

2024 INTERNATIONAL MARKET UPDATE SINGAPORE

MARKET OVERVIEW

Results based on year ending June 2024

- Singapore is South Australia's eighth largest inbound market and is currently up 9% on pre-Covid visitation levels, and 17% down on expenditure levels.
- Key demand-driving experiences include food and wine, nature and wildlife, self-drive journeys and road trips.
- Singapore is the most mature travel market from Asia with daily, direct air access to Adelaide.
- 93% of Singaporean visitors to South Australia have been to Australia before.
- Singaporeans generally visit one state on each visit to Australia.
- Singaporeans are well travelled and seek new experiences, usually travelling as couples or families.
- The majority of Singaporeans who visit South Australia will base themselves in Adelaide. The accessibility to, from and within the regions is an important consideration.

SNAPSHOT OF CURRENT STATISTICS

Results based on year ending June 2024

VISITORS



NIGHTS



EXPENDITURE



AVERAGE SPEND



AVERAGE LENGTH OF STAY

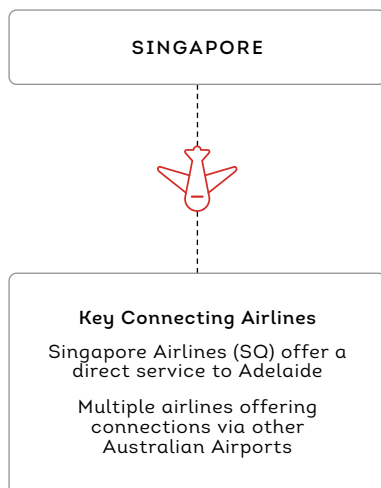


INTERNATIONAL RANKING IN SOUTH AUSTRALIA

#8 FOR VISITORS
#9 FOR NIGHTS
#5 FOR EXPENDITURE

[#]A high average due to education visitors.

AIR ACCESS



FAST FACTS & FIGURES

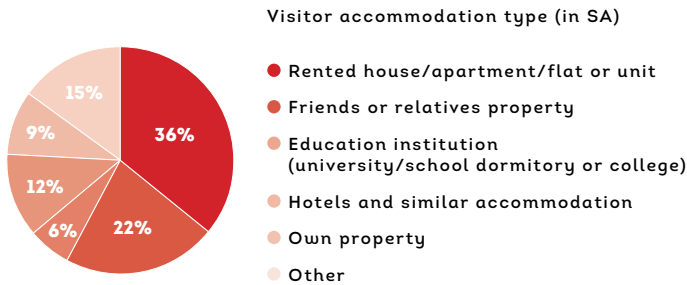
Annual average of 2017-2019 figures - current year samples not yet sizeable enough

SINGAPORE	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
Visits (SA)	6	5	3	1	14
Visits (AUS)	221	115	72	35	396
Nights (SA)	26	63	9	183	281
Nights (AUS)	1,663	1,415	509	2,270	5,857
ALOS - Nights (SA)	4	13	3	183	20
ALOS - Nights (AUS)	8	12	7	65	15
Expenditure					\$63M

ALOS = Average Length Of Stay, VFR = Visiting Friends and Relatives.

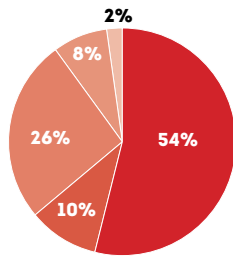
VISITOR ACCOMMODATION TYPE & TRAVEL PARTY DESCRIPTIONS

Annual average of 2017-2019 figures - current year samples not yet sizeable enough



Travel party description (to SA)

- Unaccompanied
- Adult couple
- Family group
- Friends/relatives travelling together
- Business



IMPORTANCE FACTORS

Data from Consumer Demand Project (CDP) report - August 2023



62%

Safety and security
VS. 53% GLOBAL AGGREGATE



40%

Value for money
VS. 37% GLOBAL AGGREGATE



38%

Good food & wine
VS. 37% GLOBAL AGGREGATE



37%

Friendly citizens
VS. 31% GLOBAL AGGREGATE



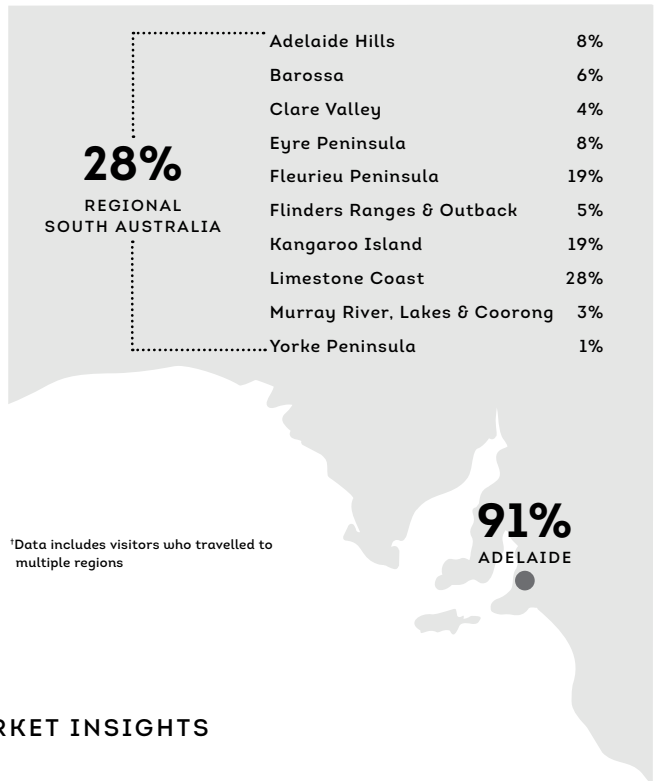
33%

World-class beauty and nature
VS. 40% GLOBAL AGGREGATE

GLOBAL AGGREGATE: This is from the Consumer Demand Project research conducted quarterly by Tourism Australia in 12 key international markets for Australia. Global aggregate refers to the average across all these markets.

VISITOR DISPERSAL[†]

Annual average of 2017-2019 figures - current year samples not yet sizeable enough



MARKET INSIGHTS

- Singaporeans have a preference for local immersive experiences that are short, sharp and interactive.
- Singaporeans will invest energy to find the best deal possible and will compare value between traditional partners, Online Travel Agents and operators directly.
- The SATC continues to build strong relationships with key trade partners (both traditional and online) in market to ensure that products and experiences are easily bookable.
- In addition to building key trade partner relationships, it is important to build destination awareness through consumer direct marketing to educate and inspire Singaporeans to select South Australia for their next holiday.
- Digital marketing is critical in the market. The SATC continues to focus on increasing consumer awareness by working with trade and airline partners as well as through digital activity.

TARGET MARKET PROFILE



Professionals who travel as a couple or with family/friends are well-travelled and seeking unique and bespoke experiences, with most having visited Australia previously.

BOOKING PREFERENCES

Data from Consumer Demand Project (CDP) report - March 2024



57%

Direct with Airline



51%

Online Travel Agent (e.g. Expedia)



33%

Direct with Accommodation



20%

Retail Travel Agent/ Tour Operator



14%

Direct with Experienced Provider



1%

Other

TOP 3 BARRIERS TO VISITING AUSTRALIA

Data from Consumer Demand Project (CDP) report - August 2023



Other places I would prefer to go



Expensive airfares



High cost of travelling around

CONTRACTING & BROCHURE TIMES

The key contracting period runs from April to June with validity from 1 October to 30 September.

SINGAPORE CHECKLIST

Consider the following points when targeting travellers from Singapore:

- ✓ **Be easy to book online** by ensuring you have a seamless booking platform and informative, up-to-date website.
- ✓ **Connect with major OTAs in-market** to ensure that your product/experiences are showcased to their audiences.
- ✓ **Build relationships with trade partners** by attending various trade events, ensure that you keep them across any changes to your product and be responsive to their enquiries and questions.
- ✓ **Showcase the immersive experience** you offer highlighting the unique and authentic aspects of your offering with rich imagery and video assets.

KEY TRADE PARTNERS

KEY WHOLESALE PARTNERS

Pacific Arena

Klook

EU Holidays

Chan Brothers

Let's Go Europe Travel

INBOUND REPRESENTATIVE COMPANY IN AUSTRALIA

Business is highly competitive and travel agents are not necessarily always loyal to one in bound tour operator. They will often request quotations from multiple companies to find the best price. Active inbound tour operators for the region include (but not limited to):

Tranquil Travel

Xceptional Tours Australia

Fortune Dragon

H2Oz

Holiday Services Down Under

TOP ONLINE TRAVEL AGENTS



TOP TRAVEL RESORUCES



CONTACT

ADELAIDE

Martin Kaesler
Manager, Global Markets
martin.kaesler@sa.gov.au

SOUTHEAST ASIA

Suzanne Lim
Regional Manager, Southeast Asia
suzanne.lim@adelaide.com



Disclaimer: Source: International Visitor Survey Dec 2017, Dec 2018, Dec 2019, and June 2024 conducted by Tourism Research Australia, Consumer Demand Project (CDP) Aug 2023 and 2024. Totals may not add to 100% due to rounding. VFR = Visiting Friends and Relatives. ALOS = Average Length of Stay (Nights).

Disclaimer: This summary has been prepared by the South Australian Tourism Commission (SATC) in good faith. While every care has been taken in preparing the information, the SATC does not represent or warrant that it is correct, complete, or suitable for the purposes for which you wish to use it. By using this information, you acknowledge that it is provided by SATC without any responsibility on behalf of the SATC and agree to release and indemnify the SATC for any loss or damage that you or any third party may suffer as a result of your reliance on this information. Produced by the South Australian Tourism Commission September 2024.