



Hotel Benchmarking

Benchmarking hrvatskog hotelijerstva
Benchmarking Croatian Hotel Industry



UNIVERSITY OF RIJEKA
FACULTY OF TOURISM AND
HOSPITALITY MANAGEMENT
OPATIJA, CROATIA

HOTEL BENCHMARKING

REPORT FOR MARCH 2018

1. SAMPLE

Table 1. Sample structure¹

	NO.OF HOTELS	NO.OF ROOMS
Total	109	23.461
Regions		
Istria	26	7.016
Kvarner	26	4.525
Dalmacija	45	9.620
Continent	12	2.300
Category		
5*****	21	3.985
4****	59	13.197
3***	27	5.821
2**	2	458
Hotel size		
< 75 rooms	18	916
75 - 150 rooms	13	1.557
151 - 200 rooms	17	3.077
201 - 250 rooms	22	4.962
251 - 300 rooms	13	3.464
> 300 rooms	26	9.466



¹ **Hotels (Croatia: total 109)** which are a part of the Benchmarking project:

Istria (26): Kempinski Hotel Adriatic (Savudrija), Sol Aurora, Melia Coral, Sol Umag (Umag), Aminess Maestral Hotel, Aminess Laguna Hotel (Novigrad), Valamar Rubin, Valamar Diamant Hotel, Valamar Crystal Hotel, Valamar Zagreb Hotel, Valamar Club Tamaris, Valamar Pinia, Valamar Isabella Island Resort, Valamar Isabella Miramare Island Resort, Laguna Mediteran, Laguna Parentium (Poreč), Park, Eden, Istra, Lone, Monte Mulini (Rovinj), Park Plaza Histria, Park Plaza Arena (Pula), Park Plaza Belvedere (Medulin), Valamar Sanfior, Valamar Miramar Hotel (Rabac), **Kvarner (26):** Design hotel Navis, Villa Kapetanović (Opatija), Continental, Jadran, Neboder (Rijeka), Omorika, Esplanade, Kaštel, Slaven, Katarina (Crikvenica), Zvonimir, Corinthia, Atrium Residence, Valamar Koralj Romantic, Park, Beli Kamik, Jadran (Krki), Padova, Grand Hotel Imperial, Carolina, Eva (otok Rab), Wellness Hotel Aurora, Family Hotel Vespera, Bellevue, Vitality Hotel Punta, Boutique Hotel Alhambra (**Lošinj**), **Dalmatia (45):** Falkensteiner Hotel & SPA Iadera, Falkensteiner Family Hotel Diadora, Club Funimation Borik, Falkensteiner Hotel Adriana, Donat (Zadar), Kornati, Villa Donat, Ilirija, Adriatic (Biograd na Moru), Andrija, Ivan, Jure, Niko, Jakov (Šibenik), Hotel Atrium, Park, Vestibul Palace, Luxe, Radisson Blu Resort, Le Méridien Lav (Split), Bluesun Hotel Berulia, Bluesun Hotel Soline (Brela), Bluesun Hotel Elaphusa, Bluesun Hotel Borak, Bluesun Hotel Bonaca (Bol), Meteor, Dalmacija, Rivijera (Makarska), Bluesun Hotel Alga (Tučepi), Sensimar Makarska (Igrane), Sensimar Adriatic Beach Resort (Zivogošće), Aminess Lume Hotel (Korčula), Aminess Grand Azur Hotel (Orebić), Sensimar Kalamota Island Resort (Koločep), Valamar Dubrovnik President Hotel, Valamar Lacroma Dubrovnik Hotel, Valamar Argosy Hotel, Valamar Tirena Hotel, Valamar Club Dubrovnik, Villa Dubrovnik, Rixos Hotel Libertas (Dubrovnik), Hotel Astarea i Ville Mlini, Hotel Mlini (Mlini), Sheraton Dubrovnik Riviera Hotel (Srebreno), **Continent (12):** Esplanade Zagreb Hotel, Sheraton Zagreb Hotel, Jadran Zagreb Hotel, International, Panorama Zagreb Hotel, The Westin Zagreb, Double Tree by Hilton Hotel Zagreb, Aristos, Livris (Zagreb), Spa Golfer (Sveti Martin na Muri), Hotel Well (Tuheljske Toplice), Hotel Osijek (Osijek).

In total there are 23.461 accommodation units included, which is 40,5% of total hotel capacity in Croatia (according to Croatian Ministry of Tourism from 03.01.2018; <<http://www.mint.hr/pristup-informacijama/kategorizacija-11512/11512>>).

2. BENCHMARKING REPORT

2.1 KEY PERFORMANCE INDICATORS FOR REVENUE MANAGEMENT BY REGION

Table 2 Average Occupancy, ADR, RevPAR, TRevPAR and Total Revenue per Overnight by region

Region	Average Occupancy				ADR (in €)	
	Operating Capacity		Full Capacity (%)			
Region	March	Cumulative (YTD) 2018	March	Cumulative (YTD) 2018	March	Cumulative (YTD) 2018
Croatia	49.63	47.38	25.58	15.44	62.19	65.30
Istra	60.03	54.40	25.74	16.63	58.35	55.43
Kvarner	41.93	42.77	17.59	7.14	64.89	61.96
Dalmatia	37.93	33.66	16.87	8.35	57.16	63.31
Continent*	65.48	61.36	65.33	56.32	73.07	79.15
Region	RevPAR (in €)		TRevPAR (in €)		Total Revenue per Overnight (in €)	
Croatia	31.05	9.11	57.07	17.23	65.10	74.03
Istra	33.70	7.67	60.42	15.19	49.53	55.86
Kvarner	24.87	3.69	44.75	6.84	60.63	67.25
Dalmatia	22.96	4.47	39.83	8.45	61.03	69.16
Continent*	48.72	42.19	96.67	78.21	96.36	101.48

Monthly Key performance indicators are shown as averages of KPI's, while the annual cumulative is shown as data average, taking in consideration available capacity of the sample in total.

Chart 1. Monthly percentage of Operating Capacity by region

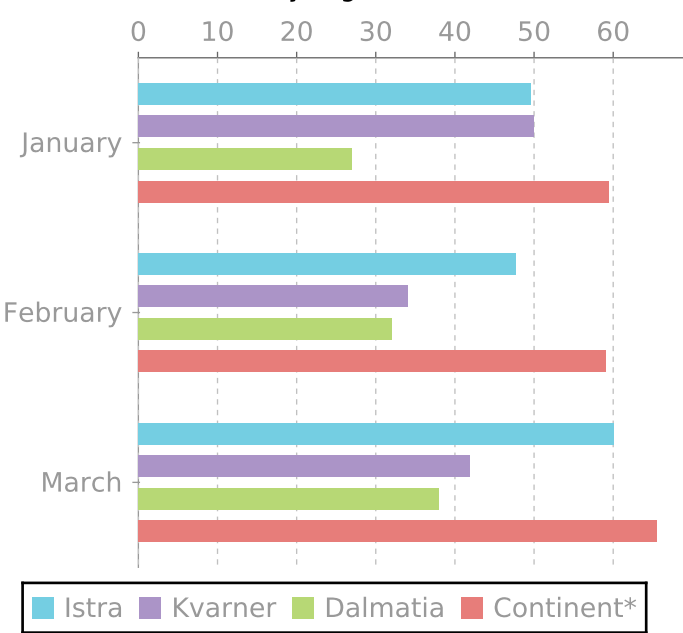
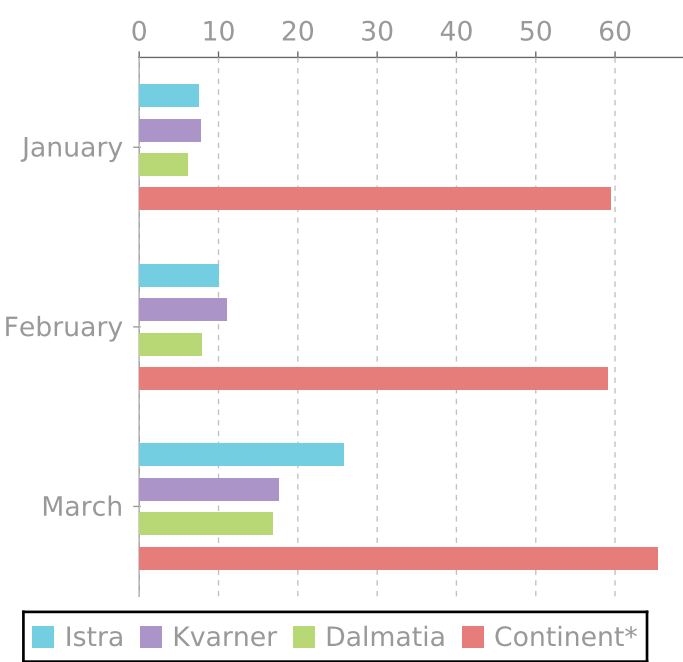


Chart 2. Monthly percentage of Full Capacity by region



*Continent consists of City of Zagreb, North Croatia and Slavonia.

Chart 3. Monthly ADR in € by region

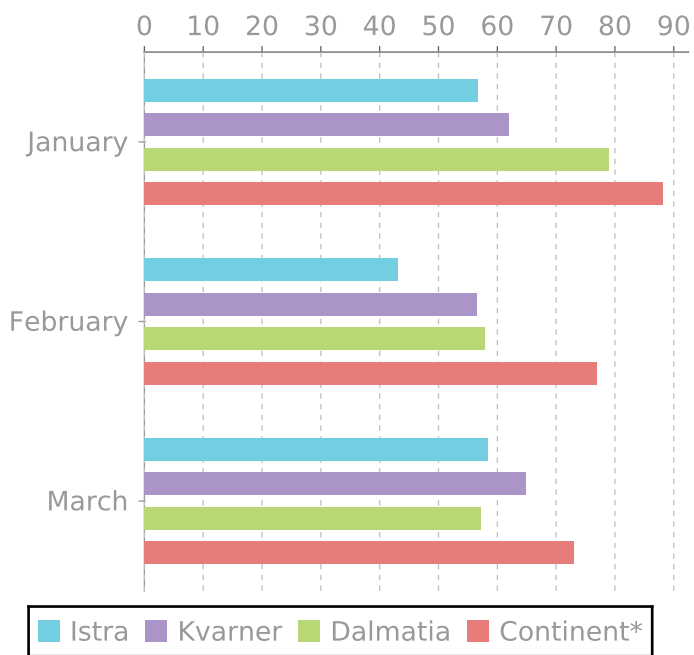


Chart 4. Monthly RevPar in € by region

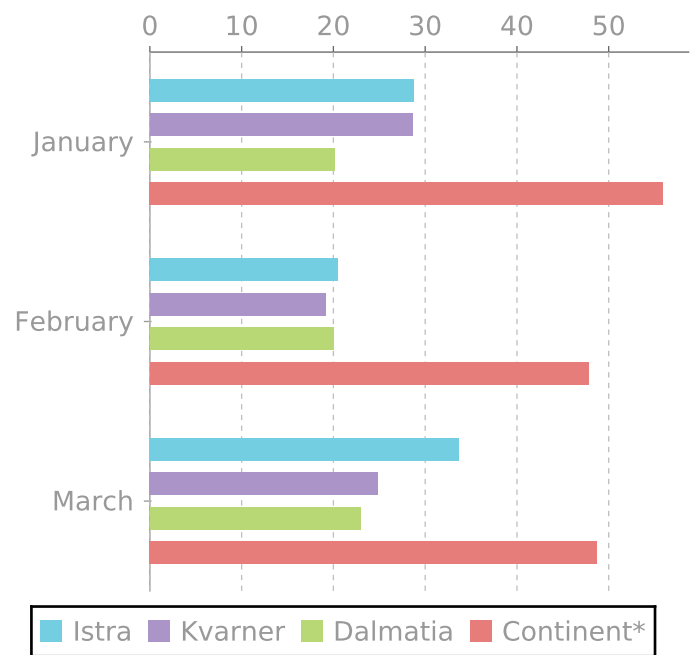


Chart 5. Monthly TRevPAR in € by region

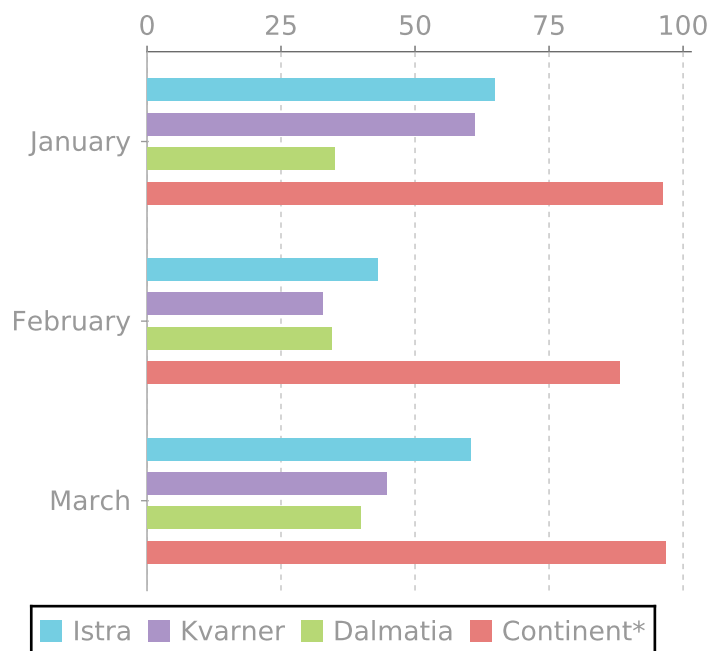
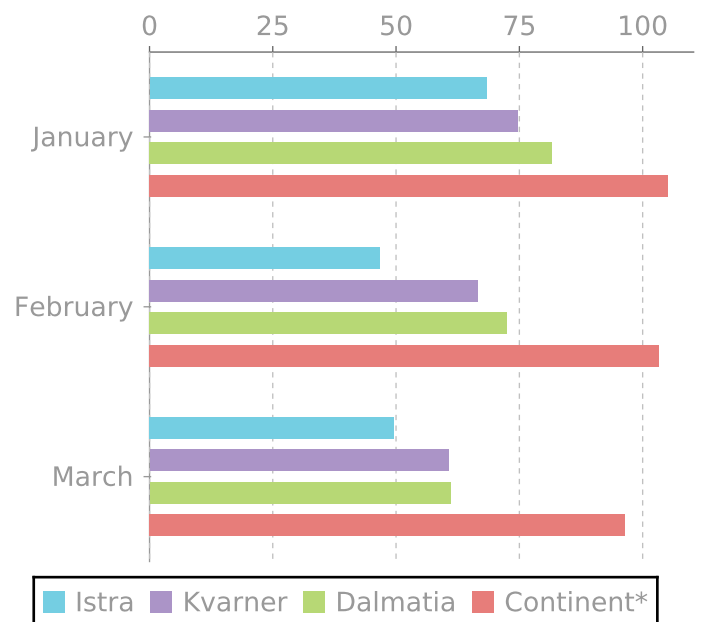


Chart 6. Monthly Total Revenue per Overnight in € by region



*Continent consists of City of Zagreb, North Croatia and Slavonia.

2.2 KEY PERFORMANCE INDICATORS FOR REVENUE MANAGEMENT BY CATEGORIES

Table 3 Average Occupancy, ADR, RevPAR, TRevPAR and Total Revenue per Overnight by categories in Croatia

Category	Average Occupancy				ADR (in €)	
	Operating Capacity		Full Capacity (%)			
	March	Cumulative (YTD) 2018	March	Cumulative (YTD) 2018	March	Cumulative (YTD) 2018
Croatia	49.63	47.38	25.58	15.44	62.19	65.30
5 *****	47.29	44.19	32.51	26.24	94.81	88.94
4 ****	51.22	48.81	27.83	17.09	54.63	58.78
3 ***	47.81	46.84	17.56	6.11	38.25	55.60

Category	RevPAR (in €)		TRevPAR (in €)		Total Revenue per Overnight (in €)	
Croatia	31.05	9.11	57.07	17.23	65.10	74.03
5 *****	44.67	20.86	76.26	38.28	89.38	96.47
4 ****	28.09	8.97	49.94	17.26	58.10	67.36
3 ***	21.86	2.85	53.44	5.44	52.34	66.56

Monthly Key performance indicators are shown as averages of KPI's, while the annual cumulative is shown as data average, taking in consideration available capacity of the sample in total.

Chart 7. Monthly percentage of Operating Capacity by category

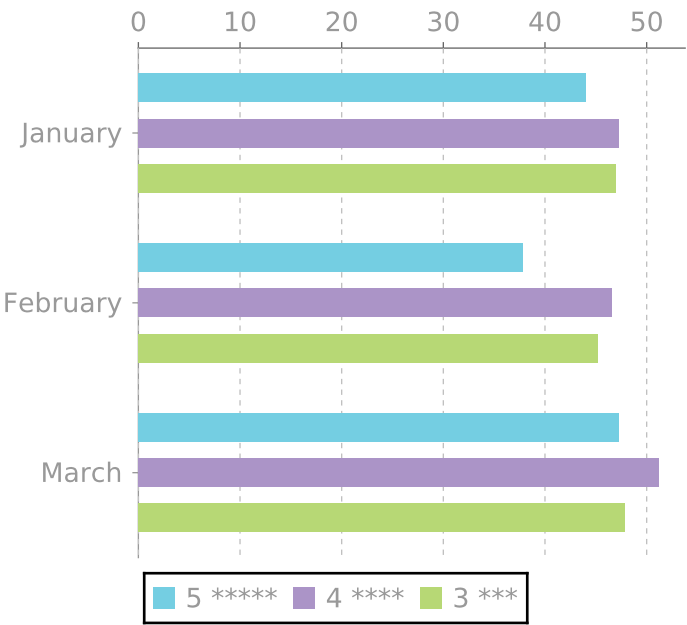


Chart 8. Monthly percentage of Full Capacity by category

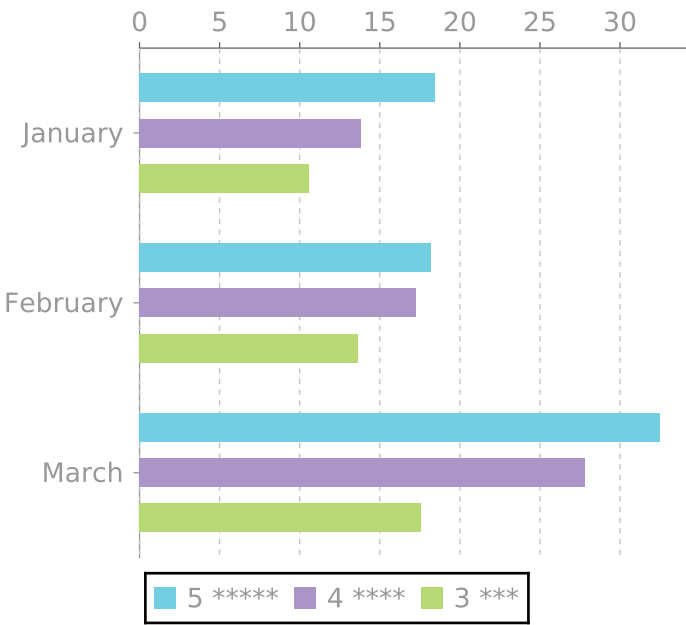


Chart 9. Monthly ADR in € by category

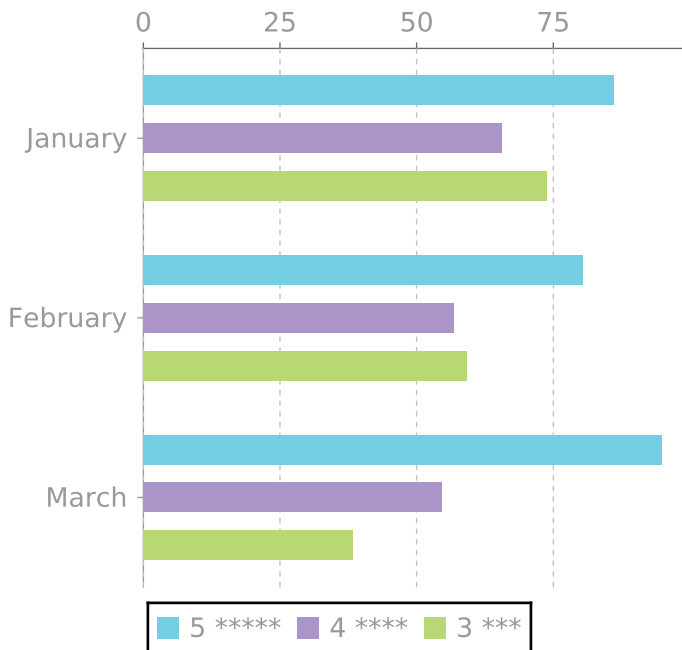


Chart 10. Monthly RevPar in € by category

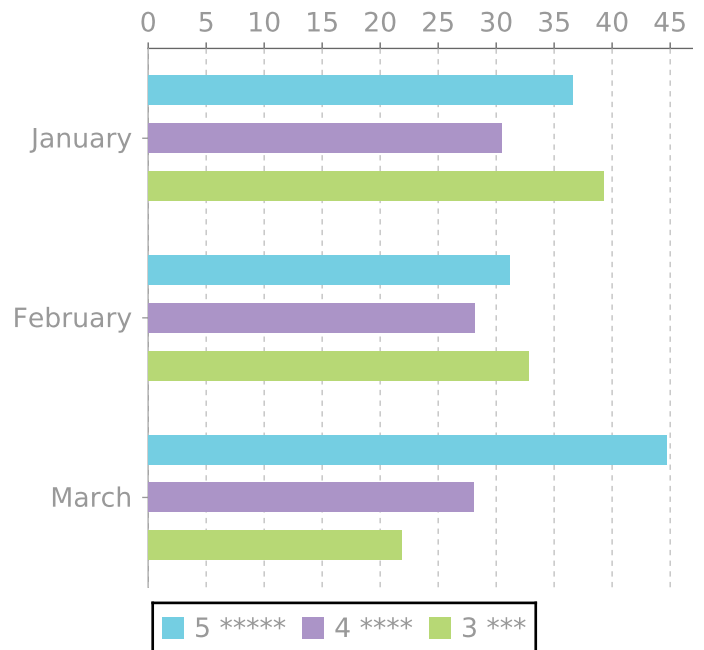


Chart 11. Monthly TRevPar in € by category

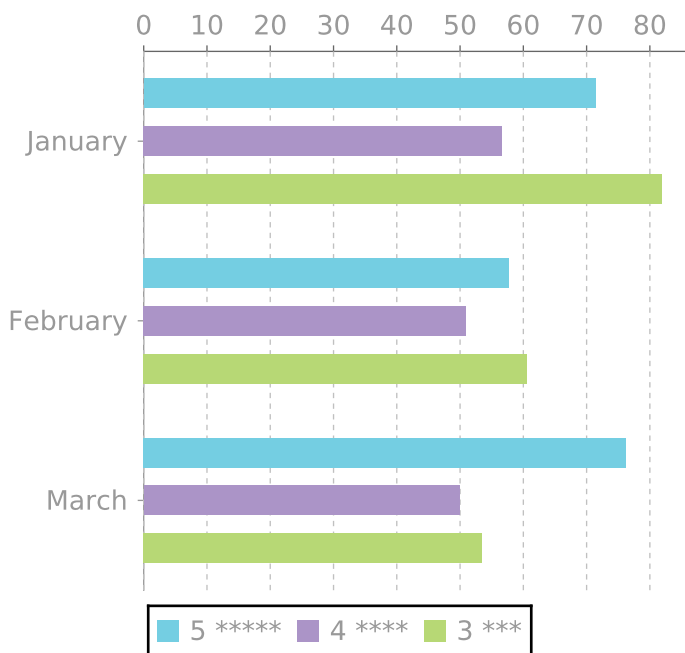
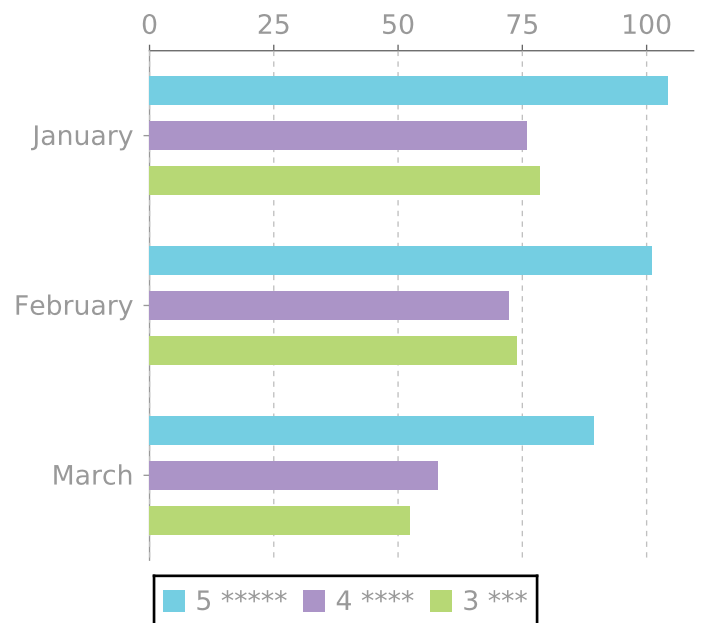


Chart 12. Monthly Total Revenue per Overnight in € by category



3. GLOSSARY

AVERAGE OCCUPANCY RATE

(Occupancy rate) is rooms occupies divided by rooms available. Occupancy is always displayed as a percentage of rooms occupied. Operating capacity is taking into consideration number of operating days in the month, and full capacity is taking into consideration calendar days.

AVAILABLE ACCOMODATION UNITS (ROOMS)

represent the sum of all daily available rooms during calendar days minus the rooms that are out of service.

OCCUPIED ACCOMODATION UNITS (ROOMS)

represent the sum of all daily occupied rooms during calendar days.

AVERAGE DAILY RATE (ADR) is calculated by dividing room revenue by occupied rooms. Room revenue is made by renting the accomodation to guests (per hour, day or longer). If you are offering full or half bord, or bed and breakfast, than you need to separate food and beverage revenue from room revenue. The room revenue also includes charged or calculated revenue from no shows (guests who didn't arrive), late check outs etc.

REVENUE PER AVAILABLE ROOM RevPAR is calculated by dividing room revenue by rooms available.

TOTAL REVENUE PER AVAILABLE ROOM TRevPAR

is calculated by dividing Total room revenues (Room Revenue, Food & Beverage Revenue, Wellness & SPA Revenue, Health & Sports Revenue, Convention Revenue and other Operated Revenues) by rooms available.

TOTAL REVENUE PER OVERNIGHT is calculated by dividing Total Revenue by Total overnights.





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