



196+ roundtable  
benelux

belgium, luxembourg,  
netherlands

online  
(25.11.2021)

22  
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 2020; 3) as per the PKF contract  
database; 4) from the viewpoint of hotel groups

supply

579 properties	107,921 rooms <sup>1</sup>
86% branded rooms	88% chain affiliated rooms

group / brand profile

- › strongest brand: **Van der Valk**
- › strongest group: **Accor**
- › fastest growing brand: **nhow**
- › fastest growing group: **Minor**
- › strongest regional brand (global presence): **Van der Valk**
- › fastest growing regional brand: **The Student Hotel**

key takeaways

- › In the Benelux, secondary cities generally outperformed capital cities in occupancy and ADR for the past 12 months
- › According to STR data, Europe showed a strong ADR recovery in Q3 2021, attaining 91% of 2019 levels in September. In the Benelux subregion, weekday and weekend ADR had a similar pattern, with Antwerp leading, Rotterdam showing growth and Amsterdam lagging behind other cities.
- › Based on the projection from STR, domestic leisure is expected to recover by 2022, international leisure by 2023 and domestic business by 2024. International business recovery will lag behind. 68% of attendees agreed that the leisure segment will perform best in the next 12-18 months.
- › According to the attendees participating in our Menti survey, it is expected that in the next 3 to 5 years the top 3 best opportunities for growth in Benelux will be apart-hotels & serviced apartments (30%), co-living & student housing (19%) as well as resorts (19%)
- › Furthermore, 54% of attendees believe that the market will recover to 2019 levels in 2024, 31% in 2025 and 15% by mid 2022

pipeline

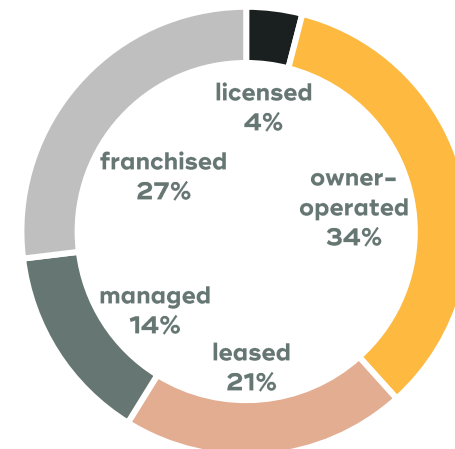
59 properties	11,444 rooms <sup>1,2</sup>
42 hotels under construction	17 planned hotels

selected openings of 2020

- › nhow Amsterdam RAI, Amsterdam, **650 rooms**
- › Holiday Inn Express Amsterdam - North Riverside, Amsterdam, **438 rooms**
- › The Student Hotel Delft, Delft, **341 rooms**
- › Inside by Meliá Amsterdam, Amsterdam, **328 rooms**
- › Van der Valk Amsterdam Rai-Zuidas, Amsterdam, **234 rooms**

contracts

386 properties	74,943 rooms under contract <sup>2,3,4</sup>
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