



# Statistical report for 2018

Rijeka Tourist Board

# TABLE OF CONTENTS



Kvarner  
**RIJEKA**  
*Raznolikost je lijepa*

<b>1. TOURISM IN 2018</b> .....	3
<b>2. COMPARISON OF ANNUAL INDICATORS</b> .....	4
2.1. Total arrival and overnight stay indicators .....	4
2.2. Tourist structure according to type of accommodation.....	7
2.3. Share of domestic and foreign guests.....	9
2.4. Share of agency and individual guests in total overnight stays.....	9
2.5. Tourist age group analysis.....	10
2.6. Tourism results per markets.....	11

# 1. TOURISM IN 2018

The positive trends in Rijeka's tourism continued in 2018, with this year being extraordinarily successful in terms of excellent tourism results, with a significant contribution to the recognition of the city of Rijeka. Regarding statistical indicators and trend analysis, in 2018, we continued the systematic comparison of relevant factors with previous years and the database accessible via the eVisitor system.

eVisitor is a unique online information system linking all the tourist boards in the Republic of Croatia, which allows daily tourism insights, provides an updated database on accommodation facilities and accommodation providers, as well as real-time statistical and marketing reports. The Rijeka Tourist Board uses eVisitor as a functional tool to manage its offerings, but also to monitor the effects of the integrated activities of all system users through physical tourism indicators.

Of the most important indicators, the accommodation capacities of Rijeka have seen continued growth in 2018. Domestic and foreign guests could choose from four hotels with 555 beds, two inns with 396 beds, fifteen hostels with an average of 424 beds, university and secondary school student homes with 1,472 beds, and private rentals with an average of 868 units and 3,833 beds. The number of arrivals and overnight stays of guests has grown as expected throughout the entire year, in particular during the second and third quarters, i.e. the summer season.

**This successful year is corroborated by some very concrete data - annually, there was a 15.56% increase in the total number of arrivals, and a significant 22.29% increase in the total number of overnight stays, with foreign guests comprising the bulk of this metric.** Nautical tourism, as the activity with the greatest statistical growth in the Rijeka area, has been analysed separately and we believe it to be one of the cornerstones of tourism in Rijeka in the near future.

The good results of 2018 show the cost-effectiveness of investing in the tourist offer of the city - in addition to traditional events like the Rijeka Carnival and Fiumanka, a particularly positive effect was observed for investing in Rijeka Advent in December, with various holiday cultural and entertainment programmes taking place, in addition to the colourful stands of Rijeka's caterers. Detailed statistical indicators of all the above-mentioned trends can be found later in the analysis.

## 2. COMPARISON OF ANNUAL INDICATORS

### 2.1. Total arrival and overnight stay indicators

Thanks to the year-round work of all the tourism employees of Rijeka Tourist Board, we are happy to say that 2018 was a very successful year. In particular, the expansion of existing private accommodation capacities should be noted, with hotels and hostels maintaining their existing high level of service.

In 2018, the city of Rijeka saw a total of 155,423 arrivals, representing a 15.56% increase in the number of guests compared to the previous year, when there was a total of 134,499 arrivals of domestic and foreign tourists. Annually, comparing the number of foreign guest arrivals - 128,063 in 2018 and 110,190 in 2017 - a significant 16.22% increase can be observed. Simultaneously, in the area of the city of Rijeka, domestic guests accounted for 27,360 arrivals, which is 12.55% more than the 24,309 arrivals from the year before. Chart 1 shows a comparison of the guest arrival structure in relation to 2017 per month, with detailed numerical data provided in Table 1.

*Chart 1. Comparison of the total annual arrival structure per month*

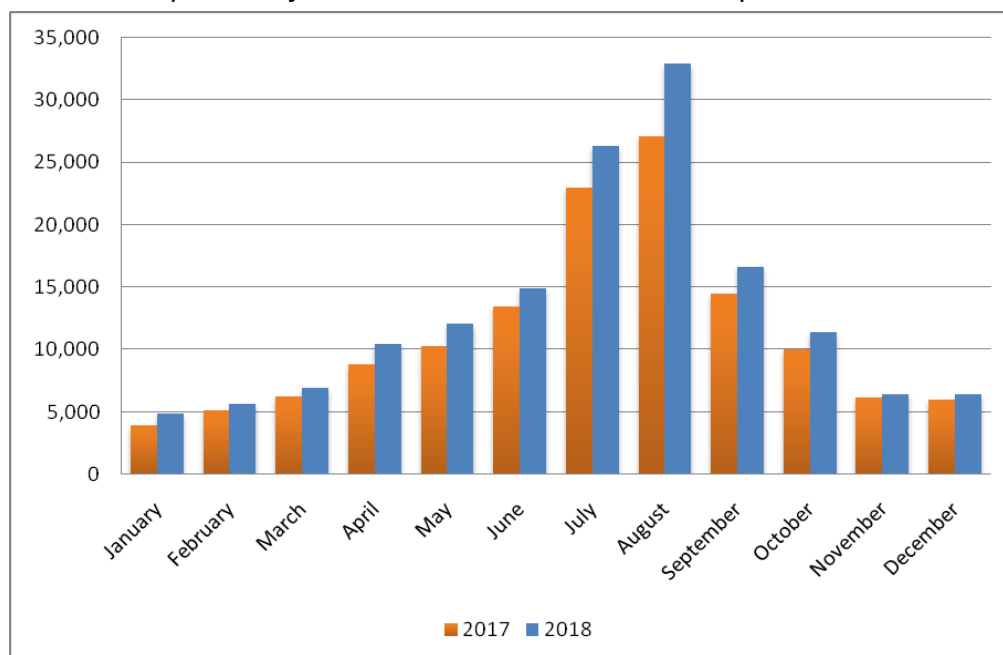


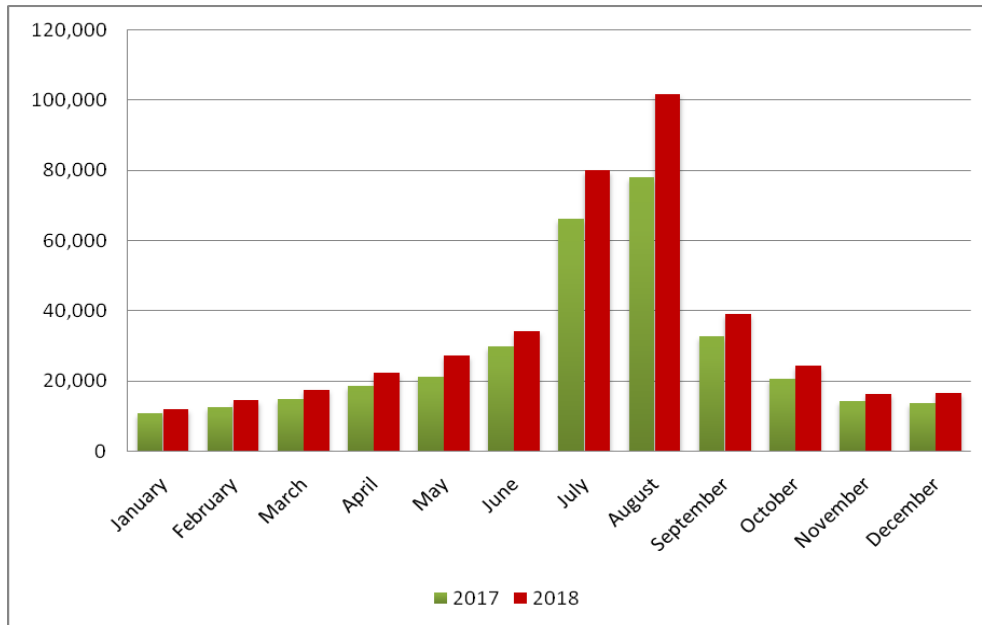
Table 1. Movement of the number of tourist arrivals per month in comparison to 2017

Month	2017	2018
January	3,906	4,875
February	5,148	5,715
March	6,261	6,968
April	8,816	10,501
May	10,282	12,086
June	13,416	14,955
July	22,952	26,366
August	27,104	32,939
September	14,494	16,688
October	9,991	11,438
November	6,163	6,461
December	5,966	6,431
<b>TOTAL</b>	<b>134,499</b>	<b>155,423</b>

In 2018, most of the Rijeka tourists arrived from abroad, with a total of 128,063 (82.40%) foreign guest arrivals, with domestic guests generating a total of 27,360 (17.60%) arrivals. Comparing the data to the previous, also successful year, **the increase in the total arrivals** is more than 20,000, i.e. **16% annually**. The number of guests has grown as expected throughout the entire year, in particular during the second and third quarters, i.e. the summer season, surpassing 30,000 arrivals in August.

Statistical indicators of the total number of overnight stays have, as is tradition, accompanied the trend of increased arrivals, with the total overnight stay number in the city seeing an exceptional 22.29% increase, representing 407,963 overnight stays in 2018, in comparison to 333,611 overnight stays in 2017. The strong growth in the number of overnight stays is primarily related to the total overnight stay numbers of foreign guests, which has seen a record 21.49% increase at the annual level, reaching 344,982 overnight stays in 2018, which is significantly more than the 283,949 overnight stays from the previous year. The total number of overnight stays of domestic guests has also accompanied the positive growth trends, with 62,981 overnight stays in 2018, representing a growth of 26.82% in comparison to 49,662 overnight stays in 2017. Below is a monthly representation of the total overnight stay numbers, compared to the same period in the previous year.

Chart 2. Comparison of the total annual overnight stay structure per month



In 2018, **407,963 overnight stays of tourists were recorded**, which is 22.29% more than in 2017. **Foreign tourists have amazingly generated 344,982 overnight stays.** This record number of overnight stays **represents a statistical increase of 21.49% in comparison to the previous year**, and with regards to the share of foreign tourists in the total number of overnight stays, we are reaching the 84.56% mark. **Domestic tourists in 2018 generated 62,981 overnight stays, which, compared to 2017, represents a 27% increase.** The share of domestic tourists in total generated overnight stays was 15.44%.

Table 2. Movement of the number of tourist overnight stays per month in comparison to 2017

Month	2017	2018
January	10,757	12,197
February	12,613	14,640
March	14,844	17,728
April	18,563	22,469
May	21,170	27,439
June	29,966	34,475
July	66,265	80,153
August	77,990	101,907
September	32,655	39,210
October	20,721	24,391
November	14,440	16,560
December	13,627	16,794
<b>TOTAL</b>	<b>333,611</b>	<b>407,963</b>

## 2.2. Tourist structure according to type of accommodation

As expected, a detailed analysis of the structure of arrivals of domestic and foreign tourists according to the type of accommodation chosen has shown that, in 2018, the greatest share was in private accommodation, with a total of 64,645 arrivals. Hotels are the second category in the total number of arrivals, maintaining their several-year-long continuity, with 56,692 arrivals. Hostels have also seen positive trends, with 29,459 arrivals in 2018, and inns recording 1,568 total arrivals of domestic and foreign guests. In non-commercial accommodation, 3,059 arrivals were generated annually. Almost all accommodation categories have seen increased arrivals in comparison to 2017 and detailed results are available in Table 3 below.

*Table 3. Structure of arrivals and overnight stays according to the type of accommodation in 2018*

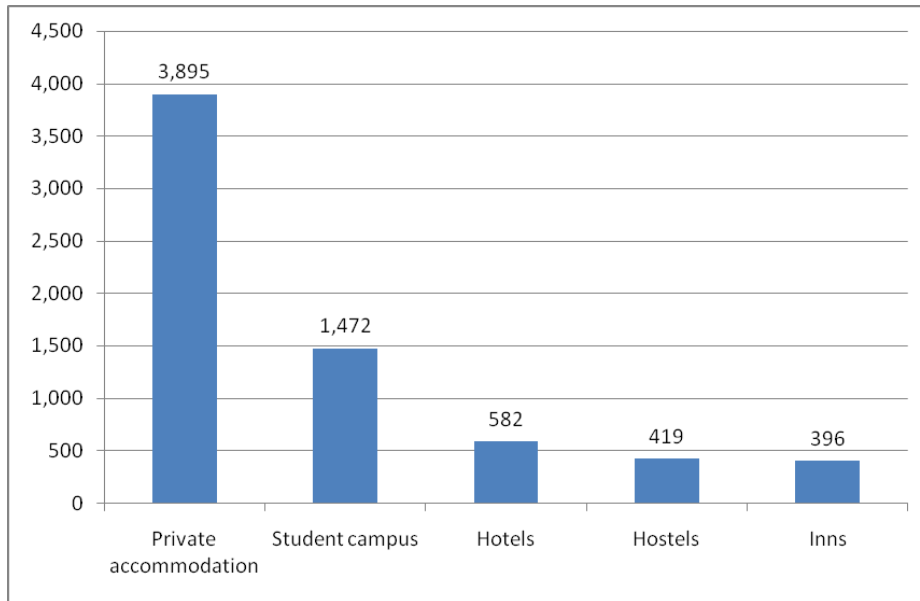
Category	Domestic		Foreign		Total	
	Arrivals	Stays	Arrivals	Stays	Arrivals	Stays
Hotels	11,753	20,569	44,939	75,614	56,692	96,183
Private accommodation	8,613	27,820	56,032	181,582	64,645	209,402
Inns	1,022	3,059	546	1,875	1,568	4,934
Hostels	5,959	11,239	23,500	44,577	29,459	55,816
Non-commercial accommodation	13	294	3,046	41,334	3,059	41,628
<b>Total:</b>	<b>27,360</b>	<b>62,981</b>	<b>128,063</b>	<b>344,982</b>	<b>155,423</b>	<b>407,963</b>

In analysing the structure of the total number of overnight stays according to the type of accommodation in 2018, the leading group is private accommodation with 209,402 stays, followed by hotels with 96,183 and hostels with 55,816 overnight stays. The longest average stay is in the category of private accommodation, amounting to 3.24 days. To compare, in 2018, the average guest in Rijeka's hotels spent a little more than one day, 1.70 days to be precise. In hostels, the statistical average stay is 1.89 days. Despite the smallest arrival and overnight stay numbers, inns record average stays of 3.15 days. The longest average stay was recorded in non-commercial accommodation, amounting to 13.61 days.

The average stay for domestic and foreign guests and all accommodation categories in the city of Rijeka in 2018 is 2.62 days, which indicates that the guests have recognised the tourism opportunities and offerings, leading to longer stays in Rijeka, compared to the historical tendency to view the city primarily as a transit centre for other destinations.

The results in 2018 demonstrate that numerous inhabitants of Rijeka have recognised tourism investments as an effective investment, which is visible when comparing accommodation categories according to the average annual number of beds.

*Chart 3. Comparison of the accommodation capacity structure according to the number of beds*



The shares from the statistics in the chart above justify the conclusion that the change in the structure of accommodation capacities in Rijeka caused a change in the habits of the guests. In total, domestic and foreign tourists prefer private accommodation as the leading form of accommodation, with a 41.59% share. In 2018, hotels maintained second place with 36.48% arrivals and an 18.95% share in total arrivals. Similar results have been seen in the percentage indicators for total overnight stay numbers, with the largest share being in private accommodation (51.33%), meaning that every other guest visiting Rijeka stays in private accommodation. The next accommodation category according to the percentage of the total number of overnight stays is hotels (23.58%), followed by hostels (13.68%).

*Table 4. Share of arrivals and overnight stays according to the type of accommodation in 2018*

Category	Domestic		Foreign		Total	
	Arrivals	Stays	Arrivals	Stays	Arrivals	Stays
Hotels	42.95%	32.65%	35.09%	21.92%	36.48%	23.58%
Private accommodation	31.48%	44.17%	43.75%	52.64%	41.59%	51.33%
Inns	3.74%	4.86%	0.43%	0.54%	1.01%	1.21%
Hostels	21.78%	17.85%	18.35%	12.92%	18.95%	13.68%
Non-commercial accommodation	0.05%	0.47%	2.38%	11.98%	1.97%	10.20%
<b>Total:</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>



### **2.3. Share of domestic and foreign guests**

In Rijeka, tourists primarily arrive from European countries, e.g. Italy, Germany, Spain, France, Austria, Slovenia, Hungary, Poland etc. However, in the last several years, there has been an increase in the number of tourists from North America, and in 2018, an increase in the number of tourists from Asian countries has been observed, primarily from the Republic of Korea.

*Table 5. Share of domestic and foreign tourists in the total arrivals and overnight stays in 2018*

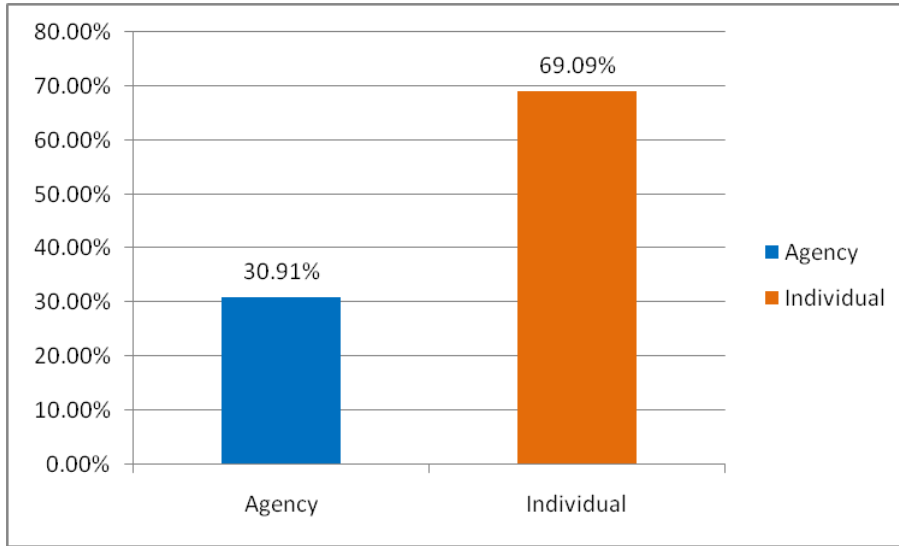
<b>Share of tourists</b>	<b>Arrivals</b>	<b>Overnight stays</b>
Share of domestic tourists	17.60%	15.44%
Share of foreign tourists	82.40%	84.56%
<b>Total</b>	<b>100.00%</b>	<b>100.00%</b>

In accordance with the tourist trends of Croatia, the share of foreign tourists in the total arrivals in 2018 was 82.40%, while the share of foreign tourists in total overnight stays was 84.56%. Comparing the abovementioned numbers with the percentages from the previous year, it is clear that the increased number of tourists at the destination is slowly shifting the proportion in favour of foreign tourists. Currently, the share of foreign tourists in the total arrivals and overnight stays in Rijeka represents more than four-fifths of the total tourism activity. Domestic tourists, thanks to a mild economic recovery resulting in an increase of buying power, have maintained their percentages in the tourist activities of Rijeka from the previous year. In Rijeka in 2018, Croatian guests have been responsible for 17.60% of arrivals and 15.44% of overnight stays.

### **2.4. Share of agency and individual guests in the total overnight stays**

One of the important indicators of tourism activity is the structure of guest stays according to the type of overnight stay, i.e. whether they use deals provided by the numerous travel agencies or they organise their accommodation individually. The chart below shows that, in 2018, individual guests have generated no less than 281,877 overnight stays, representing 69.09% of the total number of guest stays. On the other hand, agency guests represent 30.91% of the total guest overnight stays. A graphical representation of the percentage of tourist arrival types for Rijeka in 2018 is provided in Chart 4.

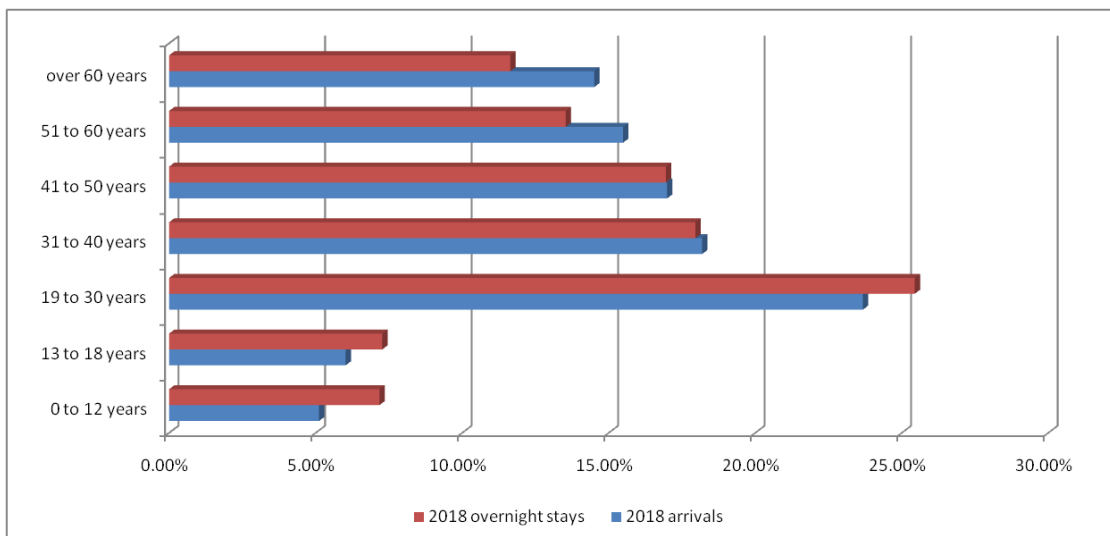
Chart 4. Percentages of types of overnight stay for 2018.



## 2.5. Tourist age group analysis

By expanding the tourist offering and the accommodation capacities of the city of Rijeka, there have been gradual changes in the age structure of the guests. Hotels, as a classic form of accommodation, provide a high standard of service for demanding guests, but younger generations travelling Europe are seeking alternative, economical forms of accommodation and individualised approaches. A large part of the credit for increasing tourism indicators is due to private accommodation, which has additionally expanded the offer of the city, following the slowdown of the growth rate of hostel accommodation capacities.

Chart 5. Percentages of total arrivals and overnight stays per age group



Most arrivals in 2018 were by tourists in the 19 to 30 age group, who, with 36,797 arrivals, represent a 23.68% share in total arrivals. The second age group is tourists aged 31 to 40, with 28,272 arrivals and an 18.19% share. The 41 to 50 age group had 26,415 arrivals and a 17.00% share, and the 51 to 60 age group had 24,076 arrivals and a 15.49% share. The above 60 age group had 22,551 arrivals and a 14.51% share in the total arrivals according to age structure. Children and minors aged 13 to 18 had 9,364 arrivals or 6.02% of all arrivals, and the age group under 12 had 7,948 arrivals, or 5.11% of the total arrivals.

Most overnight stays are tourists from the 19 to 30 age group, who, with 103,814 stays, make up 25.45% of the total. Next are tourists aged 31 to 40, with 73,277 overnight stays, or a 17.96% share. Tourists from the 41 to 50 age group represent 69,175 overnight stays, or a 16.96% share, while the 51 to 60 group had 55,222 overnight stays, a share of 13.54%. The tourist group aged over 60 had 47,512, representing 11.65% of all overnight stays. Children and minors aged 13 to 18 had 29,678 overnight stays, or 7.27% of all overnight stays, and the youngest age group under 12 had 29,285 arrivals, or 7.18% of the total overnight stays.

## **2.6. Tourism results per market**

Last year, **most arrivals to Rijeka were citizens of Italy** (19,320), after which there were significant numbers of guests from Germany (15,814), Spain (7,482), France (6,814), the Republic of Korea (5,712), Hungary (5,663), Austria (5,453), the U.S. (4,058) and Poland (4,002). In addition to the abovementioned countries, the city of Rijeka was visited by numerous guests from more than 80 different countries.

**Most overnight stays in 2018 were guests from Germany** (53,092), followed by guests from Italy (41,717), Bosnia and Herzegovina (29,268), Hungary (16,503), Poland (15,677) and the U.S. (15,068). Tourists from Serbia, France, Spain and Austria also exceeded the 10,000 mark for total annual overnight stays.

During the previous year, **foreign tourists** have stayed in Rijeka for, on average, **2.69 days**. During that period, **domestic tourists** stayed for, on average, **2.29 days**. Below is a visual representation of the most represented tourist markets according to total arrival and overnight stay indicators.

Chart 6. Structure of tourist arrivals according to their country of residence for 2018

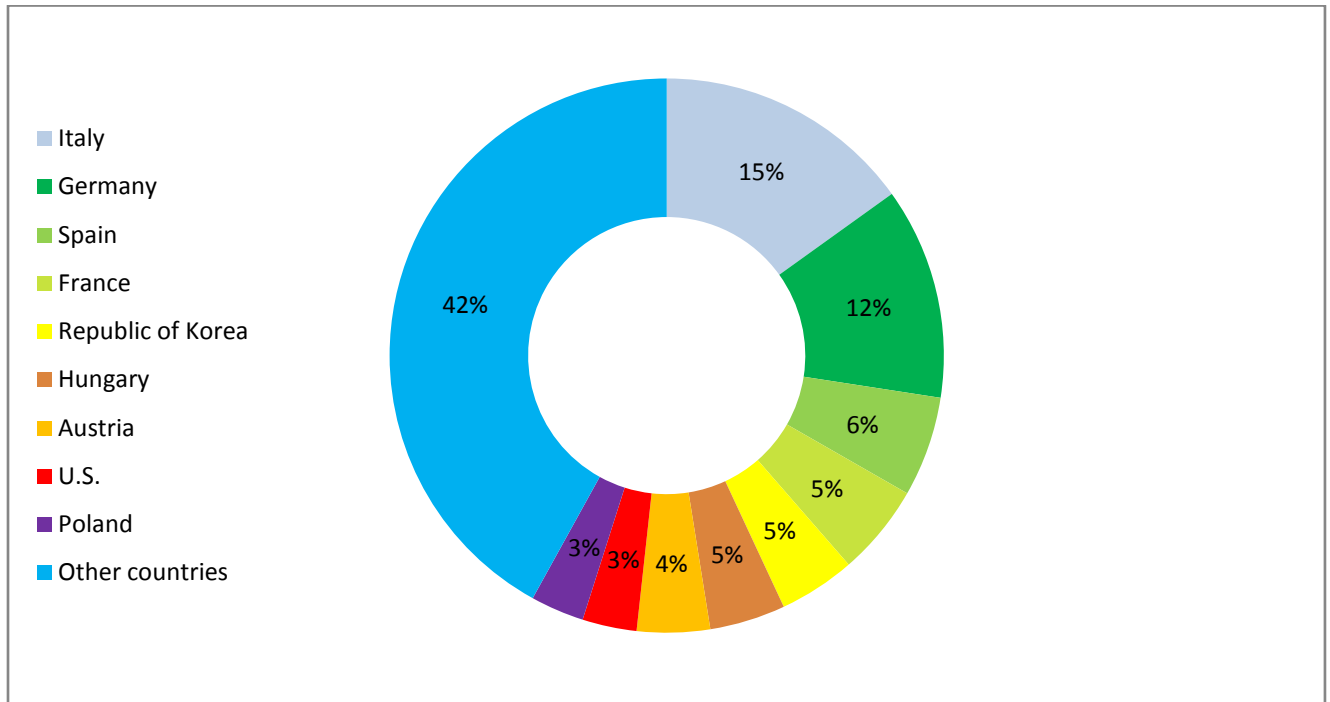
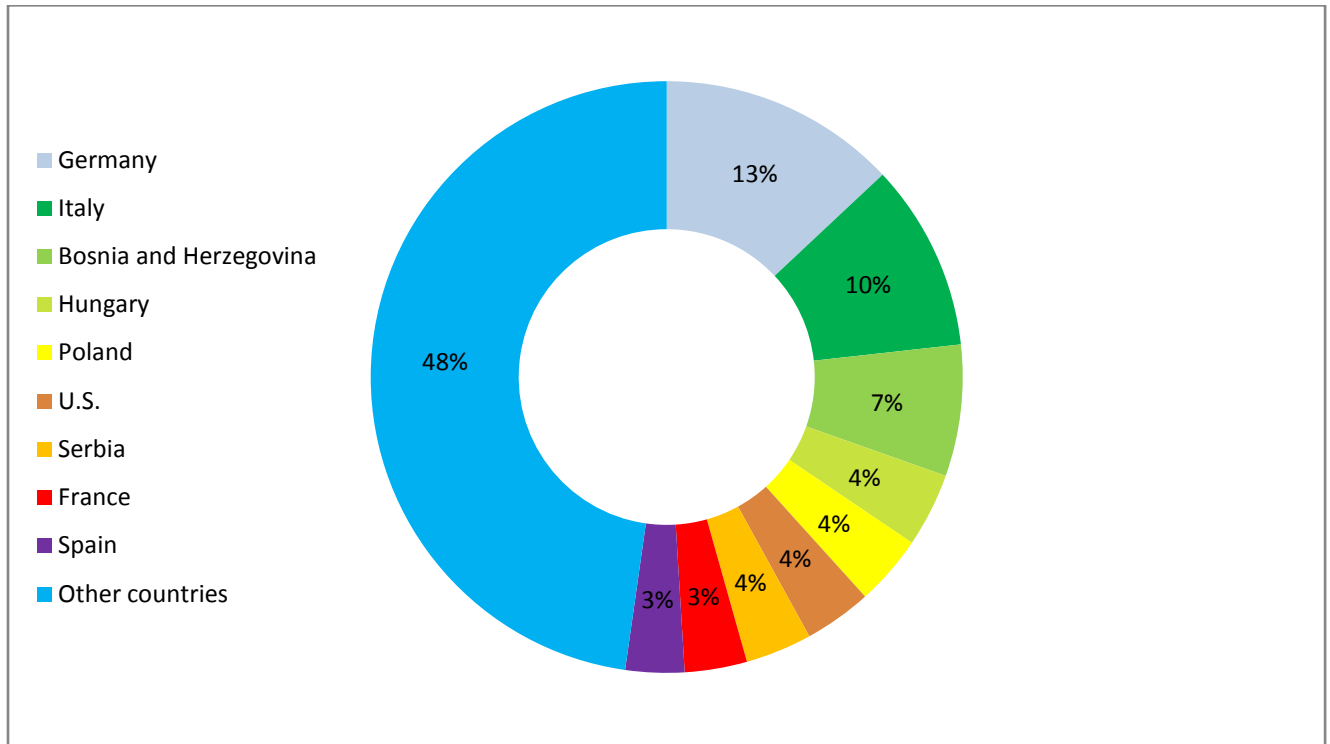


Chart 7. Structure of tourist overnight stays according to their country of residence for 2018



Observing individual markets, we can rightfully claim that 2018 was extraordinarily successful for the city of Rijeka.

Of the 74 markets observed, there was an increase in arrivals last year from no fewer than 58 countries. Italy, as the traditionally most represented market in terms of the number of arrivals, has seen a 5.17% increase, while similar results have been observed for Spain (5.01%) and Austria (4.80%). Germany shows particularly promising results, with a 38% increase in the number of arrivals (from 11,458 in 2017 to 15,814 in 2018). Very positive results have been detected for the French market, seeing a 21.68% increase, Poland (23.14%) and the U.S. (19.92%). One thing to note is that there was also a positive visiting trend from neighbouring countries, with 20.69% more arrivals from Hungary than the previous year, 33.76% more tourists from Slovenia, 16.36% more tourists from Bosnia and Herzegovina, and 9.78% more tourists arriving from Serbia. Observing the arrival percentages, record numbers have been observed for guests from Turkey, with a 236.42% increase (from 486 arrivals in 2017 to 1,635 in 2018).

As with the total number of arrivals, statistical data for the total overnight stays for 2018 have seen an increase from 59 different markets. Germany was first in terms of overnight stays, with 53,092 in comparison to 36,076 from 2017, which makes up an impressive 47.17% increase. The second most important foreign market is Italy, seeing a 12.90% growth, i.e. a total of 41,717 overnight stays, compared to the 36,951 stays from the previous year. For European countries, a significantly large increase in the total number of overnight stays has been observed for tourists from the Czech Republic (91.45%), Ukraine (57.07%), the Netherlands (46.26%), Slovenia (40.55%) and Poland (36.45%). The overnight stay indicators show that the extremely high growth rates of 200% and above have been concentrated primarily in Arab countries, but their share is not significant in absolute terms. Statistically, there is an entire series of European and other countries with total overnight stay growth rates exceeding 20%, representing a true tourism growth generator in the city of Rijeka.

A complete overview of the total arrival and overnight stay indicators according to country of residence is provided in the tables and charts below.

Chart 8. Comparison of the total number of tourist arrivals according to their country of residence in 2018 and 2017

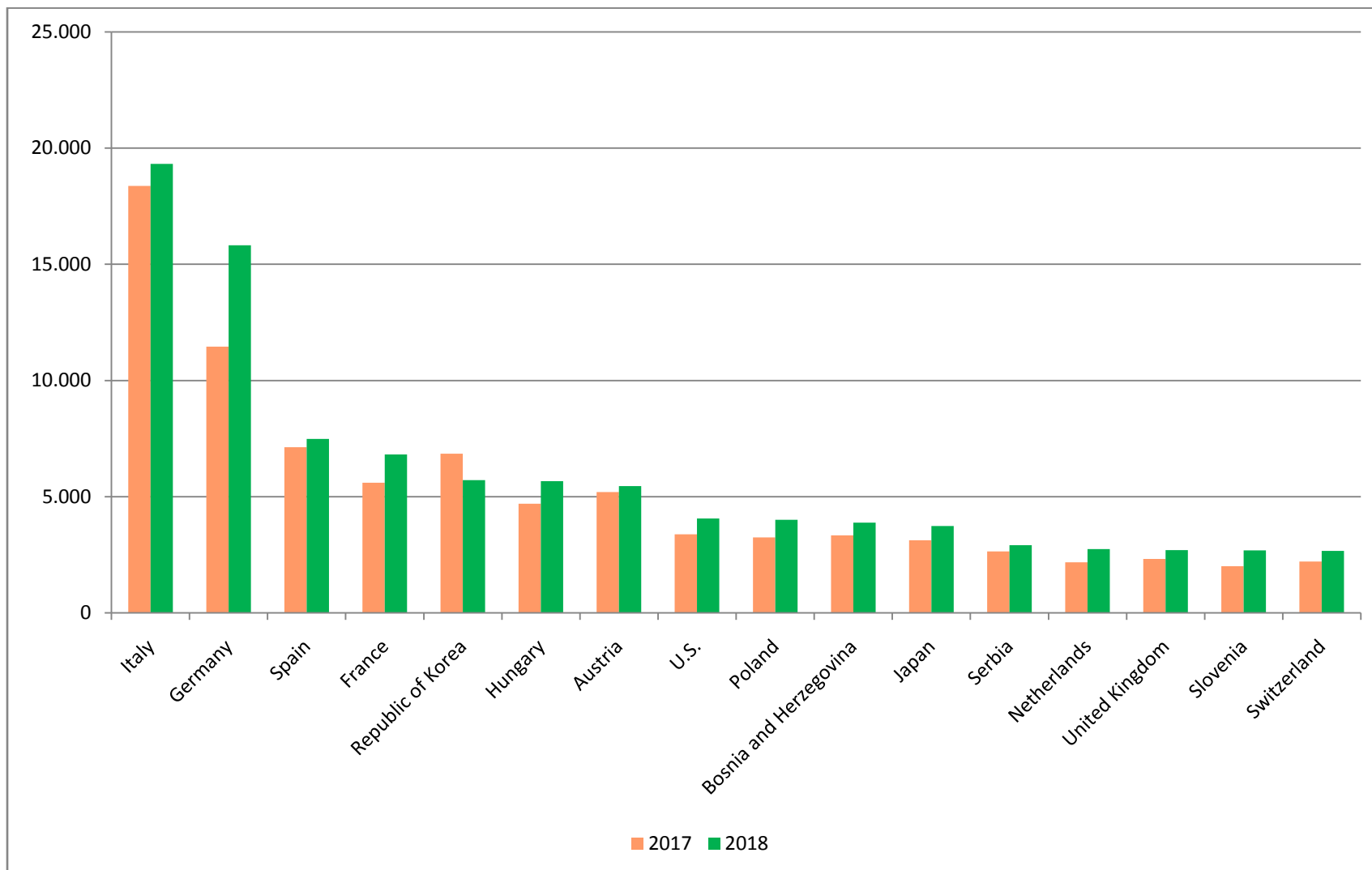


Chart 9. Comparison of the total number of tourist overnight stays according to their country of residence in 2018 and 2017

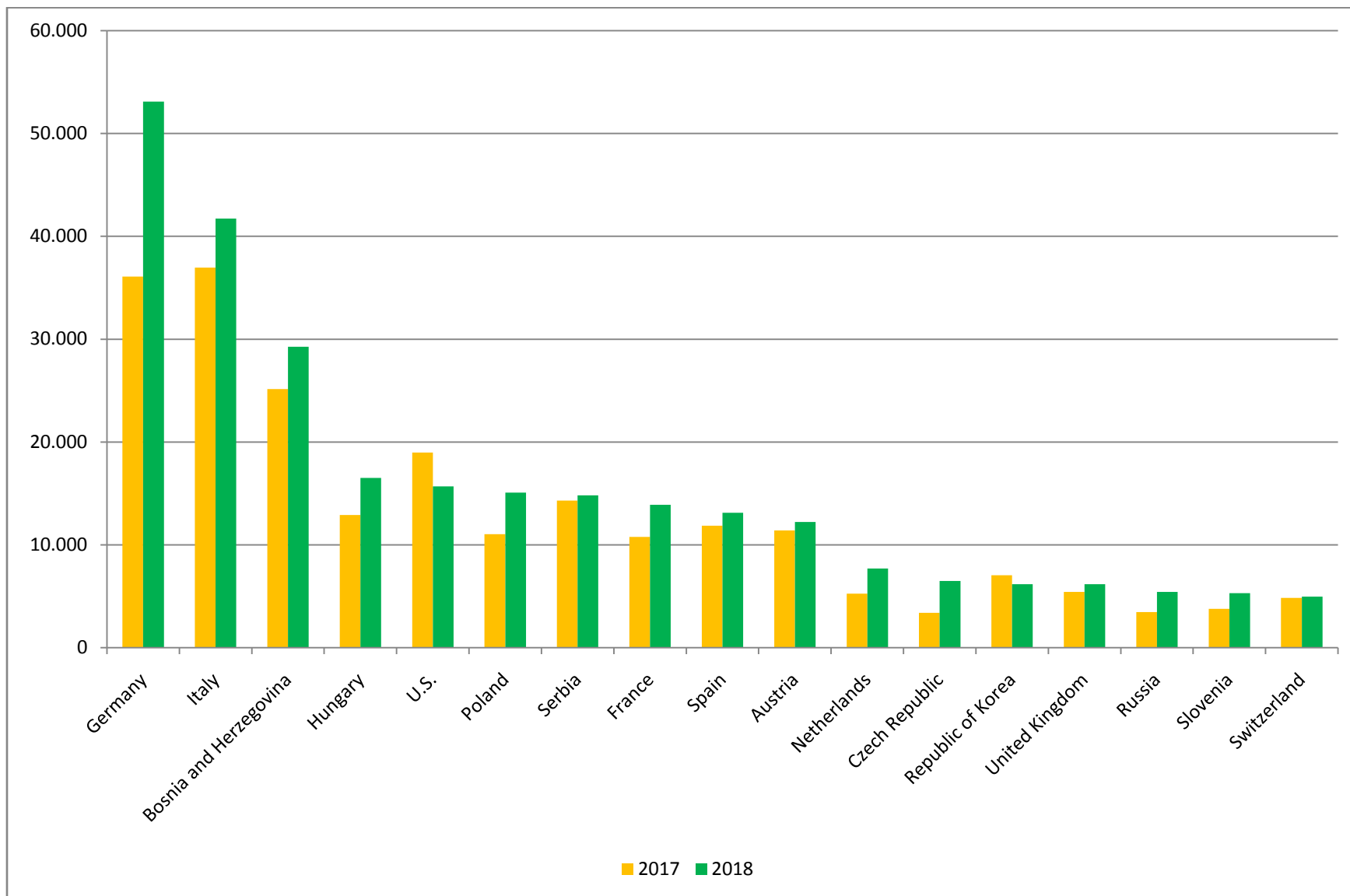


Table 6. Comparison of arrival and overnight stay indicators according to the most significant markets, annually

Country	Total arrivals		
	2018	2017	Index
Italy	19,320	18,370	105.17
Germany	15,814	11,458	138.02
Spain	7,482	7,125	105.01
France	6,814	5,600	121.68
Republic of Korea	5,712	6,847	83.42
Hungary	5,663	4,692	120.69
Austria	5,453	5,203	104.80
U.S.	4,058	3,384	119.92
Poland	4,002	3,250	123.14
Bosnia and Herzegovina	3,883	3,337	116.36
Japan	3,733	3,127	119.38
Serbia	2,908	2,649	109.78
Netherlands	2,746	2,172	126.43
Great Britain	2,701	2,317	116.57
Slovenia	2,690	2,011	133.76
Switzerland	2,670	2,211	120.76
Israel	2,031	1,683	120.68
China	1,937	1,449	133.68
Czech Republic	1,812	1,041	174.06
Belgium	1,790	1,498	119.49
Romania	1,733	1,248	138.86
Russia	1,471	1,007	146.08
Sweden	1,421	1,102	128.95
Ukraine	1,289	712	181.04
Canada	1,288	1,155	111.52
Slovakia	1,196	884	135.29
Australia	1,172	996	117.67
Bulgaria	1,077	904	119.14

Country	Total overnight stays		
	2018	2017	Index
Germany	53,092	36,076	147.17
Italy	41,717	36,951	112.90
Bosnia and Herzegovina	29,268	25,152	116.36
Hungary	16,503	12,909	127.84
U.S.	15,677	18,969	82.65
Poland	15,068	11,043	136.45
Serbia	14,821	14,306	103.60
France	13,882	10,772	128.87
Spain	13,121	11,863	110.60
Austria	12,229	11,390	107.37
Netherlands	7,689	5,257	146.26
Czech Republic	6,490	3,390	191.45
Republic of Korea	6,181	7,032	87.90
Great Britain	6,161	5,420	113.67
Russia	5,421	3,449	157.18
Slovenia	5,303	3,773	140.55
Switzerland	4,968	4,848	102.48
Romania	4,823	3,114	154.88
Ukraine	4,731	3,012	157.07
Belgium	4,449	3,339	133.24
Japan	4,386	3,415	128.43
Israel	4,022	2,937	136.94
Slovakia	3,890	3,299	117.91
Sweden	3,460	2,744	126.09
Estonia	3,168	3,206	98.81
Bulgaria	3,165	2,018	156.84
Turkey	2,686	841	319.38
China	2,681	1,788	149.94