

INTERNATIONAL MARKET PROFILE SINGAPORE



Market Overview

Singapore is the most mature travel market from Asia with daily direct air access.

Affluent experience seekers, travel as a couple, well-travelled, looking for new experiences.

Singaporeans generally visit one state on each visit to Australia and have the ability for long stays in South Australia.

Majority of Singaporeans who visit South Australia will base themselves in Adelaide for all or some of their stay and take trips out into nearby regions from there.

Singapore travellers disperse to Adelaide and surrounds to experience food and wine, nature and wildlife and also undertake self-drive journeys.

Air Access

Singapore Airlines provides direct air access into Adelaide while Malaysia Airlines provides access via Kuala Lumpur.

Key Themes

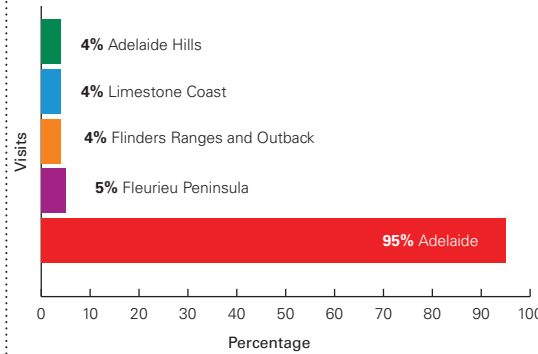
Coastal; nature and wildlife, food and wine, luxury, self-drive, shopping

Fast Facts and Figures

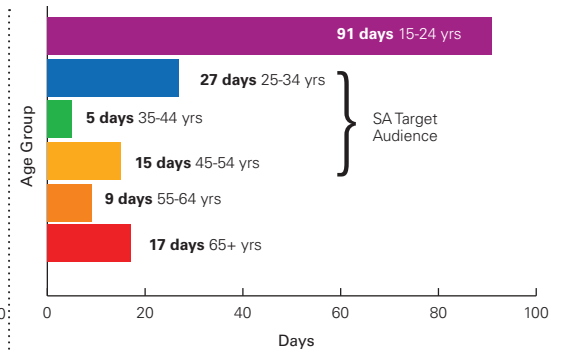
Data is based on a 3 year average for the years ending June 2012 to June 2014 for all purpose visitors.

SINGAPORE					
South Australia	Holiday	VFR	Business	Other	Total
Visits	4,000	4,000	1,400	1,300	10,000
Nights	45,000	43,000	11,000	148,000	247,000
Average Length of Stay (nights)	11	11	8	114	25
Expenditure					\$25,000,000

Key South Australian Overnight Destinations



Length of stay in South Australia by age group

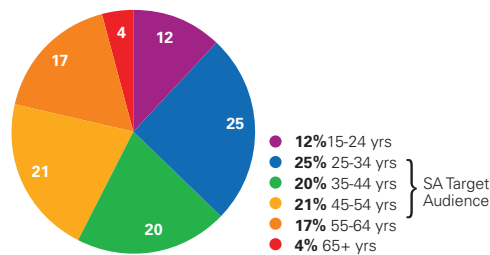


Appealing Experiences

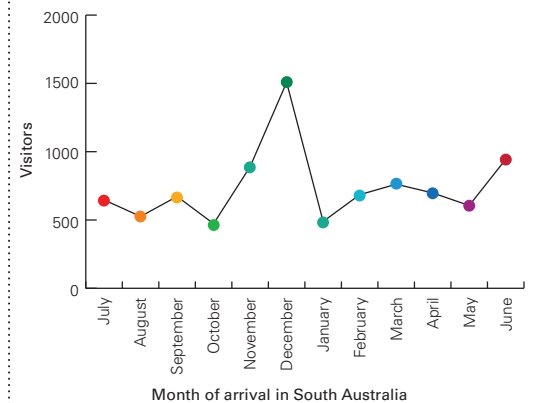
- Adelaide and surrounds offer quality food and wine experiences, wildlife and beautiful coastline.
- Self-drive journeys including the Southern Ocean Drive (Melbourne to Adelaide touring route) and the Nature, Sea and Vines Trail (well established in Singapore market incorporating the Fleurieu Peninsula and Kangaroo Island).

Average length of stay is influenced by longer staying education and VFR sectors.

Visitor Age Profile



Seasonality



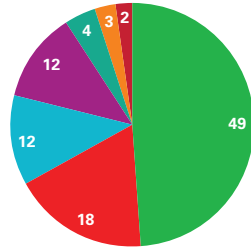
Target Market Profile

Affluent experience seeker: 25-49 years of age, travel as a couple and are well travelled and looking for new experiences. Singapore travellers generally visit one state on each visit to Australia and have the ability for long stays in South Australia.



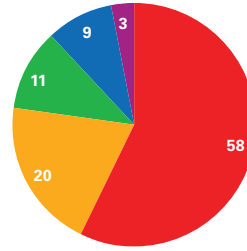
Market Insights

- A highly competitive long haul market, the challenge for South Australia lies in driving demand.
- SATC are moving towards strong marketing and third party promotions with non-traditional partners and fully integrated media consortiums to leverage strong databases and engage high spending consumers.
- Key trade partners remain important to the local strategy, however as with most of the South-East Asian market, there needs to be a strong focus on driving demand through destination awareness.
- Online research and bookings are increasing, therefore an up to date website and the ability to book online is paramount.
- Singapore is an English speaking market.
- Asians like to be on the go so quick meals preferable warm are recommended.



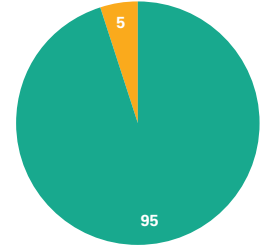
Accommodation used (visitor nights)

- 49% Rented house/apartment/unit/flat
- 18% Home of friend/relative
- 12% Hotel/resort/motel/motor inn
- 12% Educational Institution
- 4% Own property
- 3% Backpacker/hostel
- 2% Other



Travel party description

- 58% Unaccompanied
- 20% Adult couple
- 11% With Friends/relatives
- 9% Family Group
- 3% Business



Package Tours

- 95% Non Package Tour
- 5% Package Tour

This data includes Education and VFR purpose sectors.

Key Distribution Partners

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ASA Holidays Pte Ltd
Chan Brothers Travel Pte Ltd
Commonwealth Travel Service Corporation Ptd Ltd
Dynasty Travel International Pte Ltd
Euro-Asia Holidays Pte Ltd
Farmosa Holiday Tour Pte Ltd
Holiday Tours & Travel
Hong Thai Travel Services Pte Ltd
Nam Ho Travel Service Pte Ltd
New Shan Travel Service Pte Ltd
Pacific Arena Pte Ltd
Scenic Travel
Sino-America (SA) Tours Corporation
Tradewinds Tours & Travel Pte Ltd
UOB Travel Planners Pte Ltd

Business is highly competitive and travel agents do not contract a single inbound operator, rather request quotations for each tour and proceed the booking with the inbound tour operator that provides the cheapest quotation for that particular tour. Active inbound companies in the region include Encounter Australia, Experience Tours Australia, Australian Tour Management, Holiday Pacific, ADU Holidays.

Top Travel Websites		
Expedia	AsiaTravel	Priceline.com Network
TripAdviser	Zuji	Singapore Airlines

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Source: International Visitor Survey, Tourism Research Australia, Canberra | Department of Immigration and Citizenship (DIAC) | VFR = Visiting Friends and Relatives
Definition of Package Tour: Where the international airfares plus some other travel component (transport, accommodation, tour) are paid for before arrival in Australia.

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