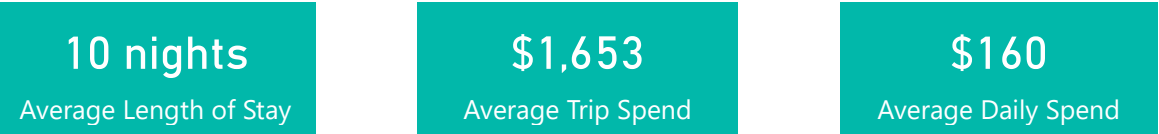


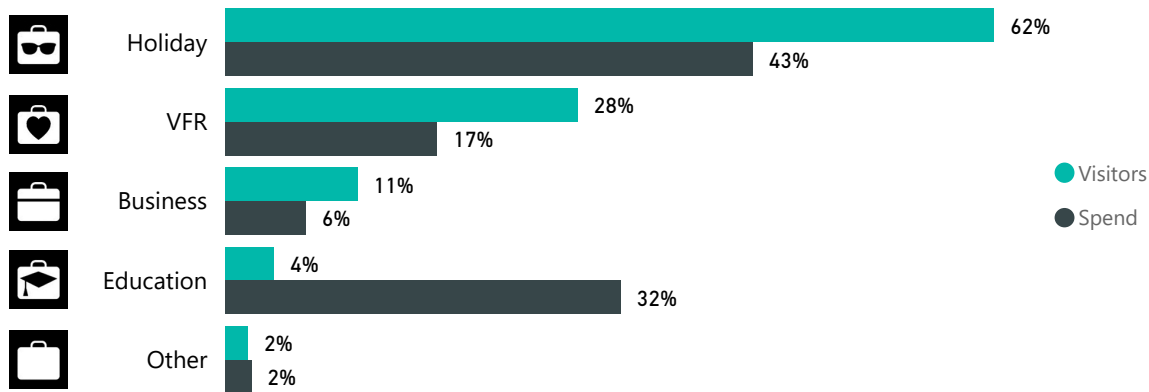
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MARKET OVERVIEW

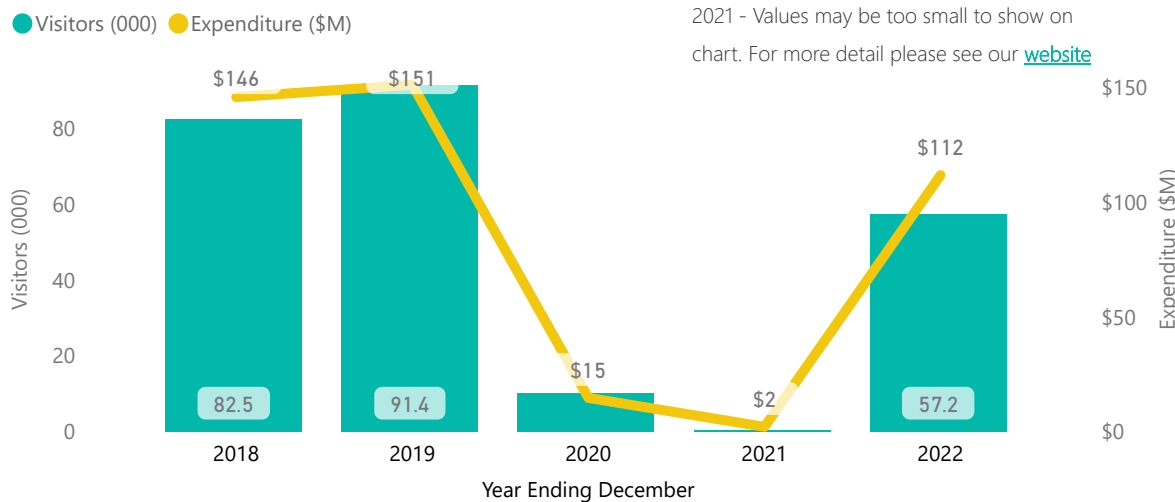
Leisure Visitation to WA¹



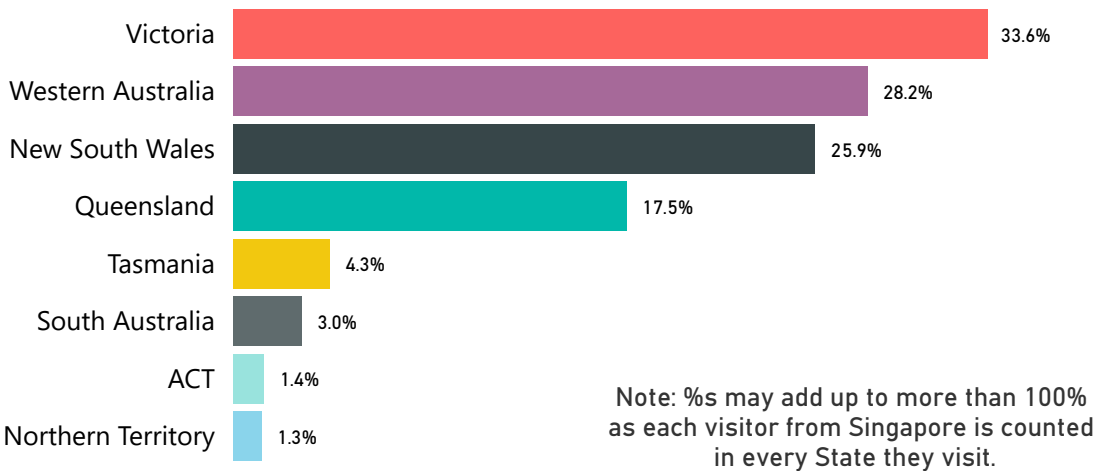
International Visitors and Spend by Purpose (WA)¹



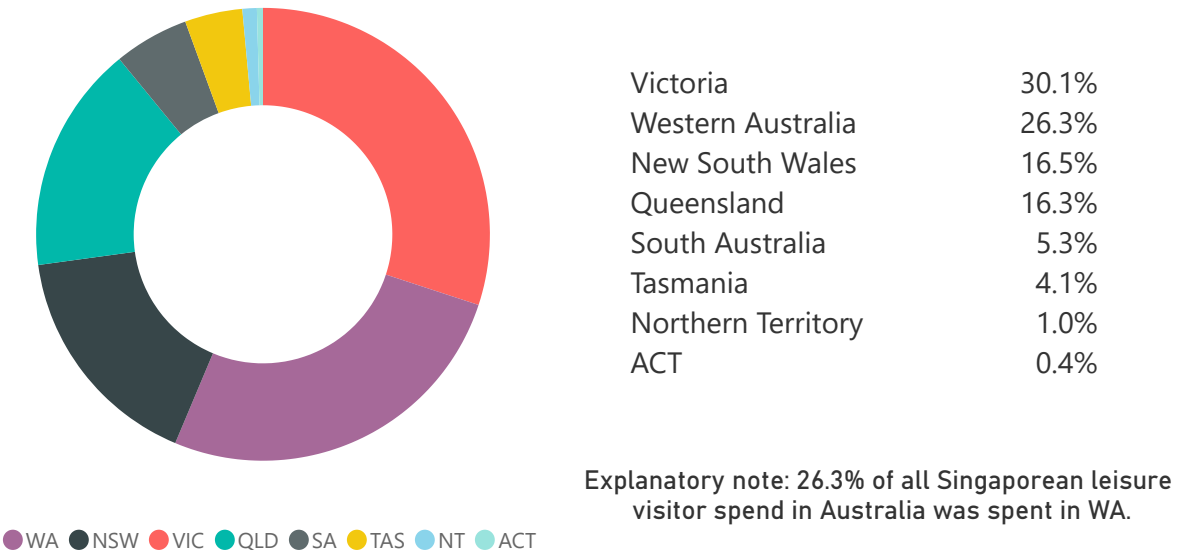
Leisure Visitation and Spend to WA²



Market Share of International Leisure Visitors to Australia¹



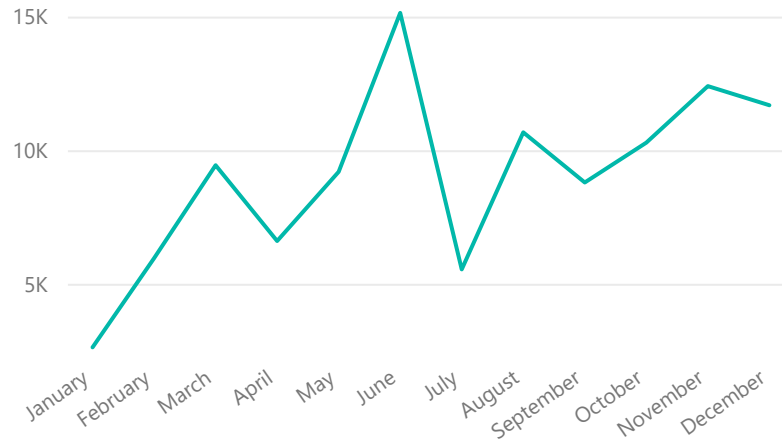
Market Share of International Leisure Visitor Spend in Australia¹



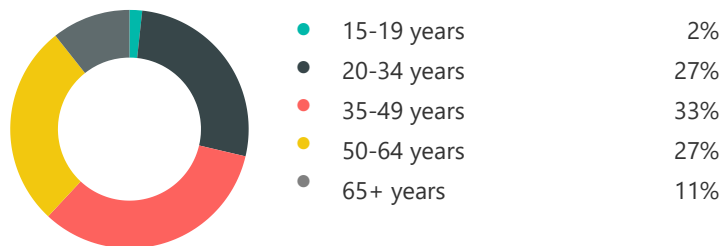
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TRIP PROFILE (THREE YEAR AVERAGE - 2017/18/19)

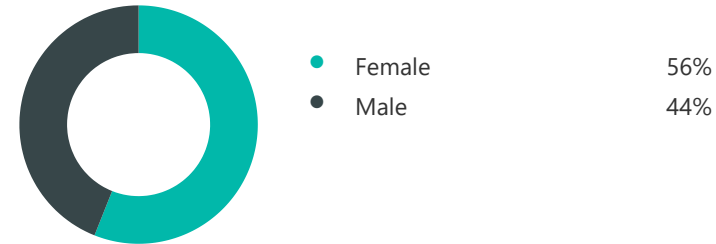
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



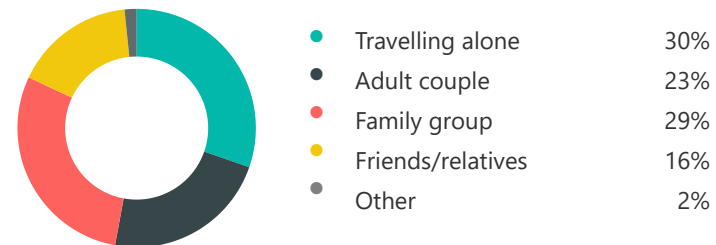
Age³



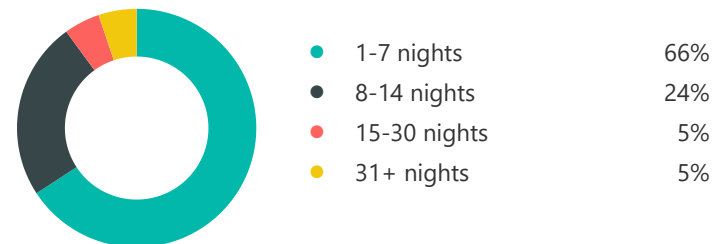
Gender³



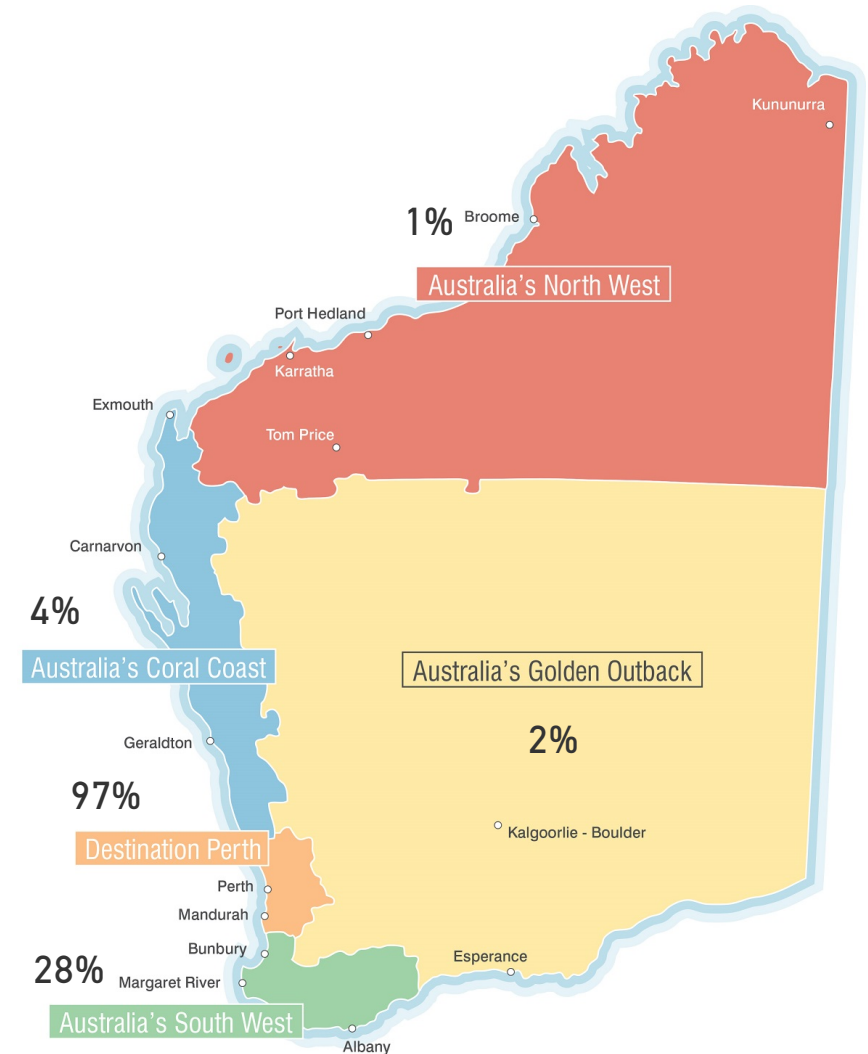
Travel Party³



Length of Trip³



Regional Dispersal³



Note: Due to the small number of international visitors to WA, trip details post 2019 cannot be provided at this time.

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TRIP PROFILE (THREE YEAR AVERAGE - 2017/18/19)

Top 5 Activities for Leisure Visitors to WA³

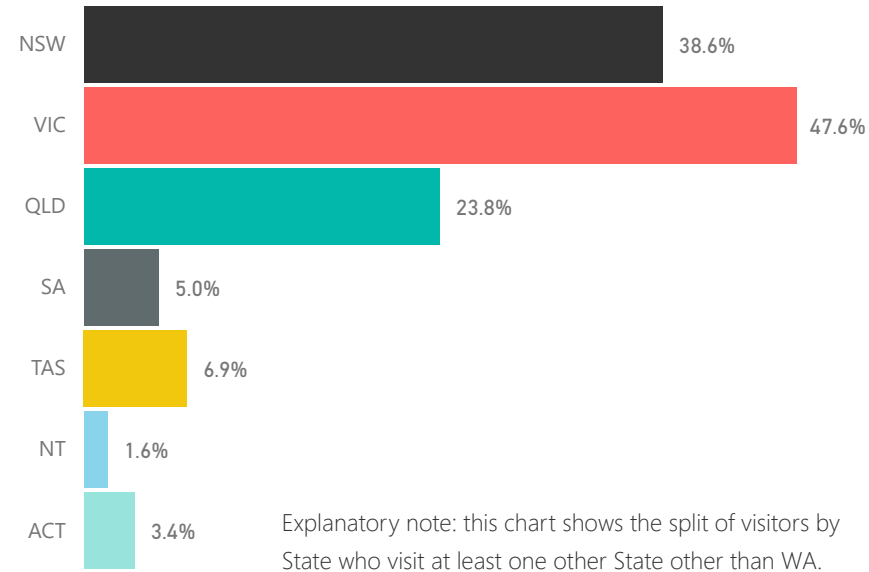
1	Eat out / dine at a restaurant and/or cafe	94%
2	Go shopping for pleasure	84%
3	Go to markets	55%
4	Sightseeing/looking around	75%
5	Visit national parks / state parks	54%

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

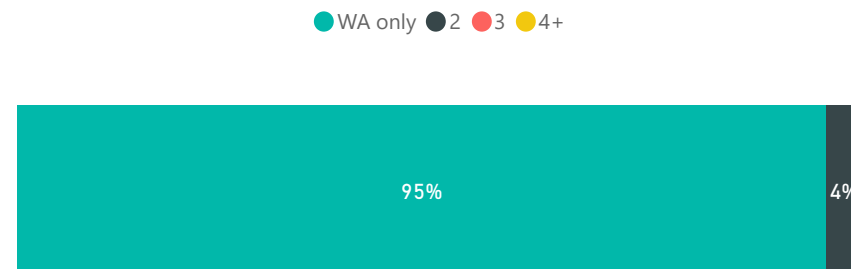
Top 3 Accommodation Choices for Leisure Visitors to WA³

1	Other Private Accommodation	50%
2	Hotel/resort/motel or motor Inn	48%
3	Friends or relatives property	32%

Other States Visited³



Number of States Visited³



Group Tour v Free Independent Travellers (FIT)³

97% 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 Visitors³

87% of Singaporean leisure visitors to WA are on a return visit to Australia

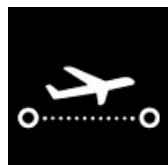
Travel Packages³

3% of Singaporean leisure visitors to WA arrived on a travel package

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MOTIVATIONS, BARRIERS, PLANNING AND BOOKING

Definition of a High Yield Traveller (HYT)



Willing to travel out of their region.



High overall trip expenditure with a minimum of \$200 per person per night

What HYTs are looking for in a holiday destination generally ⁶

- 1 Safety & security
- 2 Good food & wine
- 3 World class natural beauty
- 4 Value for money
- 5 Friendly citizens

Safety remains clearly the most important factor for Singaporean travellers and is more important in Singapore than other markets. Good food & wine, world class natural beauty and value for money follow.

HYTs Destination Choice and First Booking Timeframes ⁵

Based on last out of region holiday

Based on their last holiday, Singaporean HVTs tend to decide on their holiday destination and make their first booking around 3-6 months before their trip.

HYTs Top Sources for Inspiration, Information & Booking ⁵

Inspiration

- 1 General internet searching
- 2 Online flights booking site
- 3 Online hotel booking site
- 4 Traveller review sites
- 5 Talking to F&R

Booking



Flights

Airline (online)

Travel website/app

Travel agent (offline)



Activities

Travel website/app

Tour operator (online)

Travel agent (offline)



Accommodation

Travel website/app

Accomm. Provider (online)

Private accomm. Provider

Top 5 Barriers to HYTs visiting Australia ⁶

- 1 There are other places I would prefer to travel to/ have planned to travel to
- 2 I have already travelled there and now want to see other places
- 3 Expensive airfares
- 4 High cost of living expenses
- 5 High cost of travelling around

Competition from other destinations is the main barrier for Singapore travellers who are more inclined to feel they have 'been there, done that' than other markets. Cost is also a key barrier - both the airfare and on-the-ground costs. To overcome these barriers, continue to raise awareness of the affordable food & wine and nature-based experiences that are unique to WA.

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APPEALING WA DESTINATIONS AND EXPERIENCES

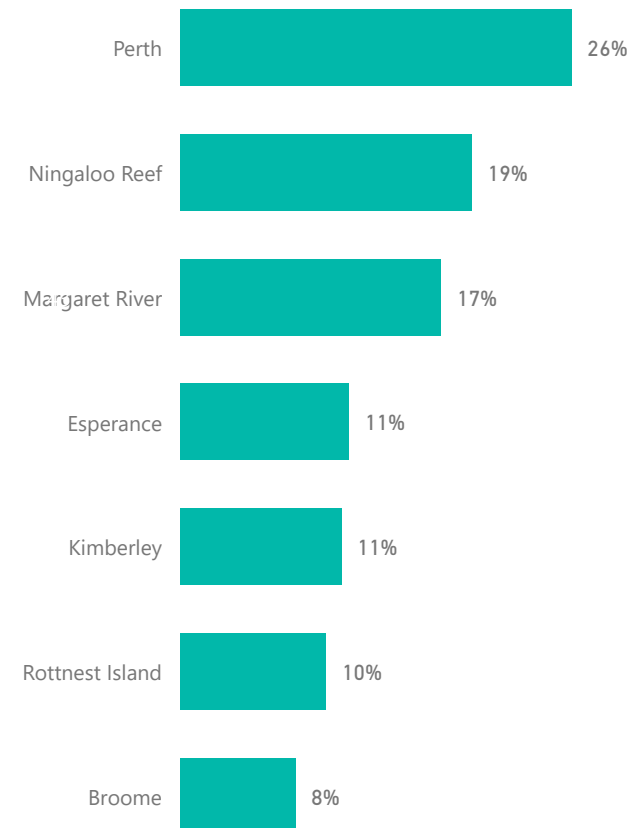
In research undertaken in 2018, Singapore HYTs were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

These results indicate that aquatic and coastal experiences generate the highest appeal amongst Singapore HYTs, particularly seeing marine wildlife. Perth is the most preferred destination followed by Ningaloo and Margaret River.

Most Appealing Experiences⁷

- 1 Witness breeding humpback whales**
(Kimberley)
- 2 Spotting diverse marine wildlife**
(Esperance)
- 3 Visiting beautiful beaches & secluded coves**
(Margaret River)
- 4 Viewing marine wildlife**
(Rottnest Island)
- 5 Scenic flight over the pink lake**
(Esperance)
- 6 Lunch by the Swan River or Indian ocean**
(Perth & Surrounds)
- 7 Glass bottom boat tour**
(Ningaloo Reef)
- 8 Cruising along the untouched coast**
(Kimberley)
- 9 Admiring the Pink Salt Lakes**
(Rottnest Island)
- 10 Boat ride through horizontal waterfalls**
(Kimberley)

Most Appealing Destination⁷



Why These Destinations and Experiences Appeal⁷

Margaret River

"Walk the natural trails near town, enjoy the wine and food"

Ningaloo Reef

"Crystal blue ocean with tropical fish, turtles, mantarays, humpback whales & whale sharks makes it exciting"

Perth & Surrounds

"Australia's sunniest capital city, Perth effortlessly blends urban cool with raw natural beauty"

"I like the different experiences and exploration opportunities offered in this region"

Notes

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

References

1. Tourism Research Australia – International Visitor Survey, YE Dec 19
2. Tourism Research Australia – International Visitor Survey, YE Dec 18/19/20/21/22
3. Tourism Research Australia – International Visitor Survey, 3 yr average, YE Dec 17/18/19
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 19
5. Tourism Australia – Consumer Demand Project 2019.
6. Tourism Australia – Consumer Demand Project 2022.
7. BDA – International High Value Travellers - Western Australia State Report, 2019

Published by Tourism WA, April 2023

For more information, please contact: research@westernaustralia.com