

Singapore

Market Summary

Consumer confidence continues to improve in Singapore. As new GDP forecasts released in July have almost doubled the previous expectations, consumers are having greater job security and again looking to travel.

April to June period saw extensive Australia focused activity continued from February and March, one of which is Tourism Australia's Great Australian Journeys campaign that carried an umbrella message which allowed our State Tourism Organisations (STO's), Airline and Aussie Specialist (ASP) travel partners to develop their own self drive messages.

Results from airline partners indicate that whilst we are facing serious competition, Australia remains popular with passenger bookings up significantly upon 2009 figures.

1. Market News

- **Economy:** The Ministry of Trade and Industry (MTI) in July released GDP year on year results for Q1 2010, showing the economy grew by 16.9%. This strong result has seen the MTI revise the 2010 GDP Forecasts from 7.0% to 9.0% to almost doubling 13.0% to 15.0%.
- **Social:** The Football World Cup dominated popular media in June as football is probably the most followed sport in Singapore. Of note, there was no evident slow down in outbound travel during this period similar to what occurred during the 2006 World Cup season.
- **Social:** Media attention has since switched to Singapore's hosting of the inaugural Youth Olympic Games in August. Current noise and excitement is low and not expected to have a significant impact upon outbound travel.

2. Consumer Insights

- Self drive is a key experience that Australia has significant cache for in the market, as shown by IVS data where 56% of Singapore leisure visitors in 2009 chose to self drive.

- This insight is further validated by the recent Great Australian Journeys campaign, which successfully reached its target audience, generated high interest in self drive routes, and exceeded its airfare and package bookings targets.
- A range of consumer confidence surveys were released recently (Nielsen Global Consumer Confidence Index, MasterCard Worldwide Index of Consumer Confidence Survey and Insight Asia Consumer Confidence Survey), all showing continued increase in consumer confidence amongst Singaporeans. There is renewed confidence in the economy and lifestyle post GFC, although a cautious sense of optimism is evident in the data as increasing savings is still one of the key applications for discretionary income.
- Travel agent and airline partners are also reporting a general increase in demand for travel amongst Singaporean consumers. There is however, still a level of caution in the market with consumers showing a preference for Asian destinations e.g. Korea, Taiwan and Japan.

For the latest in visitor arrivals, please visit '*Research & Statistics*' at www.tourism.australia.com

3. Trade Update

- As part of major rebranding, CTC Holidays has rebranded its main travel brand to CTC Travel. The agency continues to develop other complementary brands focusing upon niche markets and intends to increase its hotel ownership business, specifically in China.
- The Best of Australia campaign developed by Qantas, STOs and 13 ASP agents was promoted in conjunction with TA's Great Australian Journeys campaign. The campaign promoted self drive road packages based upon the routes featured in the campaign which consumers could book through their preferred ASP agent.
- TA and Chan Brothers ran a retail co-op campaign, developing a range of packages with add on experiences which highlighted the diverse range of experiences a self drive journey offers the experienced Singaporean travellers.
- TA and Dynasty Travel promoted self drive journeys to HSBC Bank credit card holders. Aimed at high net worth individuals, the campaign presented a range of FIT experiences and highlighted the unique benefits that self drive in Australia offers.
- TA partnered with 3 ASP agencies in a pilot program to utilise social media to promote the passion selected agents have for Australia. These ASP agents were encouraged to share their favourite experiences in Australia with clients and friends, and demonstrate to consumers the benefits of working with an ASP.

4. Airline News

- At the end of the June quarter, Singapore Airlines utilised stimulus funding to run a tactical campaign with STOs, incorporating special fare offers and destination messaging for individual STO partners.
- Airline partners indicate that whilst we are facing serious competition from other destinations, Australia remains popular, with passenger bookings up significantly vs. 2009.
- All airlines continue to offer aggressive promotions in the market. Australia continues to be heavily promoted as part of these practices. However, heavy discounting by all carriers for European flights is stimulating demand for Western European destinations.
- Jetstar announced the expansion of their services from Singapore in to Melbourne starting 16 December. The new service was promoted at the special all inclusive fare of SGD\$98 one way.
- Singapore Airlines has announced a number of service and capacity increases on key routes. Australia will see an increase to Sydney with second daily A380 service from October, with 471 seats replacing existing Boeing 777 with 271 seats service. .

5. Competitor News

- China and specifically the Shanghai World Expo continue to receive significant media coverage in press and through advertising campaigns.
- Tourism Authority of Thailand continues to promote the country by commissioning travelogues and promoting special packages through print, broadcast and online media.
- Taiwan continues to be aggressive in the media and PR front and has managed to remain popular amongst Singaporeans, changing perceptions and attracting the younger traveller through its use of nightlife and lifestyle images.
- Singapore recently revamped its brand image to present its best face to the world. It hopes to be seen as a nurturing, transforming, actively collaborating and a nation that dares to dream. The new brand characteristics and message will cascade to the other statutory boards promoting brand Singapore, including Singapore Tourism Board who launched its new YourSingapore.com brand campaign in March.
- Korea has been actively promoting their brand campaign through TVC, Radio and print advertisements. There is a strong level of interest in Korean lifestyle (i.e. Hallyu), fuelled by popular drama and entertainment series on television.

6. Key Campaigns and Activities in Market

Country Name campaigns and activities				
START DATE	END DATE	DESCRIPTION	TARGET AUDIENCE	PARTNERS
Feb	May	Qantas Brand Coop promoting the <i>Walkabout Pass</i> and encouraging consumers to explore Australia's unique Nature, Adventure and Immersive experiences	Singles and DINKS	TA, QF
Apr	May	Great Australian Road Trip – Online Promotion Dedicated advertising in print, online and radio to drive consumers to the www.australianroadtrips.com site and competition to win the Ultimate Aussie Roadtrip.	Singles and DINKS	TA
Apr	May	Chan Brothers Great Australian Journeys – mass market advertising to provide a point of conversion for key self drive experiences.	Singles and DINKS	TA, Chan Brothers
April	May	Tourism Western Australia and Singapore Airlines stimulus campaign. Radio & print. To promote travel to Perth utilising Singapore Airlines Services. Special airfares “Extraordinary Journeys, Exceptional Value”	Singapore leisure market	TA/TWA/SQ
Apr10	May10	Supplementary campaign – GCT/TQ – to promote BOA package PLUS seasonal “Whale-Watching” experience.	Family	TQ
April	May	Online competition on www.bethepassenger.com to entice continued viewership during Singapore winner's ETR trip and blogs. 1 st prize was trip for 2 to Perth, including 2 night's accommodation Perth, 1 night regional. Other winners received taxi vouchers for use in Singapore.	Youth, singles, Dinks, families	NA
May	June	Singapore Airlines stimulus campaign. Promote five key gateways with airfare specials for travel from May to September	Mass	TA, SIA
May 10	Jun 10	ATE – a total of 26 agents have been confirmed for the event from Singapore. 2 media are also being hosted from the Singapore market to cover the trade activities and new products.	Trade	TA
Mar	Jun10	Outdoor advertising with Etihad Airways to promote Great Sunshine Way.	Singles/ DINKS/Families	Etihad, TQ
May	June	Jetstar Incremental campaign. Radio, print, edm, TVC. To create awareness of Jetstar's Singapore to Perth services and Jetstar as the price leader with special fares	18 – 54 year olds. Couples, Young singles, families	TA/TWA/JQ

May	June	ASP Self promotion through Social Media. Three agencies have nominated a total of six staff who have begun engaging with their friends and customers and sharing their favourite Australian experiences to demonstrate their skills in planning an Australian holiday	Trade	TA, Qantas Holidays, Chan Brothers, CTC
June	July	Dynasty Travel promotion of Great Australian Journeys through tie up with HSBC Bank, advertising and exposure at Dynasty's consumer events	Families, Singles and DINKS	TA, Dynasty
Aug 10	Nov 10	There's Nothing Like Australia campaign	Couples 30-45 Youth 20-29	STO's, ASP Agents, Airline
July 10	July 10	There's Nothing Like Australia – partner training	ASP Agents	TA, ASP Agents
Aug 2010	Dec 2010	SQ MOU Campaign – Collaboration with SQ to promote Sydney Family Playtime. This will be in partnership with TV, TQ and a consortium of agents	Family	SQ, STOs (TV, TQ, TNSW) , consortium of agents
Aug 2010	Sept 2010	Crave Sydney promotion with selected agents.	Singles and DINKS	TNSW, ASP Agents
Aug 2010	Dec 2010	Sydney & Surrounds Celebrity Visit Campaign	Singles and DINKS, Family	TNSW, Chan Brothers
27 Aug	29 Aug	NATAS Holidays – Annual consumer event targeting end of year travellers.	Mass	STO's
15 Sep	15 Sep	Coral Coast workshop	Singapore Trade	TWA, Coral Coast
Aug	Feb 11	Phase 2, Extraordinary Taxi Ride campaign with partner agents	Singles, DINKS, Families	QH, Chan Bros, CTC, UOB
20 Sep	24 Sep	South East Asia Mission – trade event targeting key product planners and decision makers to meet with Australian tourism providers	ASP Agents	TA
Sep	Feb 2011	New Best of Perth (Best of Australia) tactical campaign.	Singapore leisure market	TA/STOs