



196+ roundtable
heart of europe

austria, czechia,
hungary, slovakia

online
(27.05.2021)

48
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

703 properties	124,462 rooms ¹
63% branded rooms	75% chain affiliated rooms

group / brand profile

- › strongest brand: **Danubius**
- › strongest group: **Accor**
- › fastest growing brand: **Student**
- › fastest growing group: **Student**
- › strongest regional brand (global presence): **Danubius**
- › fastest growing regional brand: **Amedia**

key takeaways

- › Within the past year (or even more) the resort destinations, also more rural locations, have gained popularity and were not as significantly affected by the pandemic compared to cities with a high international demand (e.g. Vienna, Salzburg, Budapest)
- › The domestic market in Austria is still solid, also due to the travel restrictions in connection with the COVID-19 pandemic.
- › Despite the (international) travel restrictions which have led to a change in consumer behaviour, various other trends are changing the hospitality industry, such as workcation, increased demand in the co-living segment etc.
- › The buy-to-let scheme and other innovative accommodation facilities (e.g. serviced apartments, aparthotels) have experienced a strong upwards trend, especially from an investment perspective.
- › Some large hotels remained closed due to their reliance on international travel but will reopen as soon as restrictions are lifted.
- › The 196+ barometer poll sees a quicker regional recovery than a global one and expects reaching pre-corona business levels by 2023 or 2024.

pipeline

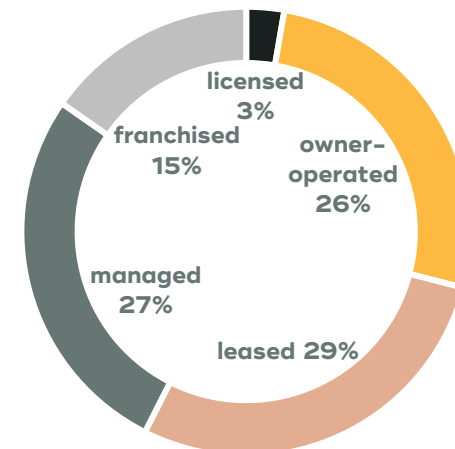
99 properties	16,697 rooms ^{1,2}
69 hotels under construction	30 planned hotels

selected openings of 2020

- › The Student Hotel Vienna, Vienna, **818 rooms**
- › InterCityHotel Graz, Graz, **229 rooms**
- › Smartments Student Graz Finkengasse, Graz, **187 rooms**
- › Campanile Vienna South, Vienna, **152 rooms**
- › TUI Blue Montafon, Tschagguns, **149 rooms**

contracts

349 properties	68,300 rooms under contract ^{2,3,4}
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