



# TOURISM SECTOR PERFORMANCE

Q1 2017 Report

## EXECUTIVE SUMMARY

The tourism sector saw good growth in Q1 2017. International Visitor Arrivals (IVA) increased 4 per cent over the same period in 2016 to reach 4.3 million visitors while Tourism Receipts (TR) grew by 15 per cent to reach \$6.4 billion.

The strong growth in TR was due to higher visitor arrivals and growth in all major TR components, except Sightseeing, Entertainment & Gaming, which held steady.

Gazetted hotel room revenue was estimated at \$0.8 billion for Q1 2017, a year-on-year decline of 1.3 per cent. Average Occupancy Rate (AOR) grew by 1.3 per cent year-on-year while Revenue per Available Room (RevPar) declined by 1.2 per cent year-on-year due to a lower Average Room Rate (ARR).

## QUARTER ONE 2017 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 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/statistics-and-market-insights/Pages/statistics-Visitor-Arrivals.aspx>



## QUARTER ONE 2017 PERFORMANCE

### TOURISM RECEIPTS BY MAJOR COMPONENTS<sup>1</sup>

TOURISM RECEIPTS: S\$6.4 BILLION (+15% VS Q1 2016)

All percentage changes are vs same period in 2016

% Share



Tourism Receipts (TR) for the first quarter (Q1 2017) was estimated at S\$6.4 billion, a 15 per cent growth over the same period last year. TR grew across all major components,

except Sightseeing, Entertainment & Gaming, which held steady.

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.

<sup>1</sup> All Tourism Receipts estimates are correct as of July 2017.

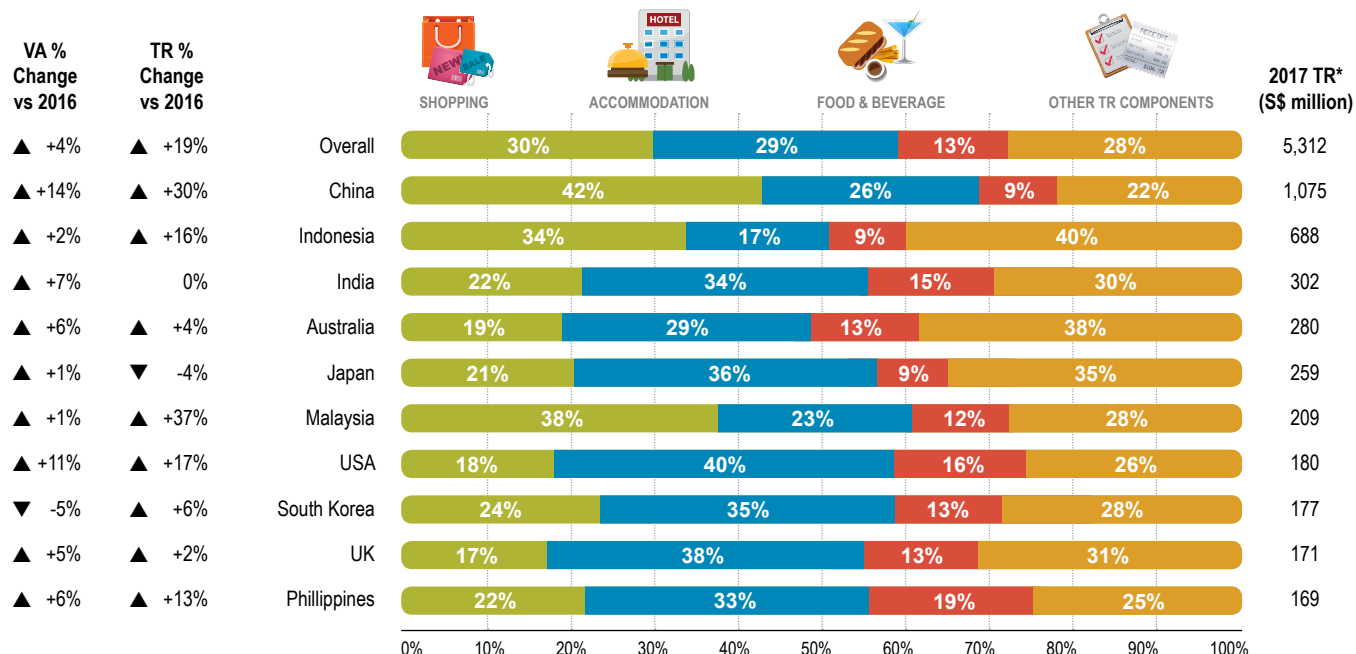
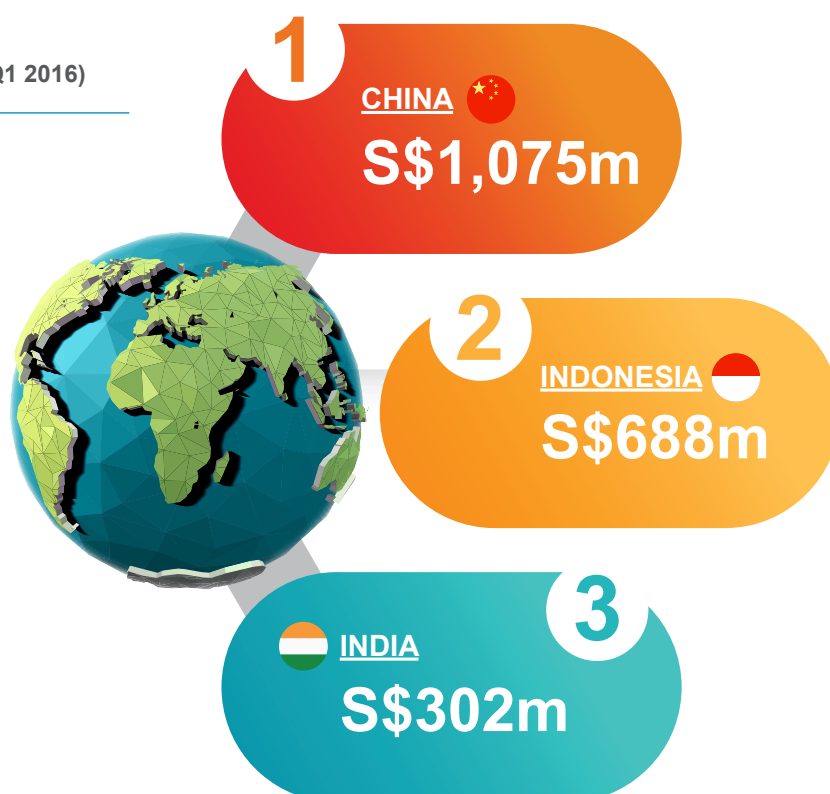


## QUARTER ONE 2017 PERFORMANCE

### TOURISM RECEIPTS BY MAJOR COMPONENTS, TOP 10 MARKETS<sup>2</sup>

TOURISM RECEIPTS: \$6.4 BILLION (+15% VS Q1 2016)

Excluding expenditure on Sightseeing, Entertainment & Gaming (SEG), China (S\$1,075 million), Indonesia (S\$688 million) and India (S\$302 million) were the top three TR generating markets in Q1 2017.



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.

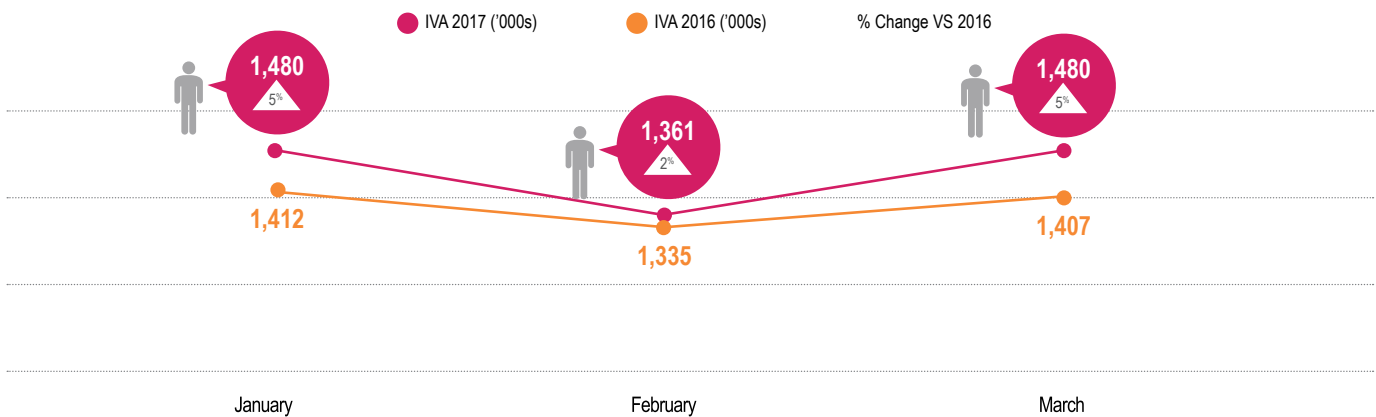
<sup>2</sup> All tourism receipts are correct as at July 2017.



## JANUARY TO MARCH 2017 PERFORMANCE

### INTERNATIONAL VISITOR ARRIVALS (IVA)<sup>3</sup>

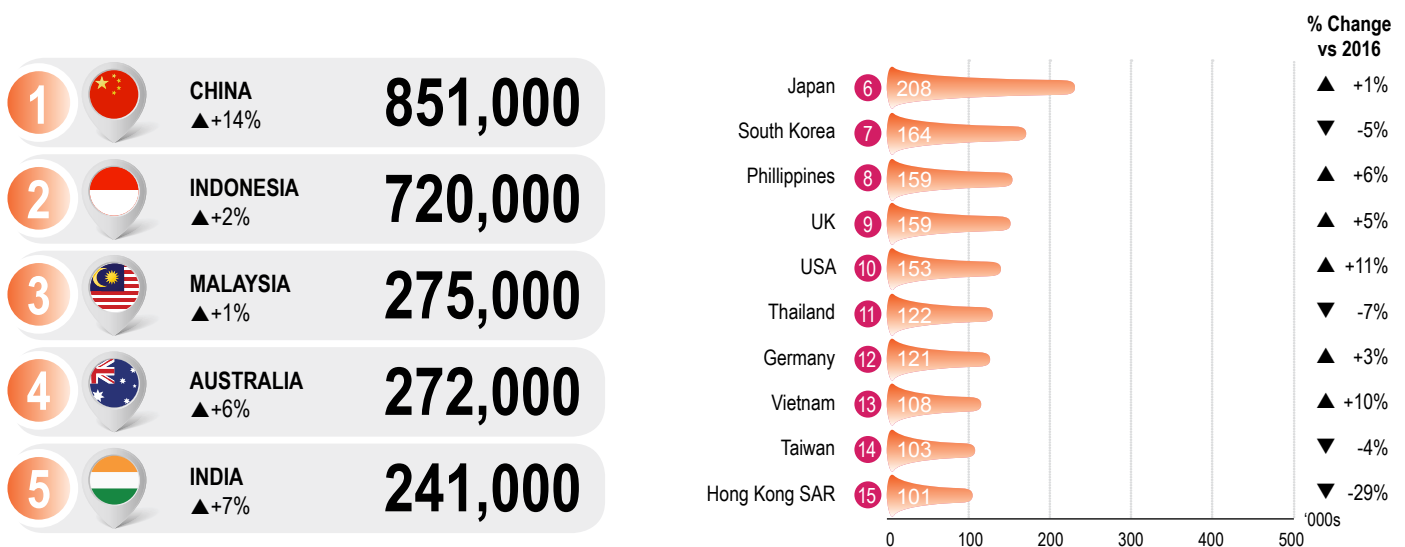
JAN-MAR 2017: 4.3 MILLION (+4% VS JAN-MAR 2016), VISITOR DAYS: 14.6 MILLION DAYS (+2%)



In Q1 2017, Singapore's international visitor arrivals (IVA) grew by 4 per cent year-on-year to reach 4.3 million.

### IVA, TOP 15 MARKETS

JAN-MAR 2017: 4.3 MILLION (+4% VS JAN-MAR 2016), VISITOR DAYS: 14.6 MILLION DAYS (+2%)



Source: Disembarkation/Embarkation Cards

China (851,000), Indonesia (720,000), Malaysia (275,000), Australia (272,000), and India (241,000) were Singapore's top five international visitor-generating markets in Q1 2017. These markets accounted for 55 per cent of total IVA during this period.

China (+14%), India (+7%) and Indonesia (+2%) registered the largest absolute year-on-year growth while Hong Kong (-29%), Thailand (-7%) and South Korea (-5%) posted year-on-year declines.

<sup>3</sup> Visitor arrival figures quoted are rounded to the nearest thousands.



## QUARTER ONE 2017 PERFORMANCE

### HOTEL INDUSTRY

Gazetted hotel room revenue<sup>4</sup> for Q1 2017 came in at an estimated S\$0.8 billion, a decline of 1.3 per cent year-on-year. Average Occupancy Rate (AOR<sup>5</sup>) came in at 86 per cent in Q1 2017, a 1.3 percentage point increase compared with the same

quarter last year while Average Room Rate (ARR<sup>6</sup>) declined by 2.8 per cent to \$233 in Q1 2017. Revenue per Available Room (RevPAR<sup>7</sup>) slipped 1.2 per cent year-on-year to \$199 in Q1 2017 due mainly to a lower ARR.

ARR, AOR and RevPAR, Q1 2017

	Average Room Rate (ARR)		Average Occupancy Rate (AOR)		Revenue Per Available Room (RevPAR)	
	\$	%Δ	%	%ptsΔ	\$	%Δ
Overall	233	▼ -2.8	86	▲ +1.3	199	▼ -1.2
Luxury	463	▲ +4.3	86	▼ -0.4	397	▲ +3.7
Upscale	252	▼ -4.9	88	▲ +2.7	223	▼ -1.9
Mid-tier	165	▼ -3.9	86	▼ -0.1	141	▼ -4.0
Economy	98	▼ -2.4	81	▲ +5.4	79	▲ +4.6

<sup>4</sup> Estimates based on Monthly Hotel Returns as at 29 June 2017, covering 77% of all gazetted hotel rooms.

<sup>5</sup> Standard AOR = [Gross lettings (Room Nights) / Available room nights] x 100

<sup>6</sup> Standard ARR = [Total room revenue / Gross lettings] x 100

<sup>7</sup> 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 June 2017. The current hotel tiers published are based on the hotels' performance in 2016. 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