EXECUTIVE SUMMARY

In the first quarter of 2019 (Q1), IVA grew 1.0 per cent year-on-year to reach 4.7 million visitors. TR totalled $6.5 billion in Q1 2019, a 4.8 per cent decline over the same period last year. Gazetted hotel room revenue for Q1 2019 came in at an estimated S$1.0 billion, a 4.3 per cent year-on-year increase.

Note: International visitor arrivals statistics up to June 2019 is now available here.

NOTE TO EDITORS

This quarterly report provides a summary of key statistics on tourism receipts, international visitor arrivals and gazetted hotels. The analysis in this report is based on data from a variety of sources, including Disembarkation/Embarkation cards, the Overseas Visitors Survey (OVS) and the monthly hotel returns from gazetted hotels. Data derived from the OVS are subject to sampling error. Users are advised to exercise discretion when drawing any conclusions or inferences, or taking any action, based on the data. Data is correct as at the time of publishing.

Download Monthly International Visitor Arrivals and Hotel statistics:
Tourism Receipts (TR) for the first quarter (Q1 2019) was estimated at S$6.5 billion, a 4.8 per cent decline over the same period last year. All major components (except Other TR Components) recorded declines in Q1 2019 – Accommodation (12%), Food & Beverage (7%), Shopping (7%) and Sightseeing, Entertainment & Gaming (3%).

Source: Disembarkation/Embarkation Cards and Overseas Visitors Survey
- Sightseeing, Entertainment & Gaming includes entrance fees to attractions and nightspots, expenditure on day-tours, leisure events as well as entertainment at the Integrated Resorts.
- Other TR components include expenditure on airfares on Singapore-based carriers, port taxes, local transportation, as well as expenditure by business, medical, education and transfer/transit visitors.

1 All Tourism Receipts estimates are correct as of July 2019.
TOURISM RECEIPTS BY MAJOR COMPONENTS, TOP 10 MARKETS

TOURISM RECEIPTS*: S$5.1 BILLION (-5.4% VS Q1 2018)

Excluding expenditure on Sightseeing, Entertainment & Gaming (SEG), China (S$1,093 million), Indonesia (S$732 million) and India (S$338 million) were the top three TR generating markets in Q1 2019, contributing to 43 per cent of TR (excluding SEG).

Among the top 10 TR markets, Indonesia, USA and Japan registered the highest absolute year-on-year growth in TR (excluding SEG).

Expenditure is estimated from Overseas Visitors Survey.

Other TR components include expenditure on airfares on Singapore-based carriers, port taxes, local transportation, as well as expenditure by business, medical, education and transfer/transit visitors.

* Sightseeing, Entertainment & Gaming has been excluded in the country analysis due to commercial sensitivity of information.
Singapore’s international visitor arrivals (IVA) in 2019 stood at 4.7 million for January to March 2019, a 1.0 per cent year-on-year growth.

IVA, TOP 15 MARKETS
JAN-MAR 2019: 4.7 MILLION (+1.0% VS JAN-MAR 2018)

China (960K), Indonesia (725K), India (300K), Malaysia (283K) and Australia (263K) were Singapore’s top five international visitor-generating markets in Q1 2019. These markets accounted for 54 per cent of total IVA in January to March 2019.

Largest absolute year-on-year growths were noted in China (3%), Germany (19%) and USA (9%).
HOTEL INDUSTRY

QUARTER ONE 2019 PERFORMANCE

Gazetted hotel room revenue for Q1 2019 came in at an estimated S$1.0 billion, a growth of 4.3 per cent year-on-year. Average Occupancy Rate (AOR) was at 86 per cent in Q1 2019, a 0.6 percentage point marginal decrease compared to the same quarter last year. Average Room Rate (ARR) grew by 1.0 per cent to S$222 and Revenue per Available Room (RevPAR) held steady at 0.3 per cent year-on-year to S$189 in Q1 2019.

ARR, AOR and RevPAR, Q1 2019

<table>
<thead>
<tr>
<th></th>
<th>Average Room Rate (ARR)</th>
<th>Average Occupancy Rate (AOR)</th>
<th>Revenue Per Available Room (RevPAR)</th>
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<tbody>
<tr>
<td></td>
<td>S$</td>
<td>%Δ</td>
<td>%</td>
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<tr>
<td>Overall</td>
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</tbody>
</table>

¹ Standard AOR = [Gross lettings (Room Nights) / Available room nights] x 100
² Standard ARR = [Total room revenue / Gross lettings] x 100
³ RevPAR = AOR x ARR

NOTE:
The hotel tiering system is a reference system developed by the Singapore Tourism Board (STB) to categorise the different hotels in Singapore into tiers based on a combination of factors that include average room rates, location and product characteristics.

Figures for the hotel industry are preliminary estimates, based on returns as at 26 Jun 2019. The current hotel tiers published are based on the hotels’ performance in 2017. The response rate across the tiers may vary.

Luxury — Includes hotels in the luxury segment and are predominantly in prime locations and/or in historical buildings
Upscale — Includes hotels in the upscale segment and are generally in prime locations or hotels with boutique positioning in prime or distinctive locations
Mid-Tier — Includes hotels in the mid-tier segment and are primarily located in prime commercial zones or immediately outlying areas
Economy — Includes hotels in the budget segment and are generally located in outlying areas