

International Market Profile

Singapore

Year Ending December 2010

This fact sheet provides a summary of the latest tourism data for Singaporean visitors to Victoria. Information includes: visitor numbers, purpose of visit, expenditure, visitor forecasts, regional visitation and dispersal, demographics, visitor behaviour, airline used, travel style, information sources and booking methods.

I OVERVIEW OF SINGAPOREAN VISITORS TO AUSTRALIA

I.1 Trends

Total Visitation from Singapore to Australia, 2000-2010

Year Ending							Av Annual	Av Annual	% Change
	December	2000	2006	2007	2008	2009	2010	% Change	
Visitors (000s)	243	221	229	234	250	270	1.0%	5.2%	8.1%
Visitor Nights (000s)	3,849	5,228	5,156	5,274	5,713	5,746	4.1%	2.4%	0.6%
Average Length of Stay	15.8	23.7	22.5	22.5	22.9	21.3			

Singapore generated 270,000 visitors to Australia in the year ending December 2010. The number of visitors from Singapore coming to Australia in 2010 increased 8.1% from the previous year, with steady growth over the period 2000-2010 (1.0% p.a.). In 2010, Singaporeans spent 5.7 million nights in Australia, a 0.6% increase from the previous year. Visitor nights have grown at a rate of 4.1% per annum between 2000 and 2010. The average length of stay in Australia by Singaporean visitors was 21.3 nights in 2010.

I.2 Main Purpose of Trip

Visitation (000s) from Singapore to Australia by Purpose of Trip, 2000-2010

Year Ending							Av Annual	Av Annual	% Change
	December	2000	2006	2007	2008	2009	2010	% Change	
Holiday	153	97	105	102	115	122	-2.3%	5.7%	5.5%
Visiting friends & relatives	29	32	32	34	42	42	3.8%	7.4%	0.7%
Business	41	58	59	62	57	66	4.8%	3.3%	15.0%
Education	14	25	23	25	24	25	6.3%	-0.1%	3.2%
Other (incl Employment)	6	9	10	12	11	15	9.6%	14.7%	38.0%

122,000 visitors came to Australia from Singapore in 2010 for holiday purposes, an increase of 5.5% from the previous year. 42,000 Singaporean visitors came to Australia to visit friends and relatives (VFR), an increase of 0.7% from the previous year. The VFR segment has experienced growth over the period 2000-2010, increasing by an average of 3.8% per annum. Holiday visitation has decreased at an annual average rate of 2.3% over the same period.

The largest average annual growth has come from the business travel sector, experiencing a year-on-year increase of 15.0% to reach 66,000 visitors in 2010. The education segment has also grown 3.2% year-on-year to 25,000 Singaporean visitors in 2010.

1.3 States/Territories Visited

Singaporean Overnight Visitation (000s) to Australia by State/Territory, 2000-2010

Year Ending							Av Annual	Av Annual	% Change	
	December	2000	2006	2007	2008	2009	2010	% Change		% Change
								2000-2010	2006-2010	09-10
Australia	243	221	229	234	250	270	1.0%	5.2%	8.1%	
New South Wales	84	66	72	76	73	91	0.9%	8.5%	24.9%	
Victoria	62	65	62	68	75	78	2.3%	4.6%	4.1%	
Queensland	64	44	45	44	43	51	-2.2%	3.6%	19.1%	
South Australia	15	9	7	11	11	12	-2.2%	7.3%	12.8%	
Western Australia	68	57	65	63	75	75	1.0%	7.3%	-0.3%	
Tasmania	6	8	5	6	5	7	1.2%	-3.7%	23.5%	

There were 78,000 Singaporean overnight visitors to Victoria in 2010, a 4.1% increase over the previous year. Victoria holds the second highest number of visitors of all states and territories from this market, following New South Wales (91,000 visitors).

Singaporean Visitor Nights (000s) in Australia by State/Territory, 2000-2010

Year Ending							Av Annual	Av Annual	% Change	
	December	2000	2006	2007	2008	2009	2010	% Change		% Change
								2000-2010	2006-2010	09-10
Australia	3,849	5,228	5,156	5,274	5,713	5,746	4.1%	2.4%	0.6%	
New South Wales	914	977	1,110	1,197	1,363	1,269	3.3%	6.7%	-6.9%	
Victoria	974	1,764	1,678	1,744	1,996	1,798	6.3%	0.5%	-10.0%	
Queensland	595	817	600	579	527	662	1.1%	-5.1%	25.6%	
Western Australia	1,109	1,231	1,219	1,316	1,423	1,447	2.7%	4.1%	1.7%	
Other States & Territories	-	-	548	-	-	565	-	-	-	

NB: Where there is a '-', figures are unreliable and are unable to be published.

In 2010, the number of visitor nights spent in Victoria by Singaporean visitors decreased by 10.0% from the previous year to 1.8 million visitor nights. However over the longer term visitor nights spent by Singaporean visitors in Victoria has grown by an average of 6.3% per annum since 2000.

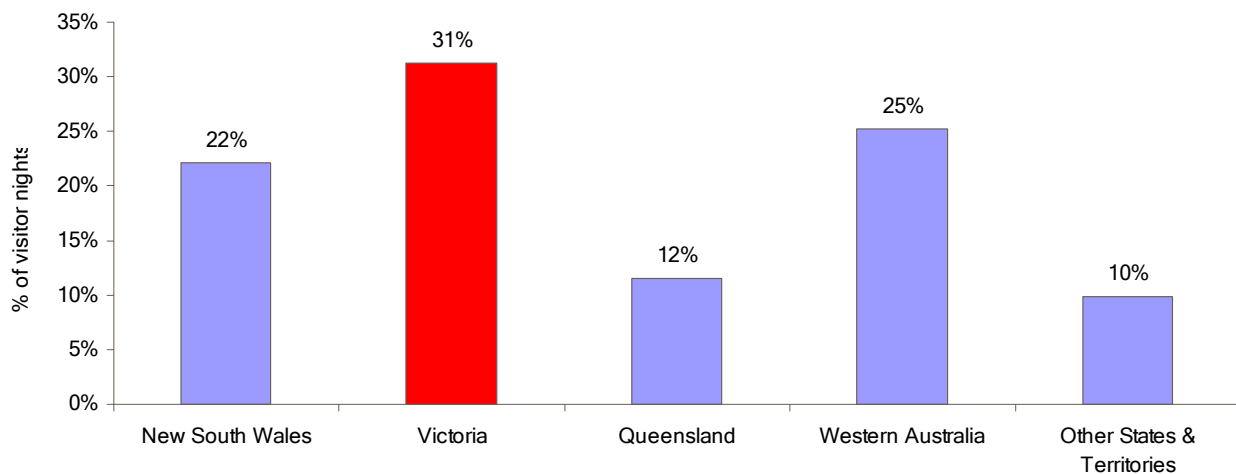
1.4 Market Share by State

Singaporean Overnight Visitors¹ to Australia, Year ending December 2010 – by State



29% of Singaporean visitors to Australia in 2010 stayed overnight in Victoria, compared to 34% in New South Wales.

Singaporean Visitor Nights to Australia, Year ending December 2010 – Market Share by State



Victoria had the highest market share of visitor nights spent by Singaporean travellers in 2010 at 31%, 6 percentage points above Western Australia (25%) and 9 percentage points ahead of New South Wales (22%).

¹ NOTE: The proportion of Visitors to the States and Territories will not add up to 100% as visitors can travel to multiple destinations in one trip; while the proportion of Visitor Nights to the States and Territories will add to 100% as this measure is mutually exclusive.

I.5 Main Purpose of Visit – Visitors to Victoria

Singaporean Visitation (000s) to Victoria by Main Purpose of Visit, 2000-2010

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual	Av Annual	
							% change	% Change	% change
							2000-2010	2006-2010	09-10
Holiday	38	26	25	28	33	35	-0.8%	8.1%	6.2%
Visiting friends & relatives	6	9	10	10	13	13	7.8%	9.9%	-6.2%
Total Leisure	44	35	35	39	47	48	0.8%	8.5%	2.6%
Business	12	16	15	16	16	18	4.2%	3.0%	15.0%
Education	-	11	9	11	10	10	-	-3.0%	-4.7%
Other (incl Employment)	-	-	-	-	-	-	-	-	-

NB: Where there is a '-', figures are unreliable and are unable to be published.

In 2010, there were 48,000 Singaporean overnight leisure visitors to Victoria, a 2.6% increase over the previous year and 8.5% average annual increase from 2006 to 2010, mainly due to an increase in overnight holiday visitors (up 6.2% year-on-year and 8.1% p.a. from 2006). Victoria also experienced a strong year-on-year increase in overnight business (+15.0%) visitors from Singapore.

I.6 Regional Dispersal² – Visitor Nights (000s), 2 years (rolling) ending 2000 - 2010

Singapore	2000	2006	2007	2008	2009	2010	Ave. Annual	Ave. Annual	% change
							Change (%)	Change (%)	2009-2010
							2000-2010	2006-2010	
Regional Australia - Visitor Nights (000s)	-	-	516	-	-	690	-	-	-
% of total nights in Aust	-	-	10.0%	-	-	12.0%			

NB: where there is a '-', figures are unreliable and are unable to be published.

Singaporean visitors spent 690,000 nights in regional Australia in 2010, representing 12.0% of all visitor nights in Australia from the market.

I.7 Melbourne and Victorian Regions Visited

Singaporean Visitation (000s) to Victoria, 2 years (rolling) ending 2000-2010

Campaign Regions	2 Years Ending December						Av Annual	Av Annual	% change
	2000	2006	2007	2008	2009	2010	% change	% change	2009-2010
							2000-2010	2006-2010	
Melbourne	127	126	123	126	137	146	1.5%	3.8%	6.6%
Great Ocean Road	10	9	8	8	12	12	1.8%	6.8%	-0.7%
Regional Victoria	22	18	16	17	21	22	0.4%	5.9%	4.4%

There were 146,000 Singaporean overnight visitors to Melbourne in the two years ending December 2010, a 6.6% increase over the previous period. Singaporean overnight visitation to Melbourne has grown at an annual average rate of 1.5% over the longer term (2000 to 2010). In the period, there were 22,000 Singaporean overnight visitors to regional Victoria and 12,000 staying overnight in the Great Ocean Road region.

² "Regional" is defined as non capital city nights for each state with the exception of the Gold Coast. For example, Regional Queensland excludes nights spent in both Brisbane and the Gold Coast.

Singaporean Visitor Nights (000s) in Melbourne, 2 years (rolling) ending 2000-2010

Campaign Regions	2 Years Ending December						Av Annual % change	Av Annual % change	% change
	2000	2006	2007	2008	2009	2010	2000-2010	2006-2010	2009-2010
Melbourne	1,761	3,315	3,299	3,275	3,536	3,496	7.1%	1.3%	-1.1%

The number of visitor nights spent in Melbourne by Singaporean visitors decreased by 1.1% from the previous period to 3.5 million visitor nights in the two years ending December 2010.

1.8 Visitor Expenditure

Expenditure by Singaporean Visitors	Total Expenditure					Expenditure Share			Expenditure Per Night			Expenditure Per Visitor		
	Nominal (\$ million)					%			\$			\$		
	Year Ending December	2000	2009	2010	Av Ann % Change 00-10	% Change 09-10	2000	2009	2010	2000	2009	2010	2000	2009
New South Wales	np	151	177	np	17.2%	np	2.5%	2.8%	np	111	139	np	2064	1937
Victoria	np	310	311	np	0.3%	np	8.3%	7.9%	np	155	173	np	4,128	3,980
Queensland	np	88	97	np	10.2%	np	2.3%	2.6%	np	167	146	np	2,051	1,897
South Australia	np	30	36	np	20.0%	np	4.6%	4.9%	np	168	190	np	2,725	2,919
Western Australia	np	187	228	np	21.9%	np	10.6%	11.8%	np	131	158	np	2,490	3,045
Tasmania	np	np	np	np	np	np	np	np	np	np	np	np	np	np
Northern Territory	np	9	np	np	np	np	2.0%	np	np	153	np	np	1,150	np
Australian Capital Territory	np	np	np	np	np	np	np	np	np	np	np	np	np	np
Australia	551	804	912	5.2%	13.4%	5.0%	4.7%	5.2%	143	141	159	2,264	3,219	3,379

np: denotes figures not published by TRA.

NB: Visitor expenditure includes expenditure on packages attributable to destination.

Source: Tourism Research Australia expenditure allocation method applied to 2000-2010 International Visitor Survey data.

Expenditure by Singaporean visitors in Australia has increased 13.4% year-on-year to reach \$912 million in 2010. Singaporean visitor expenditure in Victoria was \$311 million in 2010 with a small year-on-year increase of 0.3%, representing a 7.9% share of total international expenditure in Victoria. In 2010, Victoria achieved the highest expenditure per visitor result (\$3,980 p/visitor) of all states and territories.

1.9 Visitors to Victoria Forecast

Singapore Forecasts	2010	ACTUAL 2010	FORECAST										Ave Annual Growth Rate (2009 - 2020)
	Vic Mkt Share		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	
Visitor Numbers (000s)	29%	78	83	86	88	91	93	96	98	100	103	105	3.1%
Visitor Nights (000s)	31%	1,798	2,116	2,130	2,143	2,165	2,184	2,197	2,207	2,214	2,216	2,218	1.0%

Note 1: Based on visitors aged 15 years or over.

Note 2: Victorian estimates based on market share of visitor nights (IVS, year ending December 2010) and assumes market share remains constant.

Note 3: Slight variations in calculations are due to rounding.

Sources: Tourism Forecasting Committee, November 2010 Issue 2 and *International Visitor Survey*, year ending December 2010, Tourism Research Australia

Average annual growth for arrivals to Australia from Singapore is forecast at 3.1% over the period 2009-2020. Victoria is estimated to receive 105,000 visitors from Singapore by 2020. Despite a contraction in the economy, cut in direct aviation services and the H1N1 outbreak in Australia, visitor arrivals from Singapore have grown in 2009/2010. While Singapore Airlines is expected to cut direct aviation capacity, Jetstar Airways is expected to commence using Singapore as an aviation hub in Asia. This growth in capacity and a stronger economic performance is expected to boost arrivals in the medium term.

Source: Tourism Forecasting Committee Forecast 2010 Issue 1, June 2010.

For more detailed information on tourism forecasting, market performance and economic commentary, please refer to the source at:

<http://www.ret.gov.au/tourism/tra/traforecasts/publications/Pages/default.aspx>

2 OVERVIEW OF SINGAPOREAN LEISURE VISITORS TO VICTORIA

The main focus of this analysis will be on overnight leisure travellers from Singapore to Victoria. Leisure travellers are those who travelled to Australia for holiday purposes or to visit friends and relatives (VFR).

Singaporean Visitation to Victoria for Leisure, 2000-2010

Year Ending							Av Annual % Change	Av Annual % Change	% Change
December	2000	2006	2007	2008	2009	2010	2000-2010	2006-2010	09-10
Visitors (000s)	44	35	35	39	47	48	0.8%	8.5%	2.6%
% Market Share	24%	27%	26%	28%	30%	29%			

48,000 Singaporean leisure visitors stayed overnight in Victoria in 2010, an increase of 2.6% from the previous year.

Singaporean 'Experience Seekers' – Proportion by State/ Territory, 2007-2010

Tourism Australia defines the Experience Seekers as "looking for unique, involving and personal experiences from their holidays. Experience Seekers are long haul travellers who are less affected by the traditional barriers to travel of distance, time and cost. They are more informed, interested and curious about potential travel destinations. Experience Seekers can be found among all age groups, income levels and geographic locations."

Singapore Experience Seekers - Proportion by State/Territory, 2007-2010

Year ending				
December	2007	2008	2009	2010
Total	32%	43%	44%	42%
New South Wales	35%	38%	43%	41%
Victoria	41%	43%	48%	45%
Queensland	23%	43%	45%	45%
South Australia	47%	52%	54%	56%
Western Australia	29%	43%	43%	37%
Tasmania	50%	56%	64%	43%
Northern Territory	50%	71%	48%	48%
Australian Capital Territory	37%	50%	51%	50%

Of Singaporean overnight leisure visitors to Victoria, 45% can be defined as part of the Tourism Australia defined segment "Experience Seekers" in 2010. This is slightly higher than the proportion of Singaporean leisure travellers to Australia generally (42%), and also for key competitor New South Wales (41%). Queensland achieved a similar proportion (45%). Over time, this proportion has increased 4 percentage points, from 41% of visitors to Victoria in 2007.

For more detailed information on the Experience Seekers segment, please refer to:

<http://www.tourism.australia.com/en-au/marketing/experience-seekers.aspx>

2.1 Places Visited in Regional Victoria and Melbourne Attractions

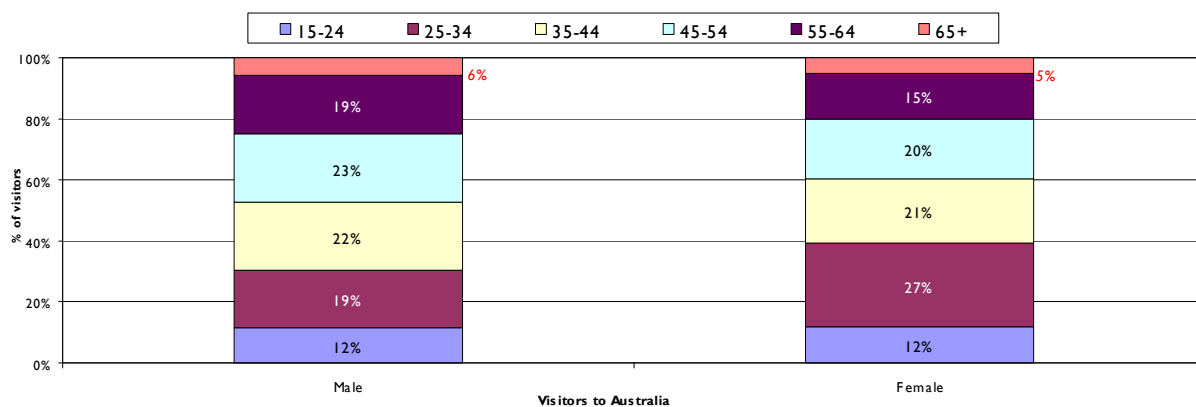
Selected Places Visited - Overnight Visit or Daytrip (% of all Leisure Overnight Visitors to Victoria)	Singaporean All International		Selected Places Visited - Melbourne Attractions (% of Leisure Overnight Visitors to Victoria)	Singaporean All International	
	Visitors	Visitors		Visitors	Visitors
Phillip Island, penguin parade	25%	20%	Crown Casino/entertainment complex	45%	33%
Ballarat, Sovereign Hill	-	12%	Federation Square	47%	50%
Dandenongs, Puffing Billy, Healesville Sanctuary	16%	14%	Queen Victoria Market	68%	51%
Great Ocean Road or Twelve Apostles	35%	34%	Southbank/Southgate	37%	31%
Mornington Peninsula	12%	9%	Melbourne Museum (Royal Exhibition Building)	20%	23%
Daylesford, Hepburn Springs, Macedon	-	2%	Docklands/Telstra Dome	32%	28%
Yarra Valley	17%	12%	National Gallery of Victoria (NGV)	-	17%
Bendigo	-	5%	Melbourne Cricket Ground (MCG)	-	11%

Of the Victorian places visited (for an overnight visit or daytrip) 35% of Singaporean overnight leisure visitors to Victoria spent time in the Great Ocean Road region and/or the Twelve Apostles. This region is very popular generally with 34% of all international overnight leisure visitors to Victoria travelling there.

Of the Melbourne attractions visited 68% of Singaporean overnight leisure visitors to Victoria spent time at the Queen Victoria Markets. The highest result for all the listed Melbourne Attractions for international overnight leisure visitors to Victoria generally was also the Queen Victoria Markets (51% of overnight leisure visitors to Victoria).

2.2 Demographic Profiling

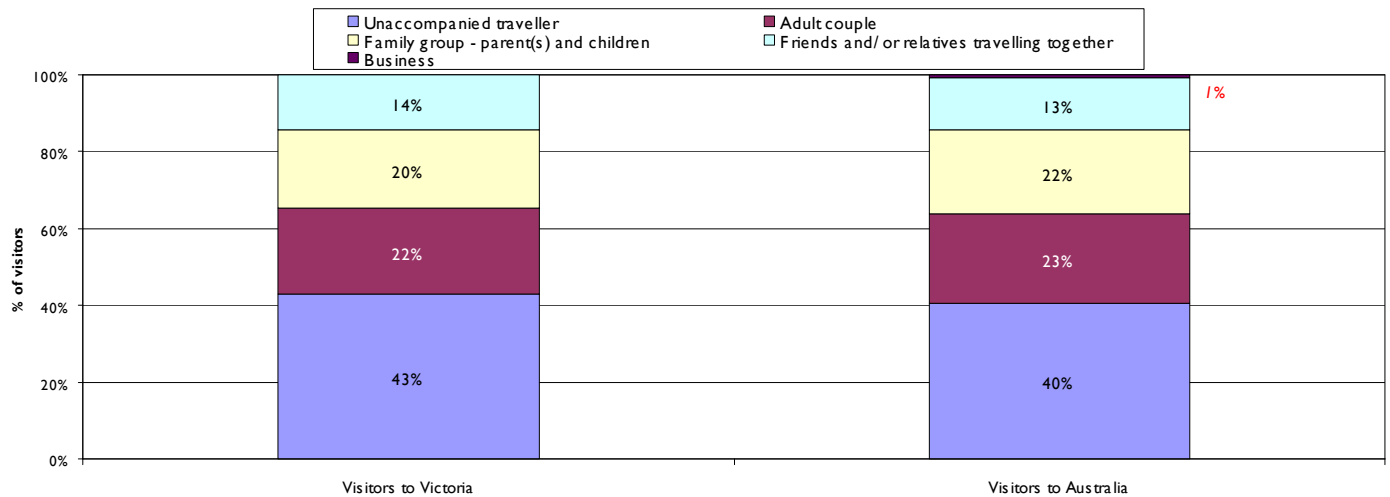
Age Group & Gender (% of overnight leisure visitors from Singapore)



In 2010, 53% of overnight leisure visitors from Singapore to Australia were female and 47% were male. For both males and females, the spread across the age groups is relatively even spread with a slight skew away from the youngest and the oldest age ranges of 15 to 24 years and 65 and over.

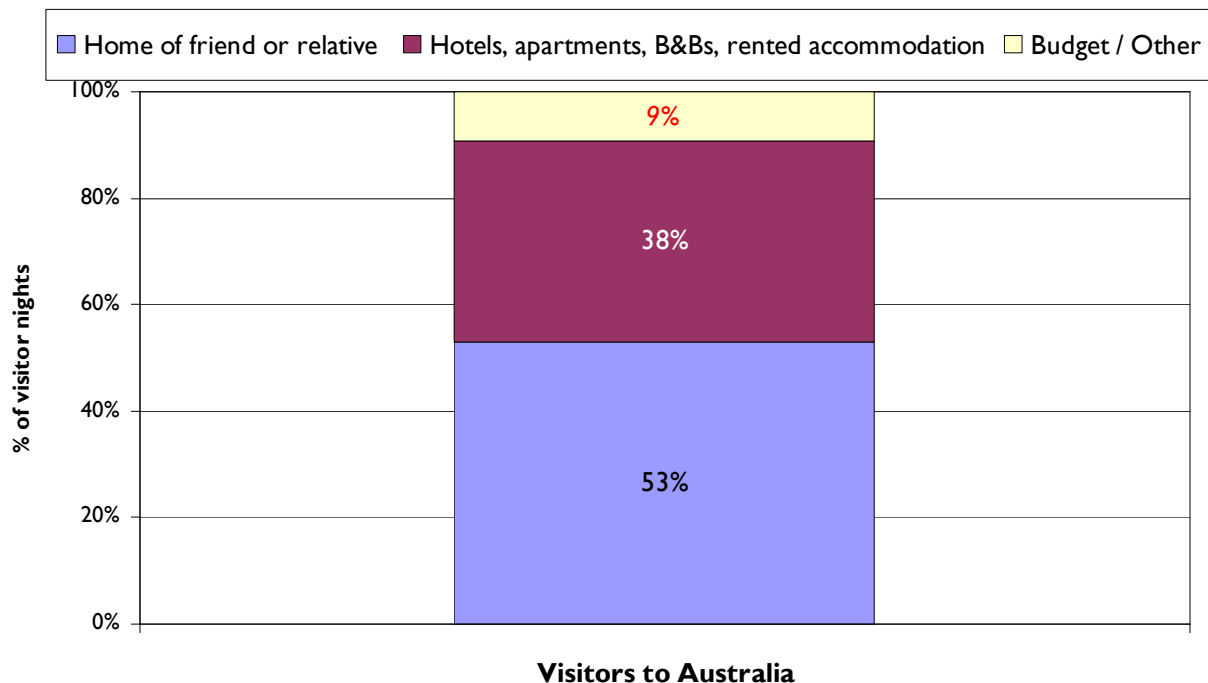
2.3 Detailed Visitor Behaviour

Travel Party Description (% of overnight leisure visitors from Singapore)



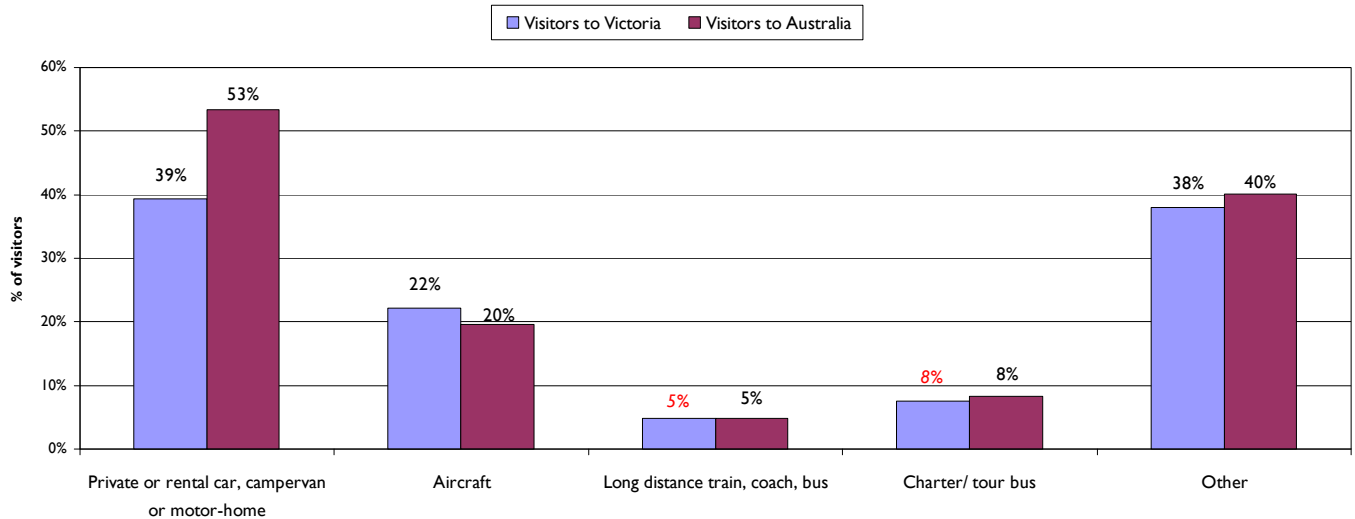
Overnight leisure visitors to Victoria and Australia from Singapore were similar in proportion for travel party on their trip in 2010. For Singaporean overnight leisure visitors to Victoria, most travelled alone (43%), however there were still 22% of visitors travelling as a couple, 20% as a family group and 14% with friends and relatives.

Accommodation (% of visitor nights spent by Singaporean leisure visitors)



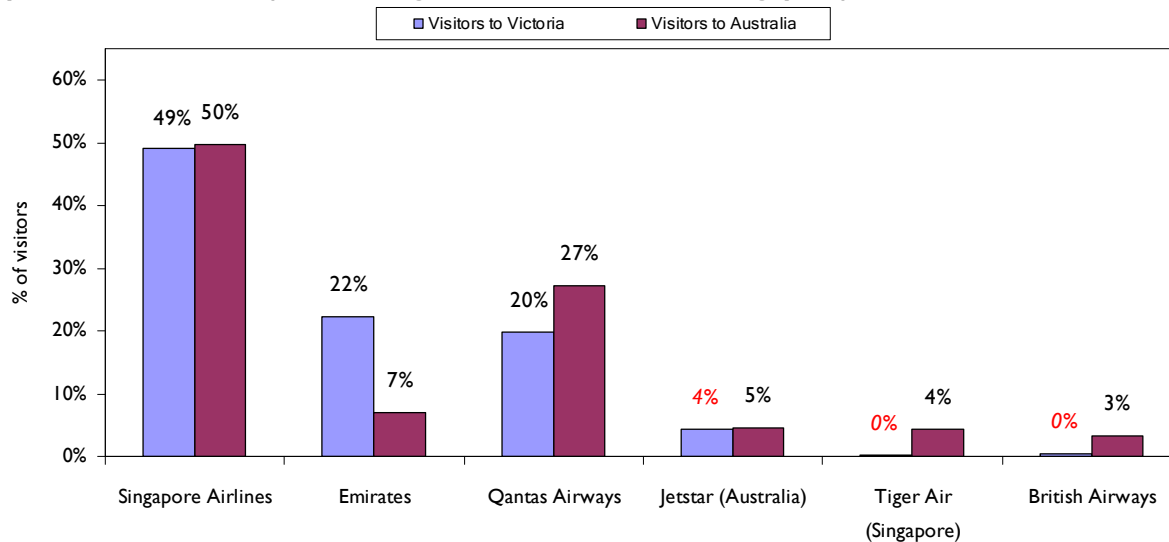
In 2010, 53% of nights spent by leisure visitors to Australia from Singapore were spent at the home of a friend or relative and 38% of nights were spent at hotels, apartments, B&Bs or rented accommodation.

Transportation used (% of leisure visitors from Singapore)



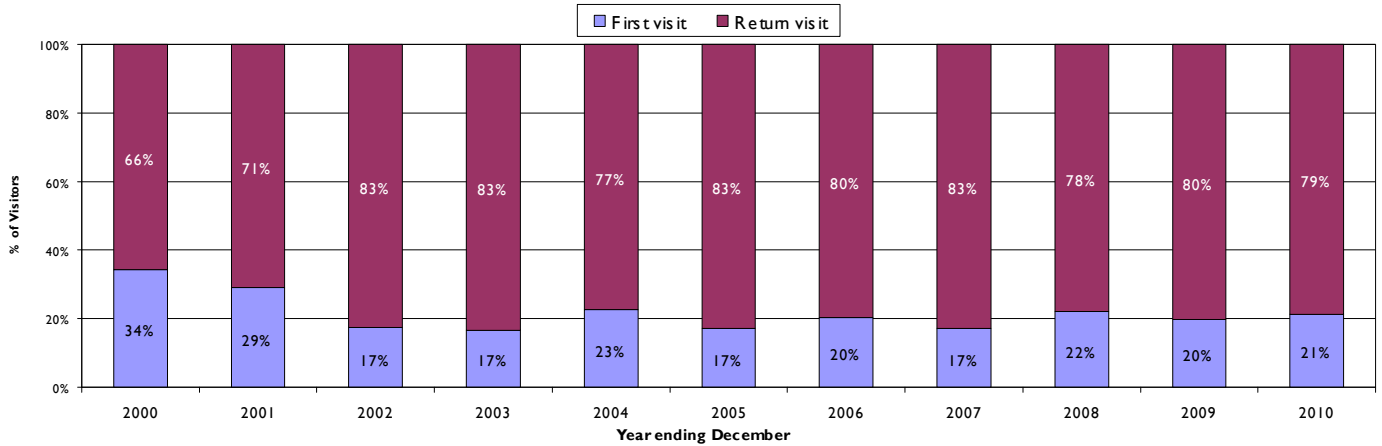
Of the 48,000 Singaporean leisure visitors who stayed overnight in Victoria in 2010, 39% used a private or rental car, campervan or motor-home on their trip while 38% used other forms of transport such as public transport or a ship/boat/ferry. In comparison, 53% of Singaporean leisure visitors to Australia used a private or rental car, campervan or motor-home and 40% used other forms of transport.

Departure Airline used (% of overnight leisure visitors from Singapore)



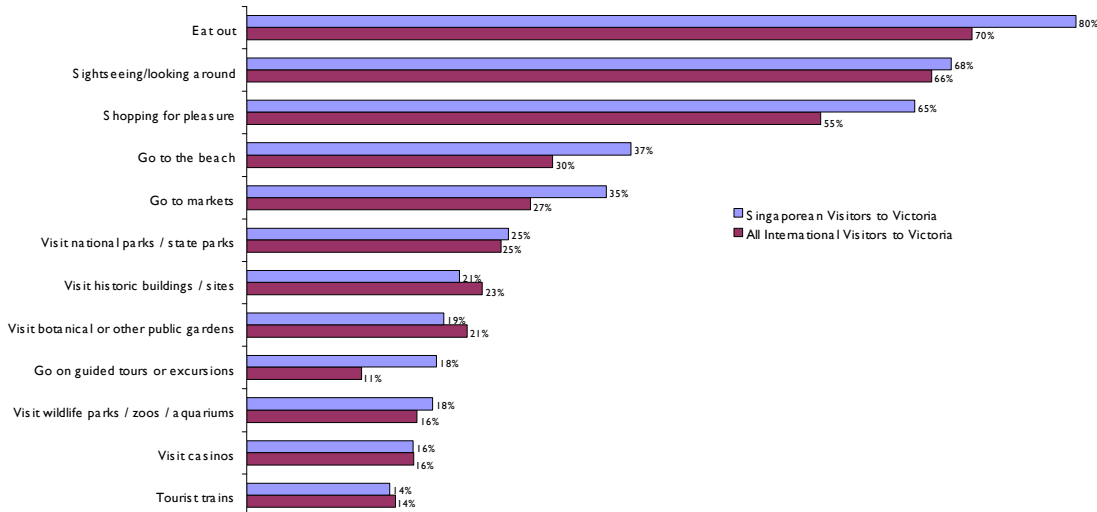
Of overnight leisure visitors to Victoria from Singapore in 2010, the most popular airline used was Singapore Airlines (49%) when departing Australia following their holiday. Of the other airlines used, overnight leisure visitors to Victoria were more likely to use Emirates (22%) compared to visitors to Australia generally (7%), but less likely to use Qantas (20% compared to 27%).

Repeat Visitation of Victoria (% of overnight leisure visitors from Singapore)



The Singaporean overnight leisure travel market is a very mature one. In 2010, the proportion of overnight leisure visitors from Singapore to Victoria who were visiting for the first time was only 21%, a decrease of 13 percentage points over the decade (from 34% in 2000). In comparison 18% were visiting Australia for the first time.

Top 15 Activities (% of overnight leisure visitors from Singapore)

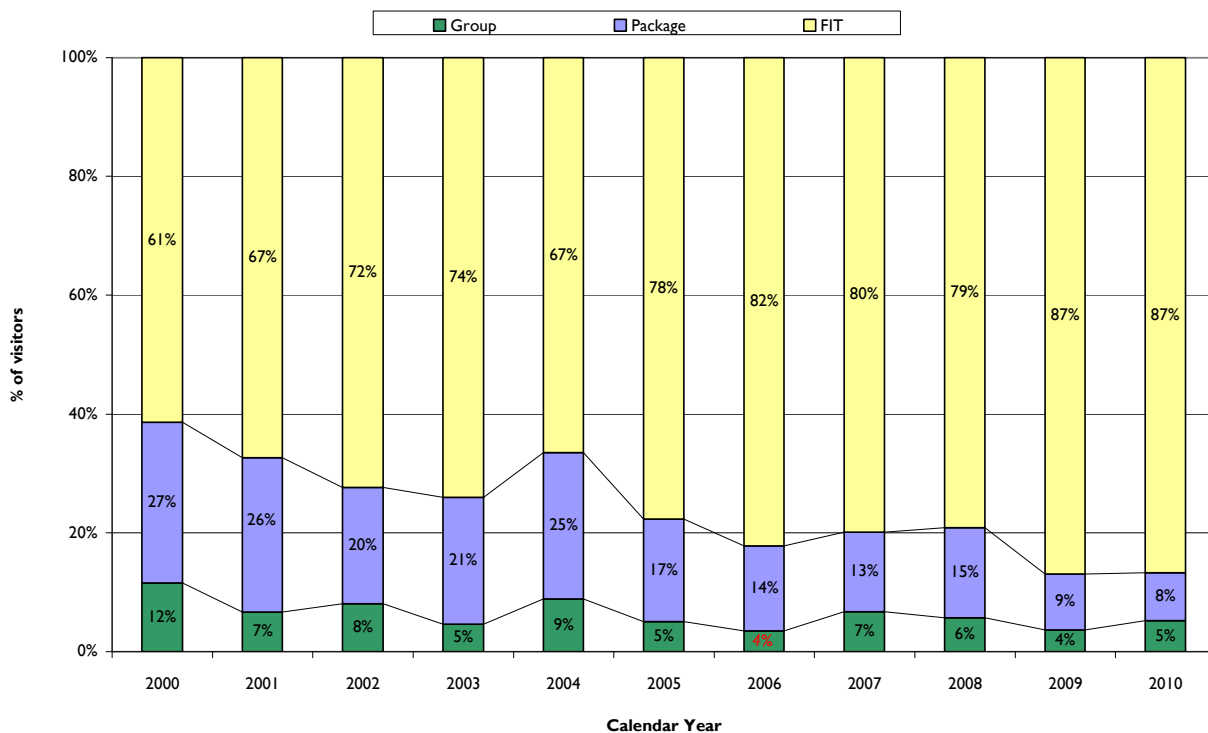


Of the most common activities on their trip as listed above, Singaporean leisure visitors who stayed overnight in Victoria were more likely to do a number of activities than the average international overnight leisure visitor to Victoria. Some of these activities include dining out (80% compared to 70%), sightseeing and looking around (68% compared to 66%), shopping for pleasure (65% compared to 55%), going to the beach (37% compared to 30%) and visiting markets (35% compared to 27%).

3 TRAVEL STYLE

3.1 Group, package & Fully Independent Travel (FIT) travel

Trends in Group, Package and FIT travel among Singaporean leisure visitors to Australia, 2000-2010



The increasing maturity of the Singaporean leisure travel market is reflected in the growing proportion of FIT travellers who now account for 87% of the market (compared to 61% in 2000). This growth has come at the expense of both group and package travel, which has decreased since 2000 from 12% to 5% for group and from 27% to 8% for package.

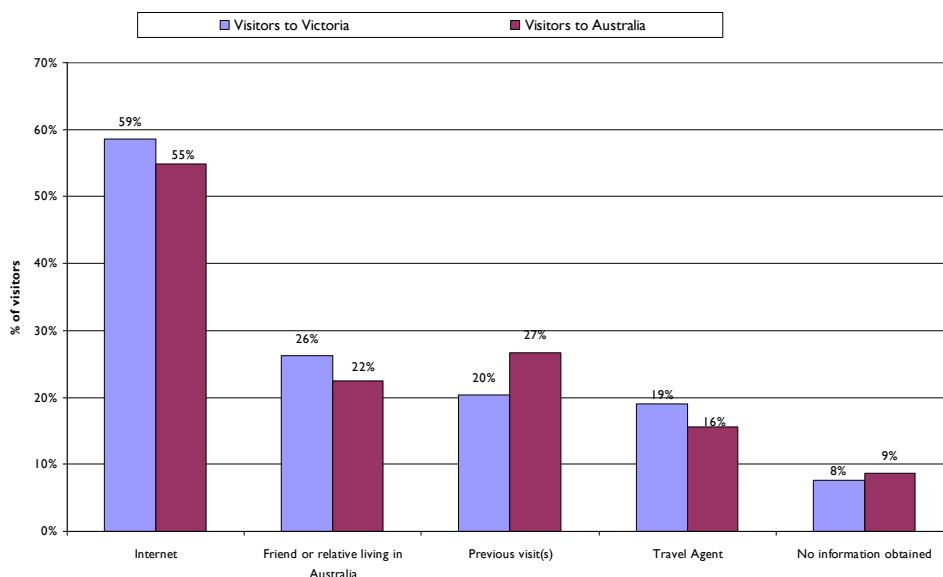
* NOTE: Group, Package and FIT are derived using the following method.

'Group' travellers refer to those who responded yes to question "Did you travel to Australia on a group tour?". 'Package' travellers refer to those who responded yes to question "Did you arrive in Australia on a travel package?" (minus 'Group' travellers). The remaining travellers who were not 'group' or 'package' are referred to as 'FIT' travellers.

4 INFORMATION SOURCES & BOOKING METHODS

4.1 Information Sources

Information Sources by Singaporean Leisure Visitors to Australia and Victoria, 2010

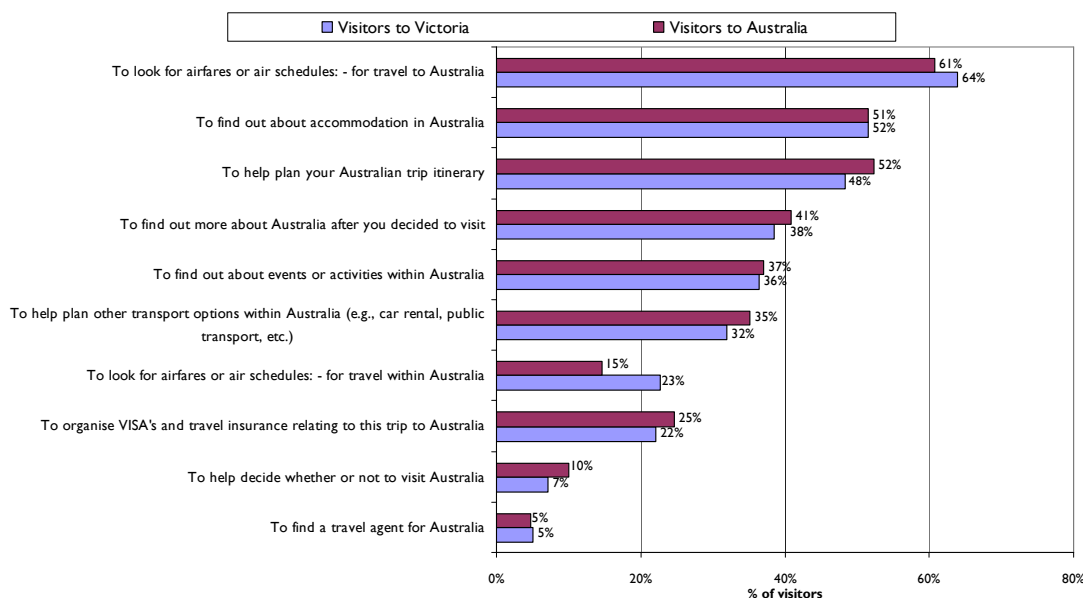


Base: Valid responses

NB: Information Sources with a value below 2% have been omitted.

Among Singaporean overnight leisure visitors to Australia in 2010, the leading information source used was the internet (55%), followed by previous visits (27%), word of mouth from an Australian resident (22%), and travel agents (16%). In comparison to Singaporean leisure visitors nationally, overnight leisure visitors to Victoria were more likely to have used the internet (59% compared to 55%), word of mouth from an Australian resident (26% compared to 22%), and a travel agent (19% compared to 16%).

Reasons for using the Internet by Singaporean Leisure Visitors to Australia and Victoria, 2010

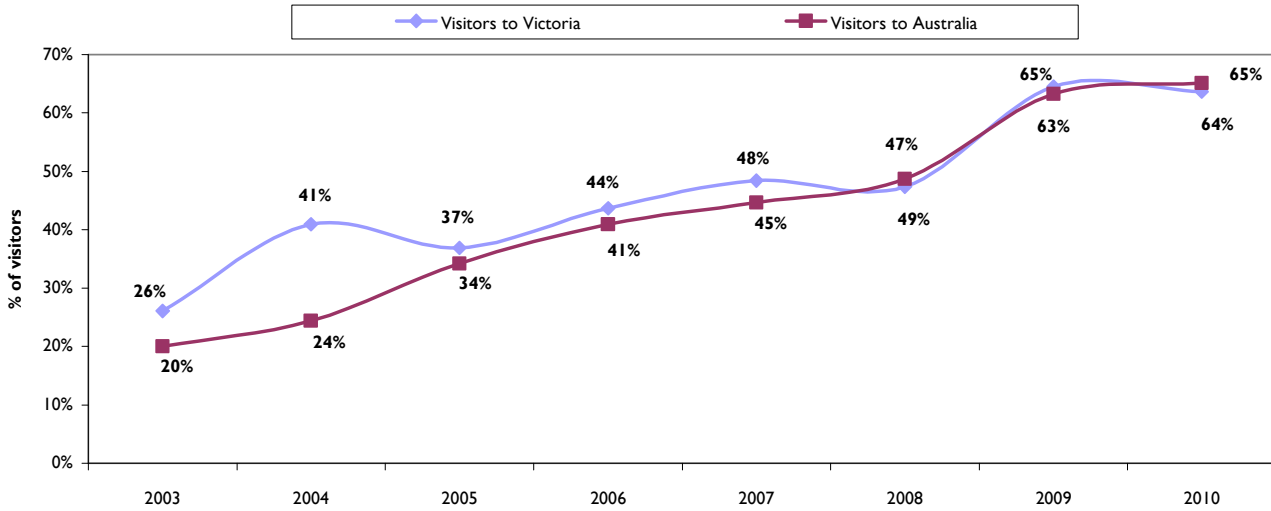


Base: Those who used the Internet as an Information Source.

Of Singaporean overnight leisure visitors to Victoria who used the internet in their holiday planning, 64% used it to look for airfares and schedules for their trip to Australia. Other uses included looking for accommodation (52%), to help plan an itinerary (48%), and to find out more about Australia after deciding to visit (38%).

4.2 Internet Booking

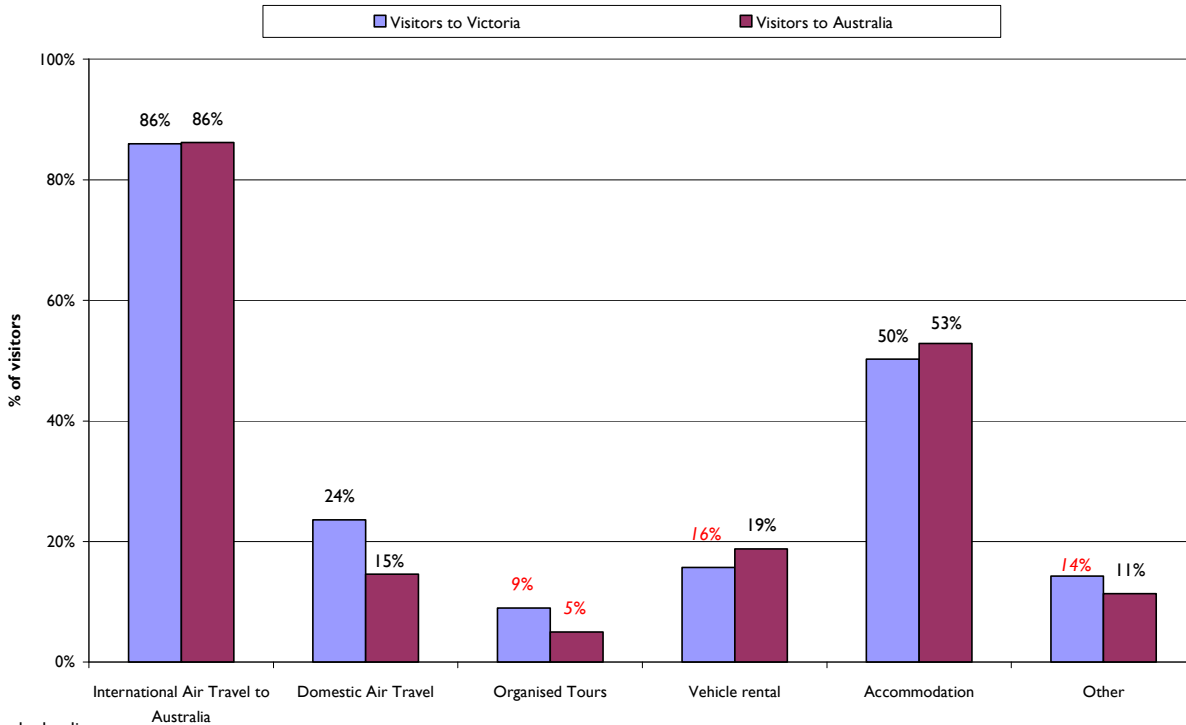
Incidence of Online Booking among Singaporean Overnight Leisure Visitors, 2003-2010



Base: Valid responses

Steady growth in the incidence of online booking among Singaporean leisure visitors to Australia is evident, increasing from 20% in 2003 to 65% in 2010. Overnight leisure visitors to Victoria from Singapore were similar, with 64% reporting usage of online booking methods in 2010.

Trip Components Booked Online among Singaporean Overnight Leisure Visitors, 2010



Base: Booked online

Among Singaporean overnight leisure visitors booking travel online, international air fares (both 86%) and accommodation (50% and 53%) were the most frequently purchased components among visitors to Victoria and Australia. Overnight visitors to Victoria from Singapore were more likely to have booked domestic air fares (24% compared to 15%) online.

4.3 Planning and Booking Horizons

	Visitors to Australia	Visitors to Victoria
Planning Horizon (average weeks)	7.9	7.7
Booking Horizon (average weeks)	6.1	6.5

Among leisure visitors from Singapore to Australia, the average planning horizon was 7.9 weeks, with a slightly shorter horizon for overnight leisure visitors to Victoria (7.7 weeks). However, 54% of visitors to Australia indicated a lead time of less than 4 weeks for planning (56% of visitors to Victoria).

For leisure visitors to Australia, flight booking occurred an average of 6.1 weeks prior to departure, with a slightly longer horizon for overnight leisure visitors to Victoria (6.5 weeks). Among leisure visitors to Australia, 60% of flight bookings (and 57% of flight bookings among Victorian overnight leisure visitors) occurred within a month of departure.

Sources:

- *International Visitor Survey*, year ending December 2000-2010, Tourism Research Australia
- *International Tourism Expenditure in Australia's regions 2000-2010*, Tourism Research Australia
- Tourism Forecasting Committee Forecast 2010: Issue 1 (June 2010) and Issue 2 (December 2010).
- Tourism Australia Corporate Website: <http://www.tourism.australia.com/en-au/marketing/experience-seekers.aspx>, February 2010.

Further information: www.tourism.australia.com/Markets.asp

www.tourism.vic.gov.au/facts-and-figures/

Figures that are unreliable and unable to be published are represented by '-'. Percentages in red italics are unreliable and should be used with caution.

Figures might not add up due to rounding.