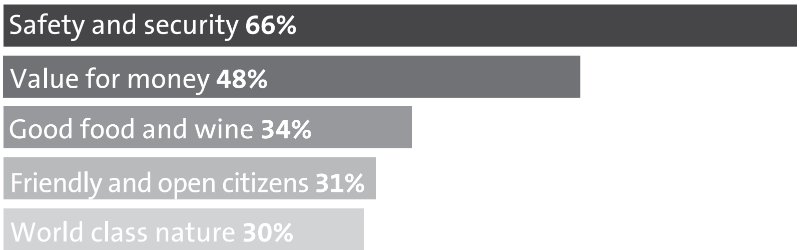
SINGAPORE
MARKET PROFILE

TOURISM AUSTRALIA

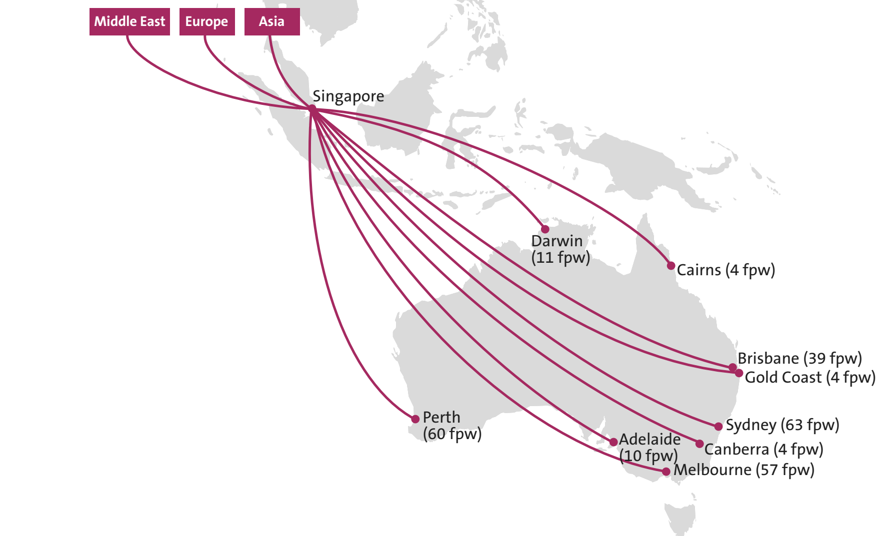
Market overview

In 2016, Singapore was Australia's fifth largest inbound market for visitor arrivals, seventh largest market for total visitor spend and 13th for visitor nights.

Key importance factors for holiday destination choice[1]



Aviation routes from Singapore to Australia[2]



fpw: flights per week

Which airlines[3] do visitors from Singapore use to travel to Australia?

Airline	2012	2013	2014	2015	2016
Singapore Airlines	49%	45%	44%	44%	41%
Scoot	15%	14%	19%	22%	26%
Qantas Airways	16%	19%	14%	13%	12%
Emirates	6%	7%	7%	7%	6%
Jetstar (Australia)	3%	3%	2%	3%	2%
Air Asia X	1%	1%	1%	1%	2%
British Airways	1%	1%	1%	2%	2%
Others	9%	11%	11%	9%	8%

$2.3-2.8bn
Potential to be worth by 2020

439,600
Visitor arrivals[3]
(↑ 11 per cent)

Holiday◊§
58%

Visiting friends & relatives◊§
17%

Business◊§
16%

Education◊§
4%

$1.4bn
Total spend[4]
(↑ 4 per cent)

17 nights *4
Average nights stayed◊

7 nights **4
Median nights stayed◊

Apr-Jun and **Oct-Dec**
Booking peak period

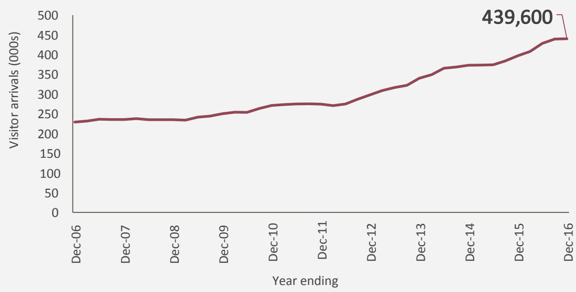
Jun and **Nov-Dec**
Travel peak period

*Notes: *Average nights: the sum of all nights divided by the sum of all visitors. **Median nights: the midpoint length of stay for which 50% of visitors stay less and 50% stay longer.◊ Data refers to an average of 2012-2016. § Refers to share of arrivals of respective purpose. ‡ Other includes education, employment and others. Sources: 1. Tourism Australia, Consumer Demand Project, 2016. 2. Department of Infrastructure and Regional Development, December 2016. 3. Department of Immigration and Border Protection, December 2016. 4. Tourism Research Australia, International Visitor Survey, December 2016.*

SINGAPORE
MARKET PERFORMANCE

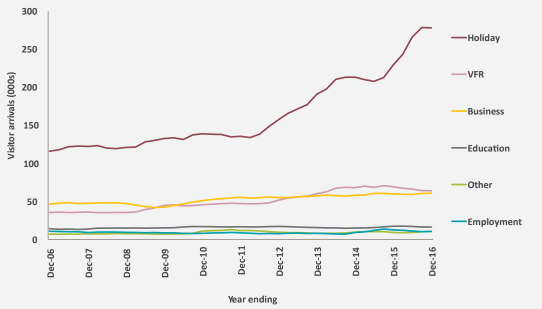
» The charts on this page provide a trend overview of visitor arrivals and spend over the last 10 years by main purpose of visit, by first and repeat leisure$^{\Delta}$ visitors and also a snapshot of age demographic split of leisure visitors and spend.

Visitor arrivals[1]

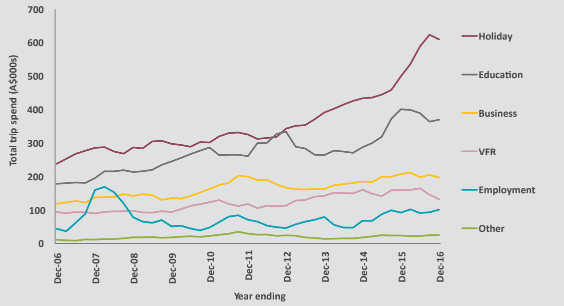


Visitor spend[2]

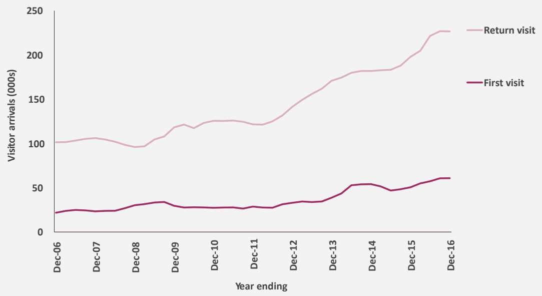
Visitor arrivals by main purpose of visit[1]



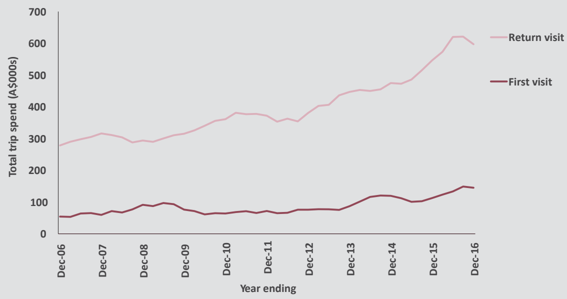
Visitor spend by main purpose of visit[2]



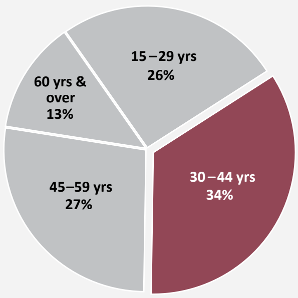
First and repeat leisure visitor arrivals[2]



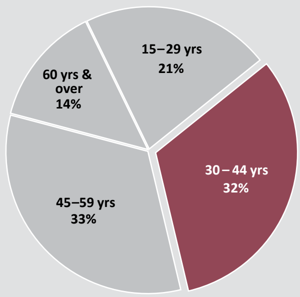
First and repeat leisure visitor spend[2]



Leisure arrivals by age[2†]



Leisure spend by age[2†]



Notes: Δ Leisure refers to main purpose of visit of holiday and visiting friends and relatives. † Age profile data refers to an average of 2012-2016.
Sources: 1. Department of Immigration and Border Protection, December 2016. 2. Tourism Research Australia, International Visitor Survey, December 2016.

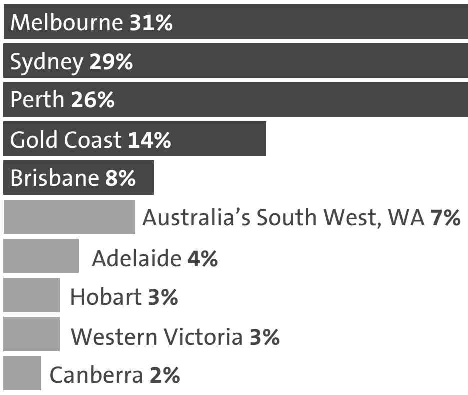
SINGAPORE
MARKET PERFORMANCE

» The following◊ table provides a summary of arrivals, spend and the proportion of repeat visitors to Australia by main purpose of visit: holiday, visiting friends and relatives, business and education.

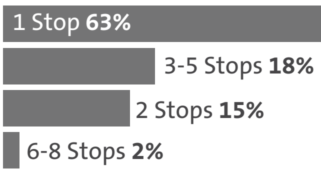
	HOLIDAY	VISITING FRIENDS AND RELATIVES	BUSINESS	EDUCATION
Arrivals[1]	213,800 (58%§)	62,600 (17%§)	58,100 (16%§)	16,200 (4%§)
Spend per trip[2]	$2,400	$2,500	$3,100	$21,600
Spend per night[2]	$293	$166	$423	$185
Repeat visitors[2]	76%	89%	86%	93%
Average nights stayed[2]	9	16	8	116
Median nights stayed[2]	7	9	4	111

» The following provides an overview of top 10 regions visited by leisure visitors and the number of stopovers made in Australia by leisure visitors.

Top 10 regions visited by leisure visitors◊*^2



Overnight stopovers made in Australia by leisure visitors ◊*^2



Read as: 18% of leisure travellers from Singapore visited 3-5 regions (and made at least one overnight stay).

*Notes: ◊ Data refers to an average of 2012-2016. § Refers to share of arrivals of respective purpose of visit. * Leisure refers to main purpose of visit of holiday and visiting friends and relatives. ^Percentages will not add to 100% as one person can visit multiple regions. The data refers to visitors that made at least one overnight stay.*
Sources: 1. Department of Immigration and Border Protection, December 2016. 2. Tourism Research Australia, International Visitor Survey, December 2016

SINGAPORE
AVIATION LANDSCAPE

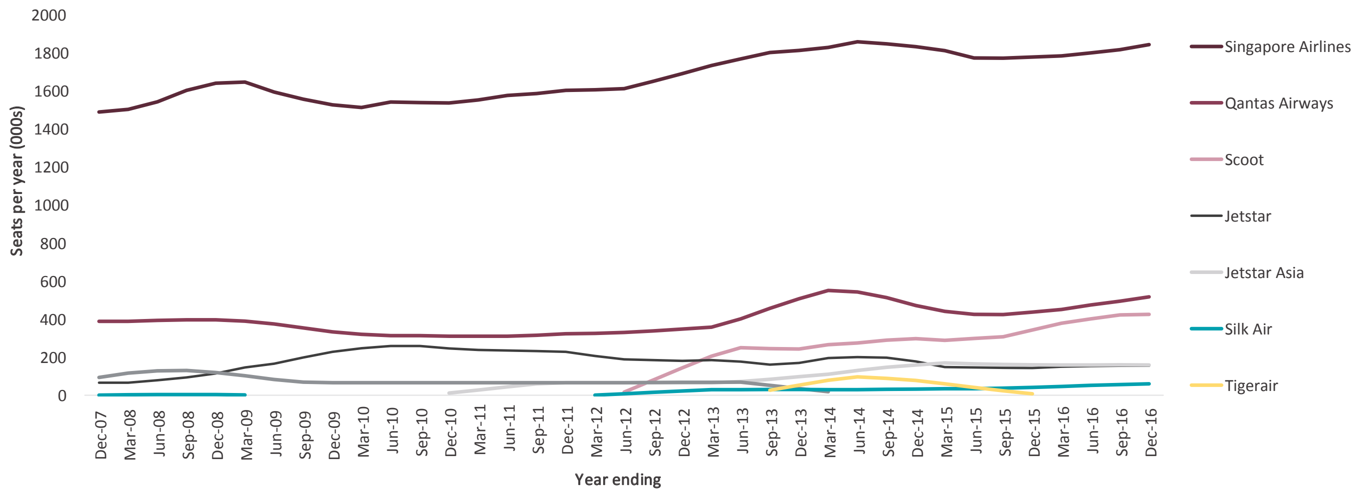
3.5 million Inbound seats

6% year on year

228 Flights per week

- There is direct access to all Australia's gateway cities, with multiple frequencies and carriers operating on most routes. Pricing and capacity is very competitive. Singapore is a popular hub for many Europeans, North and South Asian tourists travelling to Australia.
- The Singapore Airlines group has held its share of visitors from Singapore with its low-cost carrier subsidiary Scoot gaining some marginal share to carry almost a quarter of visitors from Singapore in 2016. Qantas is also an important carrier but its share has been impacted given intense competition on the route, dropping to 12% in 2016. See table on page 1.
- In 2016, Singapore Airlines commenced the inaugural capital to capital, Singapore – Canberra – Wellington service, bringing the first international service into Canberra. Overall capacity from Singapore to Australia grew 6 per cent in 2016, in particularly on the Singapore to Melbourne route. Average load factors fell marginally by two percentage points to 82% in 2016 at the back of capacity growth already off a large base.
- Singapore Changi Airport started the process to build a fifth terminal (T5) which has the potential to handle 50 million passengers every year or the equivalent of the combined capacity at T1, T2 and T3. This will further reinforce Singapore's hub status for international visitors to Australia.

Direct aviation capacity from Singapore to Australia



Sources:Department of Infrastructure and Regional Development, Aviation Statistics, December 2016

SINGAPORE
AVIATION LANDSCAPE

Weekly services to Australia

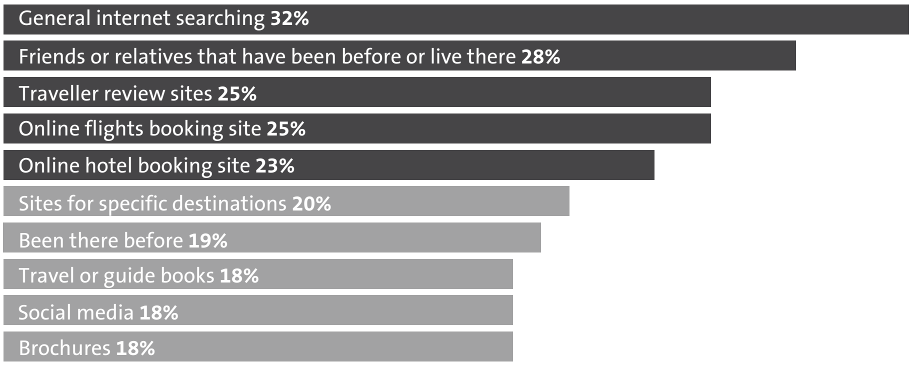
Operating Airlines	Flights per week	Route	Alliance/ code share partner (on route)
British Airways	7	London-Singapore-Sydney	
Emirates	7	Dubai-Singapore-Brisbane	
	7	Dubai-Singapore-Melbourne	
Jetstar Asia	4-7	Singapore-Darwin	Emirates, Finair, Jet Airways, Qantas, Sri Lankan
	12-13	Singapore-Perth	Finair, Jet Airways, Qantas, Sri Lankan
Jetstar	4-7	Singapore-Melbourne	Qantas
		Singapore-Denpasar-Perth	
Scoot	5	Singapore-Melbourne	Singapore Airlines
	4	Singapore-Gold Coast	
	7	Singapore-Perth	
	7	Singapore-Sydney	
SilkAir	3-5	Singapore-Cairns	Singapore Airliens, Virgin Australia International
	4-5	Singapore-Darwin	
Singapore Airlines	7	Singapore-Adelaide	Ethiopian, Lufthansa, SAS Scandinavian, Swiss International, Turkish Airlines, Virgin Atlantic, Virgin Australia International
	22-28	Singapore-Brisbane	Ethiopian, Lufthansa, SAS Scandinavian, Swiss International, Turkish Airlines, Virgin Australia International
	4	Singapore-Canberra-Wellington	Air New Zealand, Lufthansa, Swiss International, Turkish Airlines, Virgin Australia International
	28-31	Singapore-Melbourne	Aegean Airlines, Ethiopian, Lufthansa, SAS Scandinavian, Swiss International, Turkish Airlines, Virgin Atlantic, Virgin Australia International
	28	Singapore-Perth	Asiana, Ethiopian, Lufthansa, SAS Scandinavian, Swiss International, Turkish Airlines, Virgin Atlantic, Virgin Australia International
	28-35	Singapore-Sydney	Air New Zealand, Aegean Airlines, Ethiopian, Lufthansa, SAS Scandinavian, Swiss International, Turkish Airlines, Virgin Atlantic, Virgin Australia International
Qantas	7	Singapore-Brisbane	Bangkok Airways, British Airways (except for Sydney), China Eastern, Emirates, Finair, Japan Airlines, Jet Airways, Sri Lankan, Fiji Airways
	9-10	Singapore-Melbourne	
	7	Singapore-Perth	
	14	Singapore-Sydney	

Sources: Department of Infrastructure and Regional Development, International Airlines Timetable Summary (Northern Summer), 2017

SINGAPORE
PLANNING AND BOOKING INFORMATION SOURCES

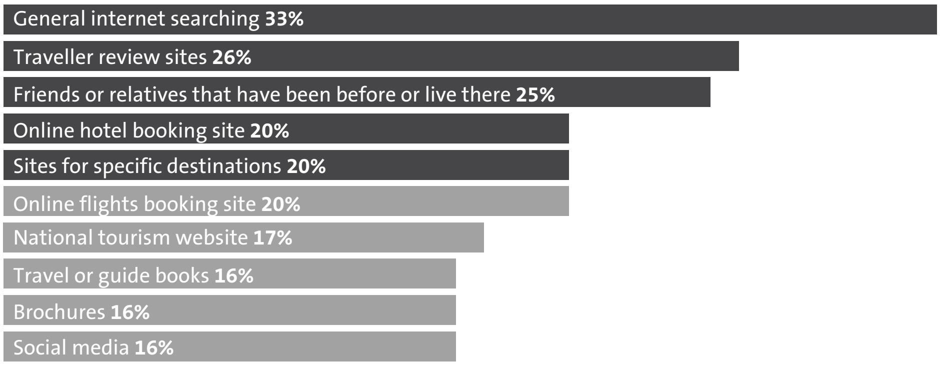
The following charts highlight the information sources that Singaporean consumers use to plan and book their holidays.

Preferred sources for early planning and inspiration



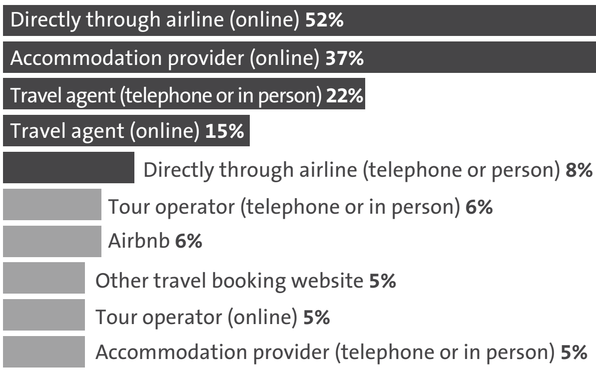
Read as: 32% of respondents indicate 'general internet searching' as a preferred source during the early stages of planning a holiday.

Preferred sources for seeking information



Read as: 33% of respondents indicate 'general internet searching' as a preferred source for seeking information about a holiday destination.

Preferred sources used to book a holiday



Read as: 52% of respondents indicate booking 'directly through (an) airline (online)' as a preferred source when booking a holiday.

Source: Tourism Australia, Consumer Demand Project, 2016

SINGAPORE
DISTRIBUTION

Online bookings are growing rapidly in Singapore as airlines and retail agencies expand their online presence for both group and Free Independent Travel (FIT) segments. Consumers in Singapore are value-conscious and actively seek destination information and deals before making travel purchases.

Distribution system

WHOLESALERS/ LARGE AGENCIES

Commission level: 10% to 15%

- The traditional wholesaler model does not apply in Singapore. Large retail agencies brochure and market their own programs with links to inbound tour operators (ITOs).
- Large travel agencies such as Chan Brothers, Dynasty Travel, Air Sino-Euro Associates (ASA Holidays), Qantas Holidays, and Commonwealth Travel take reservations from consumers through their own retail network. Some also take reservations from smaller travel agencies which have limited access to ITOs and do not undertake consumer advertising.

RETAIL AGENTS

Commission level: up to 10%

- There are approximately 868 outbound travel agencies registered with the Singapore Tourism Board. More than 100 of these sell Australian products and packages. Around 20 key agencies partner with Tourism Australia and State and Territory Tourism Organisations (STOs) in marketing campaigns.

AUSSIE SPECIALISTS

285 qualified Aussie Specialists as of Mar-17

- The Aussie Specialist Program (ASP) is the primary platform for Tourism Australia to train and develop front line travel sellers to best sell Australia.
- As at March 2017, there were 285 qualified Aussie Specialist agents in Singapore.

ONLINE

- Major Online Travel Agencies (OTAs) are growing their presence in Singapore. Evolving technical capabilities such as dynamic packaging and online group booking, are helping to drive significant growth in bookings made through OTAs.
- Key OTAs include Expedia-AirAsia, Zuji, Misa Travel, Chan Brothers, Asiatravel.com, CheapTicket.sg, Priceline and Agoda.

INBOUND TOUR OPERATOR

Commission level: up to 30%

- » ITOs remain an important element of the distribution network in the Singapore market.

SINGAPORE
DISTRIBUTION

Trends

Distribution

- Singaporeans are increasingly comfortable with booking holidays online either through an airline, an Online Travel Agency (OTA) or a traditional travel agent that has a strong online presence. Some travellers still complete their travel purchase with a retail travel agent, due to exclusive airline offers and the need to plan complicated itineraries.
- The launch of low cost carrier, Scoot, has added competitive stimulus to the market, with traditional carriers responding with aggressive pricing strategies, offering promotional fares with longer travel period validity.
- Airlines and large travel agencies continue to be proactive in establishing websites and online services. The trend is growing fast as agencies understand they must have a stronger presence anywhere consumers are purchasing travel.
- Major consumer travel fairs are organised by the National Association of Travel Agents (NATAS) and the Singapore Outbound Travel Agents Association (SOTAA), usually occurring in February/March and August/September. They are organised individually by the larger travel agencies or on a consortia basis for medium to small agencies.

Planning and purchasing travel

- Singapore is a mature market and consumers have a solid knowledge of Australia. The Free and Independent Traveller (FIT) segment continues to grow rapidly.
- Consumers in Singapore are value conscious and actively review a range of destinations and information sources, seeking favourable deals before making travel purchases.
- There are a significant number of consumers who will purchase airfares directly from airlines and then secure ground arrangements from either an OTA or a retail agent.
- Travel search engines are important information sources for consumers as they expand search options beyond flights and hotels to packages and car hire. These travel search engines are also partnering with user-review sites and affiliating content to major internet portals and media sites.

Planning a visit to market

Top tips for sales calls

- To develop an ongoing relationship with Singaporean agents, plan for meetings at least four times per year. These meetings can be a combination of market visits and trade event attendance.
- Tourism Australia and most State and Territory Tourism Organisations are located together in Singapore. Make your first call to the Tourism Australia office to receive the latest market information and to provide a product update.
- Singapore is a small country and major agents are often clustered in close proximity to each other so you can easily make numerous sales calls in one day.
- Avoid sales calls in the lead up to peak booking periods as agents are often heavily involved in consumer fairs and unable to meet you due to heavy workloads.
- The best time of the year for sales calls, contracting and product inclusions in new season launches is January. June is best for rate negotiation. October to December is useful for relevant product updates and planning for the next calendar year.
- For more general information on sales calls and planning a visit to market, please see Tourism Australia's Planning for Inbound Success ebook at www.tourism.australia.com/inboundsuccess.

SINGAPORE
FURTHER INFORMATION

Key trade and consumer events

Event	Location	Date
Consumer Travel Fairs	Singapore, Suntec City	1. NATAS Travel Fair: 11-13 Aug 17
	TBC	2. Travel Revolution: Mid-Aug 2017 (TBC)
Walkabout Southeast Asia	Bali, Indonesia (TBC)	25-28 Sept 2017 (TBC)
Dreamtime 2017	Brisbane, Australia	03-09 Dec 2017

Where to find more information

Tourism Australia's activities in Singapore are managed from its Singapore office. For more information visit Tourism Australia's corporate website at www.tourism.australia.com.

» Australian State and Territory Tourism Organisations operating in Singapore include: Destination NSW, South Australian Tourism Commission, Tourism and Events Queensland, Tourism NT, Tourism Tasmania, Tourism Victoria, and Tourism Western Australia.

Also see:

» Singapore Country Brief published by the Department of Foreign Affairs and Trade at www.dfat.gov.au/geo

» For the latest arrivals statistics, visit: http://www.tourism.australia.com/statistics/arrivals.aspx

» For additional statistical reports refer to the ABS and TRA websites, www.abs.gov.au and www.tra.gov.au

» For additional information on consumer research, visit: http://www.tourism.australia.com/statistics/consumer-demand-research.aspx

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