# TOURISM SECTOR PERFORMANCE

**Q3 2020 Report**

# Q3 TOURISM SECTOR
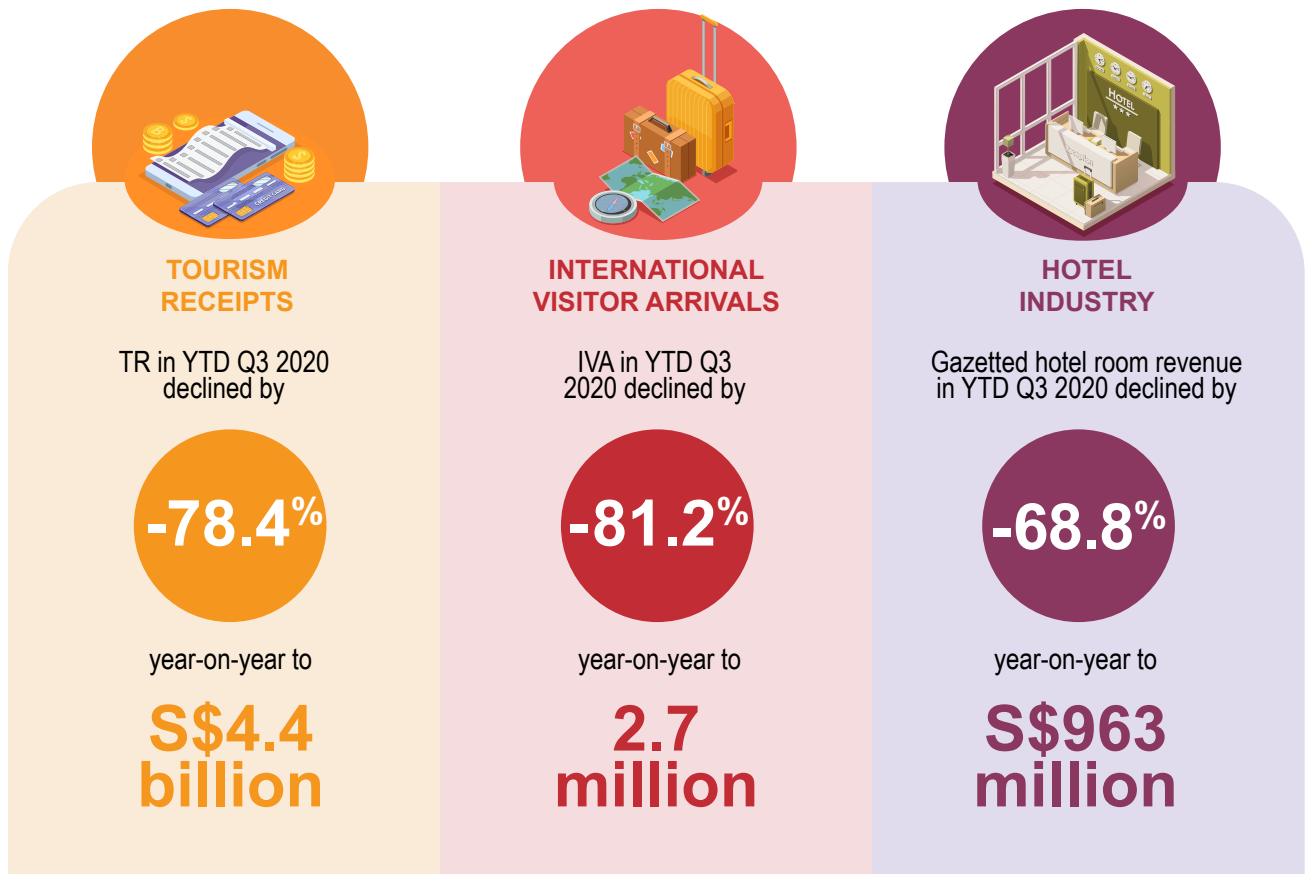# 2020 PERFORMANCE

## EXECUTIVE SUMMARY

The tourism sector in YTD Q3 2020 recorded declines in International Visitor Arrivals (IVA) and Tourism Receipts (TR) amid the COVID-19 pandemic. From January to September 2020, IVA declined 81.2 per cent over the same period last year to 2.7 million visitors.

TR is at S$4.4 billion, a decline of 78.4 per cent compared to the same period last year. The decrease in TR can be observed across all components - Shopping, Accommodation, F&B, SEG and Other TR Components.

Gazetted hotel room revenue for YTD Q3 2020 is at S$963 million, a year-on-year decline of 68.8 per cent. Average Occupancy Rate (AOR) dropped by 31.4 percentage points to 55.8 per cent while Average Room Rate (ARR) declined 30.3 per cent to S$145, resulting in a 55.4 per cent decline in RevPAR to S$81.

[Note: International visitor arrivals statistics up to November 2020 is now available here.]

## YTD Q3 2020 HIGHLIGHTS

**TOURISM RECEIPTS**

TR in YTD Q3 2020 declined by

**-78.4%**

year-on-year to

**S$4.4 billion**

**INTERNATIONAL VISITOR ARRIVALS**

IVA in YTD Q3 2020 declined by

**-81.2%**

year-on-year to

**2.7 million**

**HOTEL INDUSTRY**

Gazetted hotel room revenue in YTD Q3 2020 declined by

**-68.8%**

year-on-year to

**S$963 million**

## NOTES

This quarterly report provides a summary of key statistics on tourism receipts, international visitor arrivals and gazetted hotels. The analyses 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.
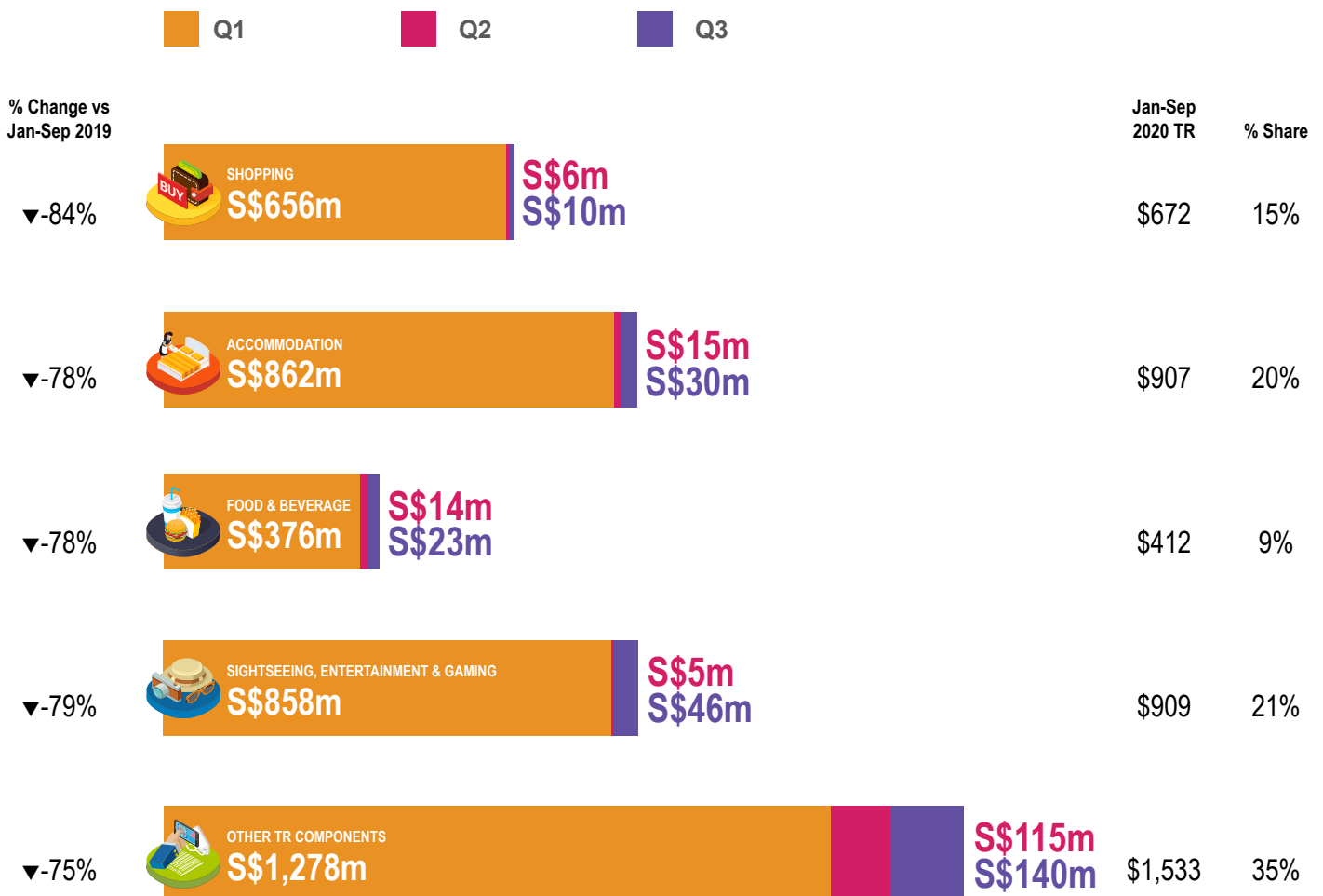
Interact with International Visitor Arrivals and Hotel Data at:
stan.stb.gov.sg

**TOURISM RECEIPTS**

# JANUARY TO SEPTEMBER 2020 PERFORMANCE

## TOURISM RECEIPTS BY MAJOR COMPONENTS[1]
### TOURISM RECEIPTS: S$4.4BILLION (-78.4% VS Jan-Sep 2019)

| | Q1 | Q2 | Q3 |
|---|---|---|---|

| % Change vs Jan-Sep 2019 | | Jan-Sep 2020 TR | % Share |
|---|---|---|---|
| ▼-84% | **SHOPPING** S$656m — S$6m / S$10m | $672 | 15% |
| ▼-78% | **ACCOMMODATION** S$862m — S$15m / S$30m | $907 | 20% |
| ▼-78% | **FOOD & BEVERAGE** S$376m — S$14m / S$23m | $412 | 9% |
| ▼-79% | **SIGHTSEEING, ENTERTAINMENT & GAMING** S$858m — S$5m / S$46m | $909 | 21% |
| ▼-75% | **OTHER TR COMPONENTS** S$1,278m — S$115m / S$140m | $1,533 | 35% |

Source: Disembarkation/Embarkation Cards, 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, business, medical, education-related items, and by transit/transfer visitors.

Tourism Receipts (TR) for January to September is at S$4.4 billion, a 78.4 per cent decline over the same period last year due to the impact of COVID-19. Large declines were recorded across all components – Shopping (-84%), Accommodation (-78%), F&B (-78%), SEG (-79%) and Other TR Components (-75%).

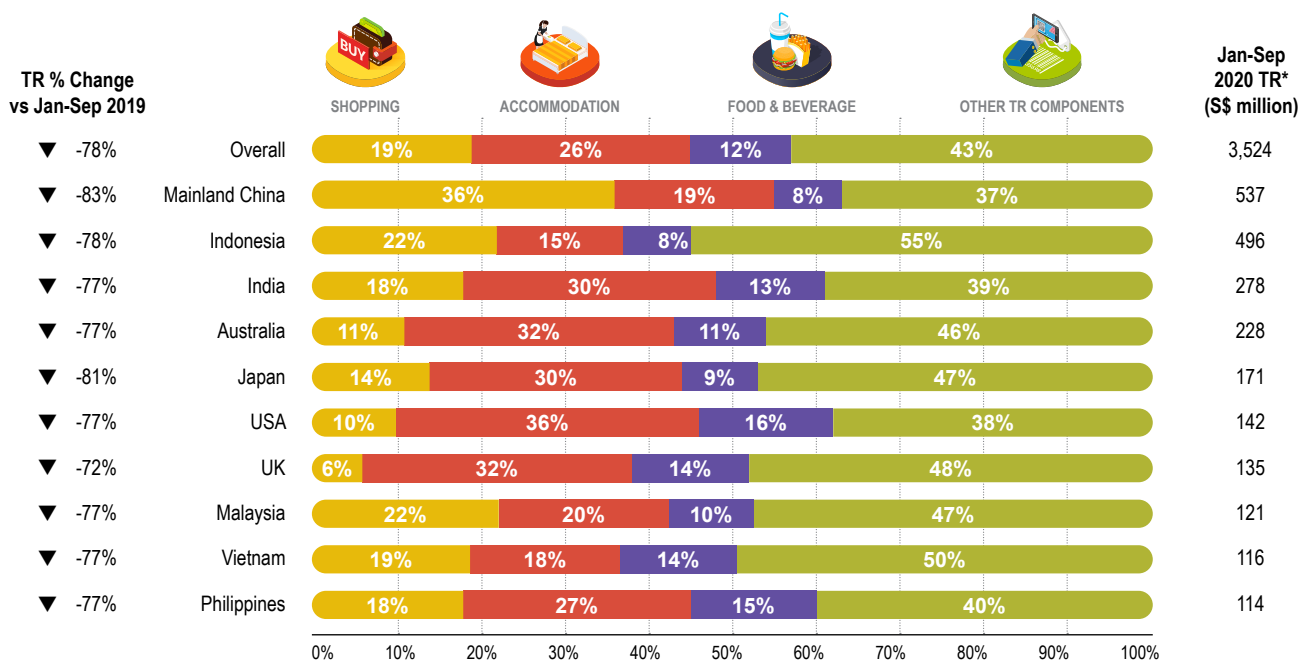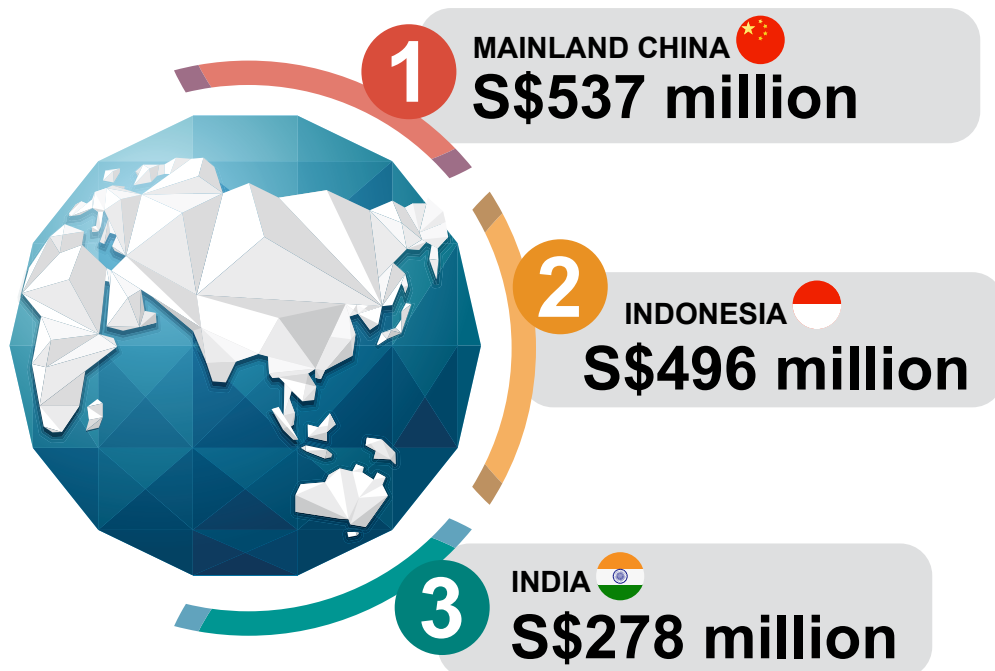[1] All Tourism Receipts estimates are correct as of January 2021.

# JANUARY TO SEPTEMBER 2020 PERFORMANCE

## TOURISM RECEIPTS BY MAJOR COMPONENTS, TOP 10 MARKETS

**TOURISM RECEIPTS\* : S$3.5 BILLION (-78.2% VS JAN-SEP 2019)**

Excluding expenditure on Sightseeing, Entertainment & Gaming (SEG), Mainland China (S$537 million), Indonesia (S$496 million) and India (S$278 million) were the top three TR generating markets for January to September 2020, contributing to 39 per cent of TR (excluding SEG), with most generated in the earlier part of the year before the pandemic.

Mainland China, Indonesia and India also registered the highest absolute year-on-year declines in TR (excluding SEG) during this period.

**1** MAINLAND CHINA
## S$537 million

**2** INDONESIA
## S$496 million

**3** INDIA
## S$278 million

| TR % Change vs Jan-Sep 2019 | | SHOPPING | ACCOMMODATION | FOOD & BEVERAGE | OTHER TR COMPONENTS | Jan-Sep 2020 TR* (S$ million) |
|---|---|---|---|---|---|---|
| ▼ -78% | Overall | 19% | 26% | 12% | 43% | 3,524 |
| ▼ -83% | Mainland China | 36% | 19% | 8% | 37% | 537 |
| ▼ -78% | Indonesia | 22% | 15% | 8% | 55% | 496 |
| ▼ -77% | India | 18% | 30% | 13% | 39% | 278 |
| ▼ -77% | Australia | 11% | 32% | 11% | 46% | 228 |
| ▼ -81% | Japan | 14% | 30% | 9% | 47% | 171 |
| ▼ -77% | USA | 10% | 36% | 16% | 38% | 142 |
| ▼ -72% | UK | 6% | 32% | 14% | 48% | 135 |
| ▼ -77% | Malaysia | 22% | 20% | 10% | 47% | 121 |
| ▼ -77% | Vietnam | 19% | 18% | 14% | 50% | 116 |
| ▼ -77% | Philippines | 18% | 27% | 15% | 40% | 114 |

0%  10%  20%  30%  40%  50%  60%  70%  80%  90%  100%

Expenditure is estimated from Overseas Visitors Survey and other secondary data sources.
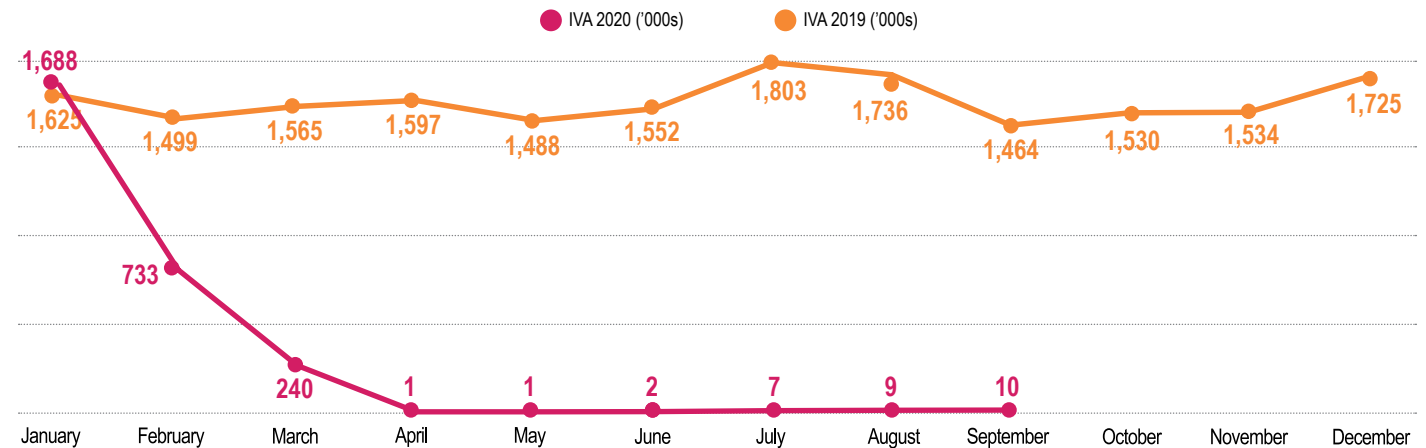Other TR components include expenditure on airfares on Singapore-based carriers, port taxes, local transportation, business, medical, education-related items and by transit/transfer visitors.
\* Sightseeing, Entertainment & Gaming has been excluded in the country analysis due to commercial sensitivity.

# JANUARY TO SEPTEMBER 2020 PERFORMANCE

## INTERNATIONAL VISITOR ARRIVALS (IVA)

**JAN-SEP 2020: 2.7 MILLION (-81.2% VS JAN-SEP 2019), VISITOR DAYS: 11.3 MILLION DAYS (-76.8%)**



● IVA 2020 ('000s)   ● IVA 2019 ('000s)

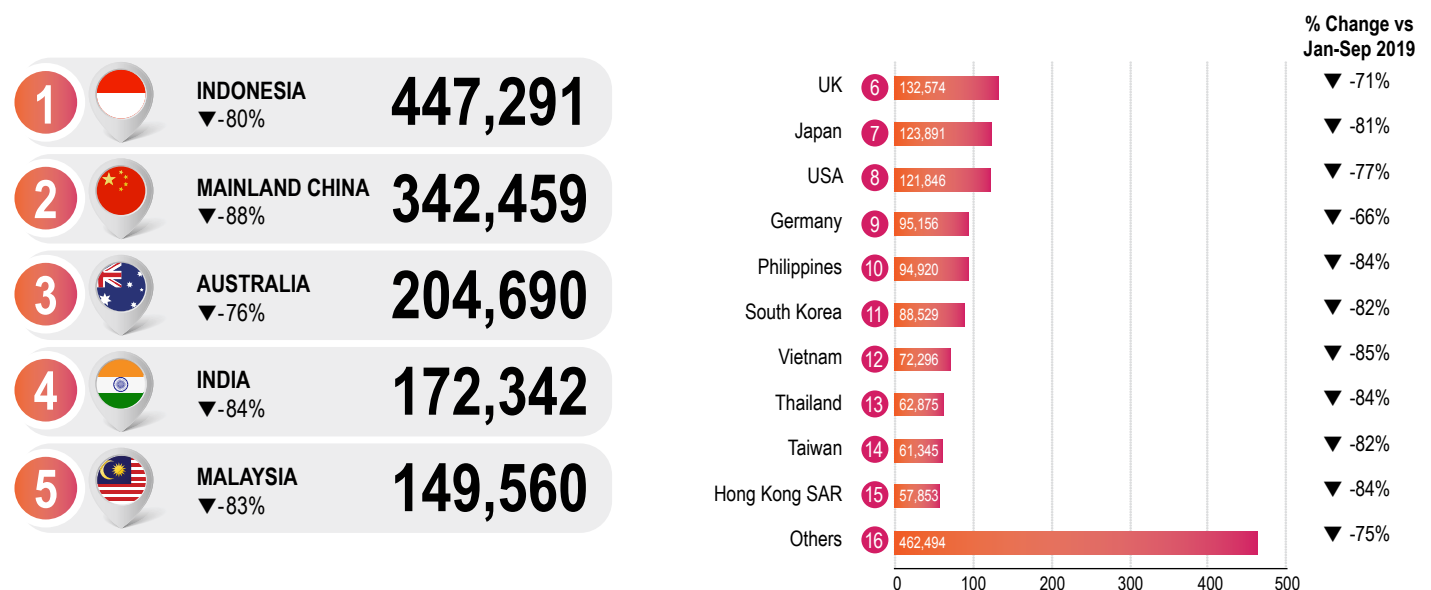| Month | IVA 2020 | IVA 2019 |
|---|---|---|
| January | 1,688 | 1,625 |
| February | 733 | 1,499 |
| March | 240 | 1,565 |
| April | 1 | 1,597 |
| May | 1 | 1,488 |
| June | 2 | 1,552 |
| July | 7 | 1,803 |
| August | 9 | 1,736 |
| September | 10 | 1,464 |
| October | | 1,530 |
| November | | 1,534 |
| December | | 1,725 |

Source: Disembarkation/Embarkation cards and SG Arrival Cards
Data updated as at 14 January 2021.

Singapore's international visitor arrivals (IVA) stood at 2.7 million for January to September 2020, a 81.2 per cent year-on-year decline.

## IVA, TOP 15 MARKETS

**JAN-SEP 2020: 2.7 MILLION (-81.2% VS JAN-SEP 2019)**

| | | | | |
|---|---|---|---|---|
| 1 | 🇮🇩 | **INDONESIA** ▼-80% | **447,291** | |
| 2 | 🇨🇳 | **MAINLAND CHINA** ▼-88% | **342,459** | |
| 3 | 🇦🇺 | **AUSTRALIA** ▼-76% | **204,690** | |
| 4 | 🇮🇳 | **INDIA** ▼-84% | **172,342** | |
| 5 | 🇲🇾 | **MALAYSIA** ▼-83% | **149,560** | |

**% Change vs Jan-Sep 2019**

| Market | | Value | % Change |
|---|---|---|---|
| UK | 6 | 132,574 | ▼ -71% |
| Japan | 7 | 123,891 | ▼ -81% |
| USA | 8 | 121,846 | ▼ -77% |
| Germany | 9 | 95,156 | ▼ -66% |
| Philippines | 10 | 94,920 | ▼ -84% |
| South Korea | 11 | 88,529 | ▼ -82% |
| Vietnam | 12 | 72,296 | ▼ -85% |
| Thailand | 13 | 62,875 | ▼ -84% |
| Taiwan | 14 | 61,345 | ▼ -82% |
| Hong Kong SAR | 15 | 57,853 | ▼ -84% |
| Others | 16 | 462,494 | ▼ -75% |

Source: Disembarkation/Embarkation Cards and SG Arrival Cards
Data updated as at 14 January 2021

Indonesia (447K), Mainland China (342K), Australia (205K), India (172K) and Malaysia (150K) were Singapore's top five international visitor-generating markets in YTD Q3 2020. These markets accounted for 49 per cent of total IVA in January to September 2020.

Largest absolute year-on-year declines were noted for Mainland China (-88%), Indonesia (-80%), and India (-84%).

# HOTEL INDUSTRY

## JANUARY TO SEPTEMBER 2020 PERFORMANCE

Gazetted hotel room revenue for January to September 2020 was S$963 million, a decline of 68.8 per cent year-on-year. Average Occupancy Rate (AOR[2]) was at 55.8 per cent in YTD Q3 2020, a 31.4 percentage point decline compared to the same period last year. Average Room Rate (ARR[3]) declined by 30.3 per cent to S$145, and Revenue per Available Room (RevPAR[4]) also dropped by 55.4 per cent year-on-year to S$81 in YTD Q3 2020.

**ARR, AOR and RevPAR, January – September 2020**

| | Average Room Rate (ARR) | | Average Occupancy Rate (AOR) | | Revenue Per Available Room (RevPAR) | |
|---|---|---|---|---|---|---|
| | S$ | %△ | % | %pts△ | S$ | %△ |
| Overall | 145 | ▼ -30.3 | 56 | ▼ -31.4 | 81 | ▼ -55.4 |
| Luxury | 373 | ▼ -17.6 | 43 | ▼ -45.8 | 160 | ▼ -60.2 |
| Upscale | 206 | ▼ -21.4 | 47 | ▼ -38.6 | 98 | ▼ -56.7 |
| Mid-tier | 118 | ▼ -29.9 | 60 | ▼ -28.9 | 71 | ▼ -52.6 |
| Economy | 69 | ▼ -23.0 | 63 | ▼ -21.2 | 44 | ▼ -42.3 |

Data updated as at 14 January 2021.

[2] Standard AOR = [Gross lettings (Room Nights) / Available room nights] x 100
[3] Standard ARR = [Total room revenue / Gross lettings] x 100
[4] 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 21 December 2020. The current hotel tiers published are based on the hotels' performance in 2019. The response rate across the tiers may vary. These figures exclude government-related transactions for COVID-related uses.

| | | |
|---|---|---|
| **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