

# TOURISM SECTOR PERFORMANCE

1H 2020 Report



## EXECUTIVE SUMMARY

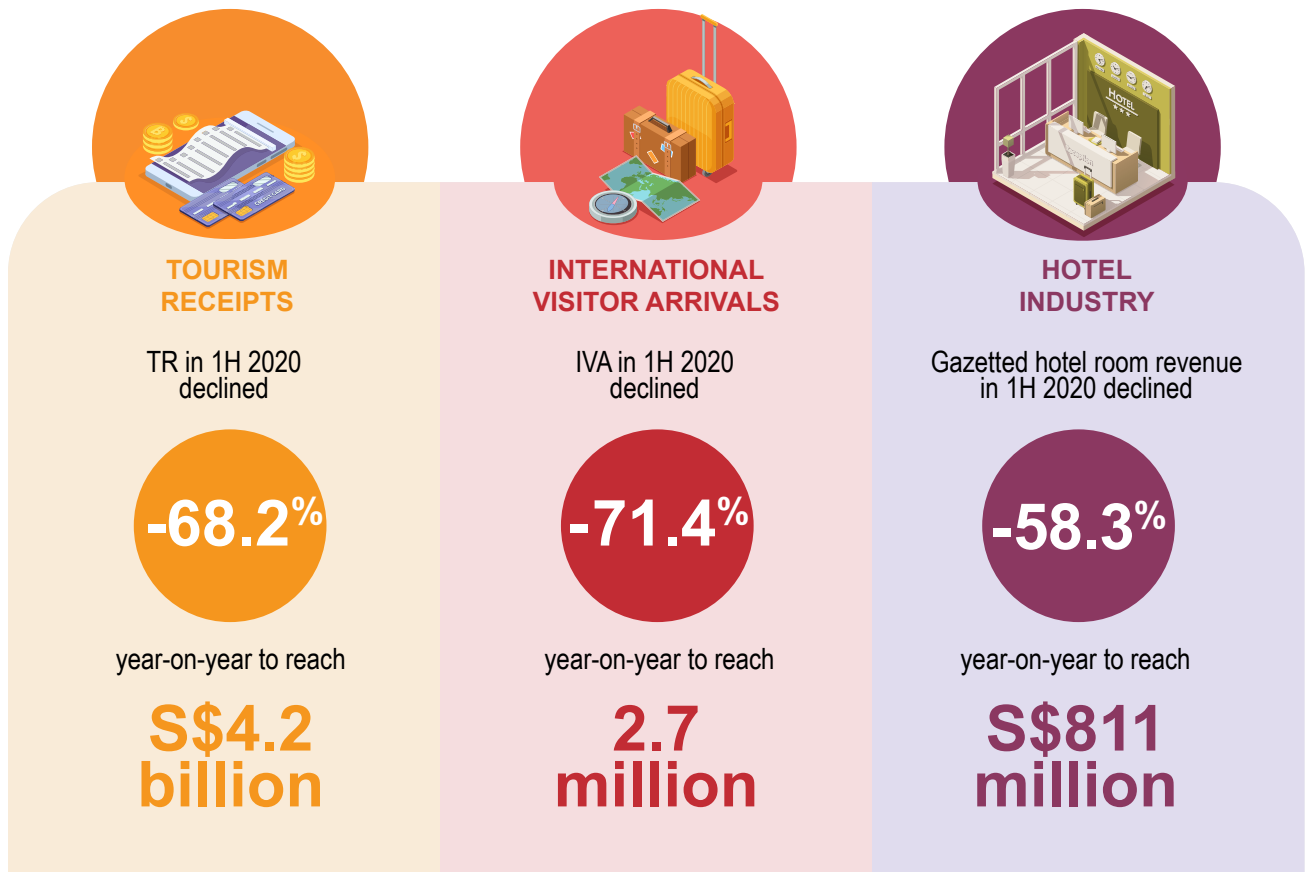
The tourism sector in 1H 2020 recorded declines in International Visitor Arrivals (IVA) and Tourism Receipts (TR) amid the COVID-19 pandemic. From January to June 2020, IVA declined 71.4 per cent over the same period last year to 2.7 million visitors. The vast majority of the IVA numbers came from January and February before COVID-19-related travel restrictions were imposed.

TR is at S\$4.2 billion, a decline of 68.2 per cent compared to the same period last year. The decrease in TR can be observed across all major components.

Gazetted hotel room revenue for 1H 2020 is at S\$811 million, a year-on-year decline of 58.3 per cent. Average Occupancy Rate (AOR) dropped by 31.6 percentage points to 53.5 per cent while Average Room Rate (ARR) declined 22.3 per cent to S\$167, resulting in a 51.2 per cent decline in RevPAR to S\$89.

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

## 1H 2020 HIGHLIGHTS



## NOTES

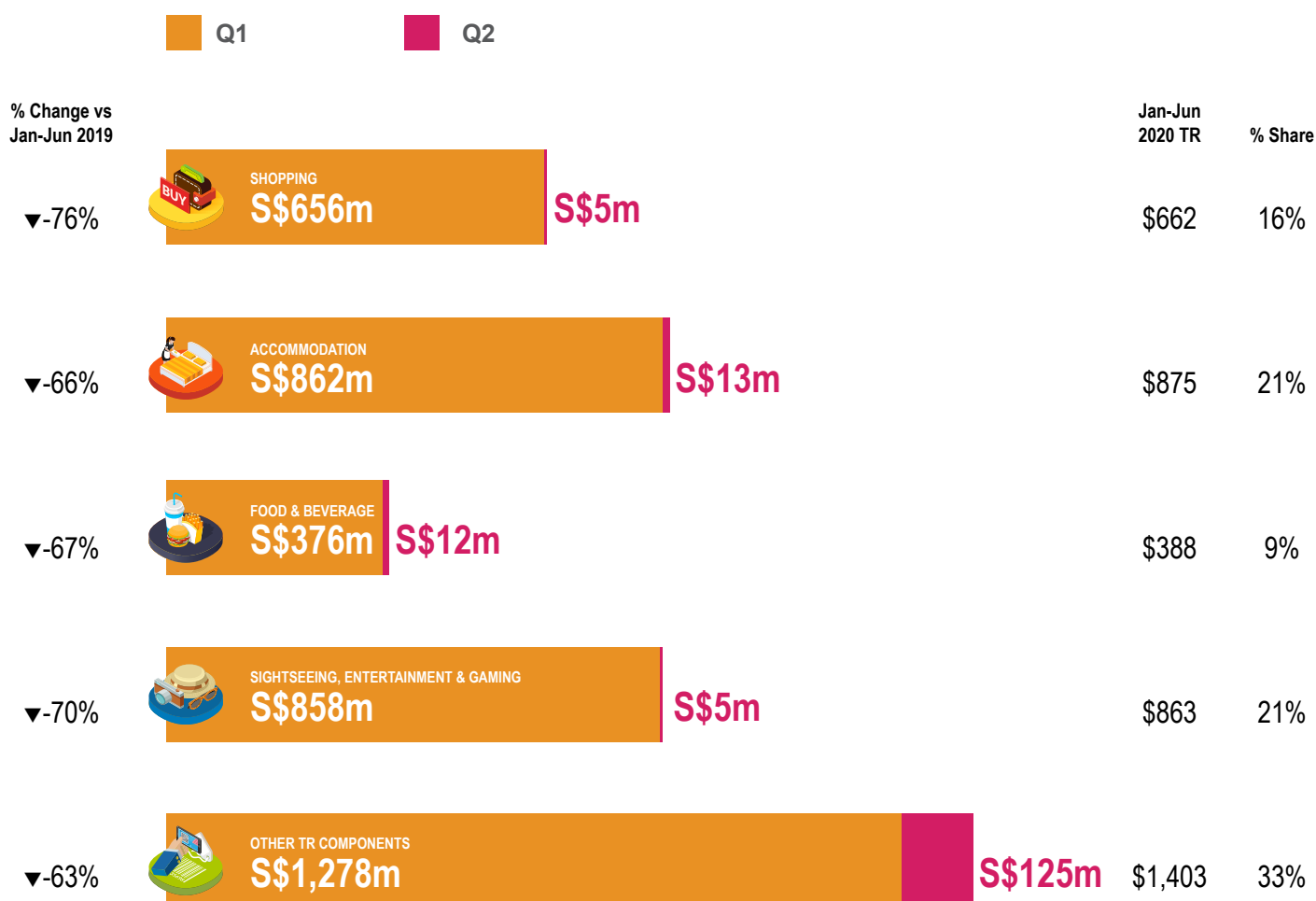
This quarterly report provides a summary of key statistics on tourism receipts, international visitor arrivals and gazetted hotels. The analysis in this report is based on data from a variety of sources, including SG Arrival Cards (SGAC), Disembarkation/Embarkation (DE) Cards, the Overseas Visitors Survey (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.



## JANUARY TO JUNE 2020 PERFORMANCE

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

TOURISM RECEIPTS: S\$4.2BILLION (-68.2% VS Jan-Jun 2019)



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 June is at S\$4.2 billion, a 68.2 per cent decline over the same period last year due to the impact of COVID-19. Large declines were recorded

across all major components – Shopping (-76%), Accommodation (-66%), F&B (-67%), SEG (-70%) and Other TR Components (-63%).

<sup>1</sup> All Tourism Receipts estimates are correct as of October 2020.



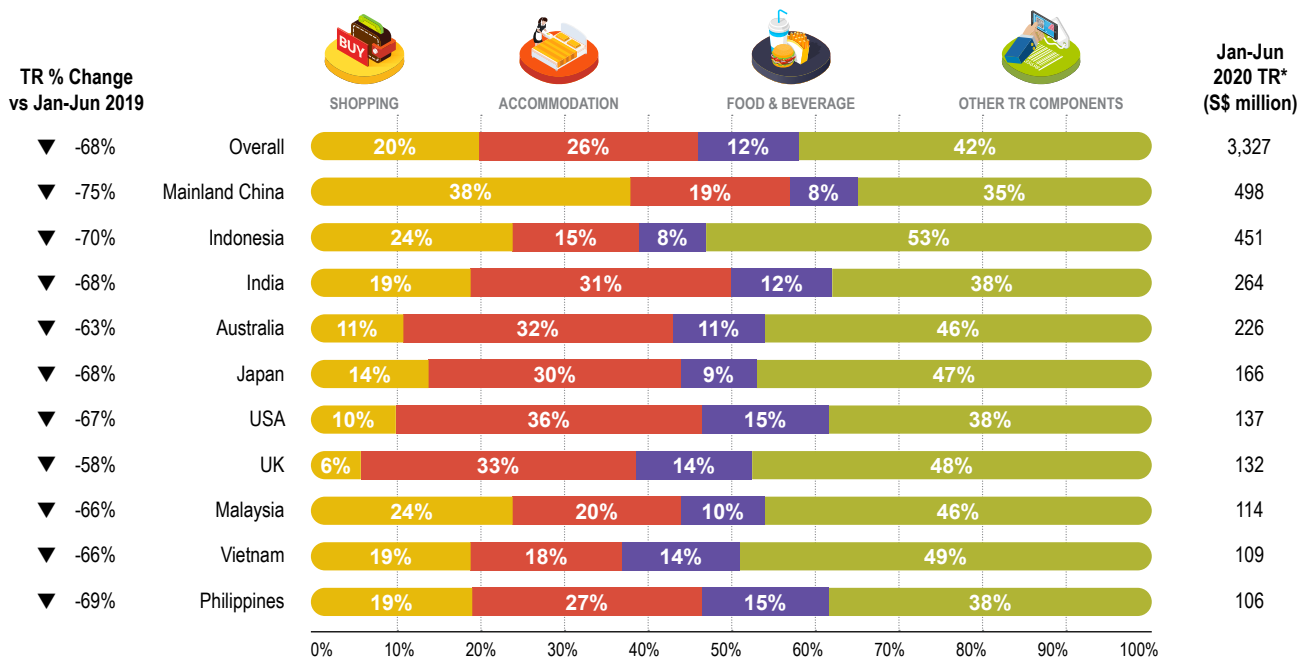
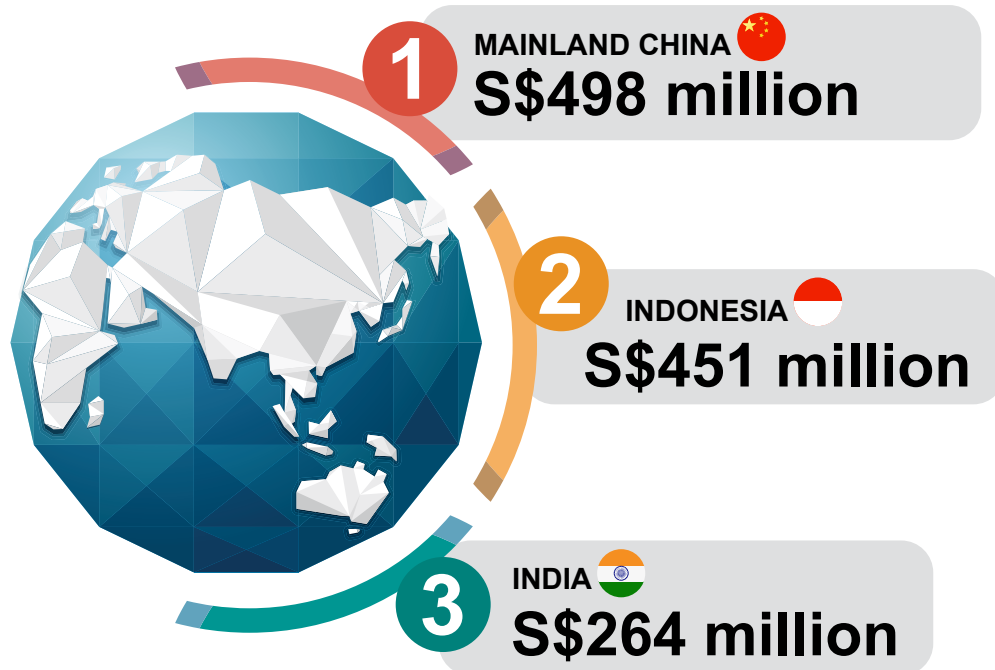
## JANUARY TO JUNE 2020 PERFORMANCE

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

TOURISM RECEIPTS\* : S\$3.3 BILLION (-67.6% VS JAN-JUN 2019)

Excluding expenditure on Sightseeing, Entertainment & Gaming (SEG), Mainland China (S\$498 million), Indonesia (S\$451 million) and India (S\$264 million) were the top three TR generating markets for January to June 2020, contributing to 38 per cent of TR (excluding SEG), with most coming from the earlier part of the year before COVID-19-related travel restrictions.

Nevertheless, these were the markets among the most heavily hit by COVID-19, registering the highest absolute year-on-year declines in TR (excluding SEG) during this period.



Expenditure is estimated from Overseas Visitors Survey and other secondary data sources.

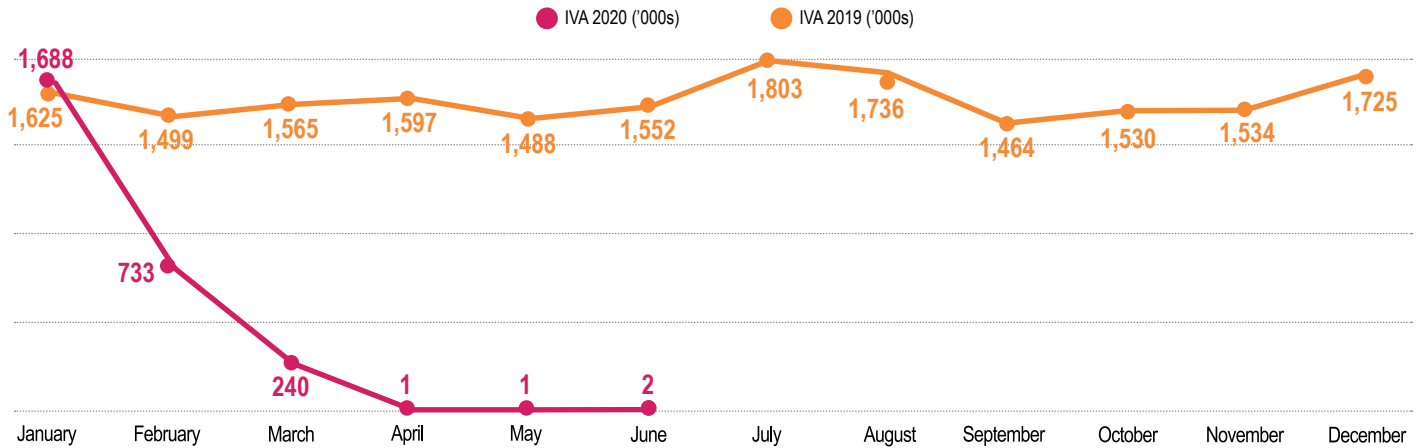
Other TR components include expenditure on airfares on Singapore-based carriers, port taxes, local transportation, business, medical, education-related items and by transit/transfer visitors.

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

# JANUARY TO JUNE 2020 PERFORMANCE

## INTERNATIONAL VISITOR ARRIVALS (IVA)

JAN-JUN 2020: 2.7 MILLION (-71.4% VS JAN-JUN 2019), VISITOR DAYS: 10.9 MILLION DAYS (-65.8%)

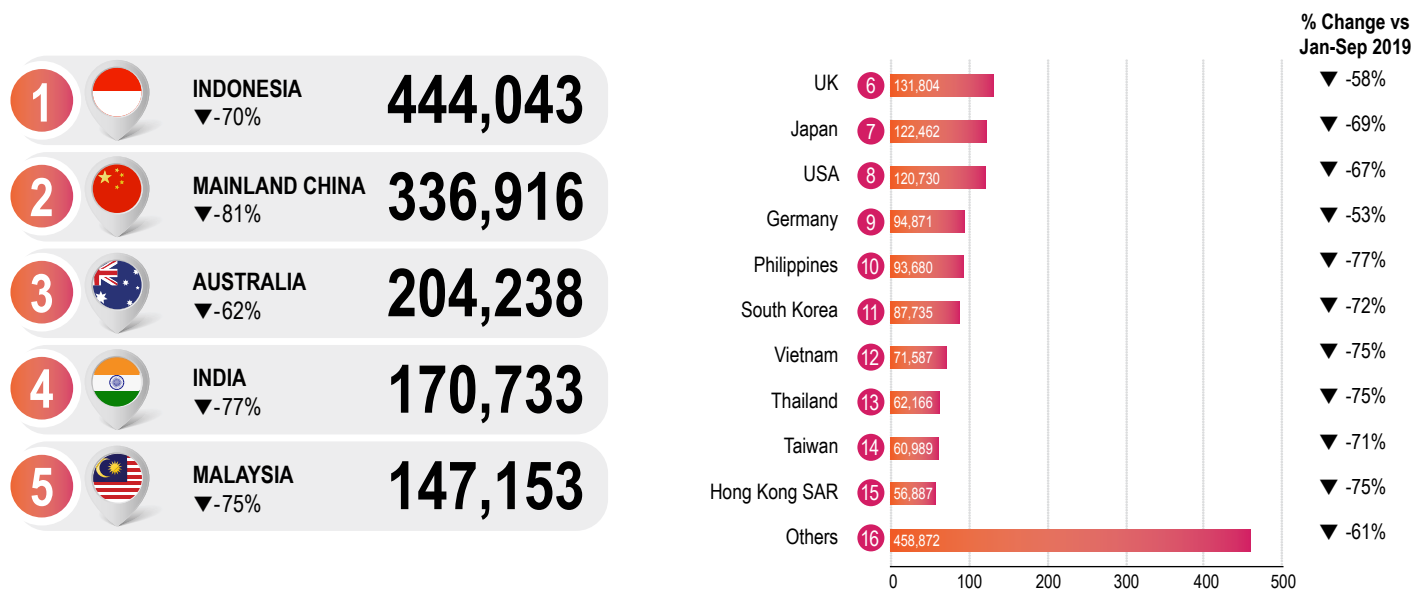


Source: Disembarkation/Embarkation cards and SG Arrival Cards  
Data updated as at 22 October 2020.

Singapore's international visitor arrivals (IVA) stood at 2.7 million for January to June 2020, a 71.4 per cent year-on-year decline.

## IVA, TOP 15 MARKETS

JAN-JUN 2020: 2.7 MILLION (-71.4% VS JAN-JUN 2019)



Source: Disembarkation/Embarkation Cards and SG Arrival Cards  
Data updated as at 22 October 2020.

Indonesia (444K), Mainland China (337K), Australia (204K), India (171K) and Malaysia (147K) were Singapore's top five international visitor-generating markets in 1H 2020. These markets accounted for 49 per cent of total IVA in January to June 2020.

Largest absolute year-on-year declines were noted for Mainland China (-81%), Indonesia (-70%), and Malaysia (-75%).



## HOTEL INDUSTRY

### JANUARY TO JUNE 2020 PERFORMANCE

Gazetted hotel room revenue for January to June 2020 was S\$811 million, a decline of 58.3 per cent year-on-year. Average Occupancy Rate (AOR<sup>2</sup>) was at 53.5 per cent in 1H 2020, a 31.6 percentage point decline compared to the same period last year.

Average Room Rate (ARR<sup>3</sup>) declined by 22.3 per cent to S\$167, and Revenue per Available Room (RevPAR<sup>4</sup>) also dropped by 51.2 per cent year-on-year to S\$89 in 1H 2020.

ARR, AOR and RevPAR, January – June 2020

	Average Room Rate (ARR)		Average Occupancy Rate (AOR)		Revenue Per Available Room (RevPAR)	
	S\$	%Δ	%	%ptsΔ	S\$	%Δ
Overall	167	▼-22.3	53	▼-31.6	89	▼-51.2
Luxury	400	▼-9.8	42	▼-44.8	170	▼-56.1
Upscale	220	▼-14.8	48	▼-36.1	105	▼-51.4
Mid-tier	129	▼-22.0	58	▼-28.8	75	▼-47.8
Economy	89	▼-14.8	57	▼-24.2	51	▼-40.1

Data updated as at 22 October 2020.

<sup>2</sup>Standard AOR = [Gross lettings (Room Nights) / Available room nights] x 100

<sup>3</sup>Standard ARR = [Total room revenue / Gross lettings] x 100

<sup>4</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 28 September 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** – 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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