



196+ roundtable benelux

belgium, luxembourg,
netherlands

amsterdam
(30.08.2022)

28
participants

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NOTES

1) calculated as per PKF sample; includes all
properties with at least 100 rooms; 2) as per 31
December 2021; 3) as per the PKF contract
database; 4) from the viewpoint of hotel groups

supply

594 properties	110,958 rooms ¹
86% branded rooms	88% chain affiliated rooms

group / brand profile

- › strongest brand: **Van der Valk**
- › strongest group: **Accor**
- › fastest growing brand: **Intel**
- › fastest growing group: **Intel**
- › strongest regional brand (global presence): **Van der Valk**
- › fastest growing regional brand: **CitizenM**

key takeaways

- › Hotels top line is recovering well with healthy rate increases, but costs are also rising.
- › Staffing in housekeeping and in particular in the kitchen remains a big problem for full-service hotels which are having to be selective about opening hours for F&B outlets.
- › Despite lower visitor numbers in Amsterdam over the past few years, over-tourism is still on people's minds. The Dutch government has passed legislation to cap the number of overnight stays in Amsterdam at below 2019 numbers – owners and operators are unsure how this will be enforced and impact their businesses.
- › Investor uptake of the CRREM tool to calculate carbon risk has helped sustainability to become a key factor impacting investor decision making. Carbon calculations can directly impact the final pricing of assets at the technical DD stage as buyers underwrite the cost of upgrading the assets energy efficiency as a direct discount on the pricing of the asset.
- › The economic case for operational ESG initiatives is also amplifying with high costs of energy and inflationary pressure on the supply chain; Operators want to reduce waste but maintain customer satisfaction.

pipeline

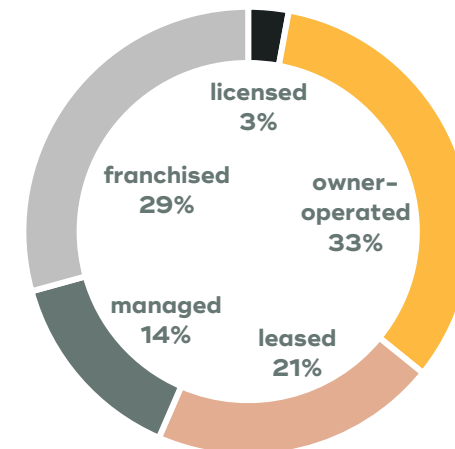
57 properties	10,587 rooms ^{1,2}
34 hotels under construction	23 planned hotels

selected openings of 2021

- › Intel Hotels Amsterdam Landmark, Amsterdam, **306 rooms**
- › Center Parcs Terhills Resort, Hasselt, **250 rooms**
- › Intel Hotels Den Haag Marina Beach, The Hague, **226 rooms**
- › Voco The Hague, The Hague, **204 rooms**
- › Amsterdam Gare du Nord, Amsterdam, **184 rooms**

contracts

455 properties	87,044 rooms under contract ^{2,3,4}
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