



EXECUTIVE SUMMARY

The tourism sector in 2019 achieved record highs in International Visitor Arrivals (IVA) and Tourism Receipts (TR) for the fourth consecutive year. From January to December 2019, IVA increased 3.3 per cent over the same period last year to reach 19.1 million visitors. TR reached S\$27.7 billion, a growth of 2.8 per cent compared to the same period last year.

The increase in TR was due to growths in Other TR Components, Shopping and SEG, which offset declines in Accommodation and F&B.

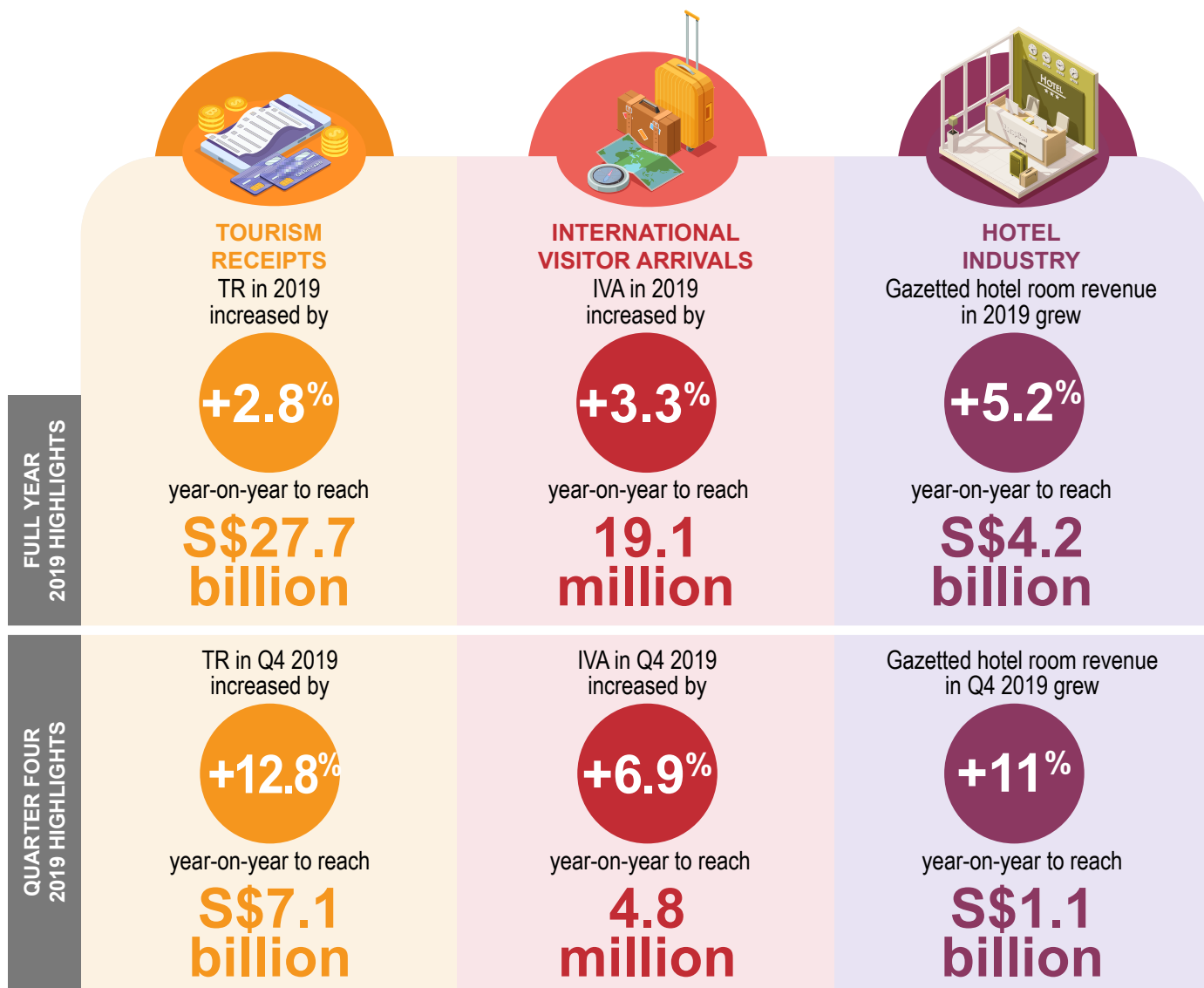
Gazetted hotel room revenue for 2019 reached S\$4.2 billion, a year-on-year growth of 5.2 per cent. Average Occupancy Rate (AOR) marginally increased by 0.9 percentage points to 86.9 per cent while

Average Room Rate (ARR) grew 1.2 per cent to S\$221, resulting in a 2.3 per cent growth in RevPAR to reach S\$192.

The tourism sector saw healthy growth in the fourth quarter of 2019 (Q4). IVA grew 6.9 per cent year-on-year to reach 4.8 million visitors. TR totalled S\$7.1 billion in Q4 2019, a 12.8 per cent growth over the same period last year. Gazetted hotel room revenue for Q4 2019 came in at an estimated S\$1.1 billion, a growth of 11 per cent year-on-year.

[Note: International visitor arrivals statistics up to Mar 2020 is now available [here](#).]

QUARTER FOUR 2019 HIGHLIGHTS



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 SG Arrival Cards (SGAC), Disembarkation/Embarkation (DE) 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.



Interact with International Visitor Arrivals and Hotel Data at:
<https://stan.stb.gov.sg/portal/>



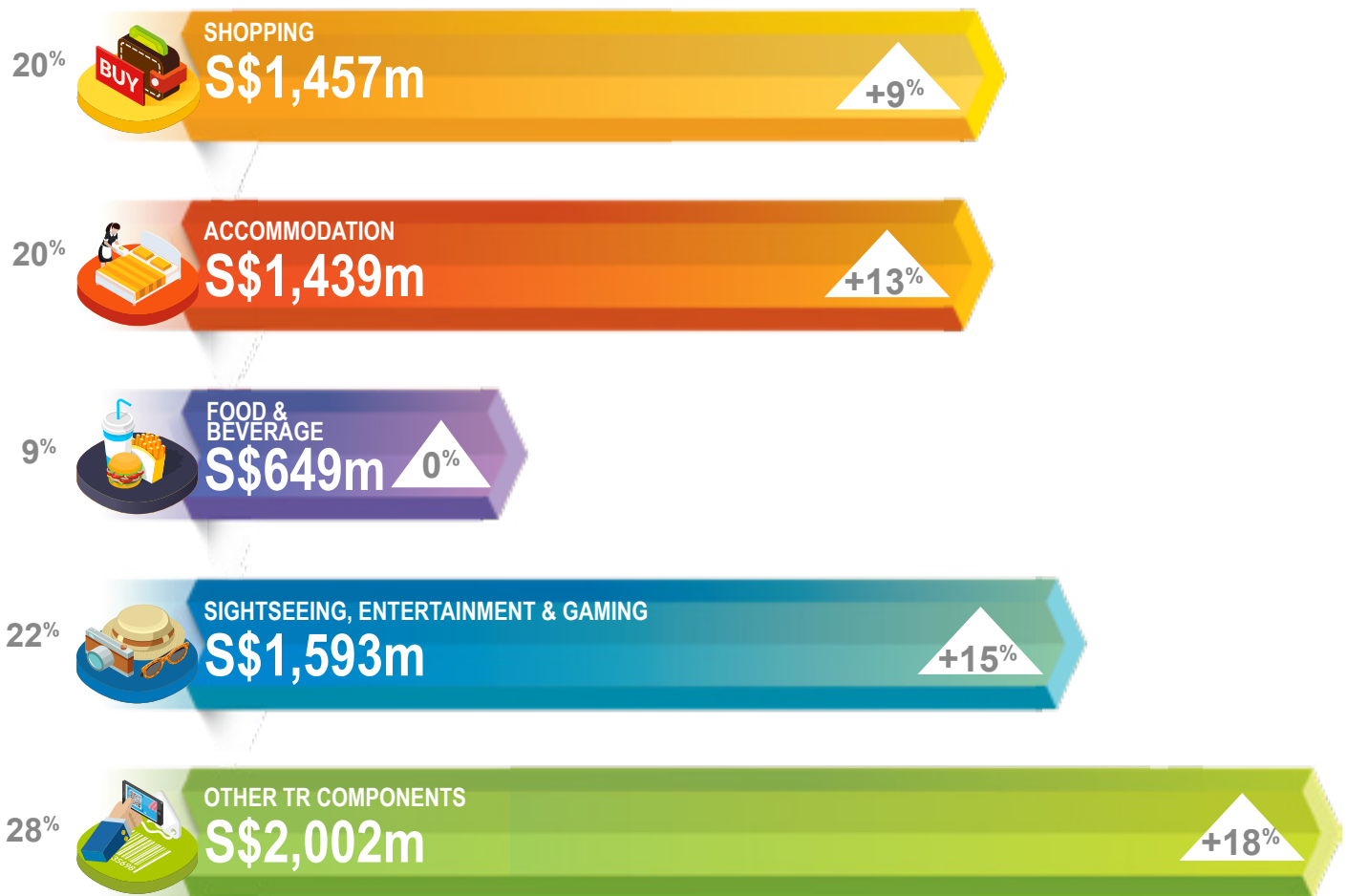
QUARTER FOUR 2019 PERFORMANCE¹

TOURISM RECEIPTS BY MAJOR COMPONENTS

TOURISM RECEIPTS: S\$7.1BILLION (+12.8% VS Q4 2018)

All percentage changes are vs same period in 2018

% Share



Tourism Receipts (TR) for the fourth quarter (Q4 2019) was estimated at S\$7.1 billion, a 12.8 per cent growth over the same period last year. Expenditure grew for most components, particularly Shopping (+9%), Accommodation (+13%),

Sightseeing, Entertainment & Gaming (+15%) and Other TR Components (+18%), while it stayed flat for Food & Beverage services (0%).

Source: SG Arrival 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 transit/transfer visitors.

¹All Tourism Receipts figures are accurate as of April 2020

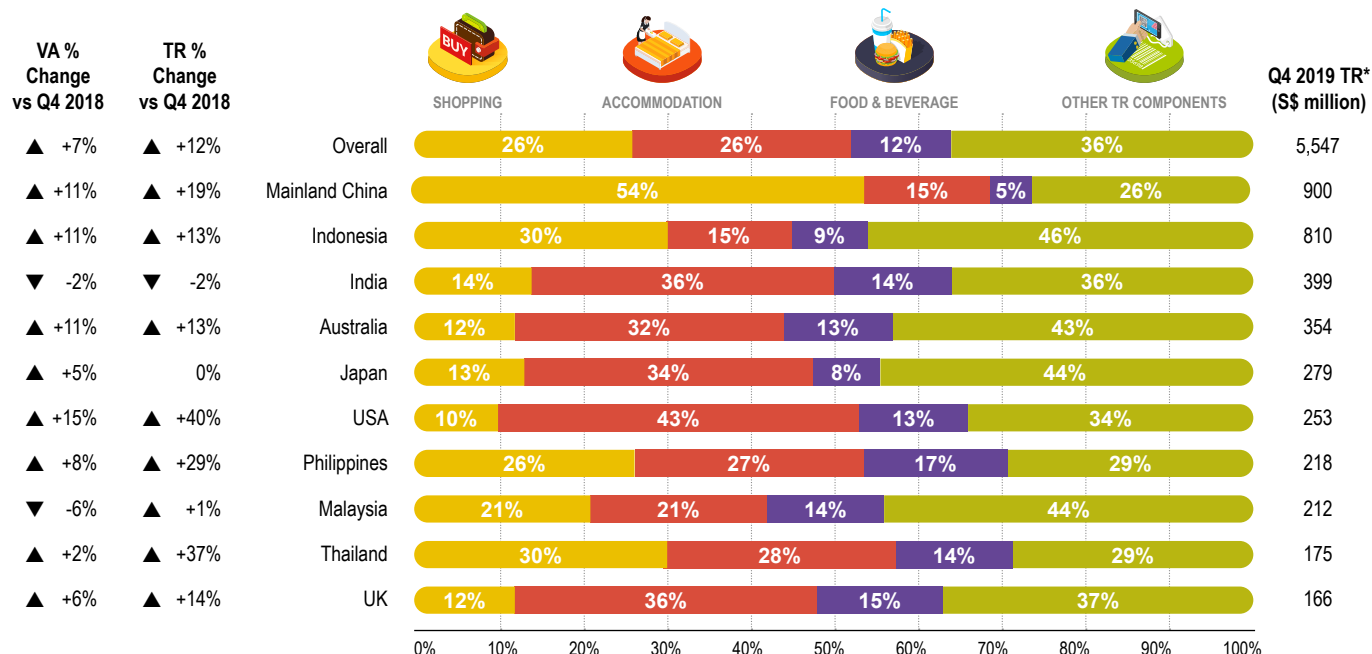


QUARTER FOUR 2019 PERFORMANCE

TOURISM RECEIPTS BY MAJOR COMPONENTS, TOP 10 MARKETS

TOURISM RECEIPTS* :S\$5.5 BILLION (+12.2% VS Q4 2018)

Excluding expenditure on Sightseeing, Entertainment & Gaming (SEG), Mainland China (S\$900 million), Indonesia (S\$810 million) and India (S\$399 million) were the top three TR generating markets in Q4 2019, contributing to 38 per cent of TR (excluding SEG). Among the top 10 TR markets, Mainland China, Indonesia and USA registered the highest absolute year-on-year growths 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, business, medical, education and transit/transfer visitors.

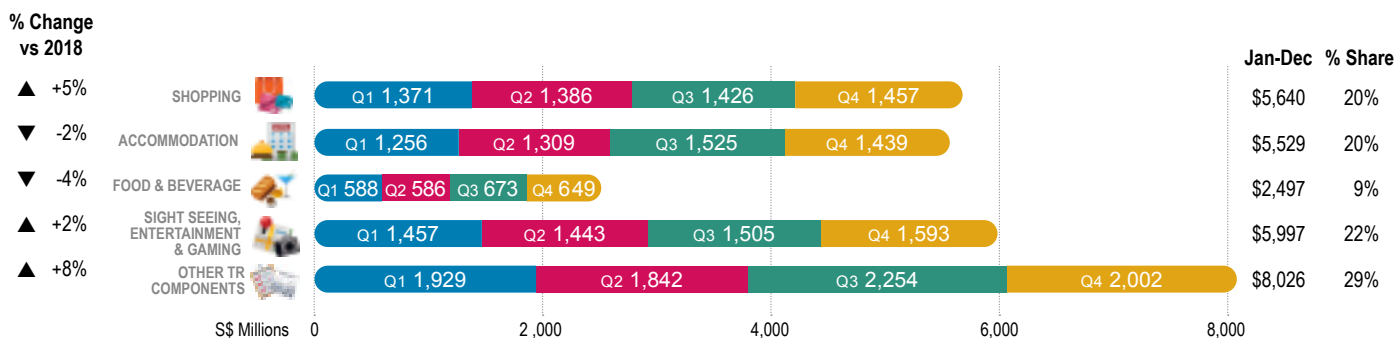
* Sightseeing, Entertainment & Gaming has been excluded in the country analysis due to commercial sensitivity of information.



JANUARY TO DECEMBER 2019 PERFORMANCE

TOURISM RECEIPTS BY MAJOR COMPONENTS²

TOURISM RECEIPTS: S\$27.7 BILLION (+2.8% VS JAN-DEC 2018)



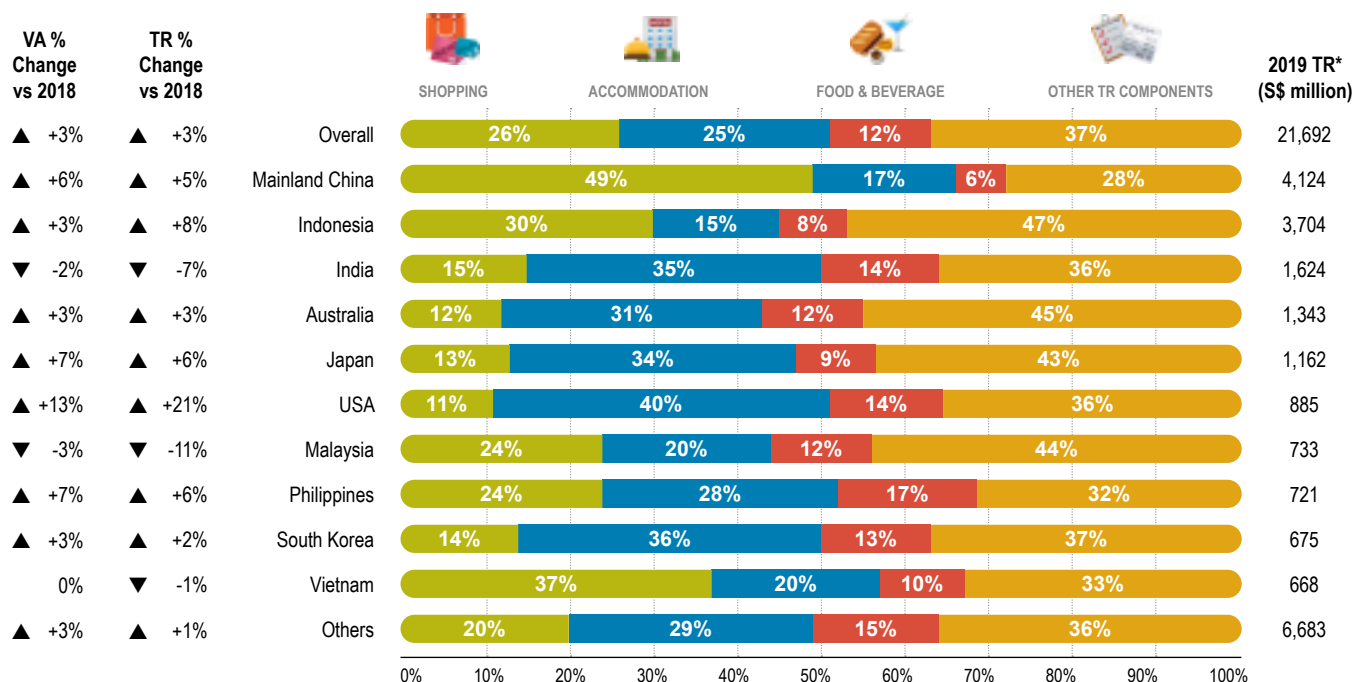
Source: SG Arrival Cards and Overseas Visitors Survey

– 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/transfer visitors.

Tourism Receipts (TR) for January to December reached S\$27.7 billion, a growth of 2.8 per cent compared to the same period last year. Growths were observed in Shopping (+5%), Sightseeing, Entertainment & Gaming (+2%), and Other TR Components (+8%), while declines were noted in Accommodation (-2%), and Food & Beverage (-4%).

TOURISM RECEIPTS BY MAJOR COMPONENTS,
TOP 10 MARKETS

TOURISM RECEIPTS* :S\$21.7 BILLION (2.9% VS JAN-DEC 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/transfer visitors.

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

Excluding expenditure on Sightseeing, Entertainment & Gaming (SEG), Mainland China (S\$4,124 million), Indonesia (S\$3,074 million) and India (S\$1,624 million) were the top three TR generating markets for January to December 2019, contributing 41 per cent of TR

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

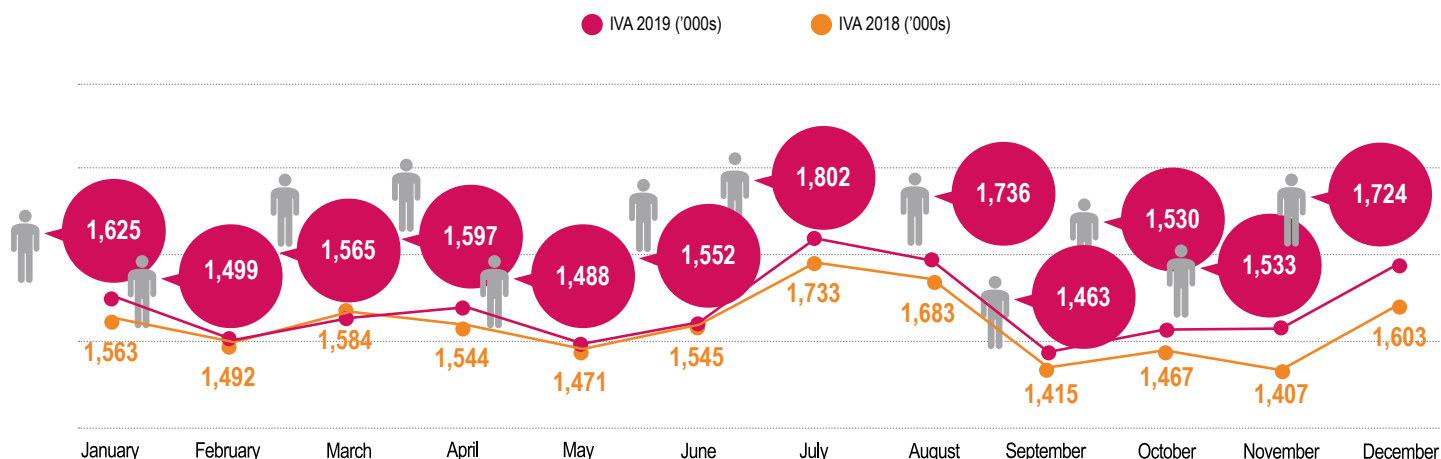
² All Tourism Receipts estimates are correct as at April 2020.



JANUARY TO DECEMBER 2019 PERFORMANCE

INTERNATIONAL VISITOR ARRIVALS (IVA)

JAN-DEC 2019: 19.1 MILLION (+3.3% VS JAN-DEC 2018), VISITOR DAYS: 64.1 MILLION DAYS (+4.0%)



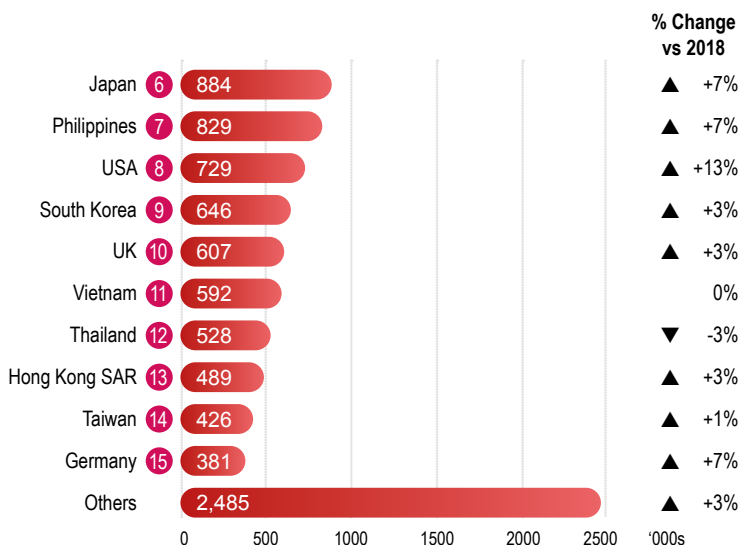
Singapore's international visitor arrivals (IVA) stood at 19.1 million for January to December 2019, a 3.3 per cent year-on-year growth.

IVA, TOP 15 MARKETS

JAN-DEC 2019: 19.1 MILLION (+3.3% VS JAN-DEC 2018)



Source: SG Arrival Cards



Mainland China (3.6 million), Indonesia (3.1 million), India (1.4 million), Malaysia (1.2 million) and Australia (1.1 million) were Singapore's top five international visitor-generating markets in 2019. These markets accounted for 55 per cent of total IVA in January to December 2019.

Largest absolute year-on-year growths were noted in Mainland China (+6%), Indonesia (+3%), and USA (+13%).



HOTEL INDUSTRY

QUARTER FOUR 2019 PERFORMANCE

Gazetted hotel room revenue for Q4 2019 was S\$1.1 billion, a growth of 11 per cent year-on-year. Average Occupancy Rate (AOR³) was at 86.3 per cent in Q4 2019, a 2.3 percentage point increase compared to the same quarter last year. Average

Room Rate (ARR⁴) grew by 3.7 per cent to S\$228, and Revenue per Available Room (RevPAR⁵) also rose by 6.5 per cent year-on-year to S\$197 in Q4 2019.

ARR, AOR and RevPAR, Q4 2019

	Average Room Rate (ARR)		Average Occupancy Rate (AOR)		Revenue Per Available Room (RevPAR)	
	S\$	%Δ	%	%ptsΔ	S\$	%Δ
Overall	228	▲ +3.7	86	▲ +2.3	197	▲ +6.5
Luxury	468	▲ +4.2	88	▲ +2.4	412	▲ +7.1
Upscale	270	▲ +1.5	86	▲ +2.2	232	▲ +4.2
Mid-tier	174	▲ +3.3	88	▲ +2.3	153	▼ +6.1
Economy	110	▲ +6.3	83	▲ +2.8	92	▲ +9.9

JANUARY TO DECEMBER 2019 PERFORMANCE

Gazetted hotel room revenue for January to December 2019 was S\$4.2 billion, a 5.2 per cent growth over the same period last year. Average Occupancy Rate (AOR) marginally increased by

0.9 percentage points to 86.9 per cent while Average Room Rate (ARR) grew 1.2 per cent to S\$221, resulting in a 2.3 per cent growth in RevPAR to reach S\$192.

ARR, AOR and RevPAR, JANUARY – DECEMBER 2019

	Average Room Rate (ARR)		Average Occupancy Rate (AOR)		Revenue Per Available Room (RevPAR)	
	S\$	%Δ	%	%ptsΔ	S\$	%Δ
Overall	221	▲ +1.2	87	▲ +0.9	192	▲ +2.3
Luxury	457	▲ +1.8	88	▲ +1.2	404	▲ +3.2
Upscale	265	▲ +0.6	86	0.0	227	▲ +0.6
Mid-tier	170	▲ +1.2	89	▲ +1.7	151	▲ +3.1
Economy	108	▲ +3.3	84	▲ +0.7	91	▲ +4.1

³ Standard AOR = [Gross lettings (Room Nights) / Available room nights] x 100

⁴ Standard ARR = [Total room revenue / Gross lettings] x 100

⁵ 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 Mar 2020. The current hotel tiers published are based on the hotels' performance in 2019. 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

Singapore
TOURISM
BOARD

Tourism Court 1 Orchard Spring Lane Singapore 247729
☎ +65 6736 6622 ☎ +65 6736 9423 🌐 stb.gov.sg