



196+ roundtable
germany

germany

online
(24.06.2021)

43
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

2,018 properties	362,826 rooms ¹
83% branded rooms	85% chain affiliated rooms

group / brand profile

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

key takeaways

- › Overall outlook for Germany is similar to Europe. Steady but longer upward trend. RevPar index is anticipating to reach 2019 levels not before 2025. The latter is also linked to the increasing hotel pipeline.
- › Despite Covid-19, the European hotel pipeline looks strong in 2021. Germany's in second position with 99k rooms (30k in planning, 18k in final planning, 55k in construction) behind the UK with about 150k rooms and before Spain with about 40k rooms. Key destination remain Frankfurt/M, Berlin and Hamburg with remaining focus on acquisitions and conversions vs. green field developments.
- › It is anticipated that hotel markets will, Post Covid, get redefined in multiples aspects as a natural evolution. Covid has acted as a catalyst accelerating changes ranging from procedures and marketing to behaviour and offers driven by the new demand – staycations, workations, bleisure, etc.
- › The serviced living segment will be, if not so already, an important hospitality element in the future, for which decisions have to be taken today.
- › Contracts will further evolve with modular components (fix/variable depending on location) and hybrid versions to adapt to the new needs and stronger trend for ESG (Environmental, Social, and Corporate Governance) elements and sustainability components in building and construction requirements.

pipeline

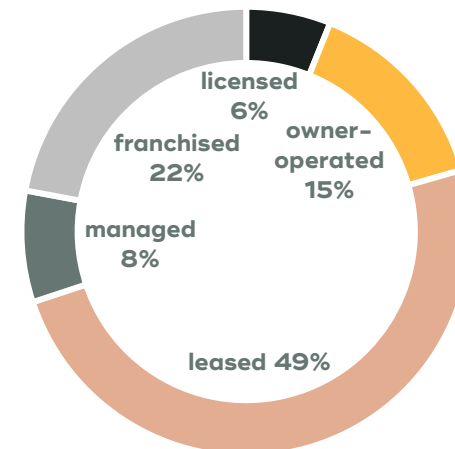
578 properties	107,728 rooms ^{1,2}
295 hotels under construction	283 planned hotels

selected openings of 2020

- › Priwall Waterfront Feriensiedlung, Lubeck, **509 rooms**
- › The Niu Air, Frankfurt Am Main, **344 rooms**
- › H2 Hotel Leipzig, Leipzig, **337 rooms**
- › MASEVEN München Messe Dornach, Aschheim, **319 rooms**
- › Campo Novo Business Freiburg, Freiburg Im Breisgau, **305 rooms**

contracts

1,494 properties	278,062 rooms under contract ^{2,3,4}
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