



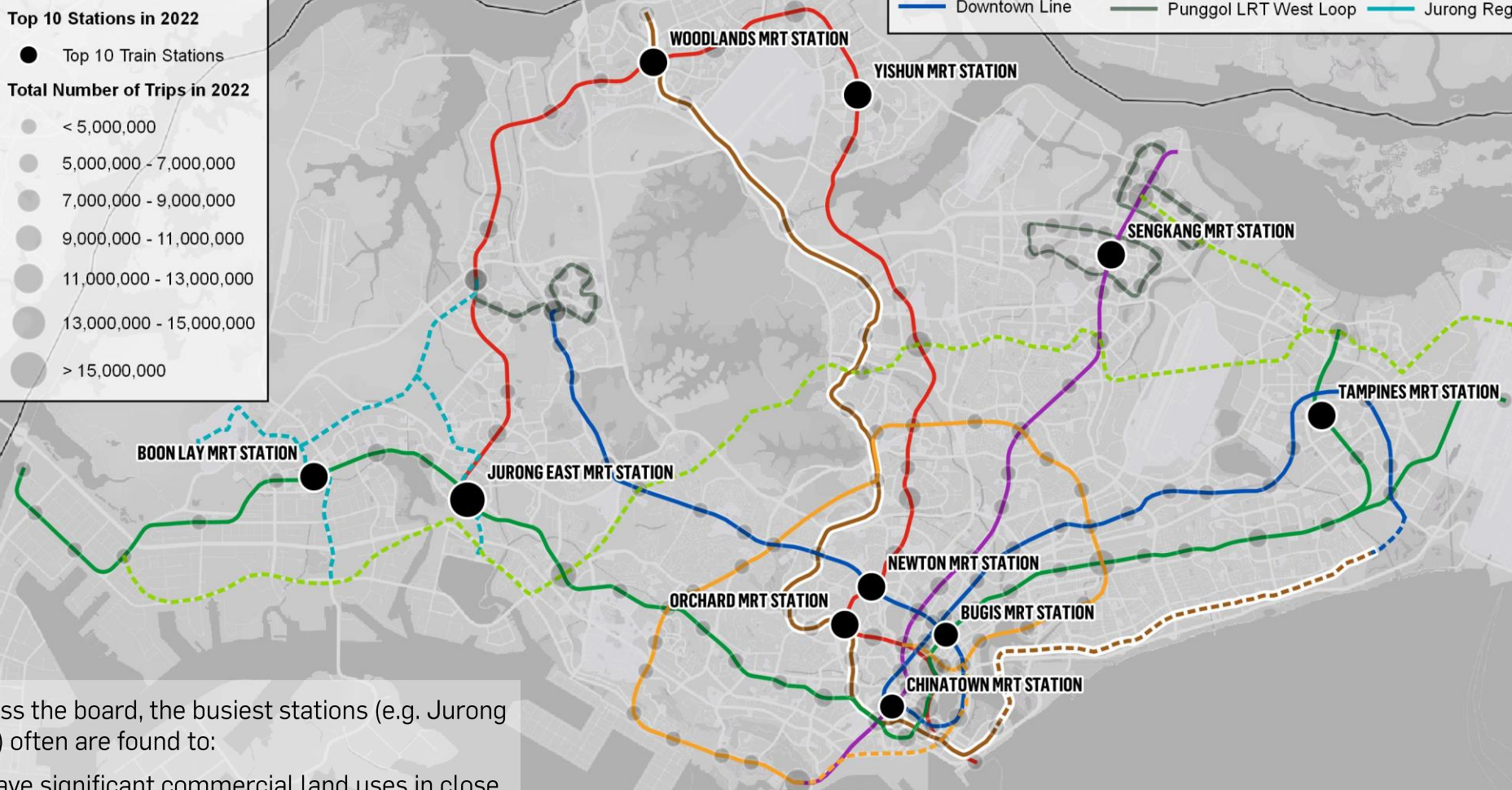
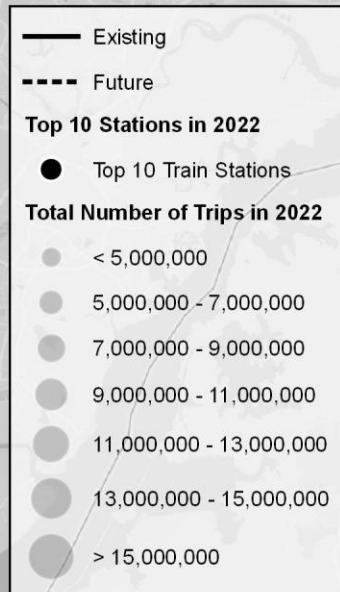
CISTRI

TEL STUDY

MAY 2023

**LET'S
CATCH UP!**

TOP 10 TRAIN DESTINATIONS IN SINGAPORE (2022)



Across the board, the busiest stations (e.g. Jurong East) often are found to:

- Have significant commercial land uses in close proximity
- Be multi-modal transport hubs
- Serve as a junction for several train lines

TEL FACT SHEET

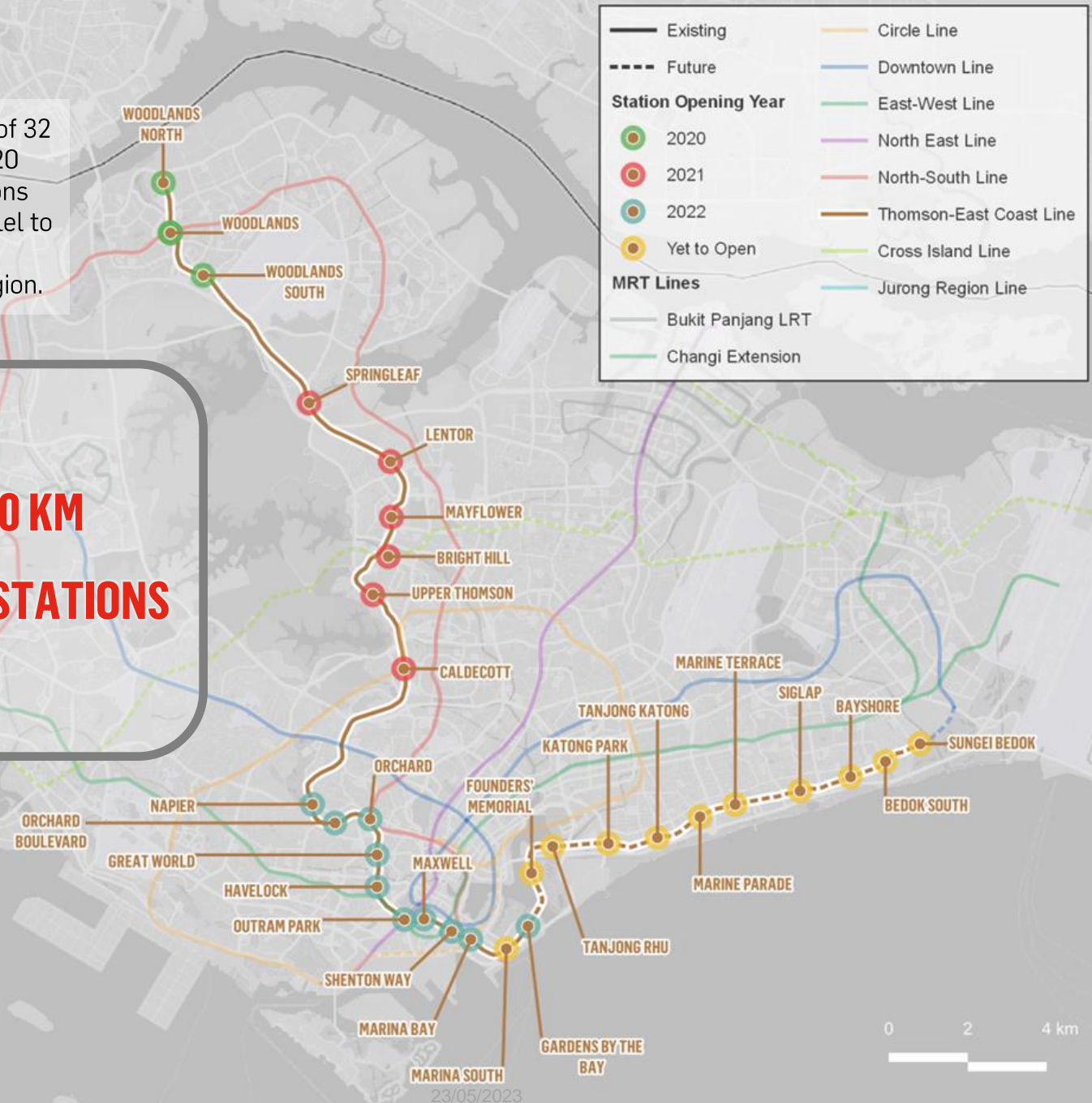
The Thomson East Coast Line (TEL) will consist of 32 stations over 43km when complete. At present, 20 stations have been opened with another 12 stations set to be introduced by 2025. The line runs parallel to the North South Line and provides estates in the North a more direct connection to the central region.

TOTAL LENGTH: 43 KM

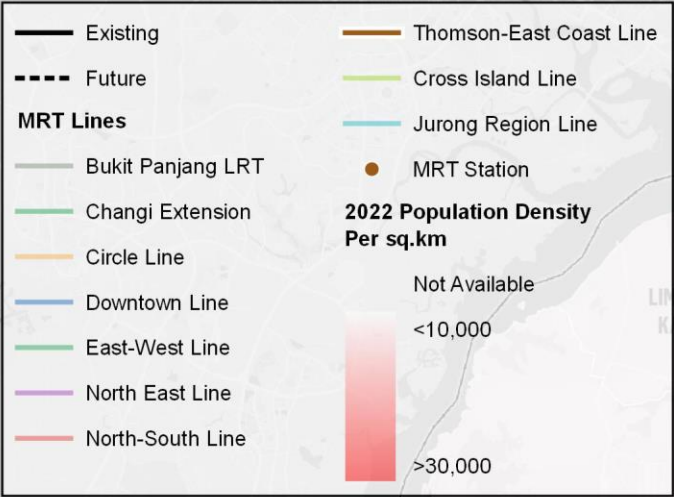
LENGTH COMPLETED TO DATE: ~30 KM

TOTAL STATIONS COMPLETE: 20 STATIONS

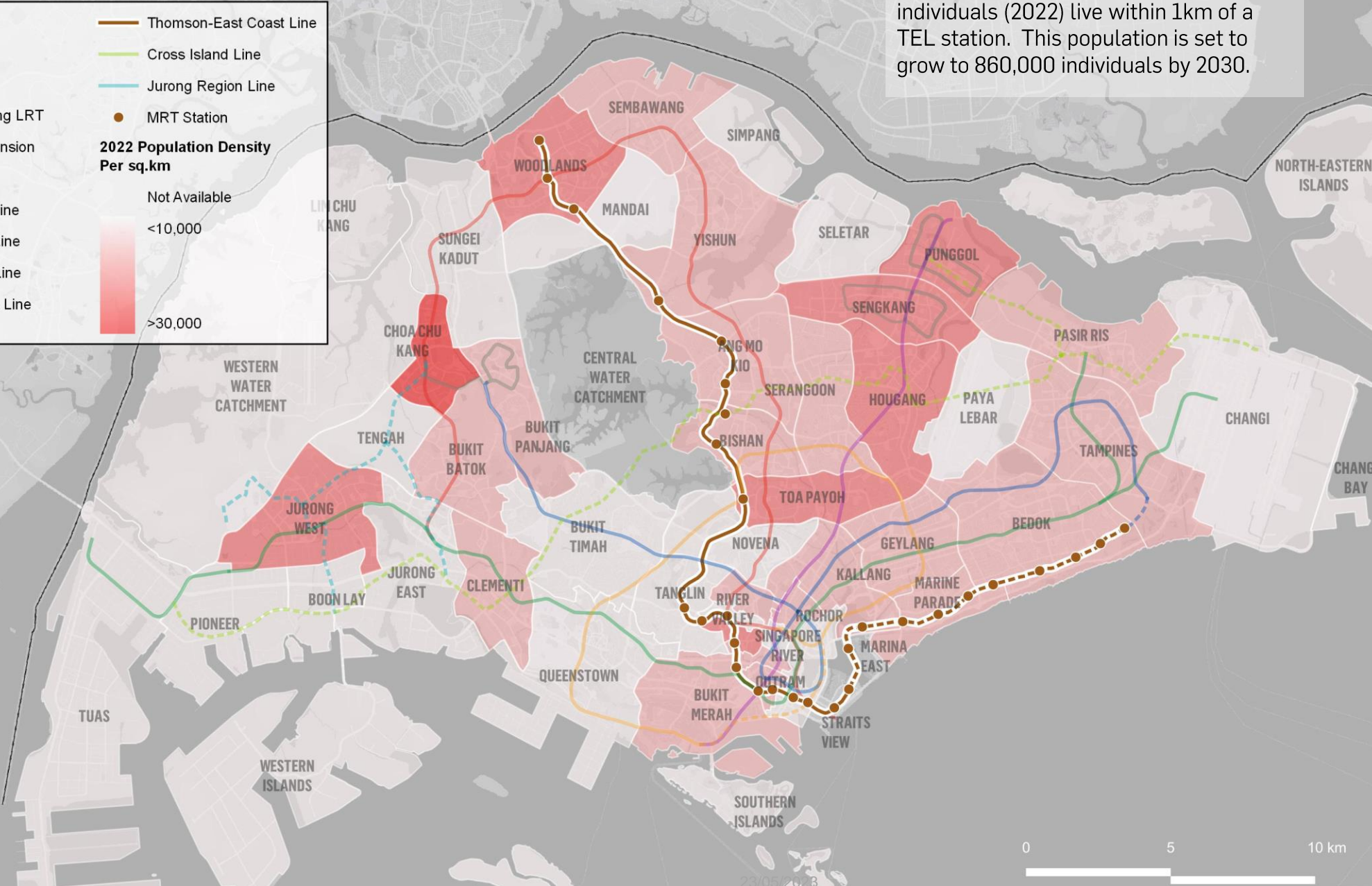
TOTAL STATIONS: 32 STATIONS



POPULATION FORECAST ALONG TEL LINE



We estimate that more than 770,000 individuals (2022) live within 1km of a TEL station. This population is set to grow to 860,000 individuals by 2030.



CHANGE IN TRIP DISTRIBUTION BETWEEN 2019 AND 2022

Given their proximity, the opening of the TEL will have its biggest impact on traffic on the North South line. Station usage statistics are starting to reflect this.

Many stations along the North South Line, particularly to the south of Yio Chu Kang, have seen a fall in their ridership market share (between 2019 and 2022), reflecting the shift in MRT riders onto the TEL line.

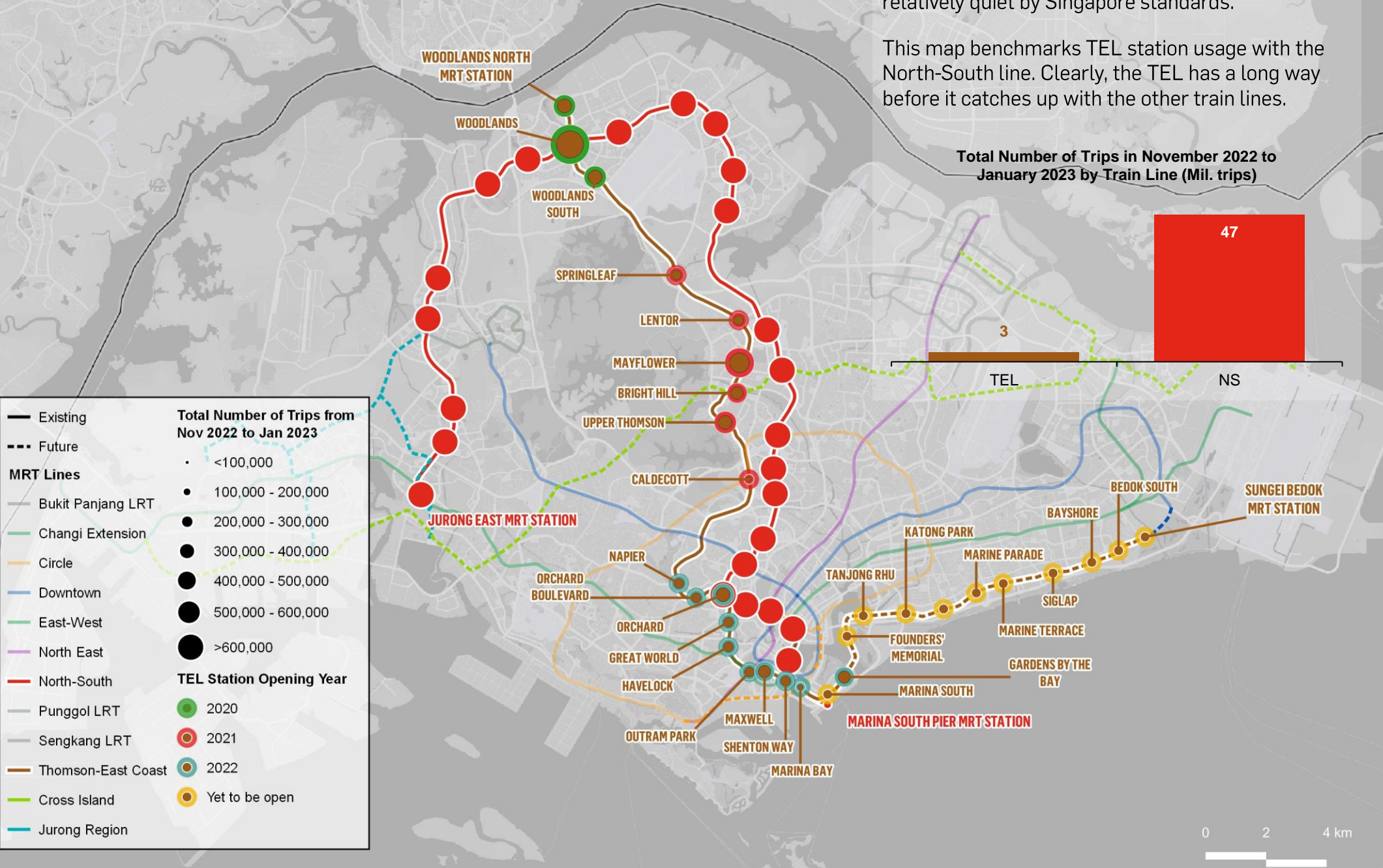


0 2 4 km

BENCHMARKING TEL TRIPS IN NOV 2022 – JAN 2023

Early usage figures show that TEL stations remain relatively quiet by Singapore standards.

This map benchmarks TEL station usage with the North-South line. Clearly, the TEL has a long way before it catches up with the other train lines.



GREAT WORLD CITY

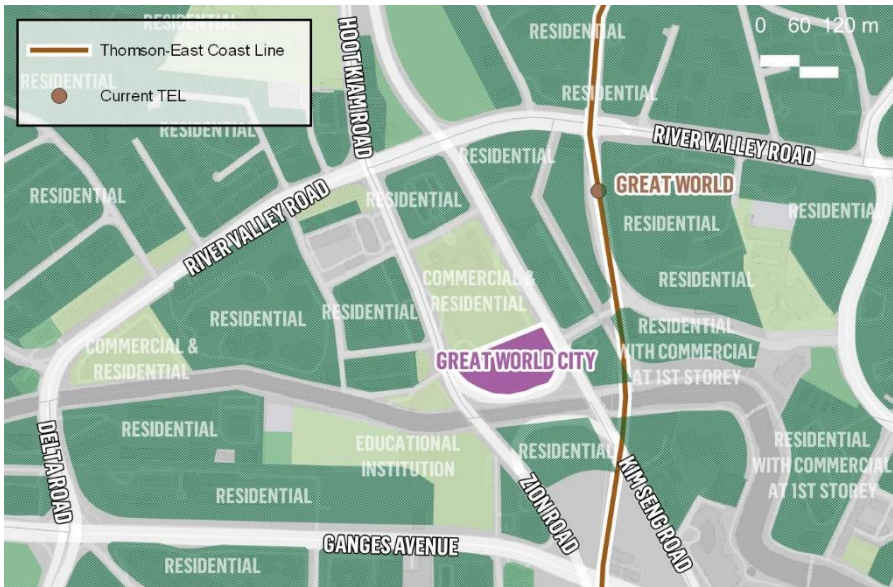
Great World City is a **sub-regional mall** located in the affluent River Valley part of Singapore. It opened in 1997 and has total retail floorspace of around 390,000 GLA sq.ft.

Prior to the TEL opening, the nearest MRT stations was more than 1km away. The mall has been a major beneficiary of the MRT opening. In the three months immediately after the MRT opened, we estimate that average monthly traffic to the mall was 40% higher than in the three months previous.

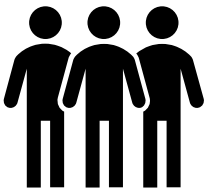
A large driver of the increase has been individuals travelling to the mall in the evening and night, many of whom are likely workers on their way home.

While the increase in footfall may dissipate over time, it is still clear that the TEL opening has a material impact on visitation to Great World City.

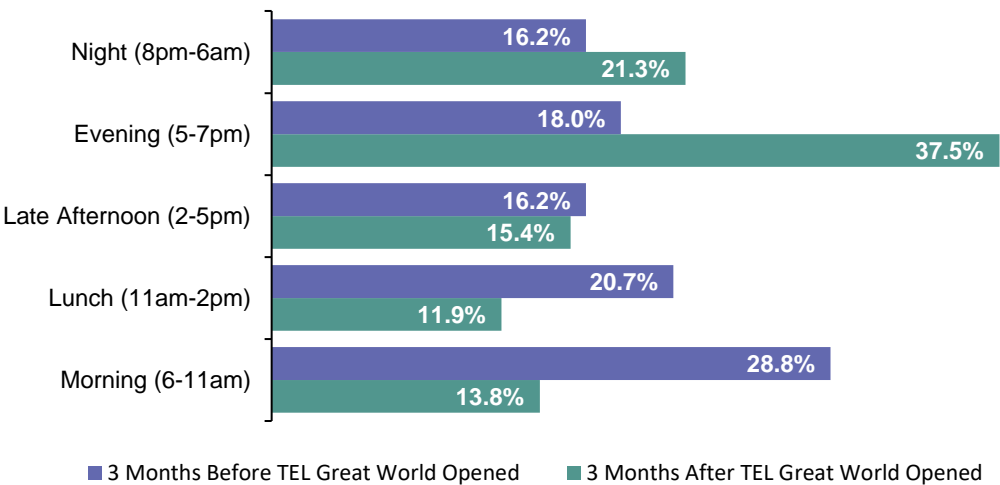
SURROUNDING LAND USES



~40% INCREASE IN AVERAGE MONTHLY VISITS TO GREAT WORLD CITY*



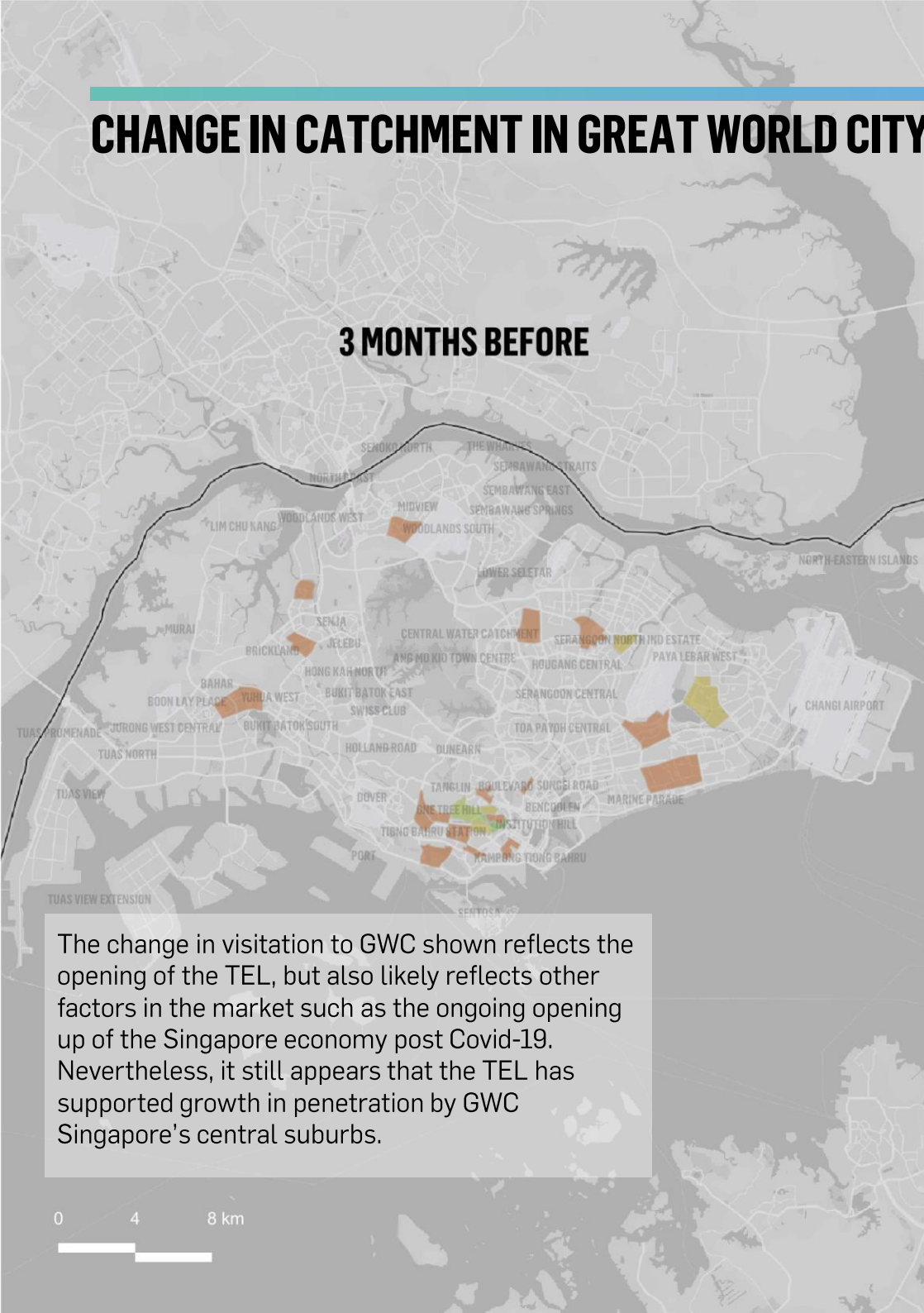
Share of Average Number of Visits to Great World City by Time*



* An average of 3 months is used for the period before the opening of Great World City and an average of 2 months is used for the period after Great World City

CHANGE IN CATCHMENT IN GREAT WORLD CITY

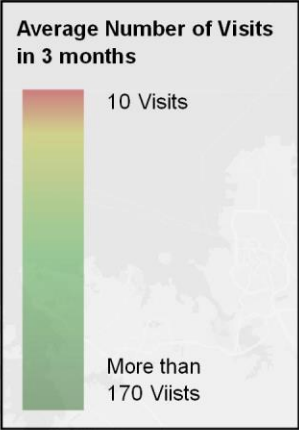
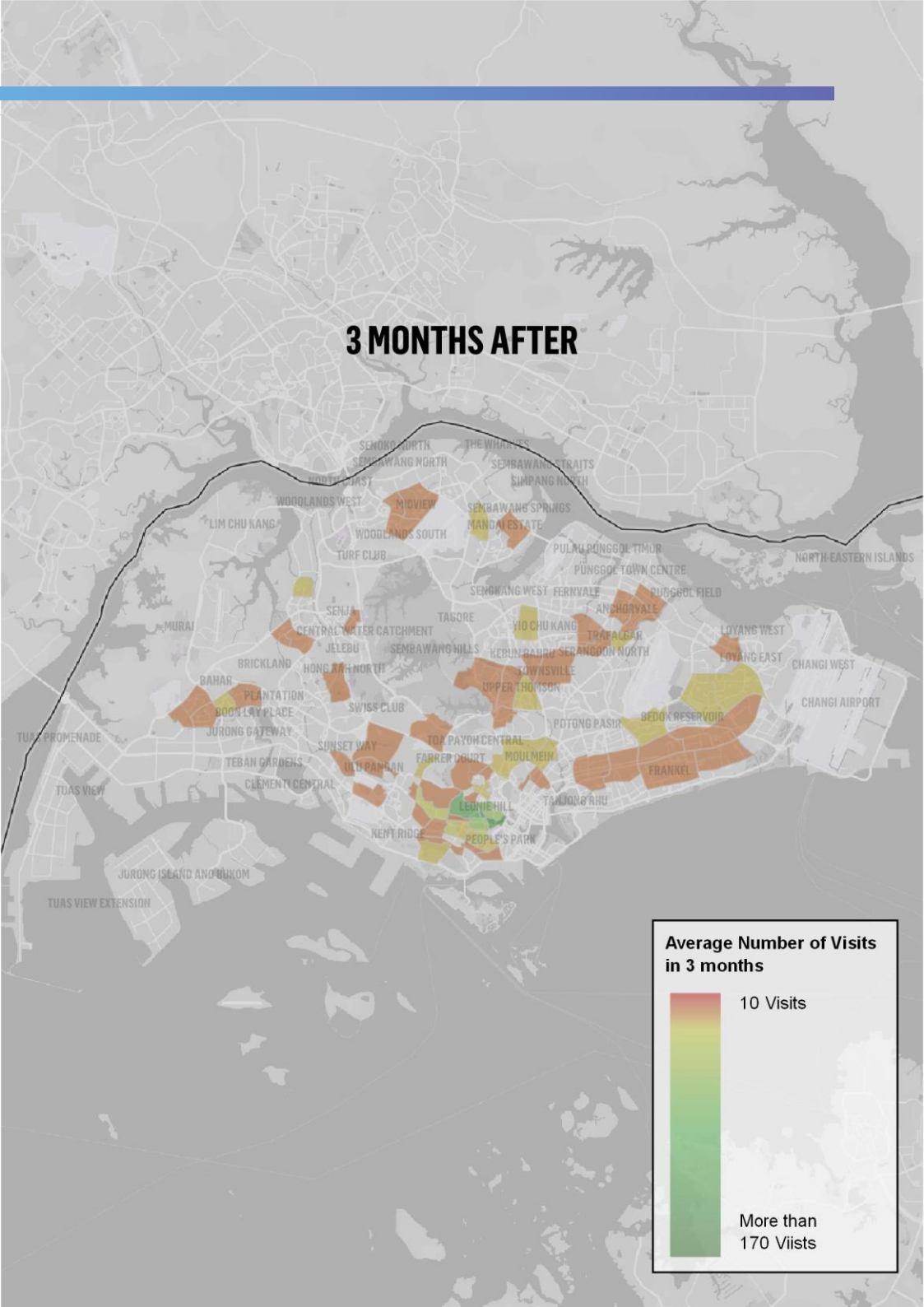
3 MONTHS BEFORE



The change in visitation to GWC shown reflects the opening of the TEL, but also likely reflects other factors in the market such as the ongoing opening up of the Singapore economy post Covid-19. Nevertheless, it still appears that the TEL has supported growth in penetration by GWC Singapore's central suburbs.



3 MONTHS AFTER

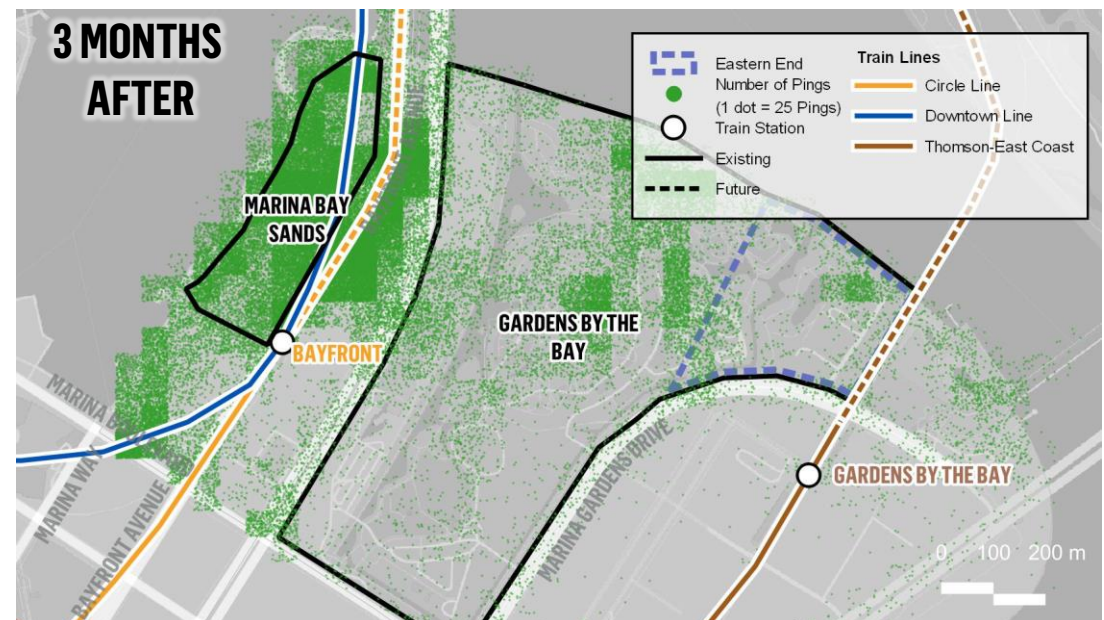
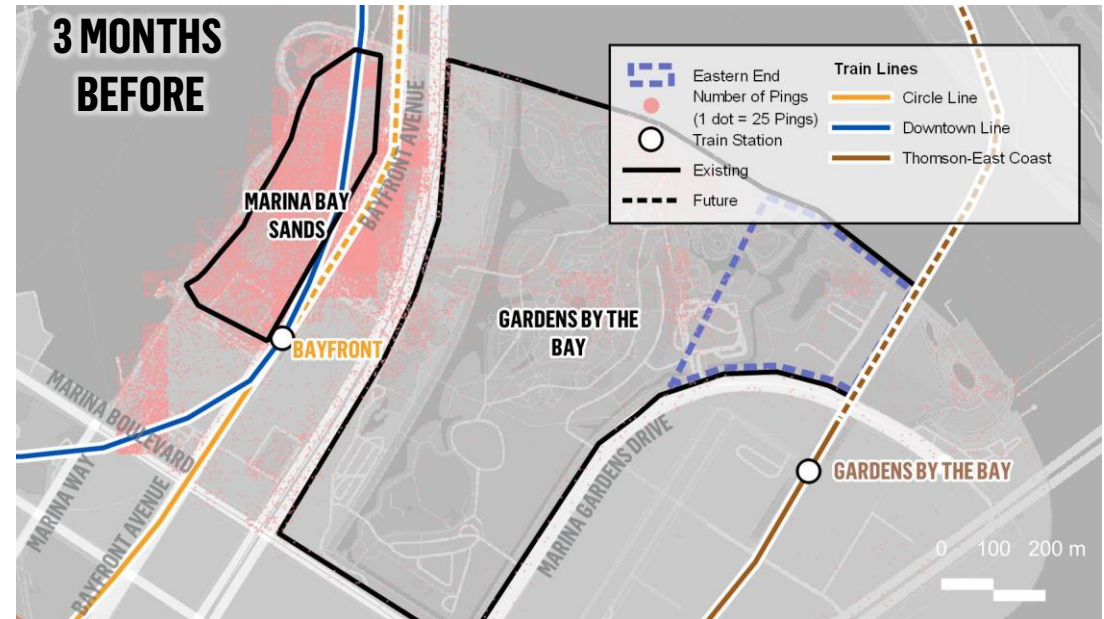


GARDENS BY THE BAY

Gardens by the Bay is a key tourist attraction in Singapore that appeals to both tourists and residents alike. Before the opening of the TEL line, train visitors would either have to disembark at Bayfront and walk or take the shuttle. Visitation was heavily focused around the western end of the park, particularly around Marina Bay Sands. However, the opening of the TEL line has led to a change in this pattern.

We have used Cistri's HMD from 3 months before and 3 months after the opening of the Gardens by the Bay MRT Station. The rate of increase in pings throughout Gardens by The Bay (~400%) was supported by growing tourism both international and domestic. But this was outpaced by growth at the eastern end where the TEL opened (~500%).

> 500% INCREASE
IN VISITS TO EASTERN END OF
GARDENS BY THE BAY*



* A sum of visits 3 months before and 3 months after the opening of the Gardens by the Bay MRT