SINGAPORE LEISURE VISITATION TO WA

- 82,500 leisure visitors to WA
- WA's 3rd largest international market by leisure visitors
- $143.7 million spent by leisure visitors in WA
- Average daily spend: $198
- Average length of stay: 9 nights

SINGAPORE LEISURE VISITATION TO AUSTRALIA

- 304,700 leisure visitors to Australia
- Australia's 7th largest international market by leisure visitors

VISITORS AND SPEND IN WA BY PURPOSE

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Visitors</th>
<th>Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>59%</td>
<td>37%</td>
</tr>
<tr>
<td>Visiting Friends and Relatives</td>
<td>31%</td>
<td>22%</td>
</tr>
<tr>
<td>Business</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Education</td>
<td>4%</td>
<td>27%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>5%</td>
</tr>
</tbody>
</table>

SEASONALITY - SHORT-TERM LEISURE VISITOR ARRIVALS TO WA

Arrivals typically fluctuate throughout the year.
An average of one in three (34%) of Singaporean leisure visitors to WA spend at least one night in Regional WA.  

REGIONAL DISPERSAL

Experience Perth 96%

Australia’s South West 30%

Australia’s Golden Outback 2%

Australia’s Coral Coast 5%

Australia’s North West 0%

LEISURE VISITORS BY AGE

WA

- 15-19 years: 2%
- 20-34 years: 26%
- 35-49 years: 35%
- 50-64 years: 27%
- 65+ years: 10%

Australia

- 15-19 years: 2%
- 20-34 years: 34%
- 35-49 years: 32%
- 50-64 years: 24%
- 65+ years: 8%

TRAVEL PARTY

- Unaccompanied: 30%
- With a partner: 24%
- Group of friends/relatives: 45%
- Other: 1%

OTHER STATES VISITED

94% of Singaporean leisure visitors to WA only visit WA on their trip.

PROPORTION OF STAYING IN ACCOMMODATION TYPE

- Hotel/resort/motel or motor Inn: 50%
- Friends or relatives’ property: 33%
- Rented house/apartment/flat or unit: 15%

LENGHT OF STAY – LEISURE VISITORS TO WA

- 1-7 Nights: 30%
- 8-14 Nights: 24%
- 15-30 Nights: 45%
- 31+ Nights: 1%

REPEAT VISITORS

86% of Singaporean leisure visitors to WA are on a return visit to Australia.
High Value Travellers (HVTs) are a new target audience for Tourism Western Australia.

**DEFINITION OF A HIGH VALUE TRAVELLER**

- Travel Long Haul
- Motivated by nature and wildlife, aquatic and coastal, and food and wine experiences
- Considering or intending to visit Australia.
- Represent “high value”: above average trip expenditure, and a higher likelihood to stay longer and disperse further

**WHAT SINGAPORE HVTs ARE LOOKING FOR IN A HOLIDAY DESTINATION GENERALLY**

- World class nature & wildlife
- A safe and secure destination
- Good food, wine, local cuisine and produce
- A destination that offers value for money
- Friendly and open citizens, local hospitality

**HVTs BARRIERS TO VISITING AUSTRALIA**

Australia’s biggest barrier to attracting more Singaporean visitors is the **high cost of travelling around**, followed by **strong competition**, particularly from Japan and North Asian destinations. Singaporeans are much more likely than international travellers to say they are not intending to visit Australia because **they have already been**. Building knowledge of WA’s **unique and authentic nature and wildlife** and **food and wine offerings**, and giving Singaporeans who have been to Australia a **reason to return**, will be critical in winning market share from this market.

**HVTs DESTINATION CHOICE AND FIRST BOOKING TIMEFRAMES**

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.

**HVTs TOP SOURCES FOR INSPIRATION, INFORMATION & BOOKING**

**Inspiration**

- Internet searching
- Traveller review sites

**Booking**

- Airline (online)
- Accomm. provider (online)
- Online hotel booking site
- Online flights booking site
- Travel agent (online)
- Travel agent (offline)
- Sites for specific destinations in a country
- Airline (offline)
APPEALING WA DESTINATIONS AND EXPERIENCES

In research undertaken in 2018, Singaporean HVTs 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 the types of experiences in WA that will most appeal to Singaporean HVTs.

MOST APPEALING EXPERIENCES

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

MOST APPEALING DESTINATION

Perth

26%

Ningaloo Reef

19%

Margaret River

17%

Esperance

11%

Kimberley

11%

Rottnest Island

10%

Broome

8%

WHY THESE DESTINATIONS AND EXPERIENCES APPEAL

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”

Ningaloo Reef

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

Margaret River

“Walk the natural trails near town, enjoy the wine and food”

Notes

* Expenditure excludes pre-paid package spend.

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

References

1. Tourism Research Australia – International Visitor Survey, YE Dec 18
3. Tourism Australia – Consumer Demand Project 2018 Singapore Report
4. Tourism Research Australia – International Visitor Survey, 3 year average (YE Dec 2016/17/18)
5. Tourism Australia – Consumer Demand Project 2018 Western Australia State Report

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