

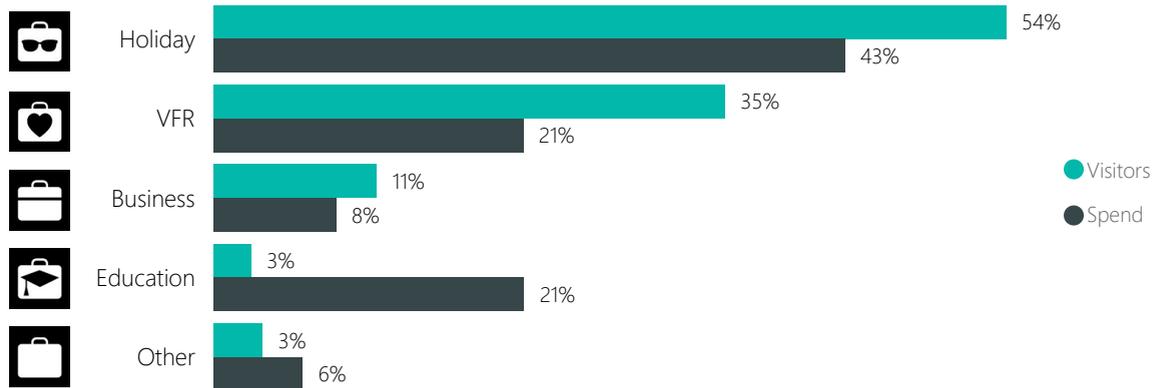
# SINGAPORE | MARKET PROFILE 2023

## MARKET OVERVIEW

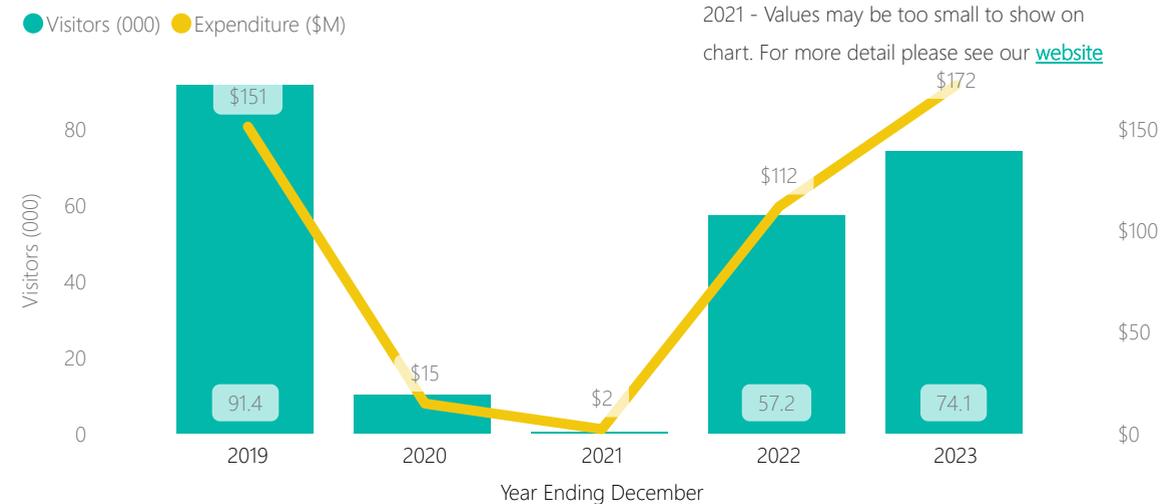
### Leisure Visitation to WA<sup>1</sup>



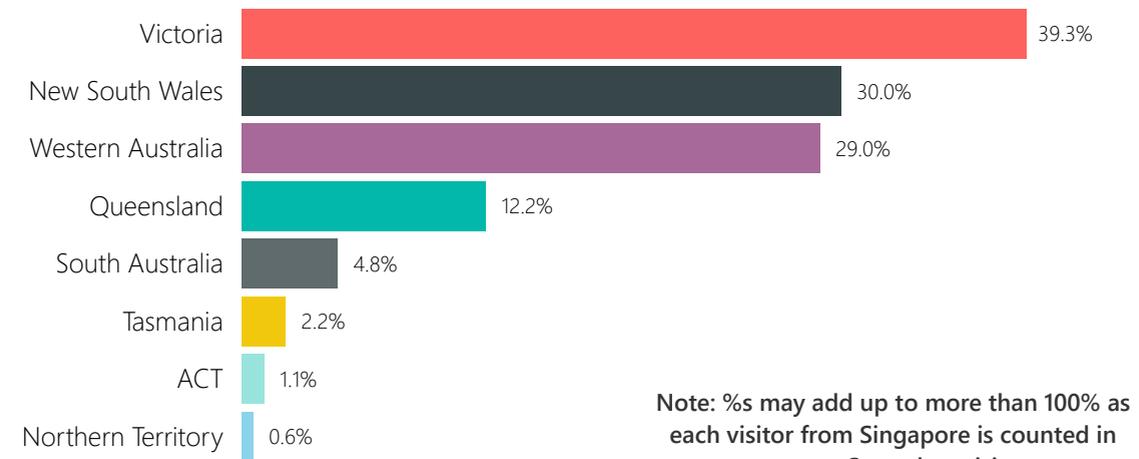
### International Visitors and Spend by Purpose (WA)<sup>1</sup>



### Leisure Visitation and Spend to WA<sup>2</sup>

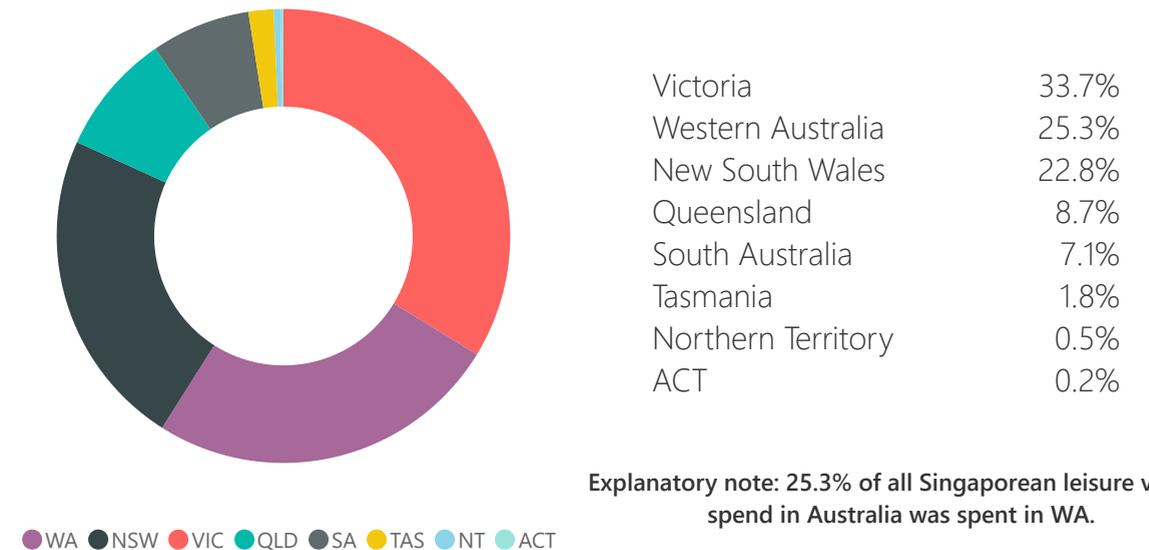


### Market Share of International Leisure Visitors to Australia<sup>1</sup>



Note: %s may add up to more than 100% as each visitor from Singapore is counted in every State they visit.

### Market Share of International Leisure Visitor Spend in Australia<sup>1</sup>



Explanatory note: 25.3% of all Singaporean leisure visitor spend in Australia was spent in WA.

# SINGAPORE | MARKET PROFILE

## TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

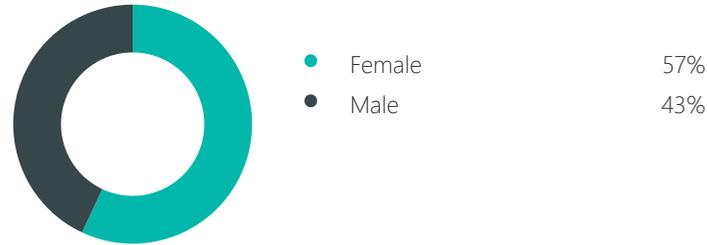
Seasonality - Short-term Leisure Visitor Arrivals to WA<sup>4</sup>



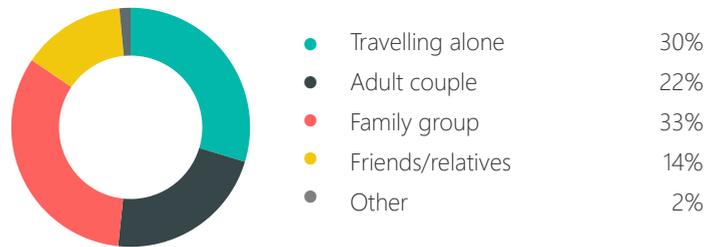
Age<sup>3</sup>



Gender<sup>3</sup>



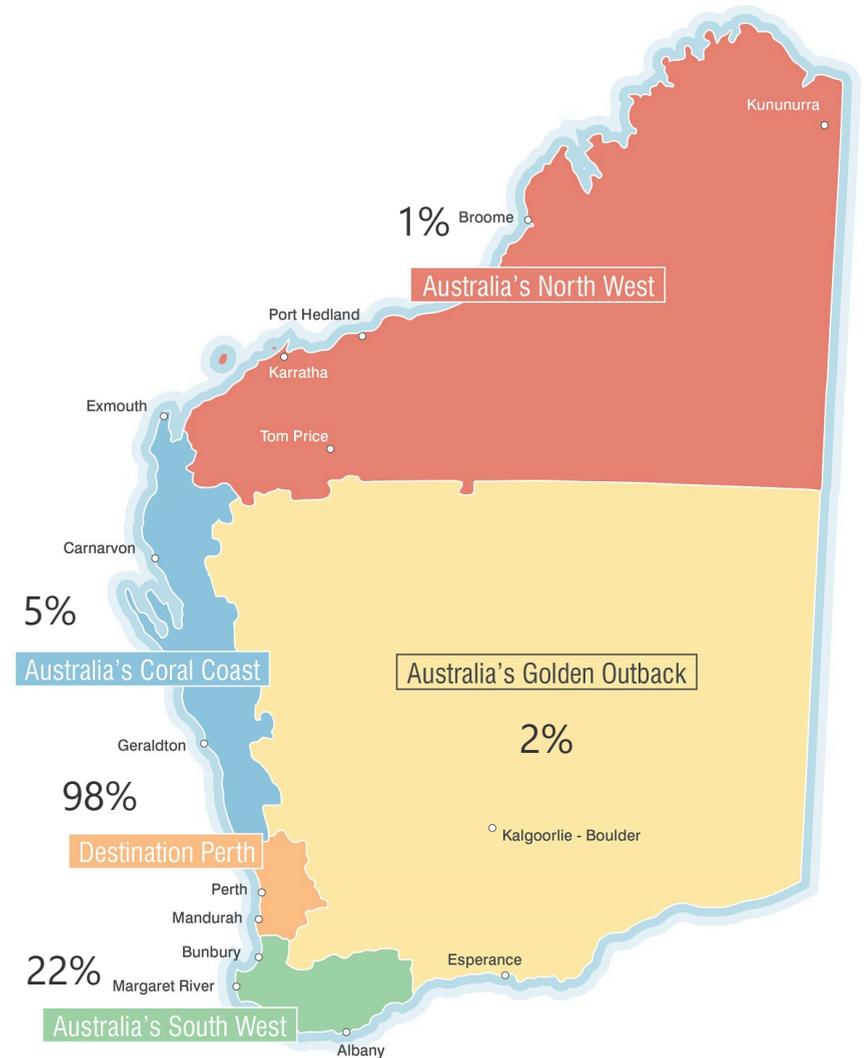
Travel Party<sup>3</sup>



Length of Trip<sup>3</sup>



Regional Dispersal<sup>3</sup>



# SINGAPORE | MARKET PROFILE

## TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

### Top 5 Activities for Leisure Visitors to WA<sup>3</sup>

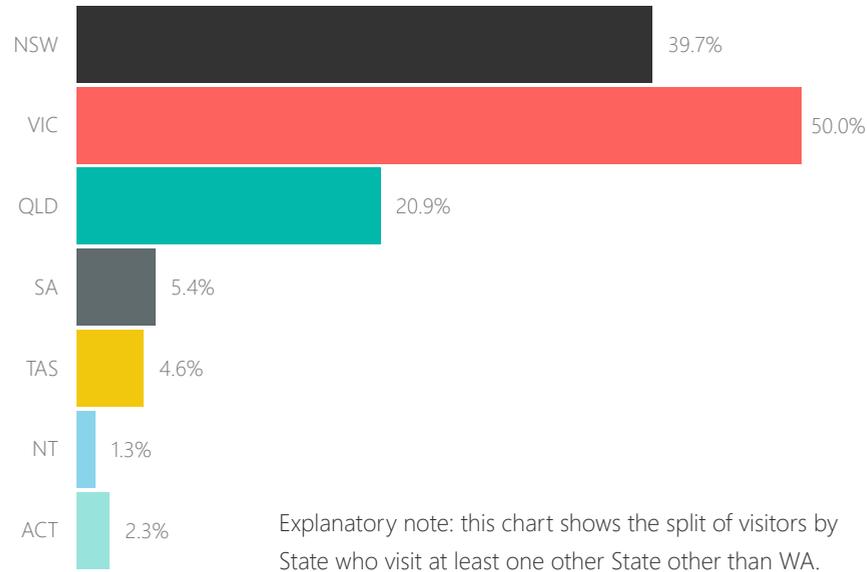
|   |  |     |
|---|--|-----|
| 1 | Eat out / dine at a restaurant and/or cafe | 95% |
| 2 | Go shopping for pleasure                   | 88% |
| 3 | Go to the beach                            | 57% |
| 4 | Sightseeing/looking around                 | 77% |
| 5 | Visit national parks / state parks         | 60% |

*NOTE: Activity may have taken in place in WA or elsewhere in Australia during the trip.*

### Top 3 Accommodation Choices for Leisure Visitors to WA<sup>3</sup>

|   |                                 |     |
|---|---------------------------------|-----|
| 1 | Hotel/resort/motel or motor Inn | 52% |
| 2 | Other Private Accommodation     | 44% |
| 3 | Friends or relatives property   | 32% |

### Other States Visited<sup>3</sup>



### Number of States Visited<sup>3</sup>



### Group Tour v Free Independent Travellers (FIT)<sup>3</sup>

95% of Singaporean leisure visitors to WA are free independent travellers. Equally, 97% of Singaporean leisure visitors to the rest of Australia are free independent travellers, so only a small proportion are likely to be on a group tour.

### Repeat Visitors<sup>3</sup>

86% of Singaporean leisure visitors to WA are on a return visit to Australia

### Travel Packages<sup>3</sup>

4% of Singaporean leisure visitors to WA arrived on a travel package

# SINGAPORE | MARKET PROFILE

## IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

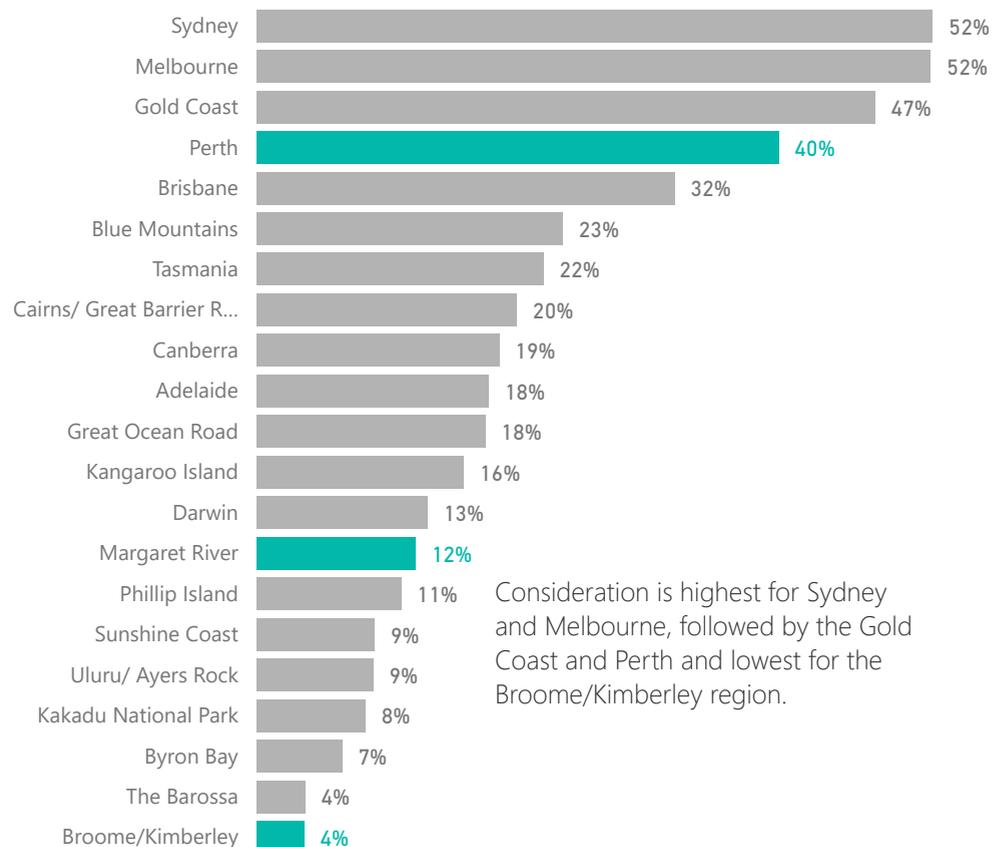
### Out of region (OOR) travellers



Travelled outside of their region within the last 5 years for leisure and/or intend to travel outside of their region for leisure within the next 2 years

### Consideration of Australian Destinations <sup>5</sup>

(those considering a trip to Australia in the next 4 years)



Consideration is highest for Sydney and Melbourne, followed by the Gold Coast and Perth and lowest for the Broome/Kimberley region.

### Which factors are most important when choosing a destination <sup>5</sup>

- 1 A safe and secure destination 48%
- 2 Value for money 45%
- 3 Good food, wine/beverages, local cuisine and produce 32%
- 4 Appealing climate or weather 30%
- 5 Beautiful natural environments e.g. mountains, rivers, forests 27%
- 6 Easy to get to (time & effort) 27%

Singaporean travellers want a safe and secure destination as well as value for money when deciding upon a holiday destination, both higher than the global aggregate.

### What OOR travellers associate with destinations <sup>5</sup>

|  | Sydney | Melbourne | Brisbane | Perth | Margaret River | Broome/Kimberley region |
|--|--------|-----------|----------|-------|----------------|-------------------------|
| A family friendly destination            | 40%    | 38%       | 24%      | 38%   | 11%            | 7%                      |
| A vibrant city lifestyle                 | 60%    | 18%       | 20%      | 25%   | 4%             | 4%                      |
| Beautiful natural environments           | 13%    | 29%       | 13%      | 16%   | 22%            | 10%                     |
| Different and interesting local wildlife | 10%    | 13%       | 8%       | 13%   | 11%            | 9%                      |
| Good food, wine/beverages                | 44%    | 24%       | 21%      | 29%   | 14%            | 5%                      |
| Interesting events and festivals         | 36%    | 20%       | 15%      | 19%   | 6%             | 5%                      |
| Value for money                          | 21%    | 20%       | 17%      | 31%   | 7%             | 5%                      |

Singaporean travellers associate Perth most strongly with value for money and it also is highly associated with being a family friendly destination. Sydney is most highly associated with a vibrant city lifestyle. Margaret River performs well in terms of association with beautiful natural environments.

# SINGAPORE | MARKET PROFILE

## NOTES & REFERENCES

### Notes

'Leisure' comprises both holiday visitors and those visiting friends and relatives (VFR).

### References

1. Tourism Research Australia – International Visitor Survey, YE Dec 23
2. Tourism Research Australia – International Visitor Survey, YE Dec 19/20/21/22/23
3. Tourism Research Australia – International Visitor Survey, 2 yr average, YE Dec 19/23 (2020-2022 cannot be used)
4. Australian Bureau of Statistics via Tourism Research Australia – Visitor Arrivals and Departures (State of Stay: WA, Category of Traveller: Short Term Visitor Arrival, Main purpose of trip: Leisure, Country (TRA benchmarks)), YE Dec 23
5. Tourism Australia – Consumer Demand Project, July - December 2023.

Published by Tourism WA, April 2024

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