



**tourism market insights**  
**SINGAPORE**

**WESGRO**

cape town & western cape  
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# 1. Overview of Singapore

## About Singapore

Where is Singapore?	Singapore is located in Southeastern Asia, islands between Malaysia and Indonesia
Population (millions)	5,7 (2019)
Time Difference	South Africa is six hours behind Singapore
Language	English, Mandarin, Malay and Tamil are the official languages
Economy	Singapore has per capita GDP higher than that of most developed countries.

Singapore's economy is expected to slow down dramatically in 2020 due to the COVID-19 pandemic. However, if the spread of the virus remains contained then real GDP is expected to increase by 4,7% in 2021, before growing by 2,0% per year from 2025 to 2027.

Singapore's current population is around 5,7 million and with moderate fertility of 1.2 births per female, the median age is rising slowly. It is predicted that the median age will grow from 43.9 years in 2019 to 49.9 years in 2030.

### General Overview

In 2019, Singapore's savings ratio amounted to 26,8% of disposable income and consumer expenditure per capita amounted to USD 23 645.

Consumer spending is expected to grow at an average annual rate of 2,5% over the 2020 – 2030 period. Hotels and catering is expected to be the fastest growing category over the 2020 – 2030 period, followed by miscellaneous goods and services.

Unemployment was 2,2% in 2019 and it is expected to increase to 2,9% in 2020 as many struggling businesses have resorted to making lay-offs due to the effects of the COVID-19 pandemic.

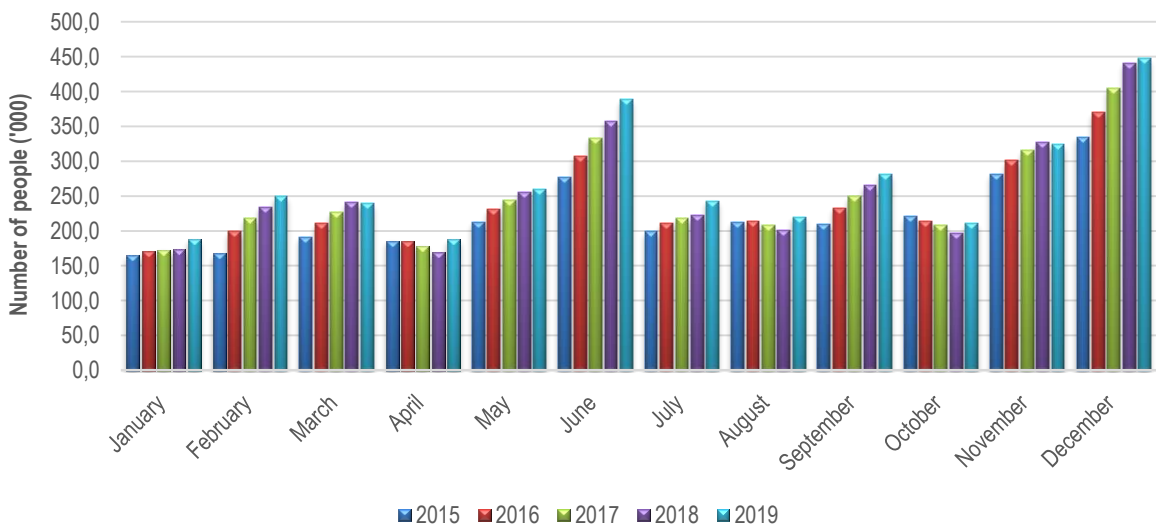
## 2. Overview of the Singaporean Travel Market

### Singapore Travel Market

Capital City	Singapore
Disposable income Per capita, US\$ 2019	32,106
Savings As % of disposable income	26.8%
Median Age	43.9 years
Paid Holidays (2019)	14.0
Public Holidays (2019)	11.0
Annual Leave (2019)	25.0
Outbound Departures ('000 trips)	1. 2017: 20,255.1 2. 2018: 18,854.3 3. 2019: 18,354.8
Top 3 Outbound Destinations ('000 trips, 2019)	1. Malaysia: 10,163.9 2. Indonesia: 1,937.7 3. Thailand: 1,056.8
Type of Outbound Trips	Leisure: 88.4% Business: 11.6%

### Seasonality Patterns

NUMBER OF PEOPLE TRAVELLING BY MONTH, JAN - DEC 2015 - 2019

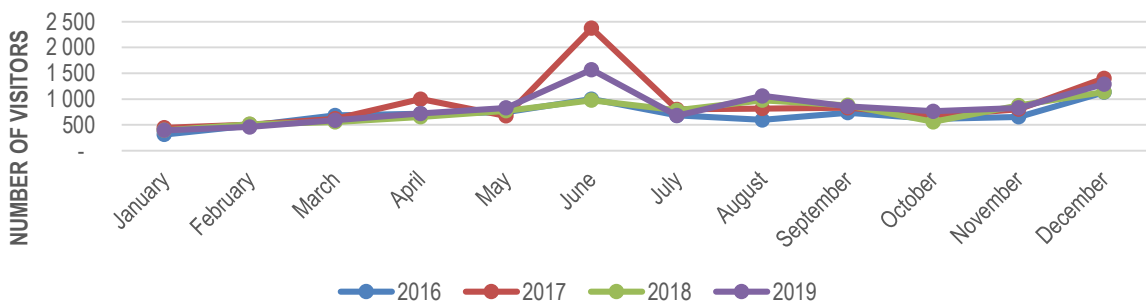


### 3. The Singaporean Traveller to South Africa

#### Singapore Travel Market

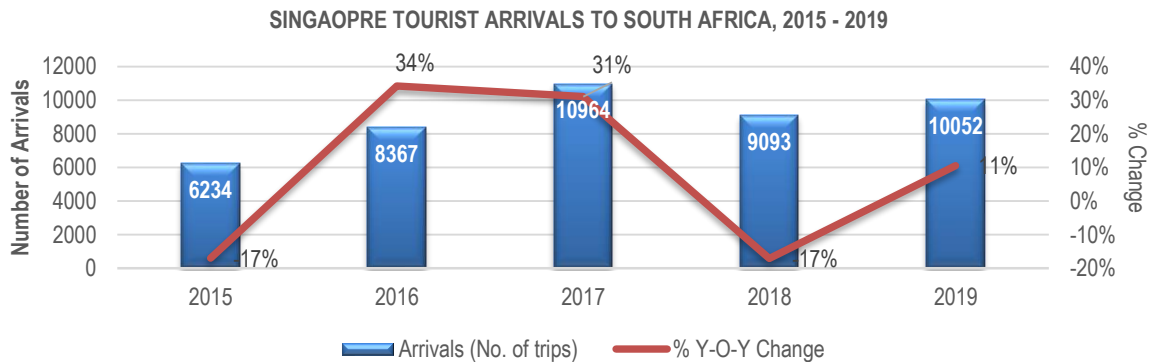
Number of Arrivals	2016: 8 367 2017: 10 964 2018: 9 093 2019: 10 052
Purpose of visit to South Africa (2019)	Holiday (44,7%) VFR (23,9%)
Average length of stay in South Africa (Number of nights)	2017: 12,9 2018: 9,3 2019: 15,3
Age profile (2019)	25 – 34 yrs (31,0%) 35 – 44 yrs (15,3%) 45 – 54 yrs (17,2%) 55 – 64 yrs (17,5%)
Repeater Rate of Singaporean Travellers (2019)	1. First Time: 57,7% 2. 2 -3 times: 15,9%
Accommodation Usage (2019)	1. Hotels (53 160) 2. Friends & Family (30 828) 3. Self Catering (20 110)
Total Foreign Direct Spend in South Africa (R in millions)	2017: R 152 2018: R 144 2019: R 264
Average Spend in South Africa	2017: R 14 800 2018: R 16 300 2019: R 27 100
Top activities for Singaporean visitors in South Africa (2019)	1. Shopping 2. Visiting natural attractions 3. Wildlife 4. Culture & Heritage

SEASONALITY PATTERNS: SINGAPORE TRAVELLERS TO SOUTH AFRICA BY MONTH, JAN - DEC 2016 - 2019



## 3. The Singaporean Traveller to South Africa

### 3.1. Visitor Arrivals to South Africa



### 3.2. Purpose of visit to South Africa

Singaporean visitors travelling to South Africa are predominantly visiting for the purpose of holiday, visiting friends and relatives, business and for Meetings, Incentives, Conferencing, and Events. They are most impressed with South Africa's beautiful scenery, friendly people and the diverse experience. They typically visit the Western Cape, Gauteng, and Mpumalanga province and their length of stay in the country is on average 15,3 nights.

They are typically between the ages of 25 and 64 years, with 31,0% in the 25 – 34 years category, 15,3% are in the 35 – 44 years category, 17,2% are in the 45 – 54 years category and 17,5% are in the 55 – 64 years category.

#### Top reasons for travel to SA

Holiday (44,7%)

VFR (23,9%)

MICE (20,0%)

Average length of stay (2019)

15,3 nights

### 3.3. Activities in South Africa

#### Top activities undertaken

1. Shopping

2. Visiting natural attractions

3. Wildlife

4. Culture & Heritage

5. Beaches & Adventure

Shopping, visiting natural attractions, wildlife, culture and heritage, visiting beaches and adventure were amongst the top activities undertaken by Singaporean tourists while in South Africa. In 2019 their average spend was R27 100 per tourist.

They are more likely to stay in hotels or with family and friends. Many Singaporean visitors also make use of self-catering and backpacker accommodation.

In 2019, 57,7% of Singaporean travellers to South Africa visited the country for the first time and 42,3% were repeat visitors.

## 4. The Singaporean Traveller to the Western Cape

### Singapore Travel Market

Number of Arrivals	2016: 3 736
	2017: 7 290
	2018: 5 164
	2019: 3 802

Total Foreign Direct Spend in the Western Cape (R in millions)	2015: 83
	2016: 146
	2017: 78

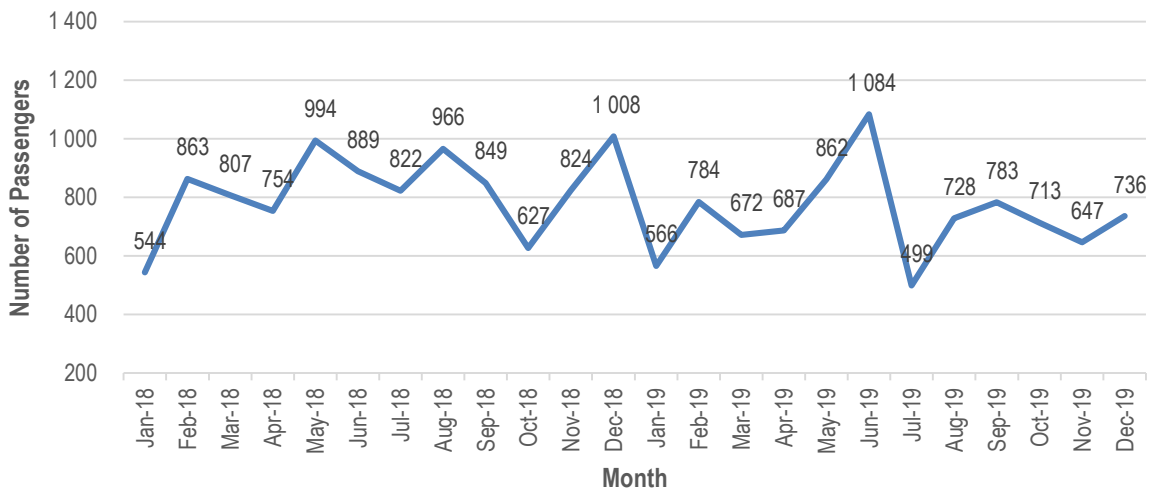
Average Spend in the Western Cape	2015: R 11 700
	2016: R 16 100
	2017: R 11 600

Average length of stay in the Western Cape (Number of nights)	2015: 10,3
	2016: 10,0
	2017: 9,6

Total bed nights spent in the Western Cape	2015: 73 000
	2016: 92 000
	2017: 67 000

Total number of *formal bed nights spent in the Western Cape	2015: 33 000
	2016: 47 000
	2017: 40 000

SINGAPORE PASSENGER MOVEMENT THROUGH CAPE TOWN INTERNATIONAL AIRPORT, JAN 2018 – DEC 2019



Sources: SA Tourism, OAG Traffic Analyser, 2020

\*Formal bed nights = Hotels, B&B's, Guesthouses, Self-catering units, Game Lodges and Backpackers

## 4. The Singaporean Traveller to the Western Cape

### 4.1. Passenger Traffic through Cape Town International Airport

Singaporean visitor arrivals to the Western Cape have slowed down over the last three years. This downward trend is in line with the general decline in Singapore's outbound travel which saw a year on year decline of -6,9% in 2018 and -2,6% in 2019.

The majority of Singaporean air travellers started their journey to Cape Town at Singapore Changi Airport.

Period	Passenger Arrivals	Y-O-Y % Change
2017	10 171	-
2018	9 947	-2,2%
2019	8 760	-11,9%

#### Inbound Passenger Performance: Singapore – Cape Town

Country	Passengers 2019	% Change 2018-19	Passengers Jan – Feb 2020	% Change Jan – Feb 2019-20
Singapore	8 760	-12%	1 285	-5%

#### Top Cities: Singapore – Cape Town

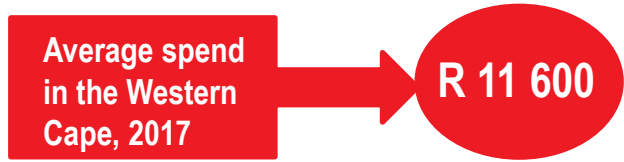
Rank	Airport	Passengers 2019	% Change 2018-19	Passengers Jan – Feb 2020	% Change Jan – Feb 2019-20
1	Singapore Changi Apt	8 760	-12%	1 285	-5%



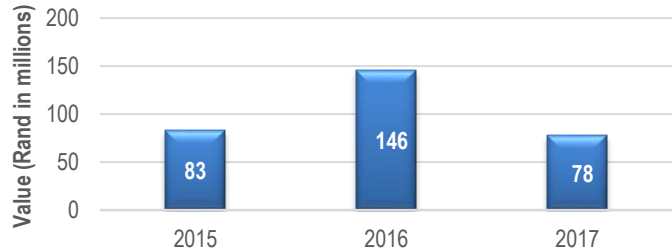
## 4.2. Spend Patterns

In 2017, the Singaporean market contributed R78 million to the Western Cape's economy making it the 5<sup>th</sup> most lucrative Asian source market for the province.

On average, Singaporean tourists spent R11 00 per trip in the Western Cape in 2017. Total Foreign Direct Spend was at its peak in 2016 at R146 million.



TOTAL FOREIGN DIRECT SPEND IN THE WESTERN CAPE, 2015 - 2017

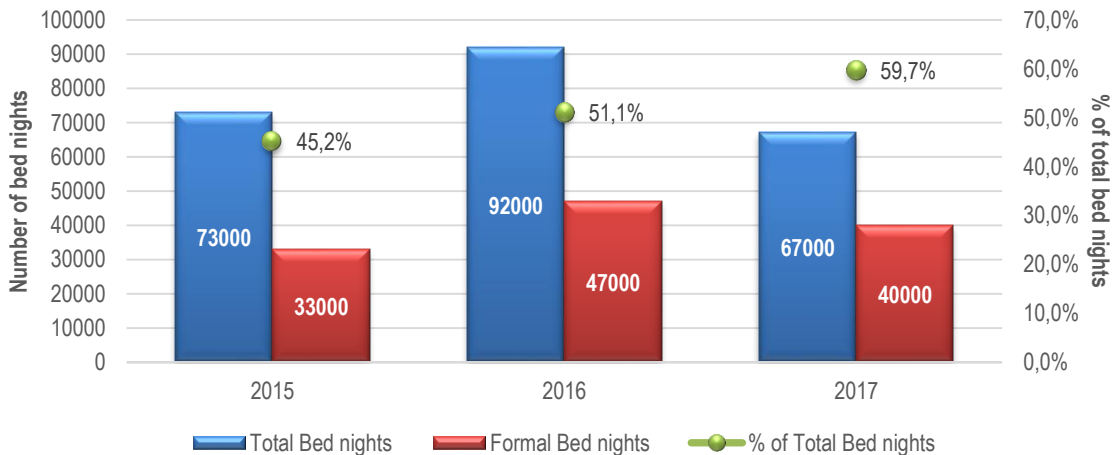


## 4.3. Bed nights and Average Length of Stay in the Western Cape

In 2017, Singaporean travellers spent 67 000 bed nights in the Western Cape, of which 40 000 were spent in the \*formal accommodation sector. The number in formal bed nights represents close to 60% of total bed nights.



NUMBER OF BED NIGHTS SPENT BY SINGAPOREAN TOURISTS IN THE WESTERN CAPE, 2015 - 2017



\*Formal Bednights refers to Hotels, B&Bs, Guesthouses, Self-catering units, Game Lodges and Backpackers.

## 5. Singaporean Traveller Trends

### 5.1. Outbound travel trends

In 2019, a total of 18 354 800 Singaporean international outbound trips were made with an expenditure value of SGD 31 million, which is expected to increase to SGD 37 million by 2025. Malaysia, Indonesia, Thailand, China and Australia were the top five outbound destinations for Singaporean travellers in 2019 which accounted for 79,8% of all outbound trips.

Outbound trips to neighbouring Asian destinations are most prevalent however, South Africa was the most prominent African destination for Singaporean travellers in 2019 and accounted for close to 1% of all Singapore's outbound trips in 2019.

Singaporean travellers have, on average, 25 days annual leave per year. Seasonality patterns indicate that they are most likely to travel during June and December. Leisure trips made up the majority of outbound trips in 2019, with 88,4% of trips taken for the purpose of leisure.

According to a market insights study on 'What Asia Pacific travellers want' published by Amadeus, Singaporean travellers are relatively cautious when sharing personal information with travel service providers during the trip planning phase. Less than half of them are open to share personal information for more relevant offers and personalized service. Singaporean travellers (84%), particularly females (90%), are keen to have service staff and tour guides who speak a language they understand.

Government bodies are a trusted source of information when it comes to safety issues, with close to three quarters of travellers saying that they expect to receive safety and security updates from their embassy/government.

### 5.2. Media consumption habits

Mobile devices are popular as a means for Singaporean travellers to research trips, however, 87% of travellers prefer to book via laptops and desktops. A 360 degree interactive video which allows travellers to experience something they would see on their trip is something Singaporean travellers find useful.

Recommendations that help them plan their itinerary are most valuable during the research phase and Singaporean travellers are heavily influenced by traveller reviews.

Singaporean travellers stay connected while travelling for the purpose of accessing maps, research things to do, and to stay updated with work. WhatsApp, Google Maps, TripAdvisor and Facebook are the most popular mobile apps used by Singaporean travellers while travelling. Sharing economy apps like Uber and Airbnb are used mainly for cost-saving.

Sources: *Euromonitor International, Amadeus, 2020*

## 6. Key Findings

- Singaporean visitors travelling to South Africa are predominantly visiting for the purpose of holiday, visiting friends and relatives, business and for Meetings, Incentives, Conferencing, and Events. They are most impressed with South Africa's beautiful scenery, friendly people and the diverse experience.
- In 2019, a total of 18 354 800 Singaporean international outbound trips were made with an expenditure value of SGD 31 million, which is expected to increase to SGD 37 million by 2025.
- Outbound trips to neighbouring Asian destinations are most prevalent however, South Africa was the most prominent African destination for Singaporean travellers in 2019 and accounted for close to 1% of all Singapore's outbound trips in 2019.
- Singaporean travellers have, on average, 25 days annual leave per year. Seasonality patterns indicate that they are most likely to travel during June and December. Leisure trips made up the majority of outbound trips in 2019, with 88,4% of trips taken for the purpose of leisure.
- A significant portion of Singaporean visitors to South Africa are business travellers (25,3%) which includes MICE, and the relatively high rate of repeat travel suggests that there is an opportunity to expand the Bleisure offering.
- In 2017, the Singaporean market contributed R78 million to the Western Cape's economy making it the 5<sup>th</sup> most lucrative Asian source market for the province.
- Singaporean travellers stay connected while travelling for the purpose of accessing maps, research things to do, and to stay updated with work. WhatsApp, Google Maps, TripAdvisor and Facebook are the most popular mobile apps used by Singaporean travellers while travelling.
- Government bodies are a trusted source of information when it comes to safety issues, with close to three quarters of travellers saying that they expect to receive safety and security updates from their embassy/government.
- Recommendations that help them plan their itinerary are most valuable during the research phase and Singaporean travellers are heavily influenced by traveller reviews.

## 7. List of sources

1. South African Tourism
2. Euromonitor International
3. OAG Airline Passenger Traffic Analyser
4. Amadeus
5. CIA Factbook

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