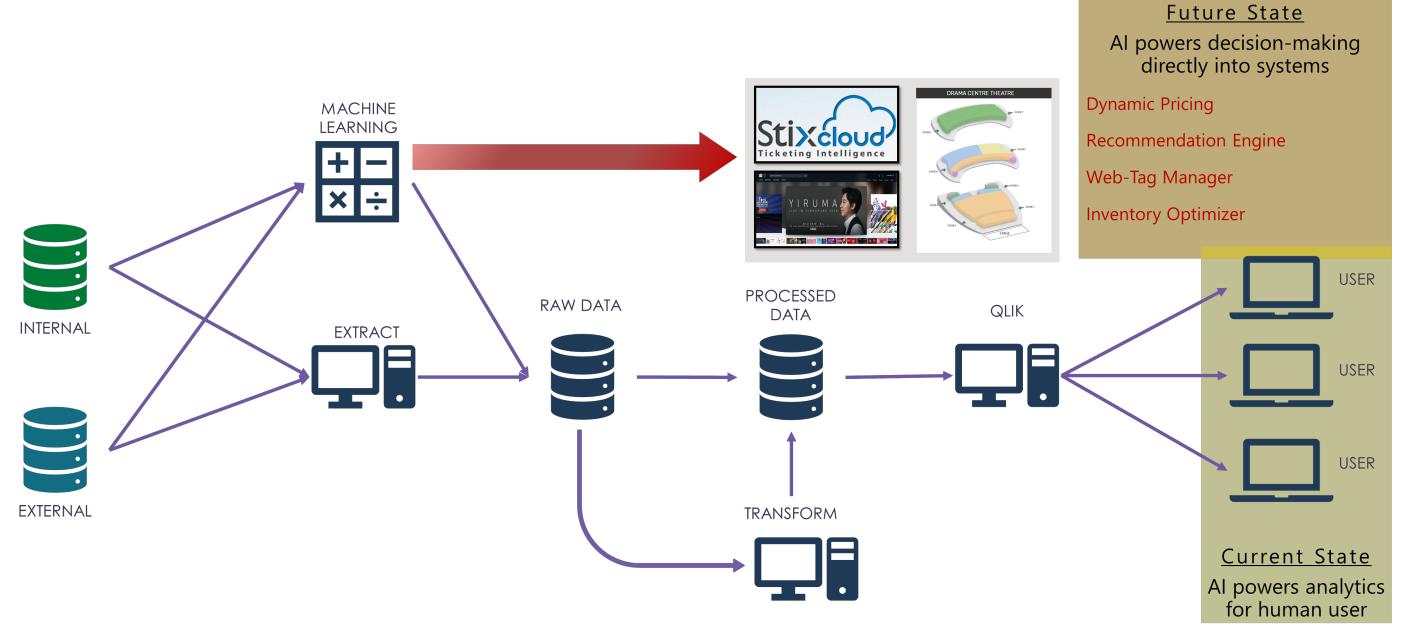
Customer Acquistion

Track the customer acquisition / retention across time.

Capabilities

Machine Learning





Machine Learning

Knowledge and data are crystalized into Machine Learning models.

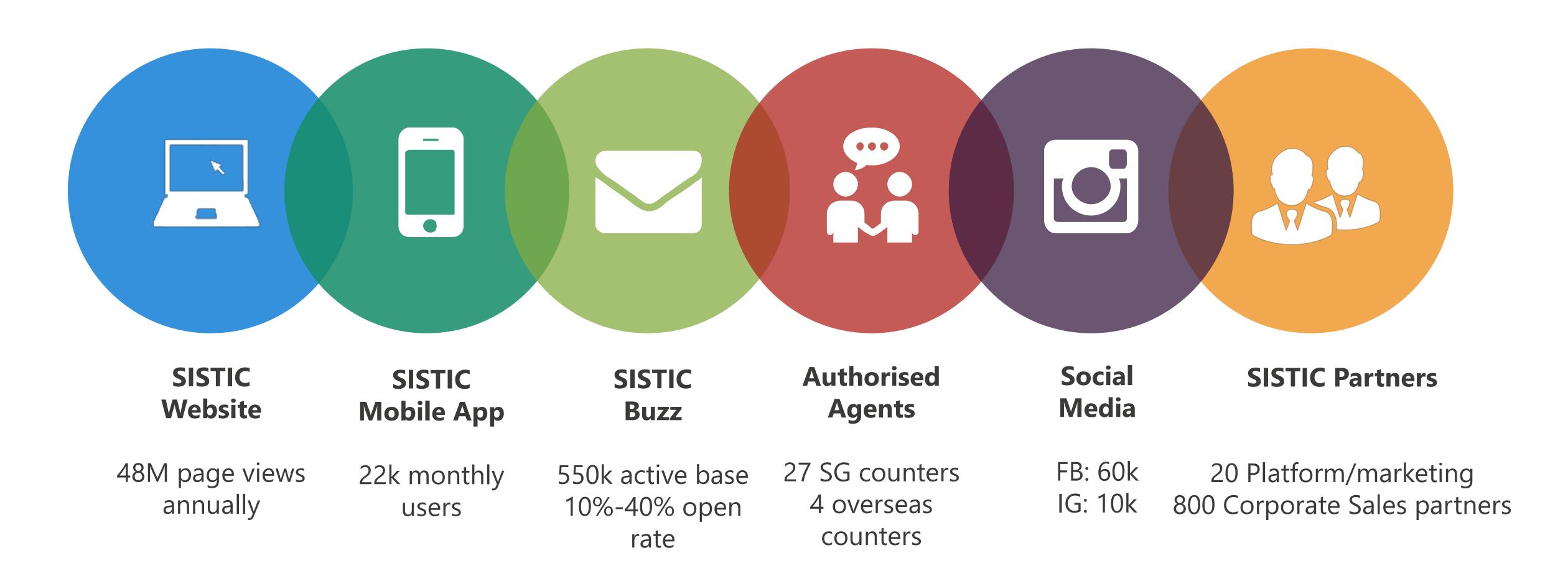
Sales forecast, Recommendation models etc

Decision Engineering

Integration of machine learning models into operations and product to provide smarter services and sales conversions



OUR SALES AND MARKETING CHANNELS

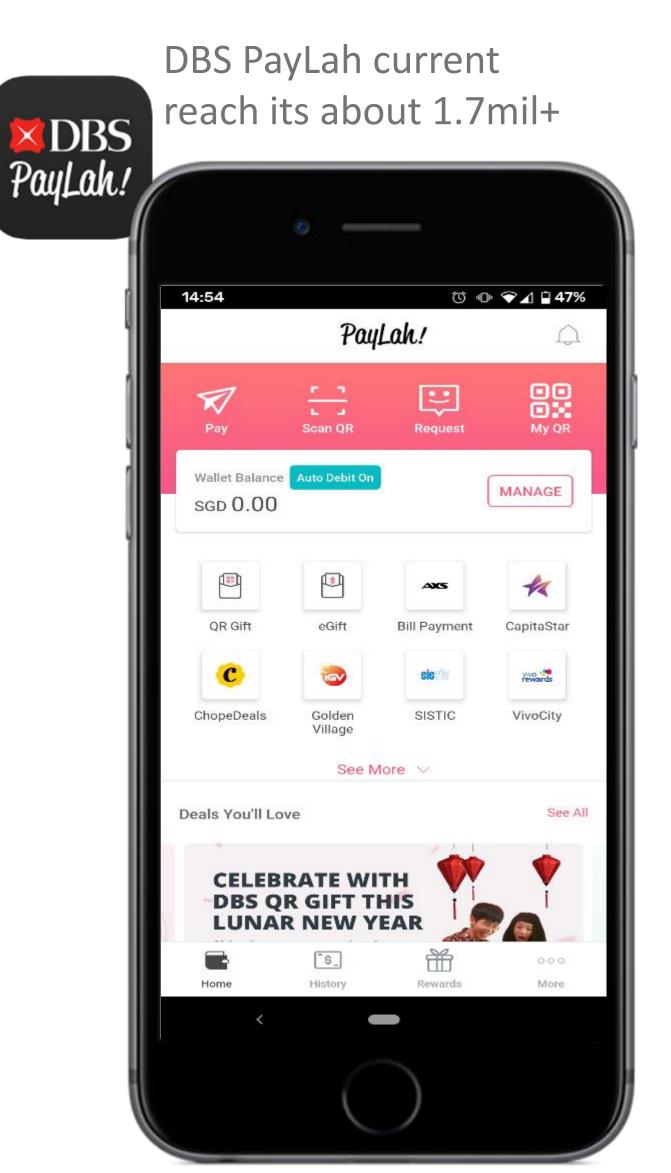


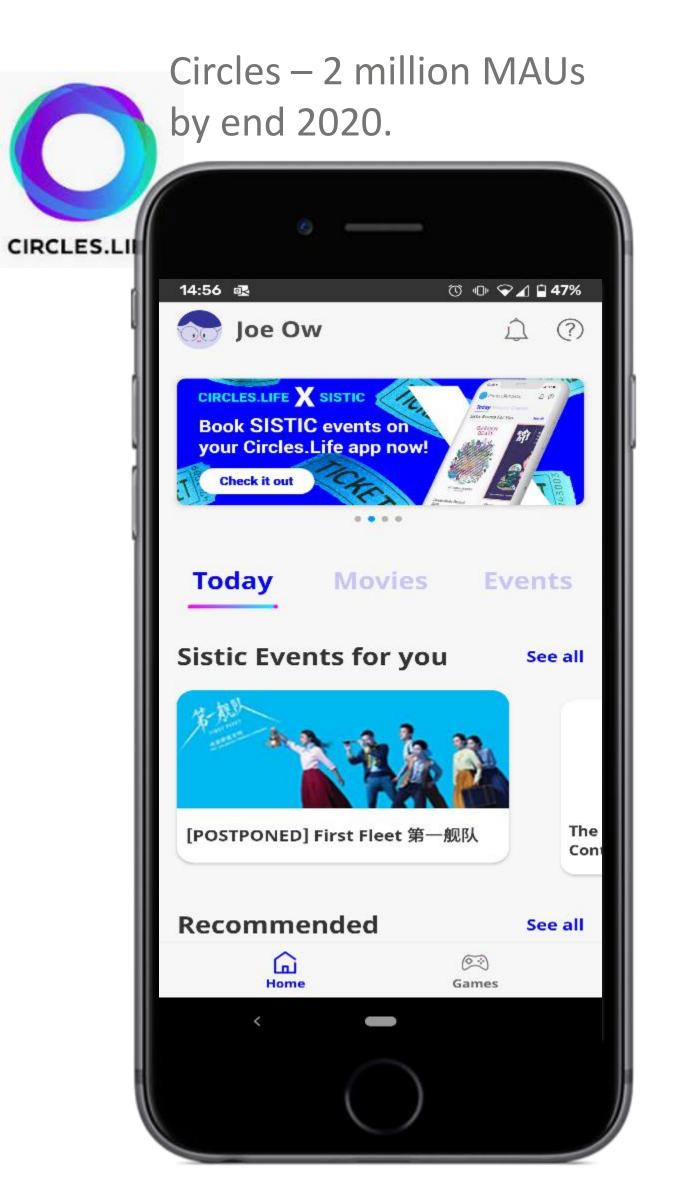


API PARTNERSHIP – Seamless Ticketing

Seamless Ticketing – Ease of access to browse and purchase tickets via API Partners. More Digital channels











PARTNERSHIPS







Visit Singapore Pass (VSP)

It allows Visit Singapore (VS) app users to be admitted into venues via a single QR code known as the VS ID.

Tourism Information Hub (TIH)

Upload content into TIH, syndicate to travel agents

Partnering with BeMyGuest & Chan Brothers

 Integrating our inventory into BeMyGuest and Chan Brothers to distribute via their extensive travel agent networks in the region



Partnering with ActiveSG:

- Integrating with ActiveSG as a sales and marketing channel
- ActiveSG Wallet as a payment option in SISTIC platform

Excellence that Inspires Our People and Connects Our Communities NATIONAL ARTS COUNCIL SINGAPORE PLAN 2018–2022

Cultural Concierge – is a single platform for Arts and Cultural content, ticketing and CRM capabilities.

This platform would allow NAC to better understand patron profile and behaviour and push for more attendance of Arts/Cultural activities



SISTIC DISTRIBUTION NETWORK

Partnering with more than 100 Travel Agents to sell more product offerings

























































Extending to more upcoming API Partners





















Corporate Exclusives Program – more than 800 corporate partners















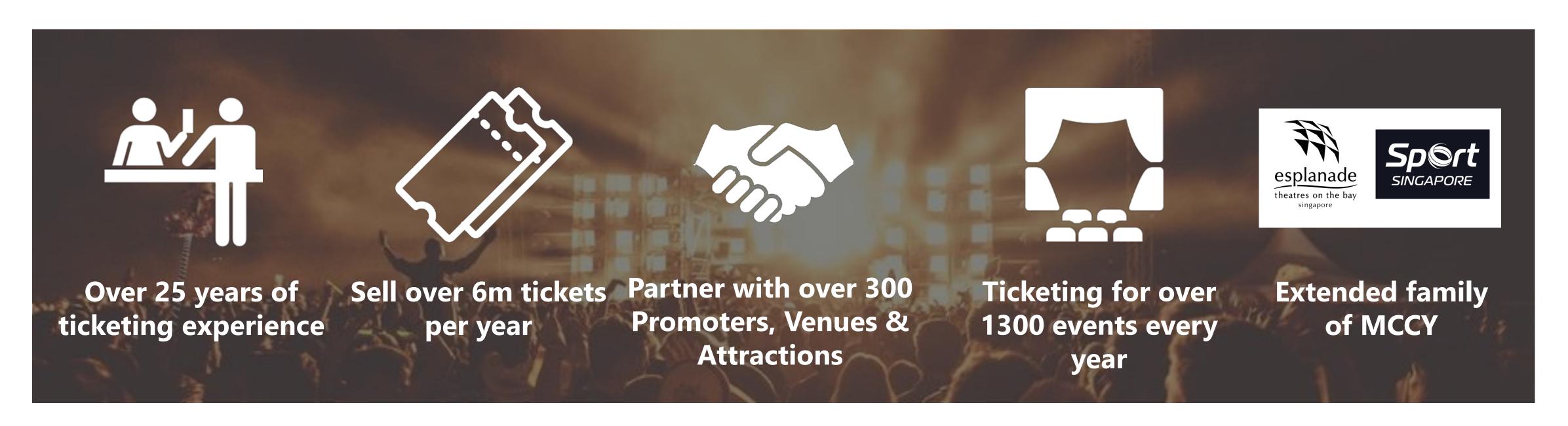




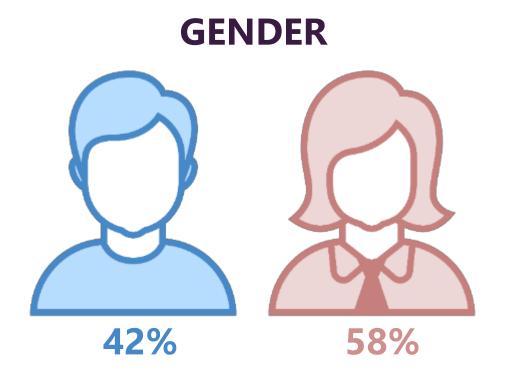


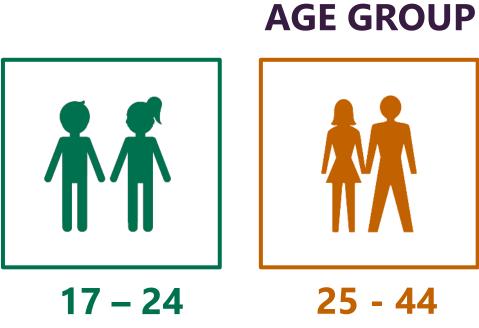
QUICK SISTIC INTRODUCTION



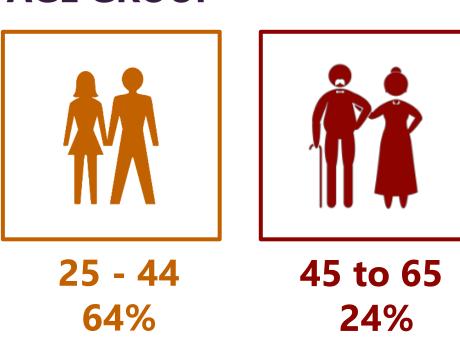


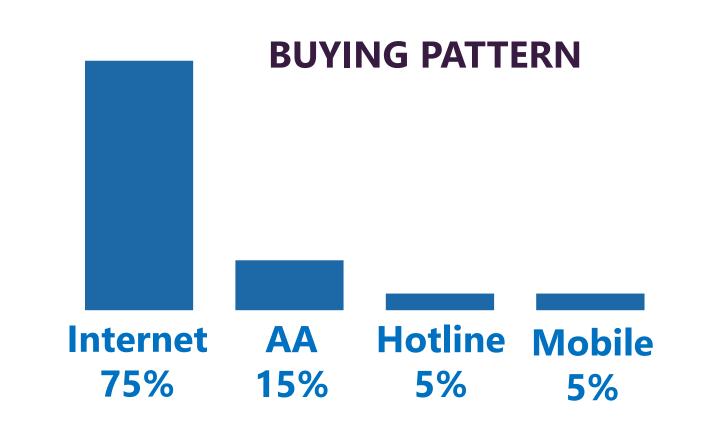
Customer Profile





12%





TICKETING SYSTEM - LOCAL CLIENTS



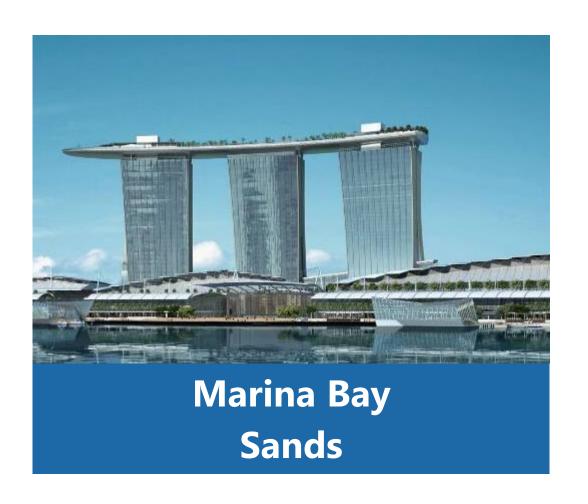


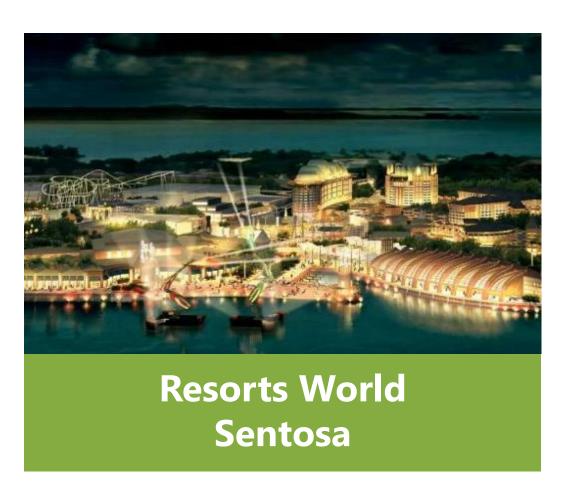










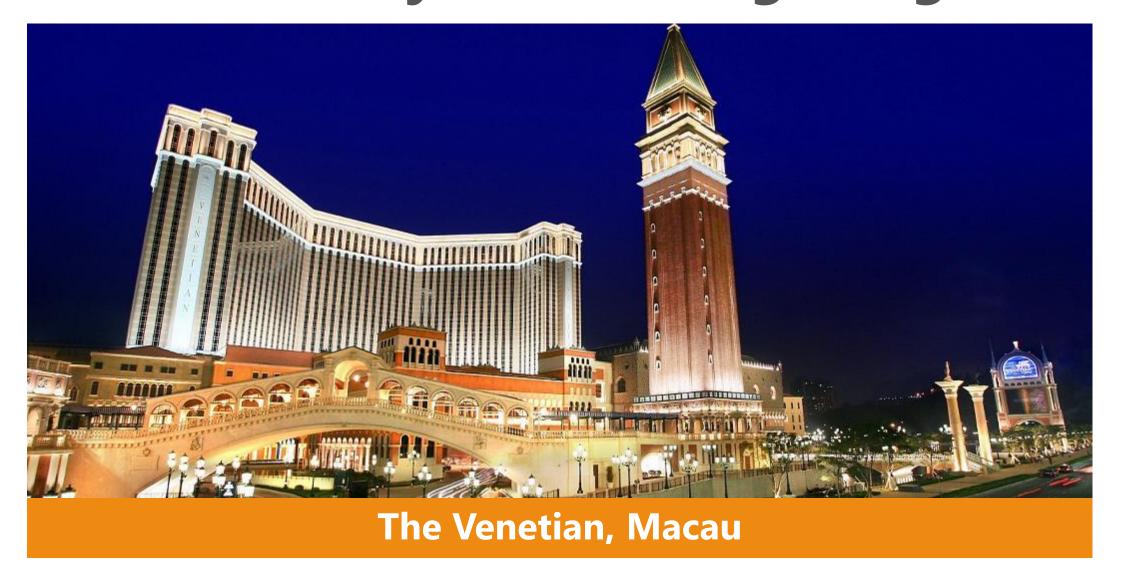




TICKETING SYSTEM - REGIONAL CLIENTS



More than 10 years in Hong Kong and Macau









OUR KEY ASSETS



ESTABLISHED CLIENT BASE

In Arts and Entertainment.

We support 300 clients & 1300 events annually.



MARKETPLACE & PATRON BASE

550k reachable patron base

Sales of 6mil tickets annually

48mil page views annually



SALES CAPABILITIES

Extended our ecosystem. API partnerships with DBSPaylah, Circles.life, Qoo10, BeMyGuest

STB integration with VS app

Partner for NAC's Cultural concierge



OWN TECHNOLOGY

We could react nimbly to changing requirements and localisations needs

E.g. SISTIC live streaming, local payments integration. ActiveSG integration.



DATA & DATA SERVICES

10 years of event & ticketing data

2mil patron accounts.

Opportunity to synergise Arts, Entertainment MICE and Sports data.

To understand and drive behaviours of Singaporeans.



THANK YOU

For more enquiries, please reach out to your SISTIC Account Manager

Or contact:

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