

HTLroundtable  
germany

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online  
(25.06.2020)

48  
participants

## supply

1,973 properties; 356,032 rooms<sup>1</sup>

BRANDED ROOMS

84%

CHAIN AFFILIATED ROOMS

86%

GROUP / BRAND PROFILE

- strongest brand: **Motel One**
- strongest group: **Accor**
- fastest growing brand: **Niu**
- fastest growing group: **Novum**
- strongest regional brand (global presence): **Motel One**
- fastest growing regional brand: **Niu**

## pipeline

607 properties; 112,324 rooms<sup>1,2</sup>

279

HOTELS UNDER CONSTRUCTION

328

PLANNED HOTELS

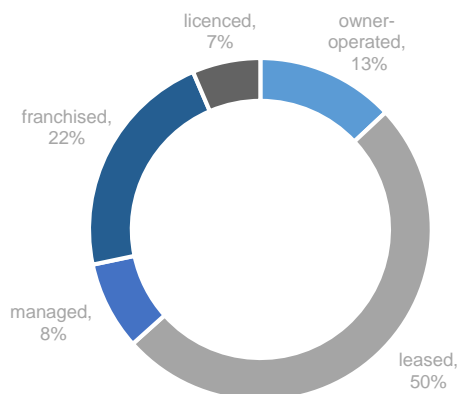


SELECTED OPENINGS of 2019

- The Student Hotel Berlin, Berlin, 475 rooms
- H2 Hotel München Olympiapark, Munich, 465 rooms
- Bento Inn Messe München, Munich, 366 rooms
- Loftstyle Hotel Hannover, Best Western Signature Collection, Hannover, 351 rooms

## hotel contracts

1,421 properties; 266,092 rooms under contract<sup>2,3,4</sup>



## key takeaways

- hotels in leisure destinations are recovering the quickest and in some cases profiting (in terms of demand) from the corona crisis
- over the next 18 months the leisure transient segment is expected to be the strongest with MICE being the weakest
- operators spoke positively concerning the cooperation and support of banks, lessors and public institutions in dealing with the present challenges
- the crisis is expected to further support more flexible i.e. hybrid lease models – the fix lease is a dying breed
- general sentiment is that a recovery to pre-corona levels will take at least two to three years
- concerning the real-estate market, the biggest loser is the retail segment possibly followed by offices which may pose an opportunity for hotels – the residential sector (also in hotels) is proving to be the most resilient
- serviced apartments followed by resorts are expected to show the strongest growth over the next three to five years

## HTL partners



## HTLroundtables around the globe



learn more and find the HTLroundtables schedule at

[www.pkfhotels.com](http://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