EXECUTIVE SUMMARY

The tourism sector grew in the first three quarters of 2017. From January to September 2017, International Visitor Arrivals (IVA) increased 5 per cent over the same period last year to reach 13.1 million visitors. Tourism Receipts (TR) also grew 5 per cent to reach $20.3 billion.

The 5 per cent growth in year-to-date (YTD) Q3 2017 TR was on the back of higher expenditure across most major components including Shopping, Accommodation, Sightseeing, Entertainment & Gaming (SEG) and other TR components.

Gazetted hotel room revenue was estimated at $2.8 billion for YTD Q3 2017, a year-on-year increase of 3.3 per cent. Average Occupancy Rate (AOR) increased by 1.4 percentage points to 85 per cent. Revenue per Available Room (RevPAR) decreased by 2.5 per cent year-on-year due to a lower Average Room Rate (ARR).

In the third quarter of 2017 (Q3), IVA grew 6 per cent year-on-year to reach 4.5 million visitors. TR in Q3 2017 fell 2 per cent over the same period last year to $6.9 billion. Gazetted hotel room revenue for Q3 2017 came in at an estimated S$1.0 billion, a 2.1 per cent year-on-year increase.

[Note: International visitor arrivals statistics up to December 2017 is now available here.]

QUARTER THREE 2017 HIGHLIGHTS

TOURISM RECEIPTS
TR in Q3 2017 declined
-2%
year-on-year to
S$6.9 billion

INTERNATIONAL VISITOR ARRIVALS
IVA in Q3 2017 increased by
+6%
year-on-year to reach
4.5 million

HOTEL INDUSTRY
Gazetted hotel room revenue in Q3 2017 increased
+2.1%
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:
Tourism Receipts (TR) for the third quarter (Q3 2017) was estimated at S$6.9 billion, a 2 per cent decrease over the same period last year. Other TR Components (+18%) grew while declines were observed for Shopping (-7%), Accommodation (-6%), Food & Beverage (-18%), and Sightseeing, Entertainment & Gaming (-6%).

Notes:
STB has reviewed and revised our methodology for data collection and computation of tourism receipts so as to better capture tourism performance. On 12 February 2018, Tourism Receipts from 2016 onwards have been updated based on the revised methodology.

Source: Disembarkation/Embarkation Cards and Overseas Visitor 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, business, medical, education and transit visitors.

1 All Tourism Receipts estimates are correct as of December 2017.
Excluding expenditure on Sightseeing, Entertainment & Gaming (SEG), China (S$1.2 billion), Indonesia (S$0.7 billion) and India (S$0.4 billion) were the top three TR generating markets in Q3 2017, contributing 39 per cent of TR (excluding SEG).

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

Expenditure is estimated from Overseas Visitor 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.

All tourism receipts are correct as at December 2017.
Tourism Receipts (TR) for January to September were estimated at S$20.3 billion, a 5 per cent growth over the same period last year. Major components such as Shopping (+9%), Accommodation (+2%) and Sightseeing, Entertainment & Gaming (+6%) grew while Food & Beverage declined (-5%).

Excluding expenditure on Sightseeing, Entertainment & Gaming (SEG), China (S$3.1 billion), Indonesia (S$2.0 billion) and India (S$1.1 billion) were the top three TR generating markets for January to September 2017, contributing 38 per cent to total TR (excluding SEG). Among the top 10 TR markets, China, UK and USA registered the highest absolute year-on-year growth in TR (excluding SEG).

Expenditure is estimated from Overseas Visitor 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 September were estimated at S$20.3 billion, a 5 per cent growth over the same period last year. Major components such as Shopping (+9%), Accommodation (+2%) and Sightseeing, Entertainment & Gaming (+6%) grew while Food & Beverage declined (-5%).

Tourism Receipts estimates are correct as at December 2017.
Singapore’s international visitor arrivals (IVA) stood at 13.1 million for January to September 2017, a 5 per cent year-on-year growth.

IVA, TOP 15 MARKETS
JAN-SEP 2017: 13.1 MILLION (+5% VS JAN-SEP 2016)

1. CHINA ▲+10% 2,487
2. INDONESIA ▲+2% 2,171
3. INDIA ▲+16% 951
4. MALAYSIA ▲+0% 832
5. AUSTRALIA ▲+5% 804

Source: Disembarkation/Embarkation Cards

China (2,487,000), Indonesia (2,171,000), India (951,000), Malaysia (832,000) and Australia (804,000) were Singapore’s top five international visitor-generating markets for January to September 2017. These markets accounted for 55 per cent of total IVA for the same period.

China (+10%), India (+16%), and Vietnam (+13%) registered the largest absolute year-on-year growth while Hong Kong (-17%), Thailand (-4%) and Taiwan (-3%) posted the largest absolute year-on-year declines.

Visitor arrival figures quoted are rounded to the nearest thousands.
**HOTEL INDUSTRY**

**QUARTER THREE 2017 PERFORMANCE**

Gazetted hotel room revenue for Q3 2017 came in at an estimated S$1.0 billion, an increase of 2.1 per cent year-on-year. Average Occupancy Rate (AOR) is at 88 per cent in Q3 2017, a 2.0 percentage point increase compared with the same quarter last year. Average Room Rate (ARR) decreased 3.2 per cent to S$219 while Revenue per Available Room (RevPAR) decreased 1.0 per cent year-on-year to S$192 in Q3 2017.

<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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<tr>
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<td>S$</td>
<td>% Δ</td>
<td>%</td>
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<tr>
<td>Overall</td>
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<td>▼ -3.2</td>
<td>88</td>
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<tr>
<td>Luxury</td>
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<td>▼ -5.1</td>
<td>83</td>
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<tr>
<td>Economy</td>
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<td>▲ +4.3</td>
<td>86</td>
</tr>
</tbody>
</table>

**JANUARY TO SEPTEMBER 2017 PERFORMANCE**

Gazetted hotel room revenue for January to September 2017 was estimated at S$2.8 billion, a 3.3 per cent increase over the same period last year. From January to September 2017, AOR increased by 1.4 percentage points to 85 per cent. ARR fell 4.1 per cent to S$215 while RevPAR decreased by 2.5 per cent to S$184.

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<td>Economy</td>
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</tbody>
</table>

**NOTE:**

STB has reviewed and updated our data estimation methodology so as to better represent the overall performance of the hotel industry (for gazetted hotels) in a more accurate and timely manner. The updated methodology takes into account estimates of statistics for hotels that do not submit their data in time for the monthly reports, especially hotels that are newly-opened.

Estimations are based on past hotel submissions as well as performance data of properties with similar size and pricing.

On 29 Jan 2018, hotel performance statistics from 1 Jan 2007 onwards have been updated based on the revised methodology.

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 25 January 2018.

The 2017 hotel tiers published are based on the hotels’ performance in 2016. The response rate across the tiers may vary.

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