

Ranking of hotel brands in Germany

News from our research team!

We wish to highlight a study done by our Munich office, that publishes an annual ranking (as per 31 March each year) of all hotel brands with more than 15 hotels in their portfolio in Germany. This year's report analyses the development of hotel brands over the last five years and during the COVID-19-pandemic in Germany. Who has grown during the crisis? Read more to find out!

Hotel brands with at least 15 hotels in Germany 2022 / 2021 (by number of hotels)



Hotel brands with at least 15 hotels in Germany							
rank	brand	brand owner	segment	number of hotels		change	
				2022	2021	2022/21	
1	Best Western (incl. Plus, Premier) ¹⁾	BWH Hotel Group Central Europe GmbH	midscale	154	161	-7	↓
2	B&B HOTELS	B&B HOTELS GmbH	budget	151	142	9	↑
3	Mercure	Accor S.A.	midscale	98	102	-4	↓
4	ibis	Accor S.A.	economy	84	85	-1	↓
5	ibis budget	Accor S.A.	budget	75	79	-4	↓
7	Motel One	Motel One GmbH	economy	56	52	4	↑
8	Leonardo (incl. Royal, Boutique)	Fattal Hotel Management Company	midscale	54	51	3	↑
9	NH (incl. Collection, nhow)	NH Hotel Group, S.A.	midscale	53	54	-1	↑
6	Novum	NOVUM Hospitality GmbH	indifferent	47	64	-17	↓
10	Holiday Inn Express	InterContinental Hotels Group PLC	economy	45	44	1	↑
11	Dorint Hotels & Resorts	Dorint GmbH	upscale	42	41	1	↑
12	ibis Styles	Accor S.A.	economy	41	40	1	↑
13	IntercityHotel	Deutsche Hospitality	midscale	38	38	0	●
14	Premier Inn	Premier Inn Hotels Limited/Whitbread PLC	economy	36	23	13	↑
15	ACHAT	ACHAT Hotel- und Immobilienbetriebsgesellschaft mbH	midscale	32	32	0	●
16	the niu	NOVUM Hospitality GmbH	economy	31	22	9	↑
17	Holiday Inn	InterContinental Hotels Group PLC	midscale	30	33	-3	↓

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Hotel brands with at least 15 hotels in Germany

rank	brand	brand owner	segment	number of hotels		change	
				2022	2021	2022/21	
18	DORMERO	DORMERO Hotel AG	midscale	27	24	3	↑
19	TRIP INN	TRIP INN Management & Service GmbH	indifferent	26	28	-2	↓
20	A&O Hotels and Hostels	A&O HOTELS and HOSTELS Holding GmbH	low budget	25	25	0	●
22	H+ Hotels	H-Hotels AG	midscale	25	25	0	●
23	Steigenberger Hotels & Resorts	Deutsche Hospitality	upscale	25	29	-4	↓
24	Maritim	Maritim Hotelgesellschaft mbH	upscale	24	30	-6	↓
25	Vienna House (incl. Easy, Townhouse)	Vienna International Hotelmanagement AG	economy	24	28	-4	↓
21	Arthotel ANA	Gorgeous Smiling Hotels GmbH	midscale	22	21	1	↑
26	MOXY	Marriott International, Inc.	economy	22	16	6	↑
27	Radisson Blu Hotels & Resorts	Radisson Hotel Group	upscale	22	22	0	●
28	Novotel	Accor S.A.	midscale	21	20	1	↑
31	Hampton by Hilton	Hilton Worldwide Holdings Inc.	economy	20	15	5	↑
30	Centro Hotels	Centro Hotel Group	indifferent	19	20	-1	↓
32	Lindner Hotels & Resorts	Lindner Hotels AG	upscale	19	19	0	●
29	Select Hotels	NOVUM Hospitality GmbH	midscale	18	15	3	↑
33	Courtyard by Marriott	Marriott International, Inc.	midscale	16	14	2	↑
34	Adina Apartment Hotels	TFE Hotels Medina Property Services Pty Ltd	midscale	15	10	5	↑

Notes

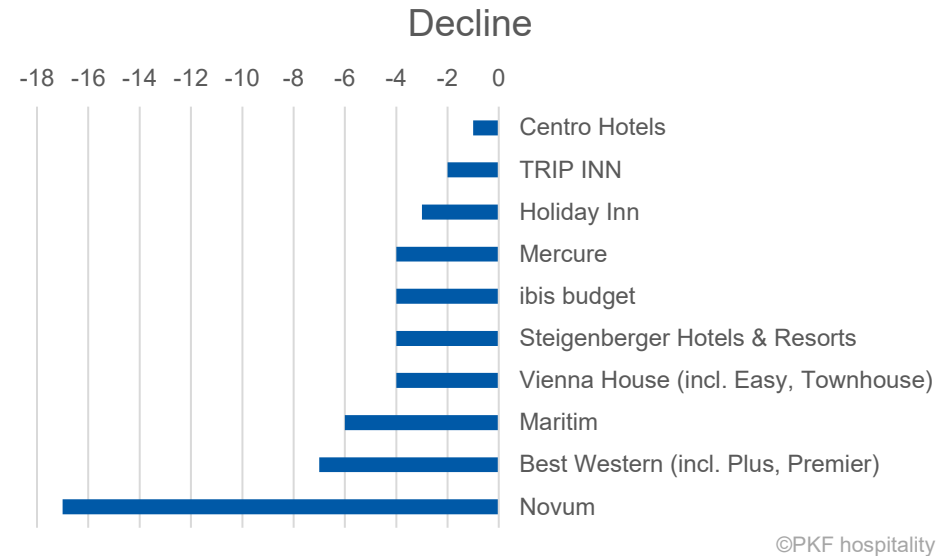
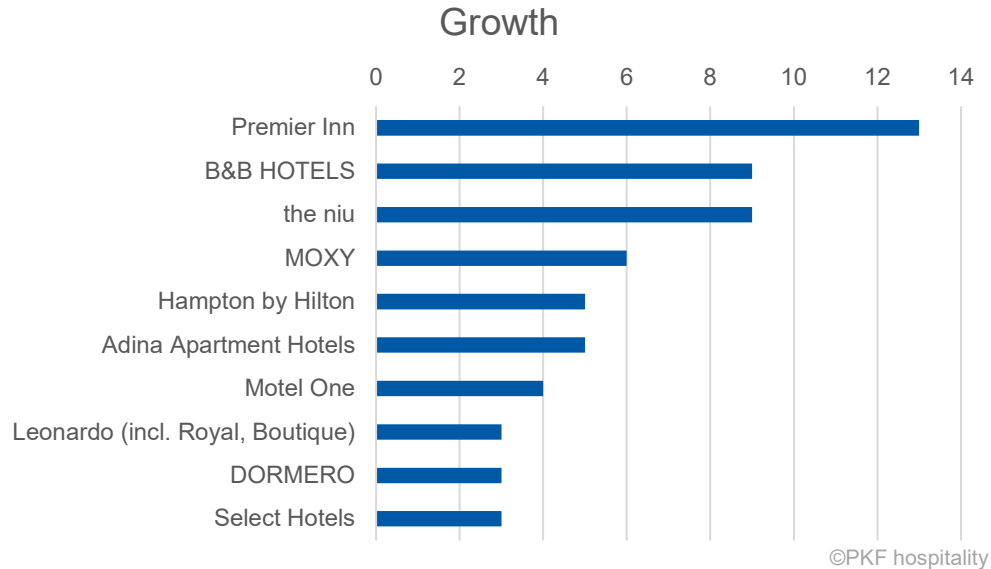
- 1) exkl. BW Premier/Signature Collection
- 2) Information without guarantee and without claim to completeness
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*Due to a retroactive revision of capacities, these data may differ from previously published data for earlier reporting dates

Source PKF hospitality group

March 2022

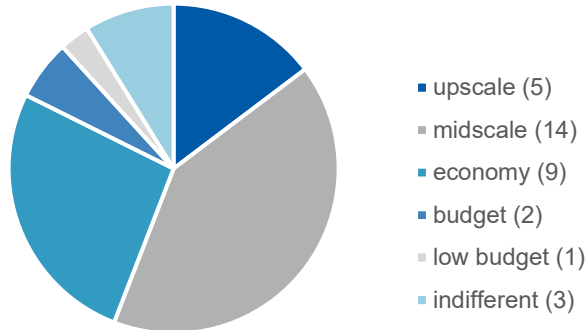
Hotel brands with at least 15 hotels in Germany 2022 / 2021 (by number of hotels)



- The **fastest growing brand: Premier Inn** (+ 13 hotels); target: strong expansion in the German market
- **B&B Hotels**: potential, if the speed of expansion is maintained, to become the most represented brand in the German hotel market and to displace Best Western from the number 1 position
- **Novum** with a **decline of 17** hotels recorded the highest reduction e.g. due to re-brandings at Novum Hospitality
- Decrease of hotels of traditional brands like Best Western, Maritim and Steigenberger

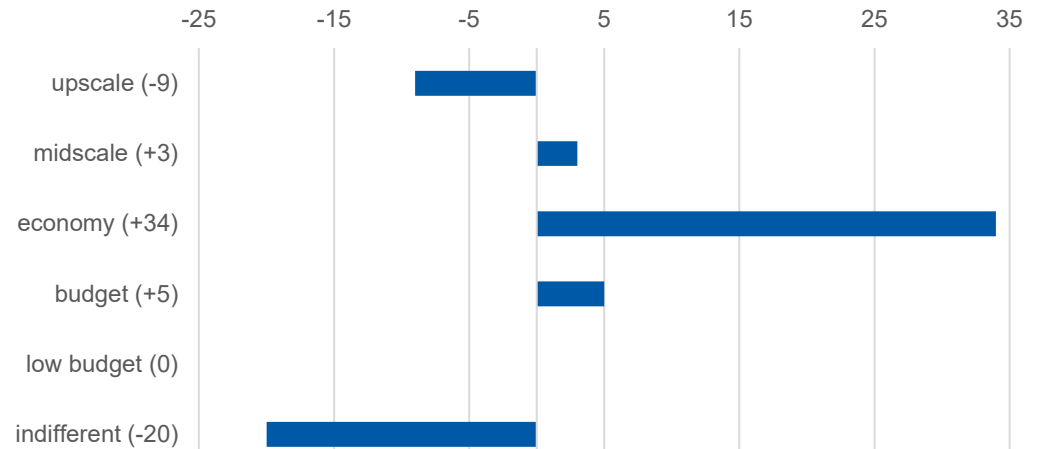
Hotel brands with at least 15 hotels in Germany 2022 / 2021 (by number of hotels)

Hotel brands by segment



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Development of the segments



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- **Midscale** segment: **largest segment** with a share of 41 % of the hotel sample
- High **increase** of hotels in the **economy segment** (+ 34 hotels; thereof Premier Inn + 13, the niu + 9)

Hotel brands with at least 15 hotels in Germany 2022 / 2021 (by number of rooms)



Hotel brands with at least 15 hotels in Germany							
rank	brand	brand owner	segment	number of rooms		change	
				2022	2021	2022/21	
1	Motel One	Motel One GmbH	economy	16.294	14.579	1.715	↑
2	B&B HOTELS	B&B HOTELS GmbH	budget	15.953	15.037	916	↑
3	Best Western (incl. Plus, Premier) ¹⁾	BWH Hotel Group Central Europe	midscale	15.885	16.534	-649	↓
4	Mercure	Accor S.A.	midscale	14.040	14.510	-470	↓
5	ibis	Accor S.A.	economy	11.503	11.476	27	↑
6	NH (incl. Collection)	NH Hotel Group, S.A.	midscale	9.703	9.833	-130	↓
7	Leonardo (incl. Royal, Boutique)	Fattal Hotel Management Company	midscale	9.665	8.961	704	↑
8	ibis budget	Accor S.A.	budget	7.716	8.059	-343	↓
9	Maritim	Maritim Hotelgesellschaft mbH	upscale	7.626	8.838	-1.212	↓
10	Dorint Hotels & Resorts	Dorint GmbH	upscale	7.311	7.131	180	↑
11	Holiday Inn	InterContinental Hotels Group PLC	midscale	6.993	7.560	-567	↓
12	Holiday Inn Express	InterContinental Hotels Group PLC	economy	6.947	6.457	490	↑
13	IntercityHotel	Deutsche Hospitality	midscale	6.930	6.680	250	↑
14	the niu	NOVUM Hospitality GmbH	economy	6.171	3.943	2.228	↑
15	Premier Inn	Premier Inn Hotels Limited/Whitbread PLC	economy	6.155	3.990	2.165	↑
16	Radisson Blu Hotels & Resorts	Radisson Hotel Group	upscale	6.049	6.049	0	●
17	Steigenberger Hotels & Resorts	Deutsche Hospitality	upscale	5.140	6.446	-1.306	↓

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Hotel brands with at least 15 hotels in Germany

rank	brand	brand owner	segment	number of rooms		change	
				2022	2021	2022/21	
18	A&O Hotels & Hostels	A&O HOTELS and HOSTELS Holding GmbH	low budget	5.068	5.068	0	●
19	Novotel	Accor S.A.	midscale	4.460	4.250	210	↑
20	ibis Styles	Accor S.A.	economy	4.415	4.057	358	↑
21	MOXY	Marriott International, Inc.	economy	4.333	3.183	1.150	↑
22	Novum	NOVUM Hospitality GmbH	indifferent	4.064	5.061	-997	↓
23	Hampton by Hilton	Hilton Worldwide Holdings Inc.	economy	3.834	2.809	1.025	↑
24	ACHAT	ACHAT Hotel- und Immobilienbetriebsgesellschaft mbH	midscale	3.742	3.765	-23	↓
25	H+ Hotels	H-Hotels AG	midscale	3.298	3.291	7	↑
26	Vienna House (incl. Easy, Townhouse)	Vienna International Hotelmanagement AG	economy	3.082	3.555	-473	↓
27	Courtyard By Marriott	Marriott International, Inc.	midscale	3.076	2.664	412	↑
28	Lindner Hotels & Resorts	Lindner Hotels AG	upscale	3.023	3.023	0	●
29	DORMERO	DORMERO Hotel AG	midscale	3.019	2.777	242	↑
30	Adina Apartment Hotels	TFE Hotels Medina Property Services Pty Ltd	midscale	2.389	1.488	901	↑
31	Select Hotels	NOVUM Hospitality GmbH	midscale	2.005	1.797	208	↑
32	TRIP INN	TRIP INN Management & Service GmbH	indifferent	1.500	1.570	-70	↓
33	Arthotel ANA	Gorgeous Smiling Hotels GmbH	midscale	1.452	1.347	105	↑
34	Centro Hotels	Centro Hotel Group	indifferent	1.210	1.320	-110	↓

Notes

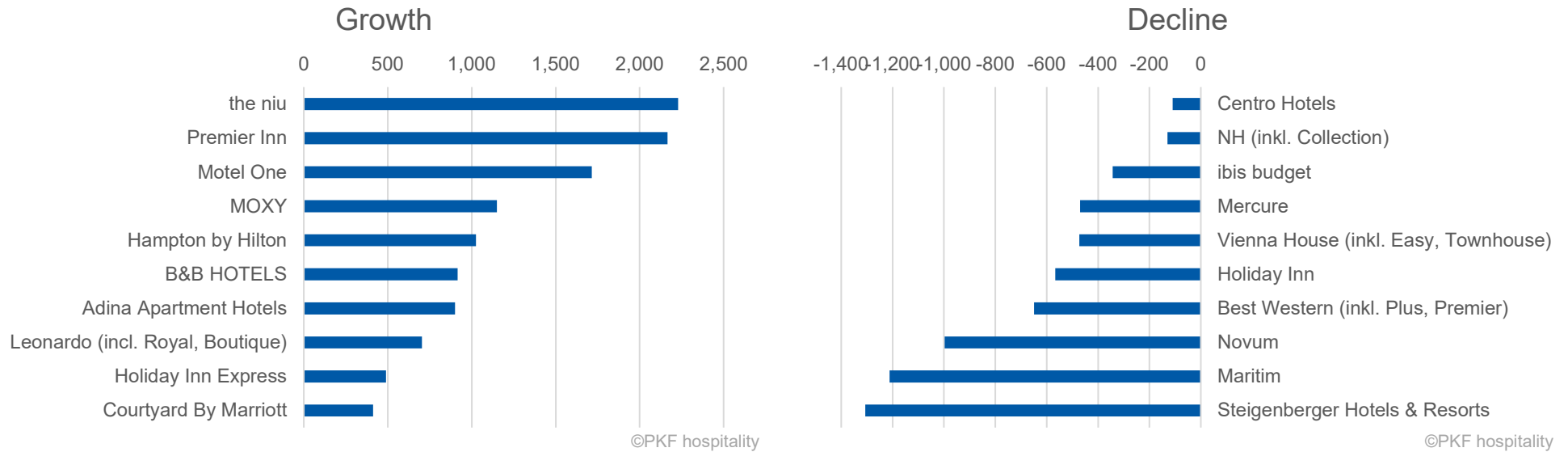
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March 2022

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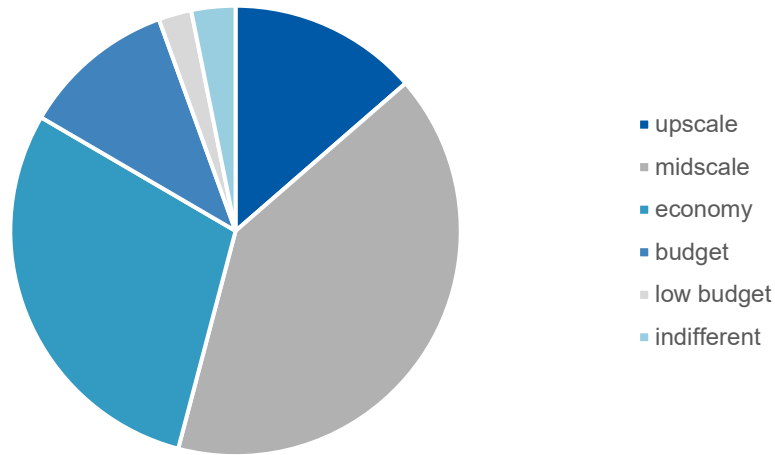


- **Six fastest-growing brands** (in terms of rooms) belong to the **budget / economy segment**: the niu, Premier Inn, Motel One, moxy Hampton by Hilton, B&B Hotels
- **Midscale** brands with highest growth: Adina Apartment Hotels, Leonardo (incl. Royal, Boutique)

- **Growth (in %):**
 - Adina Apartment Hotels: + 61 % (from 1.488 to 2.389 rooms)
 - The niu: + 57 % (from 3.943 to 6.171)
 - Premier Inn: + 54 % (from 3.990 to 6.155)
- **Decline (in %):**
 - Steigenberger Hotels & Resorts: – 20 % (from 6.446 to 5.140)
 - Novum: - 20 % (from 5.061 to 4.064)
 - Maritim: - 14 % (from 8.838 to 7.626)

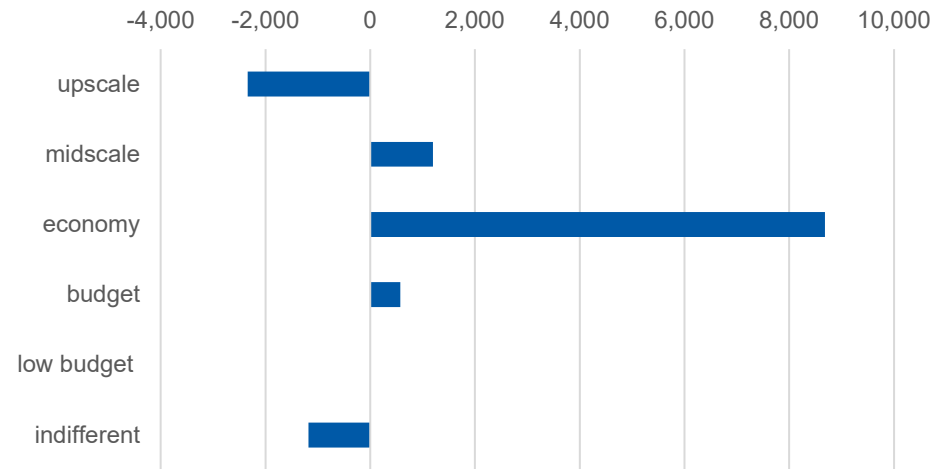
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Hotel brands by segment – 2022 (rooms)



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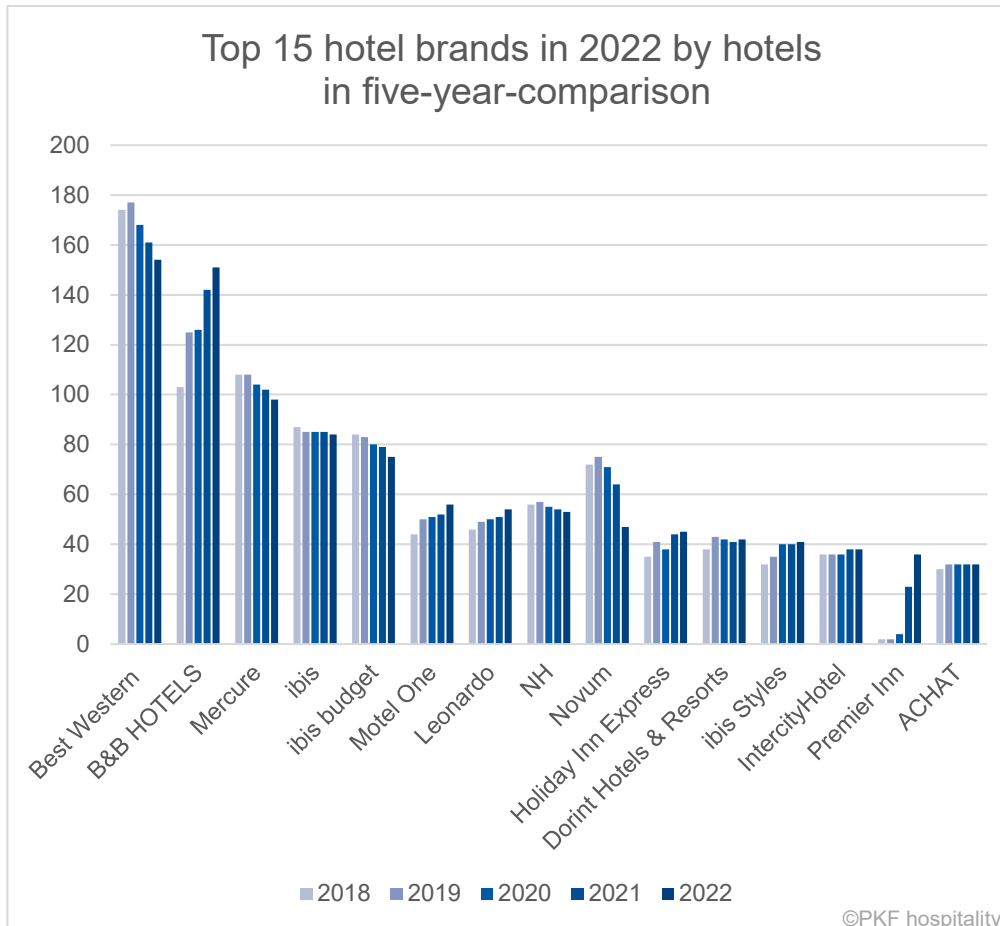
Development of the segments (rooms)



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- **Midscale** segment: the segment with the highest market share in terms of rooms in Germany (40 % of all rooms)
- High **increase** in rooms in the **economy segment** (+ 8.685 rooms)
- Highest **decline** in rooms in the **upscale segment** (- 2.338 rooms)

Top 15 hotel brands – five-year-comparison (by hotels)



2018 - 2022:

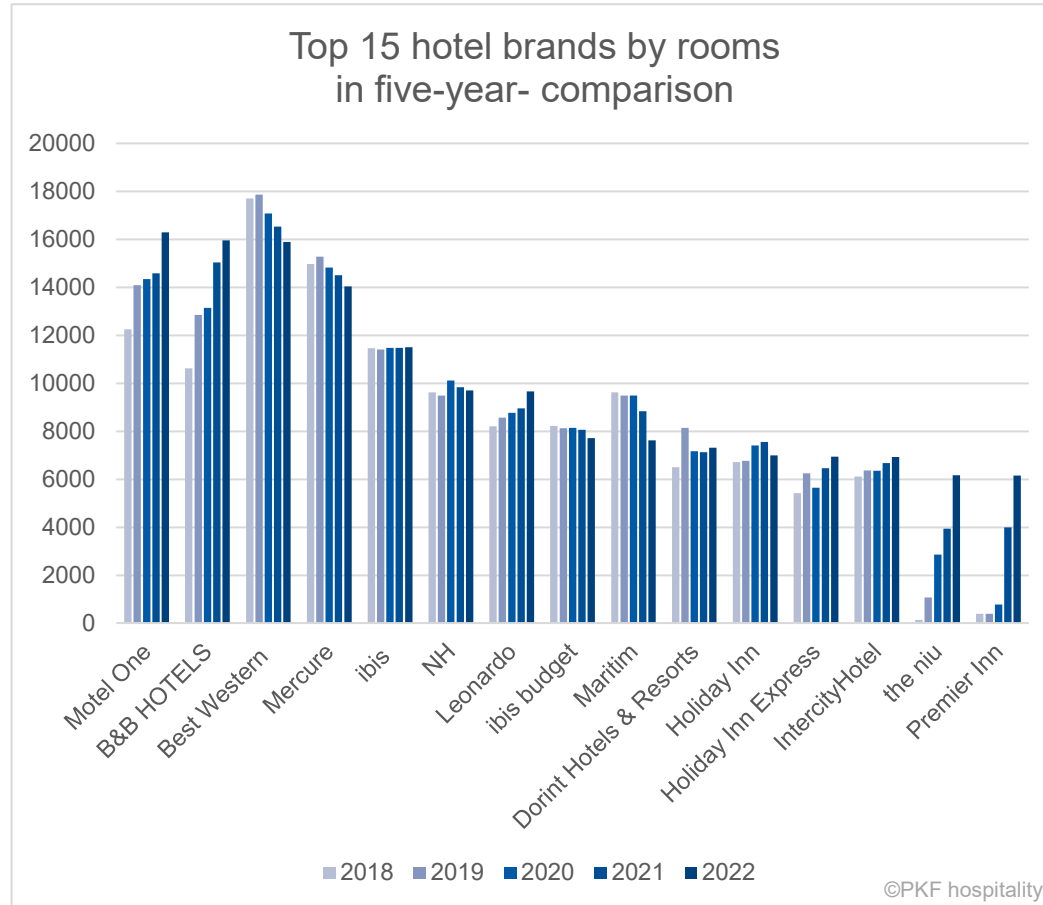
Increase:

- **Premier Inn** (+ 1.700 %, from 2 to 36 hotels)
- **B&B Hotels** (+ 47 %, from 103 to 151)
- **Holiday Inn Express** (+ 29 %, from 35 to 45)

Decrease:

- **Novum** (- 35 %, from 72 to 47 hotels)
- **Best Western** (- 11 %, from 174 to 154)
- **Ibis budget** (- 11 %, from 84 to 75)

Top 15 hotel brands – five-year-comparison (by rooms)



2018 – 2022

Increase:

- The niu (+ 4.156 %, from 145 to 6.171 rooms)
- Premier Inn (+ 1.470 %, from 392 to 6.155)
- B&B hotels (+ 50 %, from 10.624 to 15.953)
- Motel One (+ 33 %, from 12.250 to 16.294)

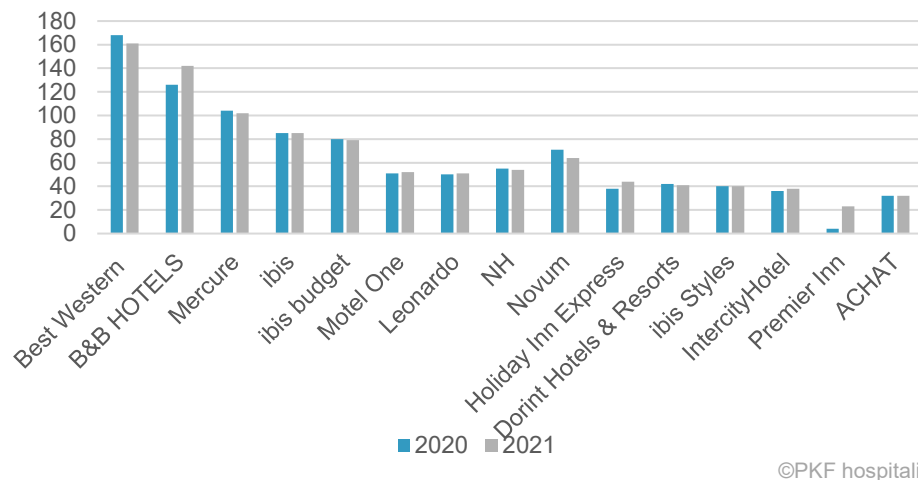
Decrease:

- Maritim (- 21 %, from 9.621 to 7.626)
- Best Western (- 10 %, from 17.700 to 15.885)
- Mercure (- 6 %, from 14.974 to 14.040)

Top 15 hotel brands - during COVID-19 (2020 / 2021)



Top 15 hotel brands by hotels - 2020 / 2021



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COVID-19 (2020/21)

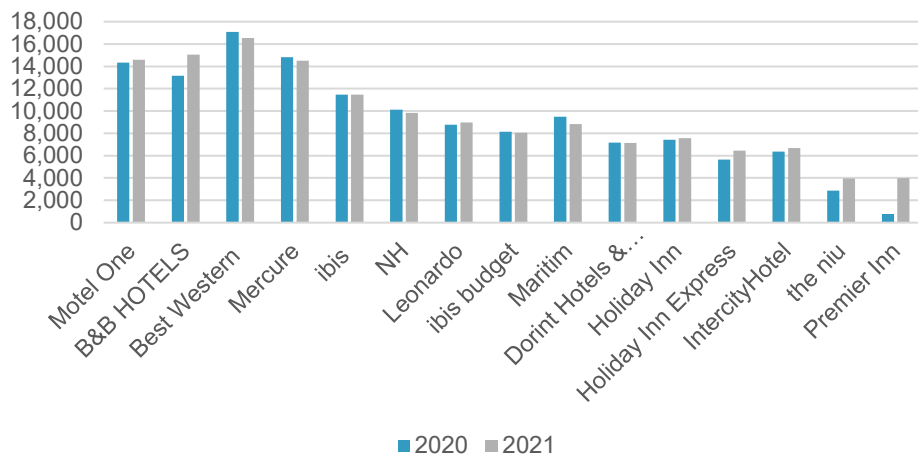
Increase:

- Premier Inn (+475%) from 4 to 32 hotels
- Holiday Inn Express (+16%) from 38 to 44
- B&B Hotels (+13%) from 126 to 142

Decrease:

- Novum (-10%) from 71 to 64
- Best Western (-4%) from 168 to 161

Top 15 hotel brands by rooms - 2020 / 2021



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COVID-19 (2020/21)

Increase:

- Premier Inn (+413%) from 778 to 3.990 rooms
- the niu (38%) from 2.866 to 3943
- B&B Hotels (14%) from 13.148 to 15.037

Decrease:

- Maritim (-7%) from 9.486 to 8.838
- Best Western (-3%) from 17.074 to 16.534