



*IN COLLABORATION WITH:*



**20<sup>th</sup> edition**  
**2018 Indonesia Hotel Industry**  
**Survey of Operations**

**2017 Financial Year**

# TABLE OF CONTENTS

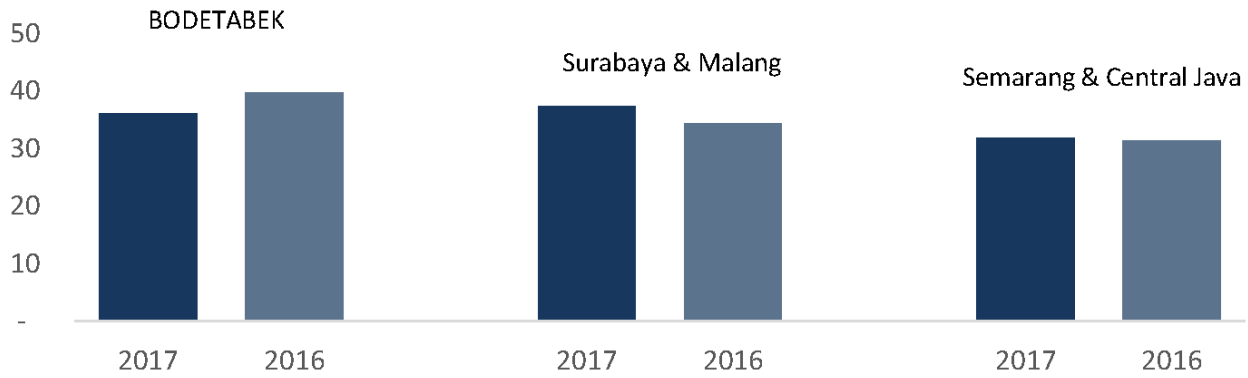
<b>MARKET AND SURVEY INTRODUCTION</b>	<b>1</b>
<b>SUMMARY OF RESULTS</b>	<b>7</b>
TABLE 1.1 SUMMARY OF RESULTS	7
TABLE 1.2 SUMMARY OF RESULTS BY AVERAGE ROOM RATES	7
TABLE 1.3 SUMMARY OF RESULTS: BY OPERATION	9
TABLE 1.4 SUMMARY OF RESULTS: BALI & BANDUNG/OTHER WEST JAVA	10
TABLE 1.5 SUMMARY OF RESULTS: JAKARTA & YOGYAKARTA	11
TABLE 1.6 SUMMARY OF RESULTS: OTHERS	13
<b>DEPARTMENTAL REVENUES &amp; EXPENSES</b>	<b>13</b>
TABLE 2.1 DEPARTMENTAL REVENUES & EXPENSES	14
TABLE 2.2 DEPARTMENTAL REVENUES & EXPENSES BY AVERAGE ROOM RATES	16
TABLE 2.3 DEPARTMENTAL REVENUES & EXPENSES BY OPERATION	18
TABLE 2.4 DEPARTMENTAL REVENUES & EXPENSES BALI	20
TABLE 2.5 DEPARTMENTAL REVENUES & EXPENSES JAKARTA	21
TABLE 2.6 DEPARTMENTAL REVENUES & EXPENSES BANDUNG/OTHER WEST JAVA & YOGYAKARTA	22
TABLE 2.7 DEPARTMENTAL REVENUES & EXPENSES BODETABEK, SURABAYA/MALANG, NUSA TENGGARA/LOMBOK, SEMARANG/CENTRAL JAVA, SOLO, BATAM	23
TABLE 2.8 DEPARTMENTAL REVENUES & EXPENSES MAKASSAR, MANADO, KALIMANTAN, MEDAN, OTHER SUMATERA/BABEL, PAPUA/MALUKU	24
<b>DEPARTMENTAL EXPENSES</b>	<b>24</b>
TABLE 3.1 DEPARTMENTAL EXPENSES BY AVERAGE ROOM RATE & OPERATION	25
TABLE 3.2 DEPARTMENTAL EXPENSES BALI & BANDUNG/OTHER WEST JAVA	27
TABLE 3.3 DEPARTMENTAL EXPENSES JAKARTA & YOGYAKARTA	29
TABLE 3.4 DEPARTMENTAL EXPENSES BODETABEK, SURABAYA/MALANG, NUSA TENGGARA/LOMBOK, SEMARANG/CENTRAL JAVA, SOLO, BATAM/BINTAN	31
TABLE 3.5 DEPARTMENTAL EXPENSES MAKASSAR, MANADO, KALIMANTAN, MEDAN, OTHER SUMATERA/BABEL, PAPUA/MALUKU	33
<b>UNDISTRIBUTED EXPENSES</b>	<b>34</b>
TABLE 4.1 UNDISTRIBUTED EXPENSES BY AVERAGE ROOM RATE & OPERATION	35
TABLE 4.2 UNDISTRIBUTED EXPENSES BALI & BANDUNG/OTHER WEST JAVA	37
TABLE 4.3 UNDISTRIBUTED EXPENSES JAKARTA & YOGYAKARTA	39
TABLE 4.4 UNDISTRIBUTED EXPENSES BODETABEK, SURABAYA/MALANG, NUSA TENGGARA/LOMBOK, SEMARANG/CENTRAL JAVA, SOLO, BATAM/BINTAN	41
TABLE 4.5 UNDISTRIBUTED EXPENSES MAKASSAR, MANADO, KALIMANTAN, MEDAN, OTHER SUMATERA/BABEL, PAPUA/MALUKU	43
<b>BUSINESS MIX</b>	<b>44</b>
TABLE 5.1 BUSINESS MIX PROFILE BY AVERAGE RATE & OPERATION	45
TABLE 5.2 BUSINESS MIX PROFILE BALI & BANDUNG/OTHER WEST JAVA	47
TABLE 5.3 BUSINESS MIX PROFILE JAKARTA & YOGYAKARTA	49
TABLE 5.4 BUSINESS MIX PROFILE BODETABEK, SURABAYA/MALANG, NUSA TENGGARA/LOMBOK, SEMARANG/CENTRAL JAVA, SOLO, BATAM/BINTAN	51
TABLE 5.5 BUSINESS MIX PROFILE MAKASSAR, MANADO, KALIMANTAN, MEDAN, OTHER SUMATERA/BABEL, PAPUA/MALUKU	53
<b>RESERVATION &amp; SALES STATISTICS</b>	<b>54</b>
TABLE 6.1 RESERVATION AND SALES STATISTICS BY ARR & OPERATION	54
TABLE 6.2 RESERVATION AND SALES STATISTICS BALI & BANDUNG/OTHER WEST JAVA	56
TABLE 6.3 RESERVATION AND SALES STATISTICS JAKARTA & YOGYAKARTA	57
TABLE 6.4 RESERVATION AND SALES STATISTICS BODETABEK, SURABAYA/MALANG, NUSA TENGGARA/LOMBOK, SEMARANG/CENTRAL JAVA, SOLO, BATAM	58
TABLE 6.5 RESERVATION AND SALES STATISTICS MAKASSAR, MANADO, KALIMANTAN, MEDAN, OTHER SUMATERA/BABEL, PAPUA/MALUKU	59

<b>NATIONALITY PROFILE</b>	<b>59</b>
TABLE 7.1 NATIONALITY PROFILE BY AVERAGE ROOM RATE & OPERATION	60
TABLE 7.2 NATIONALITY PROFILE BALI & BANDUNG/OTHER WEST JAVA	62
TABLE 7.3 NATIONALITY PROFILE JAKARTA & YOGYAKARTA	63
TABLE 7.4 NATIONALITY PROFILE BODETABEK, SURABAYA/MALANG, NUSA TENGGARA/LOMBOK, SEMARANG/CENTRAL JAVA, SOLO, BATAM/BINTAN	66
TABLE 7.5 NATIONALITY PROFILE MAKASSAR, MANADO, KALIMANTAN, MEDAN, OTHER SUMATERA/BABEL, PAPUA/MALUKU	68
<b>ROOMS STATISTICS</b>	<b>69</b>
TABLE 8.1 ROOMS STATISTICS BY AVERAGE ROOM RATE & OPERATION	70
TABLE 8.2 ROOMS STATISTICS BALI & BANDUNG/OTHER WEST JAVA	72
TABLE 8.3 ROOMS STATISTICS JAKARTA & YOGYAKARTA	74
TABLE 8.4 ROOMS STATISTICS BODETABEK, SURABAYA/MALANG, NUSA TENGGARA/LOMBOK, SEMARANG/CENTRAL JAVA, SOLO, BATAM/BINTAN	76
TABLE 8.5 ROOMS STATISTICS MAKASSAR, MANADO, KALIMANTAN, MEDAN, OTHER SUMATERA/BABEL, PAPUA/MALUKU	78
<b>FOOD &amp; BEVERAGE STATISTICS</b>	<b>78</b>
TABLE 9.1 FOOD & BEVERAGE STATISTICS PAR BY ARR & OPERATION	80
TABLE 9.2 FOOD & BEVERAGE STATISTICS PAR BALI & BANDUNG/OTHER WEST JAVA	82
TABLE 9.3 FOOD & BEVERAGE STATISTICS PAR JAKARTA & YOGYAKARTA	83
TABLE 9.4 FOOD & BEVERAGE STATISTICS PAR OTHERS	84
TABLE 9.5 FOOD & BEVERAGE STATISTICS POR BY ARR & OPERATION	86
TABLE 9.6 FOOD & BEVERAGE STATISTICS POR BALI & BANDUNG/OTHER WEST JAVA	87
TABLE 9.7 FOOD & BEVERAGE STATISTICS POR JAKARTA & YOGYAKARTA	88
TABLE 9.8 FOOD & BEVERAGE STATISTICS POR OTHERS	89
TABLE 9.9 FOOD & BEVERAGE STATISTICS % REVENUE BY ARR & OPERATION	91
TABLE 9.10 FOOD & BEVERAGE STATISTICS % REVENUE BALI & BANDUNG/OTHER WEST JAVA	92
TABLE 9.11 FOOD & BEVERAGE STATISTICS % REVENUE JAKARTA & YOGYAKARTA	93
TABLE 9.12 FOOD & BEVERAGE STATISTICS % REVENUE OTHERS	94
TABLE 9.13 F&B STATISTICS OTHERS BY ARR & OPERATION	96
TABLE 9.14 F&B STATISTICS OTHERS BALI & BANDUNG/OTHER WEST JAVA	98
TABLE 9.15 F&B STATISTICS OTHERS JAKARTA & YOGYAKARTA	99
TABLE 9.16 F&B STATISTICS OTHERS BODETABEK, SURABAYA/MALANG, NUSA TENGGARA/LOMBOK, SEMARANG/CENTRAL JAVA, SOLO, BATAM/BINTAN	100
TABLE 9.17 F&B STATISTICS OTHERS MAKASSAR, MANADO, KALIMANTAN, MEDAN, OTHER SUMATERA/BABEL, PAPUA/MALUKU	101
<b>SPA STATISTICS</b>	<b>101</b>
TABLE 10.1 SPA STATISTICS BY AVERAGE ROOM RATE & OPERATION	102
TABLE 10.2 SPA STATISTICS BALI & BANDUNG/OTHER WEST JAVA	103
TABLE 10.3 SPA STATISTICS JAKARTA & YOGYAKARTA	104
TABLE 10.4 SPA STATISTICS BODETABEK, SURABAYA/MALANG, NUSA TENGGARA/LOMBOK, SEMARANG/CENTRAL JAVA, SOLO, BATAM/BINTAN	105
TABLE 10.5 SPA STATISTICS MAKASSAR, MANADO, KALIMANTAN, MEDAN, SUMATERA/BEBEL/BINTAN, PAPUA/MALUKU	106
<b>LABOUR STATISTICS</b>	<b>106</b>
TABLE 11.1 LABOUR STATISTICS BY AVERAGE ROOM RATE & OPERATIONS	107
TABLE 11.2 LABOUR STATISTICS BALI & BANDUNG/OTHER WEST JAVA	108
TABLE 11.3 LABOUR STATISTICS JAKARTA & YOGYAKARTA	109
TABLE 11.4 LABOUR STATISTICS BODETABEK, SURABAYA/MALANG, NUSA TENGGARA/LOMBOK, SEMARANG/CENTRAL JAVA, SOLO, BATAM/BINTAN	110
TABLE 11.5 LABOUR STATISTICS MAKASSAR, MANADO, KALIMANTAN, MEDAN, OTHER SUMATERA/BABEL, PAPUA/MALUKU	111
<b>PRODUCTIVITY ANALYSIS</b>	<b>111</b>
TABLE 12.1 LABOUR & PRODUCTIVITY STATISTICS BY ARR & OPERATION	112
TABLE 12.2 LABOUR & PRODUCTIVITY STATISTICS BALI & BANDUNG/OTHER WEST JAVA	114
TABLE 12.3 LABOUR & PRODUCTIVITY STATISTICS JAKARTA & YOGYAKARTA	116
TABLE 12.4 LABOUR & PRODUCTIVITY STATISTICS BODETABEK, SURABAYA & MALANG, SEMARANG & CENTRAL JAVA, SOLO, BATAM/BINTAN	118
TABLE 12.5 LABOUR & PRODUCTIVITY STATISTICS MAKASSAR, MANADO, KALIMANTAN, MEDAN, OTHER SUMATERA/BABEL, PAPUA/MALUKU	120

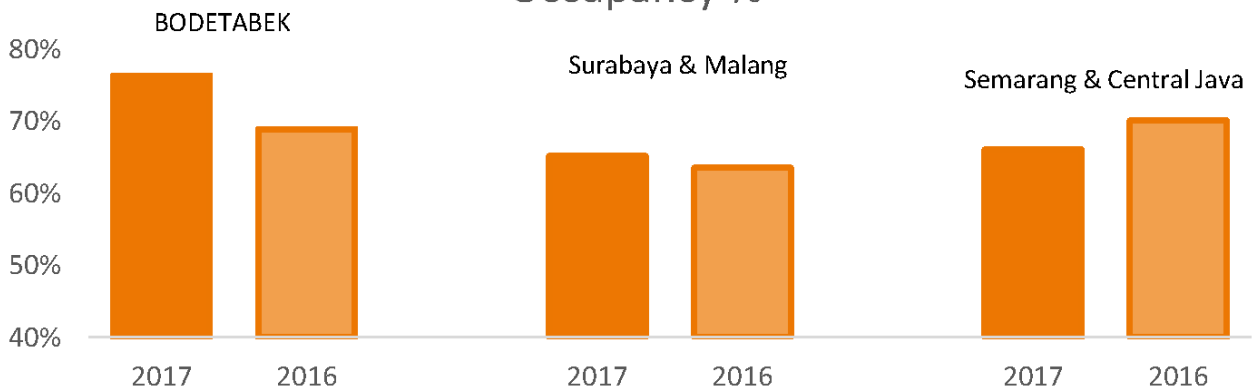
<b>ENERGY STATISTICS</b>	<b>121</b>
TABLE 13.1 ENERGY STATISTICS BY AVERAGE ROOM RATE & OPERATION	122
TABLE 13.2 ENERGY STATISTICS BALI & BANDUNG/OTHER WEST JAVA	124
TABLE 13.3 ENERGY STATISTICS JAKARTA & YOGYAKARTA	126
TABLE 13.4 ENERGY STATISTICS BODETABEK, SURABAYA/MALANG, NUSA TENGGARA/LOMBOK, SEMARANG/CENTRAL JAVA, SOLO, BATAM/BINTAN	128
TABLE 13.5 ENERGY STATISTICS MAKASSAR, MANADO, KALIMANTAN, MEDAN, OTHER OTHER SUMATERA/BABEL, PAPUA/MALUKU	130
<b>GREEN PRACTICES</b>	<b>131</b>
TABLE 14.1 GREEN PRACTICES BY AVERAGE ROOM RATE & OPERATION	14731
TABLE 14.2 GREEN PRACTICES BALI & BANDUNG/OTHER WEST JAVA	14834
TABLE 14.3 GREEN PRACTICES JAKARTA & YOGYAKARTA	137
TABLE 14.4 GREEN PRACTICES BODETABEK, SURABAYA/MALANG, NUSA TENGGARA/LOMBOK, SEMARANG/CENTRAL JAVA, SOLO, BATAM/BINTAN	1500
TABLE 14.5 GREEN PRACTICES MAKASSAR, MANADO, KALIMANTAN, MEDAN, OTHER OTHER SUMATERA/BABEL, PAPUA/MALUKU	15143
<b>FORECAST</b>	<b>146</b>
TABLE 15.1 FORECAST BY AVERAGE ROOM RATE & OPERATION	147
TABLE 15.2 FORECAST BALI & BANDUNG/OTHER WEST JAVA	148
TABLE 15.3 FORECAST JAKARTA & YOGYAKARTA	149
TABLE 15.4 FORECAST BODETABEK, SURABAYA/MALANG, NUSA TENGGARA/LOMBOK, SEMARANG/CENTRAL JAVA, SOLO, BATAM/BINTAN	150
TABLE 15.5 FORECAST MAKASSAR, MANADO, KALIMANTAN, MEDAN, OTHER OTHER SUMATERA/BABEL, PAPUA/MALUKU	151
<b>EXPLANATION OF TERMS &amp; BASES USED</b>	<b>152</b>
<b>ABOUT HORWATH HTL – ASIA PACIFIC</b>	<b>153</b>

AVERAGE DAILY RATE AND OCCUPANCY

ADR \$



Occupancy %



RevPAR \$

