

Consumer Demand Project 2019 Singapore Market Fact Sheet



Current Singapore Visitation and Expenditure in Australia¹

Singaporeans spent \$1.1b in Australia in the year ending September 2019, a 4.6 per cent increase compared to the previous year. During the same period, visitation increased 9.4 per cent to 417,000 while nights remained stable (-0.8 per cent) at 5.7m.



\$1.1b spend
+4.6% year-on-year



417,000 visitors
+9.4% year-on-year



5.7m night
-0.8% year-on-year

Factors of importance when choosing holiday destination

Singaporean travellers value safety and security, with nearly two-thirds (63%) citing that it is important to them when choosing a destination. Value for money and world-class natural beauty and wildlife were the second and third most important factors.

Top five importance factors

% ranking each factor in their top five most important



A safe and secure destination **63%**
(54%)



A destination that offers value for money **43%**
(39%)



World-class natural beauty and wildlife **42%**
(49%)



Friendly and open citizens, local hospitality **36%**
(32%)



Good food, wine, local cuisine and produce **36%**
(35%)

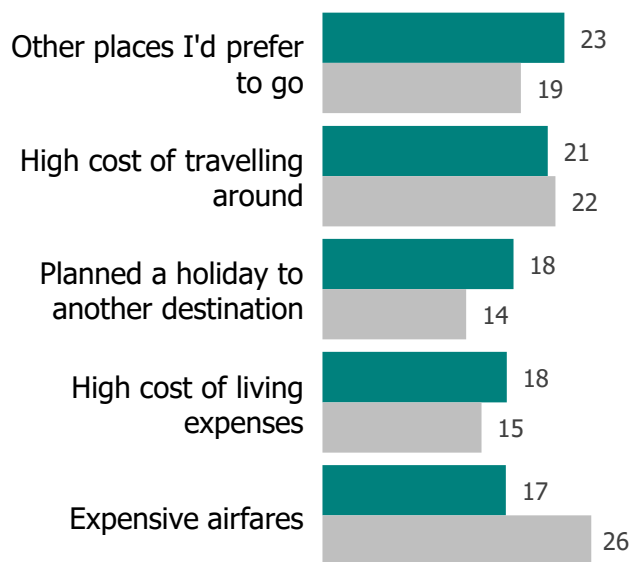
% Singaporean travellers (%) 11 Market total²

Barriers to visiting Australia

Compared to the 11 market total, Singaporeans are more likely to consider other destination as their preference or have planned a holiday to another destination.

Top five barriers to visiting Australia

% of those not intending to visit Australia



■ Singaporean travellers ■ 11 Market total²

Research Background

The Consumer Demand Project (CDP) has been run annually by Tourism Australia since 2012. This involves a large sample survey conducted in each of Australia's core international markets, focusing on key demand drivers, travel behaviours and preferences, purchase funnel and brand health metrics. Beginning in 2016, Tourism and Events Queensland and other State Tourism Organisations (STOs) have partnered with Tourism Australia for the project.

Source: Tourism Research Australia Consumer Demand Project (CDP) 2019

¹ Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)

² Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

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Current Singapore Visitation and Expenditure in Queensland¹

Visitors from Singapore to Queensland increased by 5.2 per cent in the year ending September 2019, to 70,000. During the same period, Singaporean visitor spend declined 9.4 per cent to \$155.5m. More than 742,000 nights were spent in the state, down by 23.9 per cent.



\$155.5m spend
-9.4% year-on-year



70,000 visitors
+5.2% year-on-year

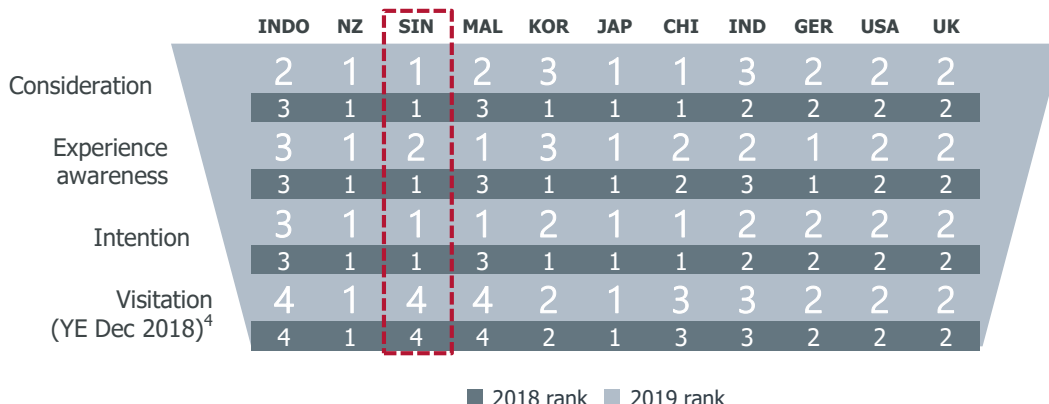


742,000 nights
-23.9% year-on-year

Competitive purchase funnel

The funnel shows traveller attitudes to destinations throughout the travel planning cycle. Amongst Australian states and territories, Queensland ranked the highest amongst Singaporean travellers for consideration and intention, and second highest for experience awareness. It was the fourth most visited state.

Queensland's competitive rankings³
ranking against other state and territories by market



How to read this:
Singaporean travellers rank Queensland 1st out of Australian states and territories for consideration

Australia's competitive rankings – Singaporean market

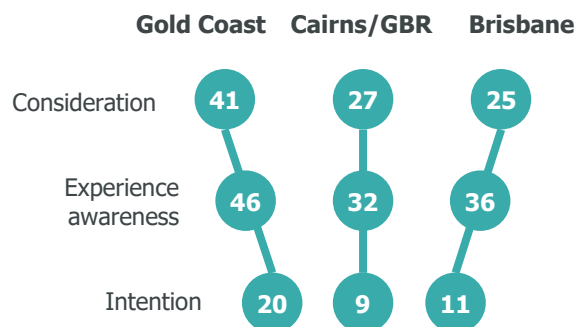
ranking against other international destinations



How to read this: Australia comes 2nd in the list of destinations Singaporean travellers intend to visit, but ranks 4th in terms of actual visitation

Queensland destinations – Singaporean market

% of travellers considering Australia



How to read this: 41% of Singaporean travellers considering visiting Australia have considered visiting the Gold Coast, but only 20% intend to actually visit

¹ Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)
² INDO = Indonesia, SIN = Singapore, MAL = Malaysia, KOR = South Korea, JAP = Japan, CHI = China, IND = India, GER = Germany
³ INDO = Indonesia, SIN = Singapore, MAL = Malaysia, KOR = South Korea, JAP = Japan, CHI = China, IND = India, GER = Germany
⁴ Tourism Research Australia, International Visitor Survey, Year Ending December 2018 (CDP visitation based on December data)

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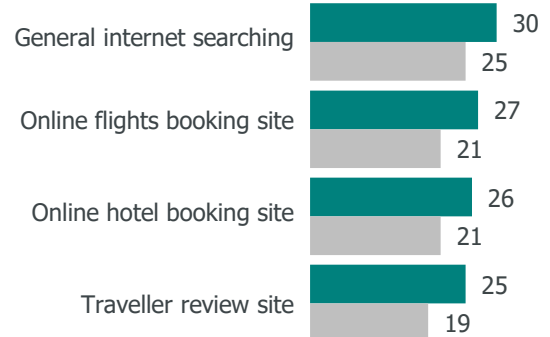


Sources for travel planning

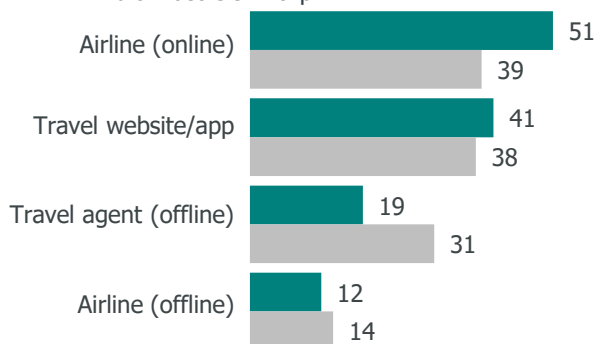
Compared to the 11 market total, Singaporean consumers are more likely to use online channels during the travel booking cycle. They are also more likely to source inspiration from online sources.

Flights booked through the airline (online) was most commonly used, tours and accommodation were most commonly booked through a travel website/app.

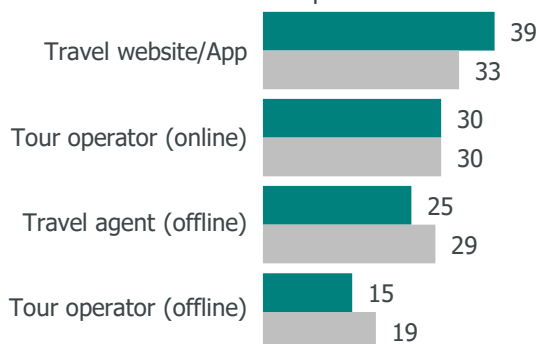
Sources of inspiration for last trip % on last OOR⁵ trip



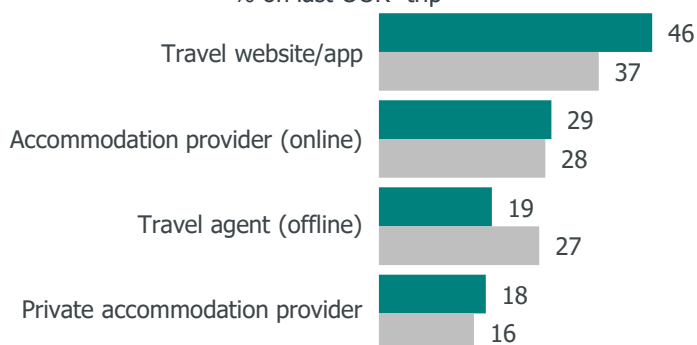
Sources used to book flights for last trip % on last OOR⁵ trip



Sources used to book tours for last trip % on last OOR⁵ trip



Sources used to book accommodation for last trip % on last OOR⁵ trip



■ Singapore travellers ■ 11 Market total²



² Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

⁵ OOR Trip – Out of Region Trip (Singaporean travelling outside South Asia/South East Asia [excl. Guam])