



TOURISM SECTOR PERFORMANCE

Q2 2019 Report



EXECUTIVE SUMMARY

In the first half of 2019, International Visitor Arrivals (IVA) increased 1.3 per cent over the same period last year to reach 9.3 million visitors.

Tourism Receipts (TR) reached \$13.1 billion, a decline of 3.0 per cent compared to the same period last year. This was due to lower expenditures across some components including Accommodation, Food & Beverage and Sightseeing, Entertainment and Gaming (SEG) even though Shopping and Other TR Components grew.

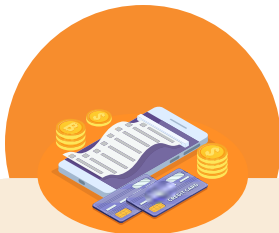
Gazetted hotel room revenue was estimated at \$1.9 billion for 1H2019, a year-on-year growth of 1.7 per cent. Average

Occupancy Rate (AOR) and Average Room Rate (ARR) held steady at 85 per cent and S\$215 respectively, while Revenue Per Available Room (RevPAR) declined slightly by 0.9 per cent to reach S\$183.

In the second quarter of 2019 (Q2), IVA grew 1.7 per cent year-on-year to reach 4.6 million visitors. TR declined a 1.3 per cent over the same period last year to reach \$6.5 billion. Gazetted hotel room revenue for Q2 2019 held steady at an estimated S\$1.0 billion.

[Note: International visitor arrivals statistics up to Aug 2019 is now available [here](#).]

QUARTER TWO 2019 HIGHLIGHTS



TOURISM RECEIPTS

TR in Q2 2019 declined by

-1.3%

year-on-year to reach

S\$6.5 billion



INTERNATIONAL VISITOR ARRIVALS

IVA in Q2 2019 increased by

+1.7%

year-on-year to reach

4.6 million



HOTEL INDUSTRY

Gazetted hotel room revenue in Q2 2019 held steady at

-0.1%

year-on-year to reach

S\$1.0 billion

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:

<https://www.stb.gov.sg/content/stb/en/statistics-and-market-insights/tourism-statistics/international-visitorarrivals.html>

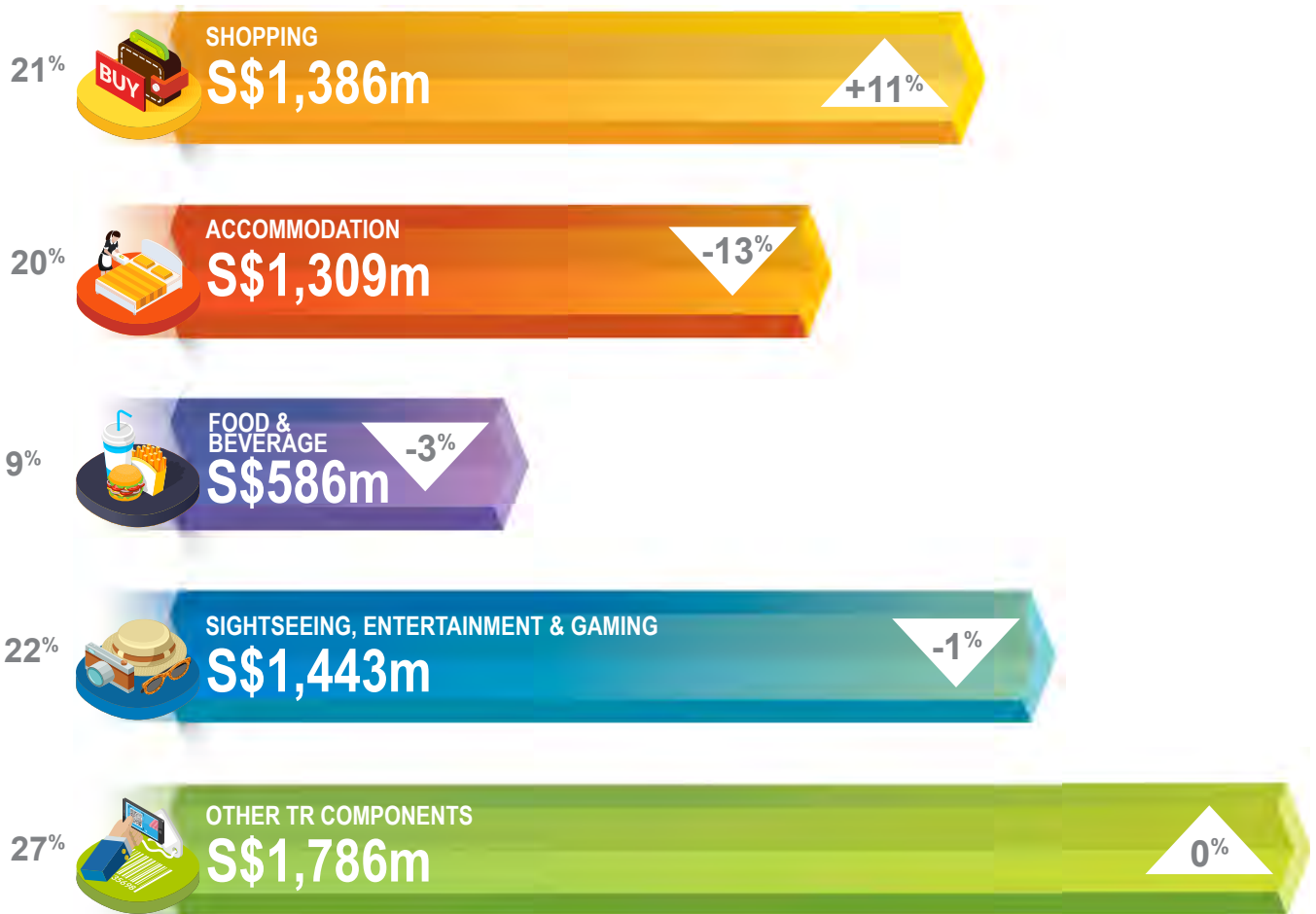


QUARTER TWO 2019 PERFORMANCE

TOURISM RECEIPTS BY MAJOR COMPONENTS¹

TOURISM RECEIPTS: S\$6.5 BILLION (-1.3% VS Q2 2018)
All percentage changes are vs same period in 2018

% Share



Tourism Receipts (TR) for the second quarter (Q2 2019) was estimated at S\$6.5 billion, a 1.3 per cent decline over the same period last year. There was an increase in Shopping expenditure (+11%) while declines were observed for

Accommodation (-13%), Food & Beverage (-3%) and Sightseeing, Entertainment & Gaming (-1%). Other TR Components (0%) held steady in the same period.

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 October 2019.

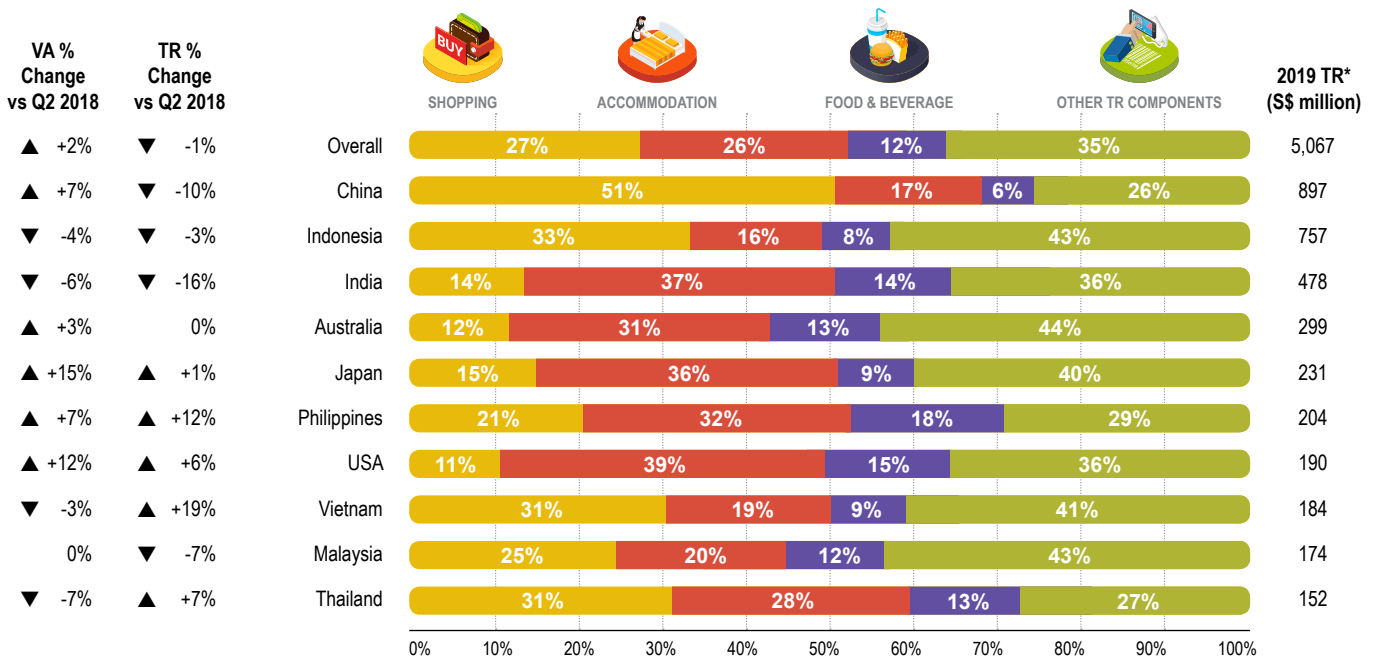
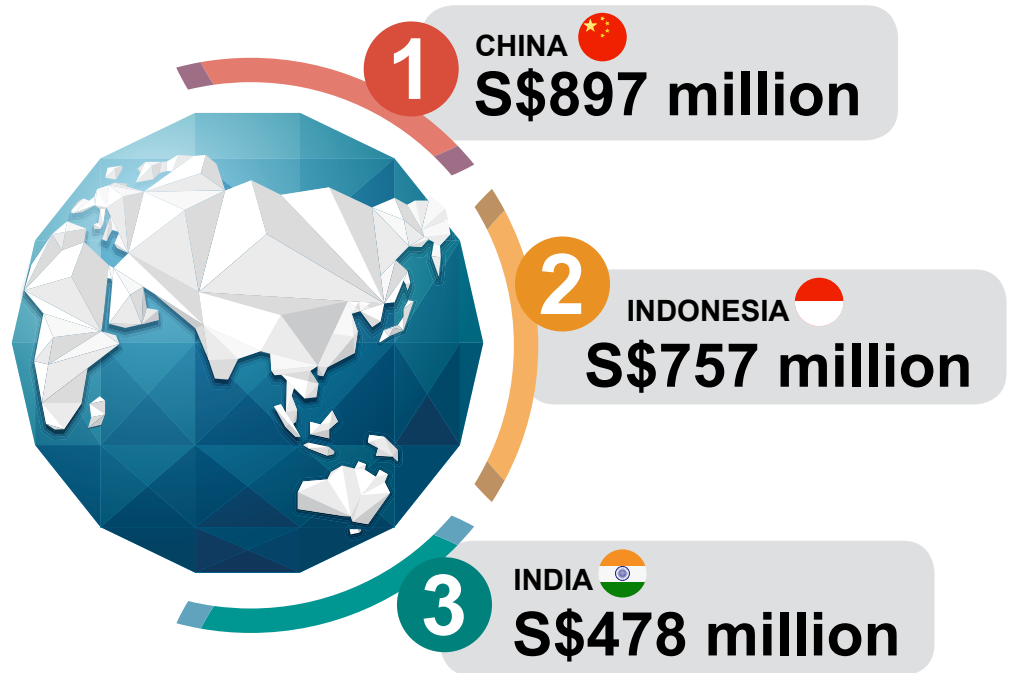


QUARTER TWO 2019 PERFORMANCE

**TOURISM RECEIPTS BY MAJOR COMPONENTS,
TOP 10 MARKETS**

TOURISM RECEIPTS* :S\$5.1 BILLION (-1.4% VS Q2 2018)

Excluding expenditure on Sightseeing, Entertainment & Gaming (SEG), China (S\$897 million), Indonesia (S\$757 million) and India (S\$478 million) were the top three TR generating markets in Q2 2019, contributing to 42 per cent of TR (excluding SEG). Among the top 10 TR markets, Vietnam, Philippines and USA 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.

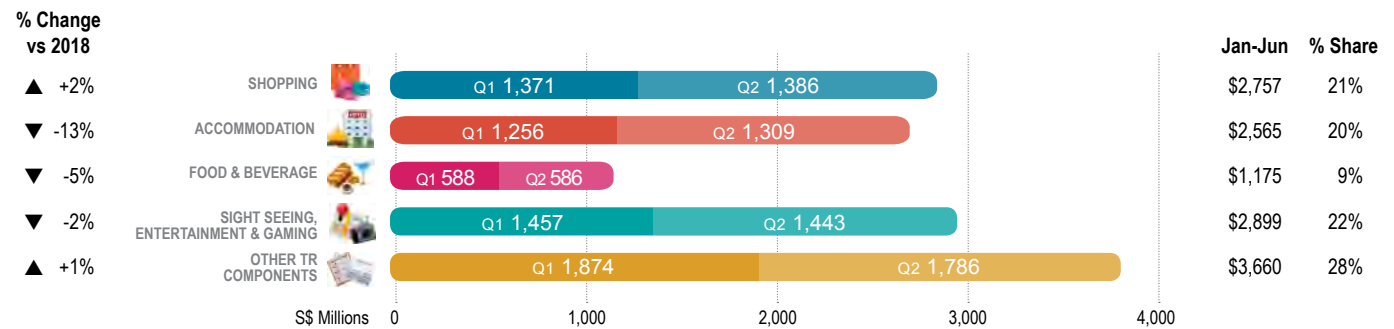
* Sightseeing, Entertainment & Gaming has been excluded in the country analysis due to commercial sensitivity of information.



JANUARY TO JUNE 2019 PERFORMANCE

TOURISM RECEIPTS BY MAJOR COMPONENTS²

TOURISM RECEIPTS: S\$13.1 BILLION (-3.0% VS JAN-JUN 2018)



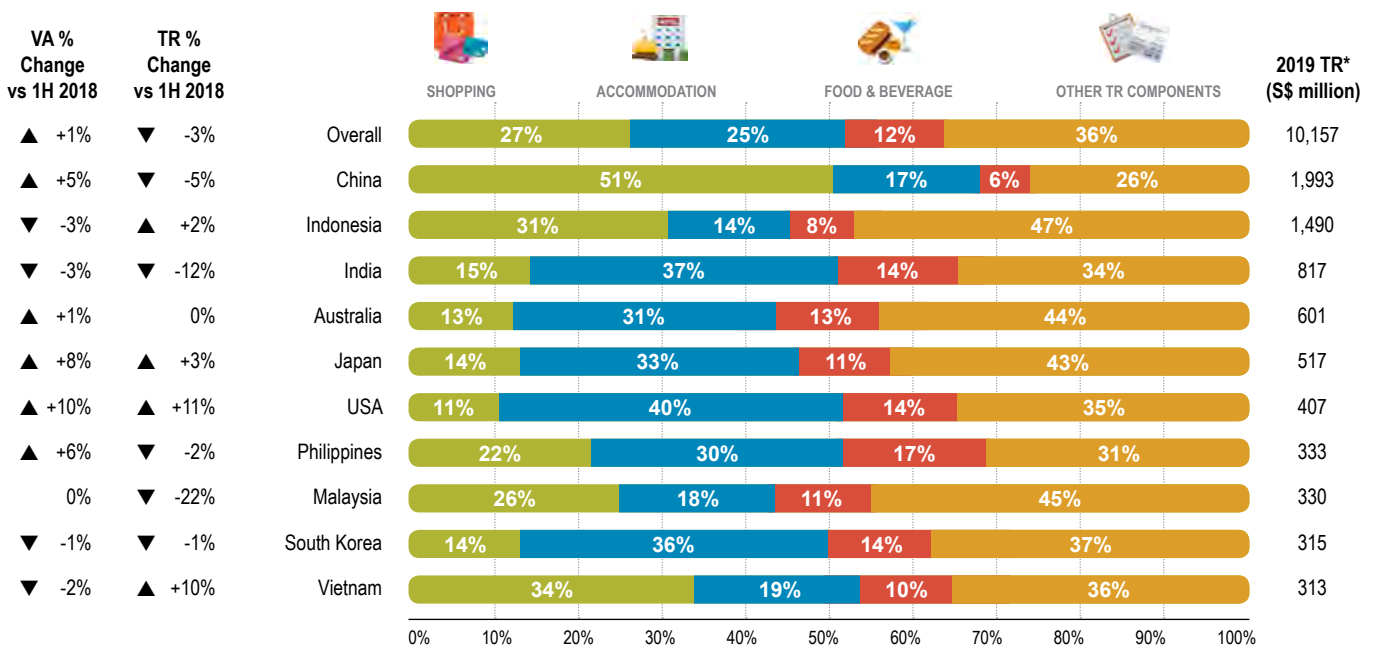
Source: Disembarkation/Embarkation Cards and Overseas Visitors Survey– Sightseeing, Entertainment & Gaming includes entrance fees to attractions and nightspots, expenditure on day-tours, leisure events and entertainment at the Integrated Resorts.

– Other TR components include expenditure on airfares on Singapore-based carriers, port taxes, local transportation, business, medical, education and transit visitors.

Tourism Receipts (TR) for January to June reached S\$13.1 billion, a decline of 3.0 per cent compared to the same period last year. While there was growth in Shopping (+2%) and Other TR Components (+1%), declines were observed in Accommodation (-13%), Food & Beverage (-5%), and Sightseeing, Entertainment & Gaming (-2%).

TOURISM RECEIPTS BY MAJOR COMPONENTS, TOP 10 MARKETS

TOURISM RECEIPTS* : S\$10.2 BILLION (-3.4% VS JAN-JUN 2018)



Expenditure is estimated from Overseas Visitors Survey.

– Other TR components include expenditure on airfares on Singapore-based carriers, port taxes, local transportation, business, medical, education and transit visitors.

* Sightseeing, Entertainment & Gaming has been excluded in the country analysis due to commercial sensitivity of information.

Excluding expenditure on Sightseeing, Entertainment & Gaming (SEG), China (S\$1,993 million), Indonesia (S\$1,490 million) and India (S\$817 million) were the top three TR generating markets for January to June 2019, contributing 42 per cent of TR (excluding SEG).

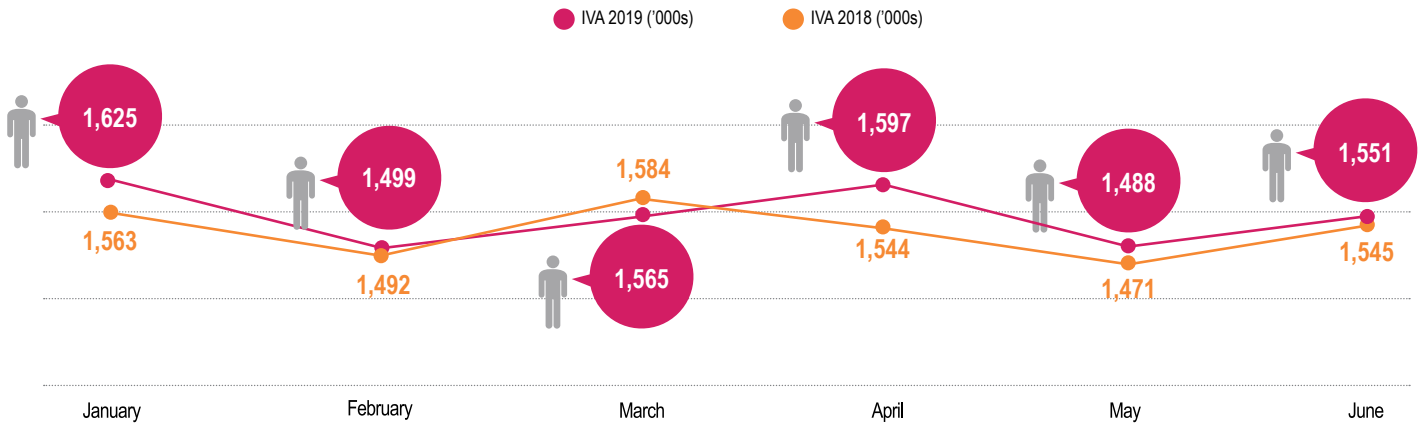
Among the top 10 TR markets, USA, Vietnam and Indonesia registered the highest absolute year-on-year growth in TR (excluding SEG).

² All Tourism Receipts estimates are correct as at October 2019.

JANUARY TO JUNE 2019 PERFORMANCE

INTERNATIONAL VISITOR ARRIVALS (IVA)

JAN-JUN 2019: 9.3 MILLION (+1.3% VS JAN-JUN 2018), VISITOR DAYS: 31.7 MILLION DAYS (+2.5%)



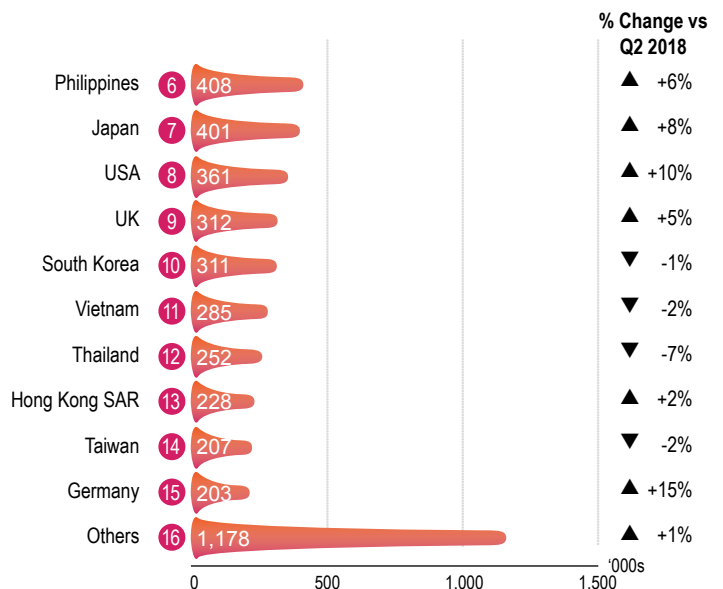
Singapore's international visitor arrivals (IVA) stood at 9.3 million for January to June 2019, a 1.3 per cent year-on-year growth.

IVA, TOP 15 MARKETS

JAN-JUN 2019: 9.3 MILLION (+1.3% VS JAN-JUN 2018)



Source: Disembarkation/Embarkation Cards



China (1.8 million), Indonesia (1.5 million), India (0.7 million), Malaysia (0.6 million) and Australia (0.5 million) were Singapore's top five international visitor-generating markets in 2019. These markets accounted for 56 per cent of total IVA in January to June 2019.

China (+5%), USA (+10%) and Japan (+8%) registered the largest absolute year-on-year growth.



HOTEL INDUSTRY³

QUARTER TWO 2019 PERFORMANCE

Gazetted hotel room revenue for Q2 2019 held steady at an estimated S\$1.0 billion. Average Occupancy Rate (AOR⁴) held steady at 85 per cent while Average Room Rate (ARR⁵)

declined by 1.0 per cent to reach \$211. Revenue per Available Room (RevPAR⁶) declined by 1.0 per cent year-on-year to S\$178 in Q2 2019.

ARR, AOR and RevPAR, Q2 2019

	Average Room Rate (ARR)		Average Occupancy Rate (AOR)		Revenue Per Available Room (RevPAR)	
	S\$	%Δ	%	%ptsΔ	S\$	%Δ
Overall	211	▼ -1.0	85	0.0	178	▼ -1.0
Luxury	434	▲ +0.1	86	▲ +0.8	373	▲ +1.0
Upscale	255	▼ -0.8	82	▼ -0.8	209	▼ -1.7
Mid-tier	165	▼ -0.5	87	▲ +1.1	143	▲ +0.8
Economy	105	▼ -1.2	82	▼ -1.3	86	▼ -2.8

JANUARY TO JUNE 2019 PERFORMANCE

Gazetted hotel room revenue for January to June 2019 was estimated at S\$1.9 billion, a 1.7 per cent growth over the same period last year. AOR held steady at 85 per cent while ARR

declined marginally by 0.8 per cent to reach \$215. RevPAR declined slightly by 0.9 per cent to reach \$183.

ARR, AOR and RevPAR, JANUARY – JUNE 2019

	Average Room Rate (ARR)		Average Occupancy Rate (AOR)		Revenue Per Available Room (RevPAR)	
	S\$	%Δ	%	%ptsΔ	S\$	%Δ
Overall	215	▼ -0.8	85	▼ -0.2	183	▼ -0.9
Luxury	443	▲ +0.1	87	▲ +0.8	386	▲ +1.0
Upscale	258	▼ -1.3	84	▼ -0.9	217	▼ -2.4
Mid-tier	166	▼ -1.0	87	▲ +0.9	145	0.0
Economy	105	▲ +0.4	82	▼ -1.4	85	▼ -1.3

³Hotel figures are accurate as at 16 October 2019

⁴Standard AOR = [Gross lettings (Room Nights) / Available room nights] x 100

⁵Standard ARR = [Total room revenue / Gross lettings] x 100

⁶RevPAR = 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



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