

# International Tourism Summary: Singapore

Year ending December 2019



**138,000 Singaporean visitors spent 1.7 million nights and \$319 million on trips to Victoria in the year ending December 2019.**

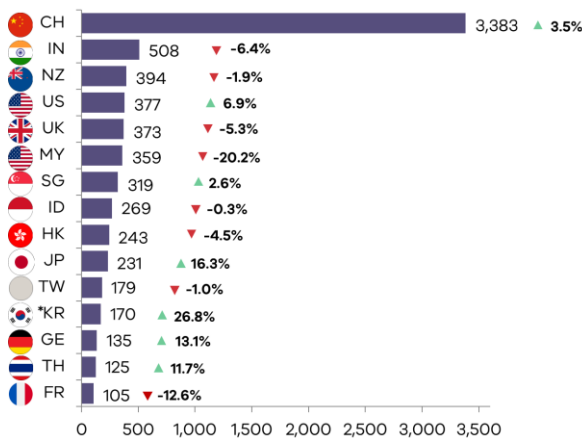
**SPEND**  
**\$319m**  
 ▲ +2.6% y/y  
 Share\*: 29.0% +0.5% pts  
 AAG: +6.5% p.a. (2014-2019)

**VISITORS**  
**138.0k**  
 ▲ +4.7% y/y  
 Share\*: 33.1% -0.5% pts.  
 AAG: +7.7% p.a. (2014-2019)

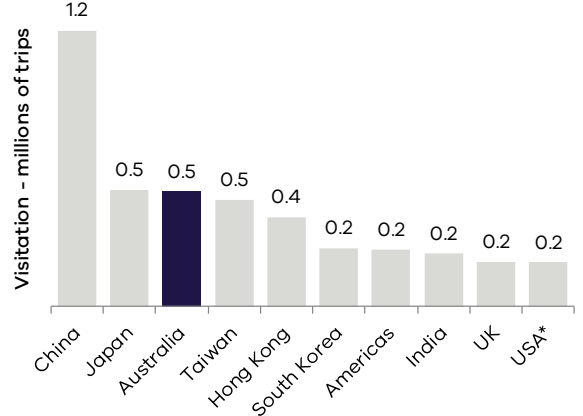
**NIGHTS**  
**1.7m**  
 ▲ +3.2% y/y  
 Share\*: 29.1% +1.1% pts.  
 AAG: +5.7% p.a. (2014-2019)

**Context:** In the year ending December 2019, international overnight visitors to Victoria (3.1 million) accounted for 3 per cent of total visitors to the state and 27 per cent (\$8.8 billion) of total visitor expenditure in Victoria.

## International Overnight Expenditure in Victoria (\$m)



## Top 10 Out-of-Region Destinations for Singaporean Travellers



International Overnight Visitor Expenditure in VIC (\$millions)

Singaporean visitors spent \$319 million on trips to Victoria in the year ending December 2019, a year-on-year increase of 2.6 per cent. This represents 3.6 per cent of all international overnight visitor spend in Victoria. Singapore is ranked Victoria's 7th largest international market in terms of expenditure.

Australia was ranked #3 for visitation against other out-of-region destinations for Singaporean travellers in the year ending December 2019 (up from #4 in 2018).

\*USA including Hawaii Source: Tourism Economics, YE2019

\* In the year ending December 2019, all Korean visitors to Australia were from South Korea.

### AUSTRALIA



**\$1.1b** Spend  
 ▲ 0.9%  
**417k** Visitors  
 ▲ 6.4%  
**5.8m** Nights  
 ▼ -0.9%

### NEW SOUTH WALES



**\$232m** Spend  
 ▼ -8.1%  
**126k** Visitors  
 ▲ 0.3%  
**1.1m** Nights  
 ▼ -22.2%

### QUEENSLAND



**\$151m** Spend  
 ▼ -14.6%  
**70k** Visitors  
 ▲ 4.7%  
**762k** Nights  
 ▼ -19.7%

The rate of growth of Singaporean expenditure on trips to Victoria (+2.6% year-on-year) was ahead of the national average (+0.9%), New South Wales (-8.1%) and Queensland (-14.6%).

### MELBOURNE



**\$298m** Spend  
 ▲ 1.1%  
**131k** Visitors  
 ▲ 3.2%  
**1.5m** Nights  
 ▲ 0.9%

### REGIONAL VICTORIA



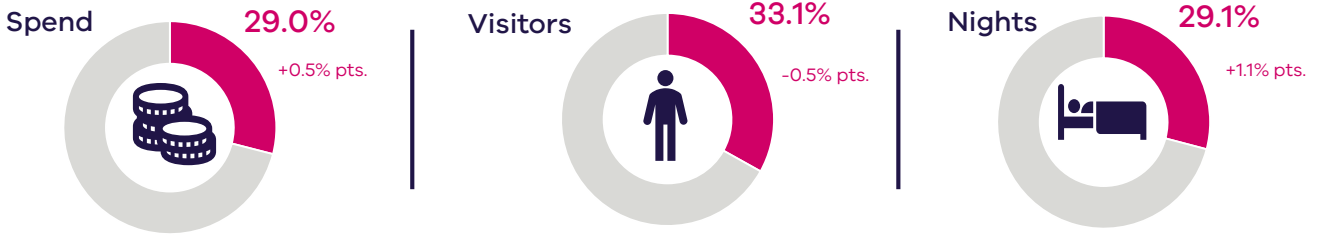
**np** Spend  
**28k** Visitors  
 ▲ 18.1%  
**np** Nights

In the year ending December 2019:

- 131,000 Singaporean visitors spent 1.5 million nights and \$298 million on trips to Melbourne
- 28,000 Singaporean visitors stayed in regional Victoria.

## Singaporean Spend, Visitors and Nights by Key States Visited

Victoria's Market Share of Singaporean spend, visitors and nights



### Singaporean Overnight Expenditure in Australia by Key States, 2014-2019

Expenditure by Visitors from Singapore Year Ending December	Total Expenditure (\$ million)					Share of National %			Expenditure Per Night \$			Expenditure Per Visitor \$		
	2014	2018	2019	Av Ann 14-19	% Change 18-19	2014	2018	2019	2014	2018	2019	2014	2018	2019
New South Wales	224	252	232	0.7% p.a.	-8.1%	27.1%	23.2%	21.1%	155	174	205	2,074	2,005	1,836
<b>Victoria</b>	<b>233</b>	<b>311</b>	<b>319</b>	<b>6.5% p.a.</b>	<b>2.6%</b>	<b>28.1%</b>	<b>28.5%</b>	<b>29.0%</b>	<b>183</b>	<b>191</b>	<b>190</b>	<b>2,452</b>	<b>2,360</b>	<b>2,311</b>
Queensland	110	177	151	6.5% p.a.	-14.6%	13.3%	16.3%	13.8%	148	187	199	1,887	2,665	2,173
<b>Australia</b>	<b>829</b>	<b>1,089</b>	<b>1,099</b>	<b>5.8% p.a.</b>	<b>0.9%</b>				<b>164</b>	<b>187</b>	<b>190</b>	<b>2,615</b>	<b>2,780</b>	<b>2,638</b>

<b>Total VIC International Expenditure</b>	4,903	8,467	8,826	12.5% p.a.	4.2%
<b>Singapore's Share of VIC International Expenditure</b>	4.8%	3.7%	3.6%		

AAG = Average Annual Growth

NB: Visitor expenditure includes expenditure on packages attributable to destination. Estimates may differ from those published by Tourism Australia  
Source: Regional Expenditure Model, International Visitor Survey, December 2014-2019, Tourism Research Australia, Canberra.

Victoria received 29.0 per cent of Singaporean overnight visitors' expenditure in Australia in the year ending December 2019, ahead of New South Wales (21.1%) and Queensland (13.8%). Singaporean visitors' expenditure per night in Victoria (\$190) in line with the national average (\$190) but behind New South Wales (\$205) and Queensland (\$199). Victoria received a higher total spend per visitor (\$2,311) compared with Queensland (\$2,173) and New South Wales (\$1,836).

### Singaporean Overnight Visitation (000s) to Australia by Key States, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change		Share of Visitors %
							14/19	18/19	
<b>Australia</b>	<b>317</b>	<b>337</b>	<b>375</b>	<b>379</b>	<b>392</b>	<b>417</b>	<b>5.6% p.a.</b>	<b>6.4%</b>	
New South Wales	108	114	120	117	126	126	3.1% p.a.	0.3%	30%
<b>Victoria</b>	<b>95</b>	<b>109</b>	<b>123</b>	<b>129</b>	<b>132</b>	<b>138</b>	<b>7.7% p.a.</b>	<b>4.7%</b>	<b>33%</b>
Queensland	58	61	66	60	67	70	3.6% p.a.	4.7%	17%

Singaporean overnight visitors to Victoria increased by 4.7 per cent in the year ending December 2019, behind the national average (+6.4%), in line with Queensland (+4.7%) and ahead of New South Wales (+0.3%). Over the longer term (2014 to 2019), Singaporean overnight visitors to Victoria increased at an average annual rate of 7.7 per cent, ahead of the national average (+5.6% p.a.), Queensland (+3.6% p.a.) and New South Wales (+3.1% p.a.).

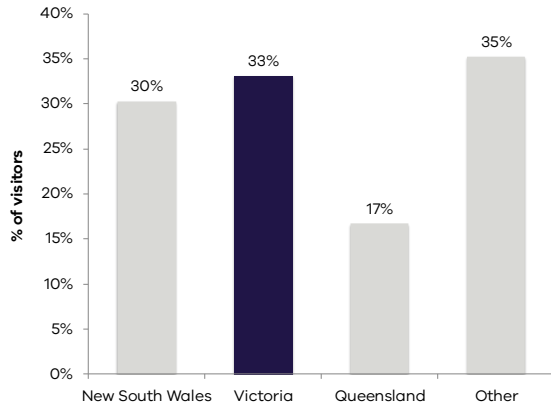
### Singaporean Visitor Nights (000s) in Australia by Key States, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change		Share of Nights %
							14/19	18/19	
<b>Australia</b>	<b>5,063</b>	<b>6,249</b>	<b>6,043</b>	<b>5,964</b>	<b>5,829</b>	<b>5,779</b>	<b>2.7% p.a.</b>	<b>-0.9%</b>	
New South Wales	1,446	1,605	1,519	1,155	1,451	1,129	-4.8% p.a.	-22.2%	20%
<b>Victoria</b>	<b>1,275</b>	<b>1,793</b>	<b>1,755</b>	<b>1,779</b>	<b>1,630</b>	<b>1,682</b>	<b>5.7% p.a.</b>	<b>3.2%</b>	<b>29%</b>
Queensland	747	1,091	750	898	948	762	0.4% p.a.	-19.7%	13%

In the year ending December 2019, Singaporean visitor nights to Victoria increased by 3.2 per cent year-on-year, ahead of a decline nationally (-0.9%) and for key competitors New South Wales (-22.2%) and Queensland (-19.7%). Over the longer term (2014 to 2019), Singaporean visitor nights spent in Victoria increased at an average annual rate of 5.7 per cent, ahead of the national average (+2.7% p.a.), Queensland (+0.4% p.a.) and New South Wales (-4.8% p.a.).

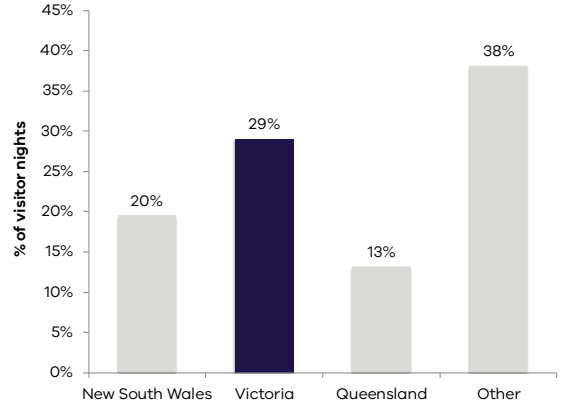
## Market Share by Key States<sup>1</sup>

Singaporean Overnight Visitors to Australia  
Year ending December 2019 – Market Share by Key States



In the year ending December 2019, 33 per cent of Singaporean visitors to Australia stayed overnight in Victoria; ahead of New South Wales (30%) and Queensland (17%).

Singaporean Visitor Nights to Australia  
Year ending December 2019 – Market Share by Key States



Victoria's market share of visitor nights spent by Singaporean travellers to Australia in the year ending December 2019 was 29 per cent; ahead of New South Wales (20%) and Queensland (13%).

## Main Purpose of Trip (000s) to Australia by Key States Visited and Market Share Year Ending December 2019

Year Ending December 2019	Holiday	Visiting friends and relatives	Total Leisure*	Business	Education	Total
New South Wales	58	24	83	37	-	126
Market Share %	25%	29%	26%	50%	-	30%
<b>Victoria</b>	<b>82</b>	<b>27</b>	<b>109</b>	<b>22</b>	<b>6</b>	<b>138</b>
Market Share %	<b>35%</b>	<b>32%</b>	<b>34%</b>	<b>30%</b>	<b>38%</b>	<b>33%</b>
Queensland	43	13	55	10	-	70
Market Share %	18%	15%	17%	14%	-	17%
<b>Australia</b>	<b>235</b>	<b>84</b>	<b>319</b>	<b>74</b>	<b>15</b>	<b>417</b>

\* Total Leisure = Holiday + VFR

NB: Where there is a '-', figures are unreliable and are unable to be published.

In the year ending December 2019, 34 per cent of Singaporean leisure visitors to Australia stayed overnight in Victoria, including 35 per cent of holiday and 32 per cent of visiting friends and relatives (VFR) visitors. New South Wales' share of Singaporean leisure visitors was lower at 26 per cent, as was Queensland's share (17%). During the same period, Victoria's share of the Singaporean education market was 38 per cent and business market share was 30 per cent.

## Purpose of Visit to Victoria (and the Destinations Within)

Some international visitors to Victoria visit more than one destination in the state, and for different purposes. For example, a visitor might stay in Melbourne for education reasons, and visit the Great Ocean Road region for a holiday. As such, the percentages of international visitors who visited Victoria for each purpose total more than 100 per cent.

Singaporean Overnight Expenditure and Visitation to Victoria by Destination Purpose of Visit – Year Ending December 2019

Year Ending December 2019	Holiday	Visiting friends and relatives	Total Leisure*	Business	Education	Total
<b>Overnight Expenditure (\$M)</b>	117	56	173	37	101	319
<b>Overnight Visitors (000s)</b>	78	38	109	23	-	138
<b>Visitor Nights (000s)</b>	508	401	909	-	581	1,682
<b>Average Length of Stay</b>	6.5	10.5	8.4	-	-	12.2
<b>Spend per Visitor</b>	1,489	1,464	1,590	1,614	-	2,311
<b>Spend per Night</b>	230	140	190	-	174	190

\* Total Leisure = Holiday + VFR (NB total leisure may equal more than the sum of holiday + VFR, since visitors can visit more than one destination in Victoria with more than one purpose)

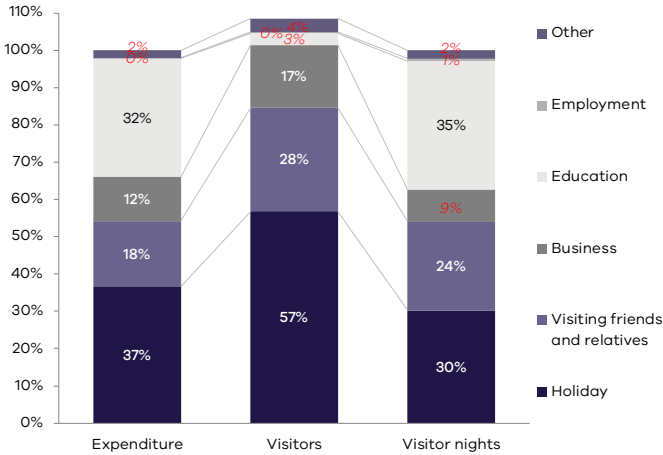
NB: Where there is a '-', figures are unreliable and are unable to be published.

NB: Figures for 'Employment' and 'Other' visitors are unreliable and are unable to be published

<sup>1</sup>NOTE: The proportion of Visitors to the States and Territories will not add up to 100% as visitors can travel to multiple destinations in one trip; while the proportion of Visitor Nights to the States and Territories will add to 100% as this measure is mutually exclusive.

# Singaporean Overnight Expenditure, Visitors and Nights to Victoria by Purpose of Visit

## Year Ending December 2019



In the year ending December 2019, more than half (54%) of Singaporean visitor expenditure in Victoria was accounted for by leisure visitors, comprising holiday visitor expenditure (37%) and VFR visitor expenditure (18%)\*. A further 32 per cent was contributed by education visitors and 12 per cent by the Singaporean business visitor market.

During the same period, 57 percent of Singaporean visitors travelled to Victoria for holiday purposes, 28 per cent travelled for VFR and a further 17 per cent came for business purposes.

Thirty-five per cent (35%) of all nights spent in Victoria by Singaporean visitors in the year ending December 2019 were accounted for by education visitors, while holiday visitors accounted for 30 per cent of visitor nights and VFR visitors for 24 per cent of nights.

Note: Percentages of visitors will not add up to 100% as visitors can travel to multiple destinations in Victoria with different purposes.

Note: Percentages in red are based on small survey samples and are subject to high levels of sampling variability. Results should be interpreted with caution.

\*Figures might not add up due to rounding.

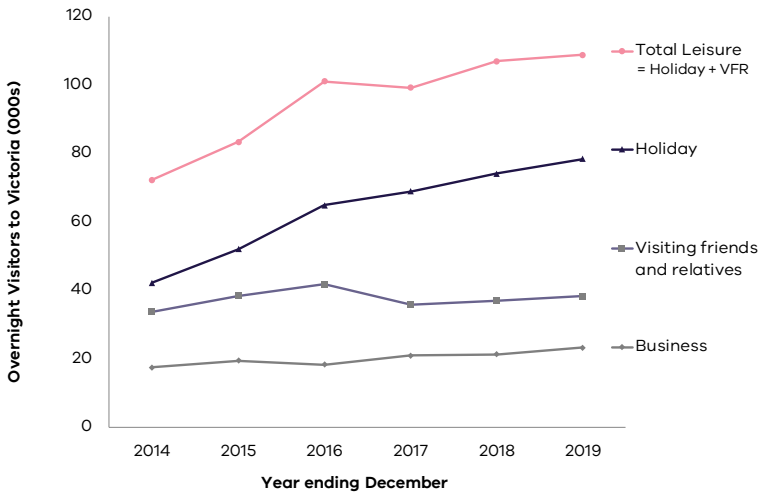
## Singaporean Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Holiday	42	52	65	69	74	78	13.2% p.a.	5.8%
Visiting friends and relatives	34	38	42	36	37	38	2.6% p.a.	3.6%
<b>Total Leisure</b>	<b>72</b>	<b>83</b>	<b>101</b>	<b>99</b>	<b>107</b>	<b>109</b>	<b>8.5% p.a.</b>	<b>1.6%</b>
Business	17	19	18	21	21	23	5.9% p.a.	9.4%

NB: Where there is a '-', figures are unreliable and are unable to be published.

NB: Figures for 'Education', 'Employment' and 'Other' visitors are unreliable and are unable to be published

## Singaporean Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019

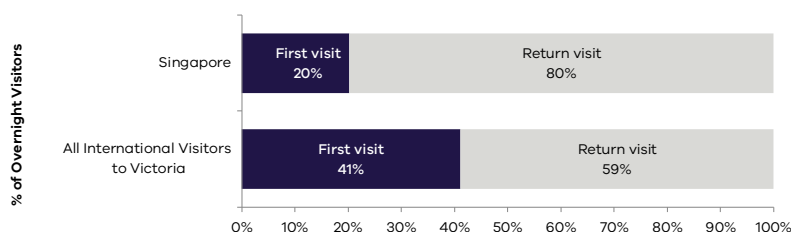


Of all the main purpose segments, the Singaporean holiday market has provided the strongest growth to overnight visitor numbers to Victoria over the past five years (+13.2% p.a.), while VFR visitors have increased at an average annual rate of 2.6 per cent. Overall, overnight Singaporean leisure visitors to Victoria have increased at an average annual rate of 8.5 per cent over the period 2014-2019.

Overnight Singaporean business visitors to Victoria have increased at an average rate of 5.9 per cent per annum since 2014.

## Repeat Visitation to Australia

### Repeat Visitation to Australia (% of Singaporean overnight visitors to Victoria vs all international overnight visitors to Victoria)



In the year ending December 2019, 20 per cent of overnight visitors from Singapore to Victoria were visiting Australia for the first time, compared with 41 per cent of international overnight visitors to Victoria overall.

## Melbourne and Regional Victoria Overnight Visitation

### Singaporean Overnight Visitation (000s) to Victoria, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Melbourne	93	108	120	124	127	131	7.1% p.a.	3.2%
Regional Victoria	12	18	18	21	24	28	18.8% p.a.	18.1%
<b>Victoria</b>	<b>95</b>	<b>109</b>	<b>123</b>	<b>129</b>	<b>132</b>	<b>138</b>	<b>7.7% p.a.</b>	<b>4.7%</b>

There were 131,000 Singaporean overnight visitors to Melbourne in the year ending December 2019, a 3.2 per cent increase over the previous year. Singaporean visitors to Melbourne have grown at an average annual rate of 7.1 per cent over the period 2014 to 2019.

In the year ending December 2019, there were 28,000 Singaporean overnight visitors to regional Victoria, an 18.1 per cent increase year-on-year. Over the longer term (2014-19), Singaporean overnight visitors to regional Victoria have grown at an average annual rate of 18.8 per cent per annum.

### Singaporean Visitor Nights (000s) to Victoria, 2 years<sup>2</sup> (rolling), 2014-2019

2 Years Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Melbourne	2,624	2,928	3,395	3,335	3,156	3,042	3.0% p.a.	-3.6%
Regional Victoria	-	-	-	-	253	271	-	7.0%
<b>Victoria</b>	<b>2,748</b>	<b>3,068</b>	<b>3,548</b>	<b>3,534</b>	<b>3,410</b>	<b>3,313</b>	<b>3.8% p.a.</b>	<b>-2.8%</b>

NB: Where there is a '-', figures are unreliable and are unable to be published.

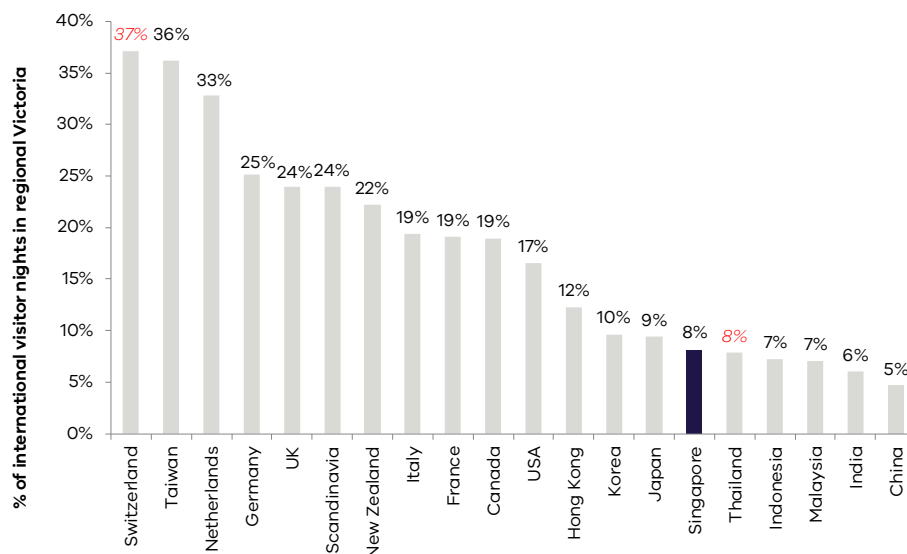
Singaporean visitors spent 3.0 million nights in Melbourne in the two years ending December 2019, a decline of 3.6 per cent compared with the two years ending December 2018. During the period 2014 to 2019 (using two years of data per annum\*), visitor nights spent in Melbourne increased at an average annual rate of 3.0 per cent.

In the two years ending December 2019, Singaporean visitors spent 271,000 nights in regional Victoria, representing an increase of 7.0 per cent compared with the two years ending December 2018.

\* where 2014 includes years ending December 2013 and 2014 and 2019 includes years ending December 2018 and 2019.

## Regional Dispersal

### Regional Dispersal of Top 20 International Overnight Markets to Victoria – 2 Years Ending December 2019



Note: Percentages in red are based on small survey samples and are subject to high levels of sampling variability. Results should be interpreted with caution.

Of the 3.3 million nights spent in Victoria by Singaporean visitors in the two years ending December 2019, only eight per cent (271,000) of them were spent in regional Victoria.

Singaporean visitors to Victoria have the 6<sup>th</sup> lowest rate of overnight dispersal of all the state's top 20 international markets.

<sup>2</sup> Two years of data are used to increase reliability of the figures.

## Places Visited in Regional Victoria and Melbourne Attractions

### Places Visited in Regional Victoria – Year Ending December 2019

Selected Places Visited - Overnight Visit or Daytrip (% of all Overnight Visitors to Victoria)	Singapore Visitors	All International Visitors
Ballarat, Sovereign Hill	6%	6%
Bendigo	-	3%
Daylesford, Hepburn Springs, Mt. Macedon	-	1%
Geelong & the Bellarine Peninsula	10%	9%
Great Ocean Road/Twelve Apostles	40%	33%
Healesville Sanctuary	6%	2%
Mornington Peninsula	8%	8%
Phillip Island/Penguin Parade	26%	17%
Puffing Billy and Dandenong Ranges	13%	10%
Victorian Snowfields	-	2%
Wilson's Promontory	-	3%
Yarra Valley	23%	12%

NB: Where there is a '-', figures are unreliable and are unable to be published.

In the year ending December 2019, 40 per cent of Singaporean overnight visitors to Victoria spent time (daytrip or overnight) in the Great Ocean Road/Twelve Apostles region. This region is very popular generally, with 33 per cent of all international overnight visitors to Victoria travelling there.

Twenty-six per cent (26%) of Singaporean overnight visitors to Victoria went to the Phillip Island/Penguin Parade area (compared with 17 per cent of international overnight visitors to Victoria overall) and 23 per cent visited the Yarra Valley (compared with 12 per cent of international visitors overall).

### Melbourne Attractions Visited – Year Ending December 2019

Selected Places Visited - Melbourne Attractions (% of Overnight Visitors to Victoria)	Singapore Visitors	All International Visitors
Australian Centre for the Moving Image (ACMI)	4%	4%
Brunswick Street	10%	10%
Chadstone Shopping Centre	16%	15%
Chapel Street	9%	9%
Crown Casino/entertainment complex	19%	19%
Docklands/Marvel Stadium (prev. Etihad Stadium)	17%	19%
Federation Square	35%	38%
Melbourne CBD Shopping Precinct	74%	63%
Melbourne Cricket Ground (MCG)	-	6%
Melbourne Museum (Royal Exhibition Building)	15%	16%
Melbourne Zoo	4%	8%
National Gallery of Victoria (NGV)	12%	17%
Queen Victoria Market	62%	44%
Shrine of Remembrance	10%	12%
Southbank/Southgate	33%	26%
St Kilda	33%	28%

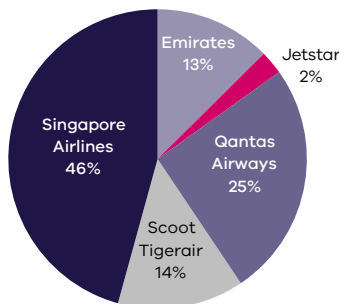
NB: Where there is a '-', figures are unreliable and are unable to be published.

The most visited Melbourne attractions by Singaporean overnight visitors to Victoria were the CBD shopping precinct (74 per cent compared with 63 per cent of international visitors overall) and Queen Victoria Market (62 per cent compared with 44 per cent of international visitors overall).

Other attractions that Singaporean visitors were more likely to visit compared to international visitors overall included St Kilda (33 per cent compared with 28 per cent of international overnight visitors to Victoria overall) and Southbank/Southgate (33 per cent compared with 26 per cent of international visitors overall).

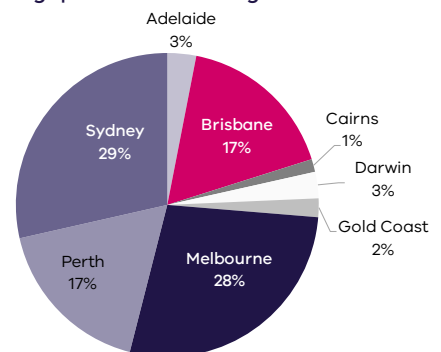
## Aviation<sup>3</sup>

### Airline Market Share – Direct Seats into Melbourne from Singapore – Year ending December 2019



In the year ending December 2019, Singapore Airlines contributed 46 per cent of the 1.1 million available seats on direct flights from Singapore to Melbourne. Qantas Airways contributed 25 per cent, Scoot Tigerair accounted for 14 per cent of seats and Emirates 13 per cent.

### Direct Flight Market Share – Direct Seats into Australian Airports from Singapore – Year ending December 2019



In the year ending December 2019, Melbourne received 28 per cent of the 3.8 million available seats on direct flights from Singapore to Australia. This was slightly behind Sydney's share (29%) of available seats on direct flights from New Zealand to Australia.

<sup>3</sup> Note: Aviation capacity is measured by "available seats", which includes international visitors and Australian residents returning home.

## Sources:

- International Visitor Survey (IVS), years ending December 2014-2019, Tourism Research Australia (data released 8 April 2020)
- Regional Expenditure Model (REX) 2014-2019, Tourism Research Australia (data released 8 April 2020)
- Tourism Australia Consumer Demand Project, Tourism Economics, April 2020
- International Airlines Operated Flights and Seats, year ending December 2019, Department of Infrastructure and Regional Development (BITRE)
- Visitor Arrivals and Departures, year ending December 2019, Tourism Research Australia

Base for IVS and Expenditure data: Only those trips where International visitors aged 15 years or over who have stayed in Australia for less than 12 months are in scope. Expenditure includes package expenditure.

Figures that are unreliable and unable to be published are represented by '-'. Figures might not add up due to rounding.

To view the full suite of 15 International Tourism Summaries (Victoria's top 15 international markets in terms of expenditure, visitors and nights), see <https://www.business.vic.gov.au/tourism-industry-resources/research/international-research>

For further information on IVS and Expenditure data sources used please refer to our Guide to Tourism Data Sources and Definitions document found here: <https://www.business.vic.gov.au/tourism-industry-resources/research/teve-research>

For further information on Tourism Australia's Consumer Demand Project, see <http://www.tourism.australia.com/en/markets-and-research/reports/consumer-research.html>

Further information on international visitor statistics: <https://www.tra.gov.au/international>;  
<http://www.tourism.australia.com/en/markets-and-research/market-regions.html>

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