HTLroundtable british isles	british isles	online (03.09.2020)	**49** participants

supply

2,062 properties; 365,365 rooms[1]

BRANDED ROOMS

79%

CHAIN AFFILIATED ROOMS

91%

GROUP / BRAND PROFILE

- strongest brand: Premier Inn
- strongest group: IHG
- fastest growing brand: Premier Inn
- fastest growing group: Marriott
- strongest regional brand (global presence): Holiday Inn
- fastest growing regional brand: Holiday Inn Express

pipeline

437 properties; 89,272 rooms[1,2]

247 HOTELS UNDER CONSTRUCTION

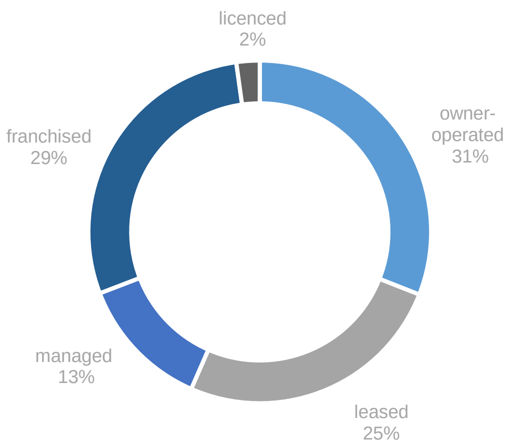
190 PLANNED HOTELS

Upcoming openings

- Bermonds Locke, Bermondsey, London 143 rooms
- NoMad, Covent Garden, London 92 rooms
- Artist Residence, Bristol 23 rooms
- The Harper, Norfolk, 32 rooms

hotel contracts

1,809 properties; 326,934 rooms under contract[2,3,4]



key takeaways

- regional hotel recovery is much stronger than major cities like London or Manchester, in fact, some coastal and countryside properties have had record performance in July and August
- government assistance for operators including furlough and the moratorium on forfeiture may just be delaying the inevitable and marginal properties may fail once these measures end
- it is key for owners and operators to communicate and work together for them to survive the economic downturn, the onus cannot only be on one party
- private equity funds are flush with capital and interest rates are at record lows which could be the ideal combination for post-pandemic growth
- brands should be making the effort to maintain the connection with their customers during this time and brands that can differentiate themselves are likely to deliver the greatest value to owners and guests alike

HTL partners

Artemide, be we emp, GH Hotel Interior Group, GIRA, GROHE, HÄFELE, hotel forum, JELD-WEN, JOI-DESIGN, KALDEWEI, KAMPMANN, Radisson Hotel Group, str, Wombat's the city hostel, 360 decoro

HTLroundtables around the globe

learn more and find the HTLroundtables schedule at

www.pkfhotels.com

NOTES:
1) calculated as per PKF sample; includes all properties with at least 100 rooms; 2) as per 31 December 2019;
3) as per the PKF contract database 4) from the viewpoint of hotel groups