

Hotel Pipeline Report

DACH

October 2023

OVERVIEW

Countries

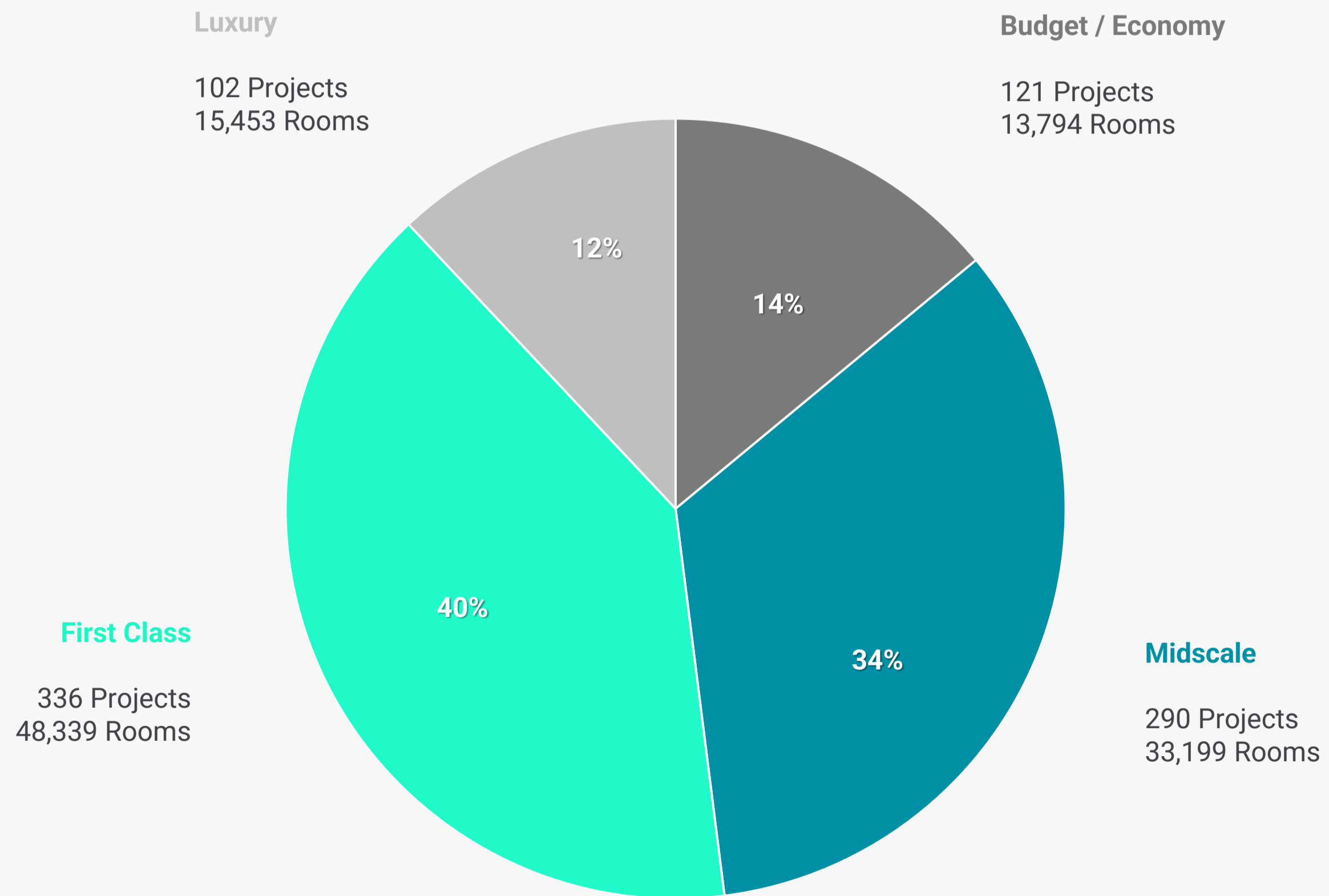


849
Projects

110,784
Rooms

HOTEL SEGMENT Categories

38% of all 849 hotel projects that are currently arising in the DACH region will be four-star hotels. In terms of hotel projects the first class and midscale segments are the strongest.



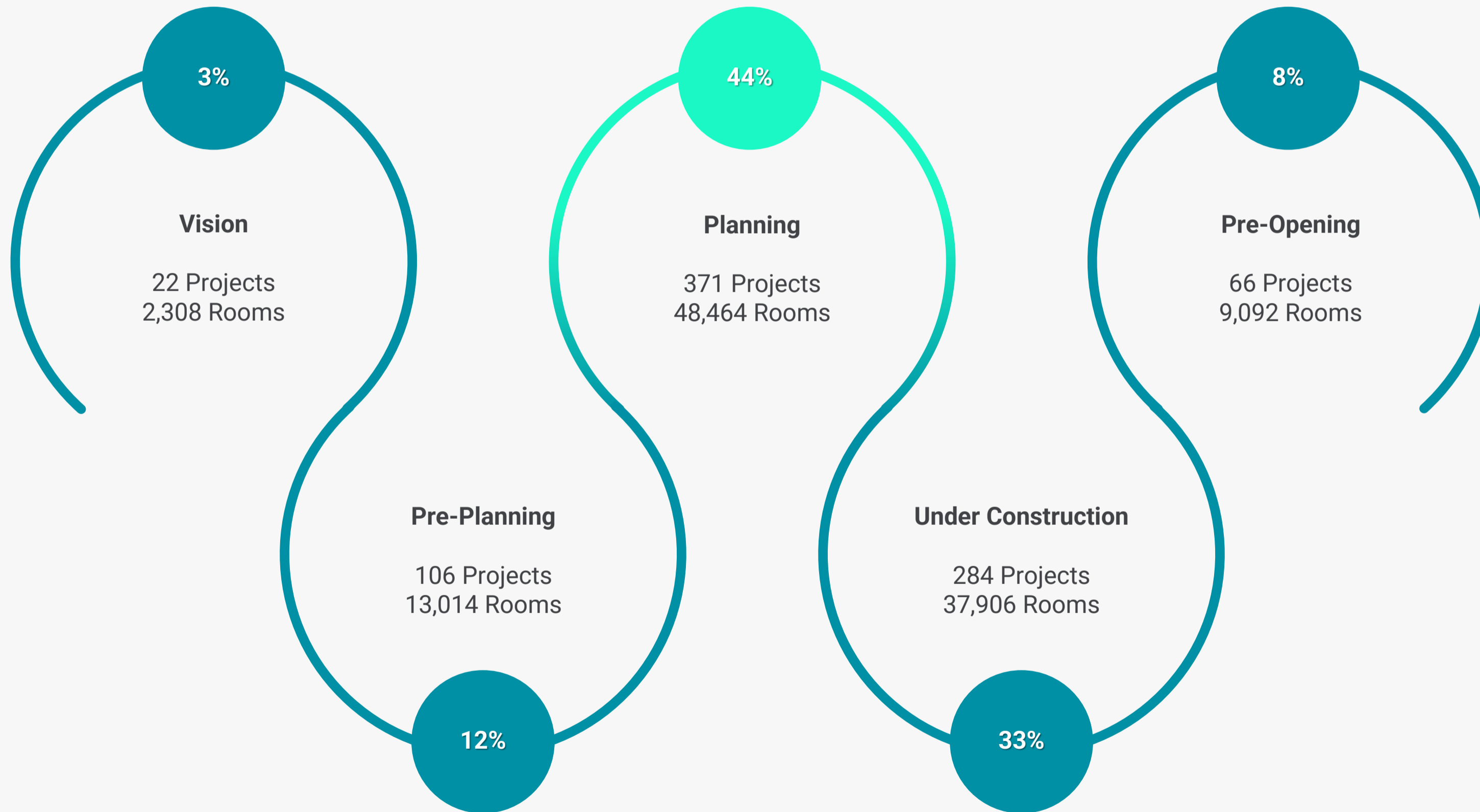
OVERVIEW

Year of Opening



PHASE

Construction



PROJECT PIPELINE

Germany

678
Projects

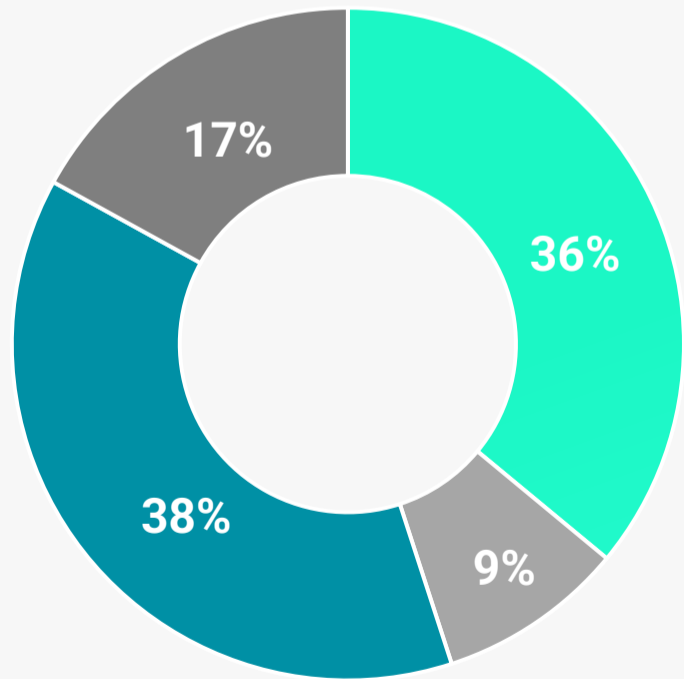
90,153
Rooms

Budget / Economy

112 Projects
13,004 Rooms

Midscale

247 Projects
28,574 Rooms

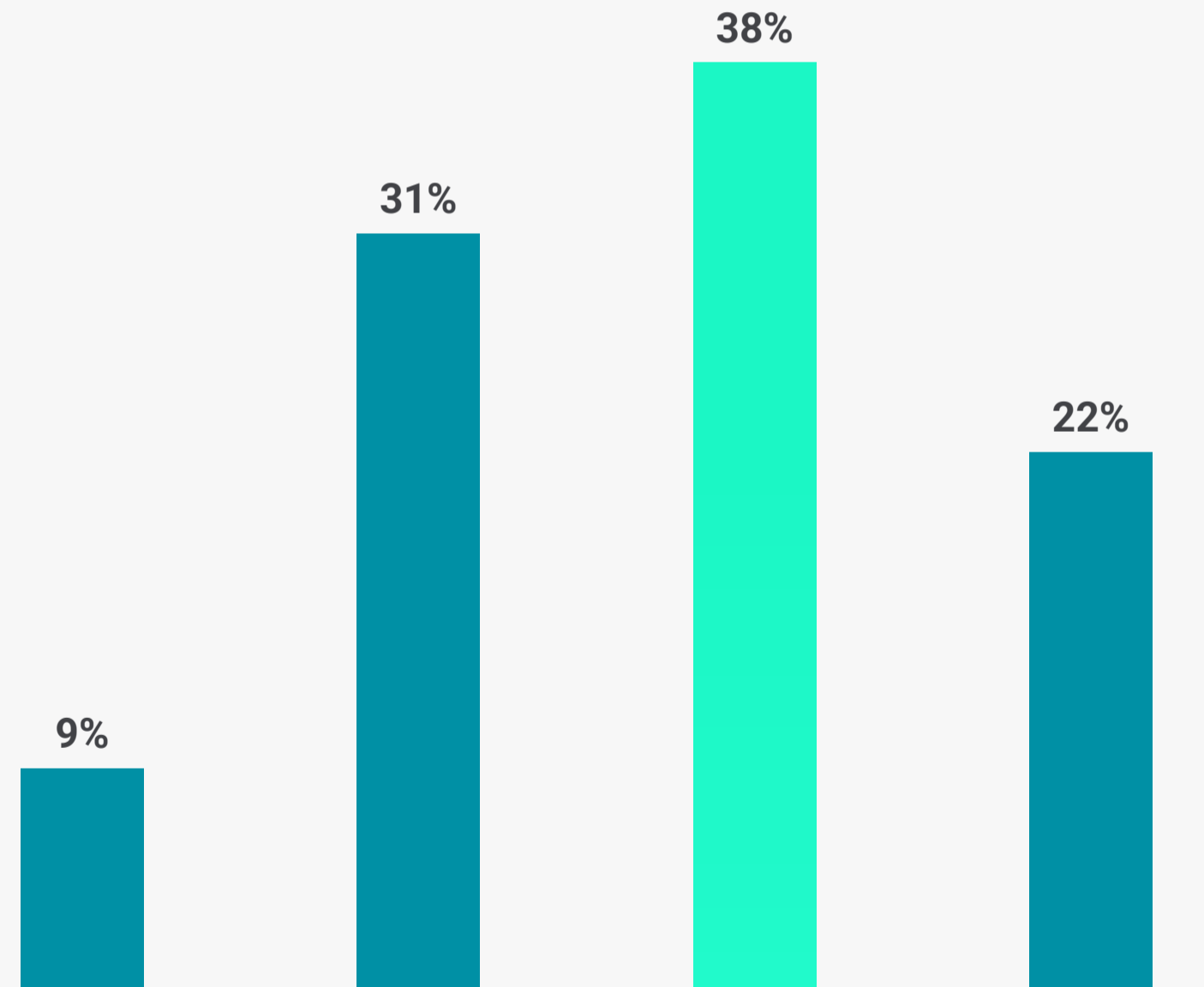


First Class

257 Projects
38,000 Rooms

Luxury

62 Projects
10,575 Rooms



2023

60 Projects
8,260 Rooms

2024

208 Projects
25,349 Rooms

2025

261 Projects
36,917 Rooms

2026+

149 Projects
19,627 Rooms



1. Hamburg

45 Projects
8,134 Rooms

2. Berlin

34 Projects
7,217 Rooms

3. Frankfurt am Main

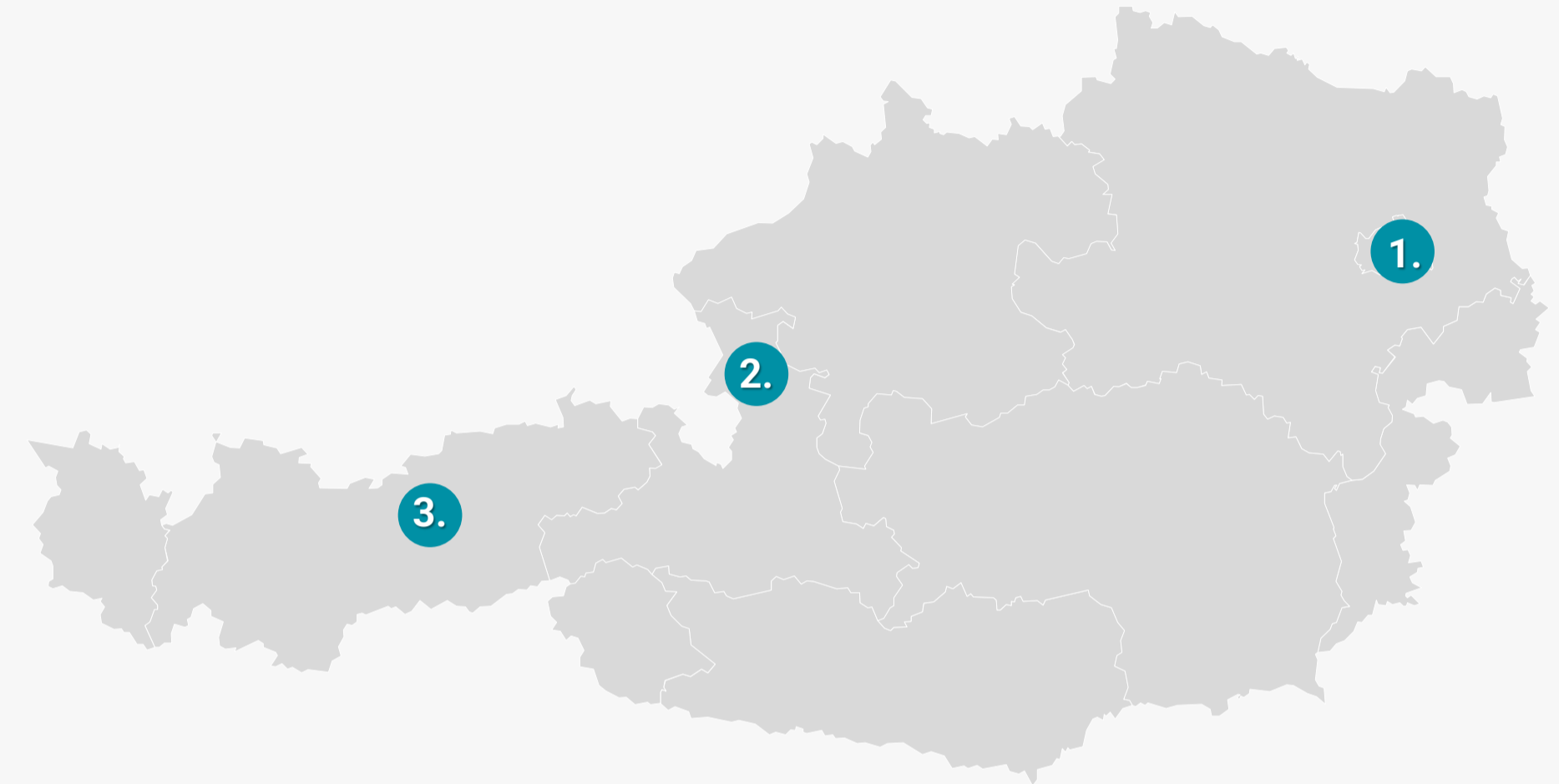
25 Projects
5,268 Rooms

PROJECT PIPELINE

Austria

91
Projects

12,021
Rooms

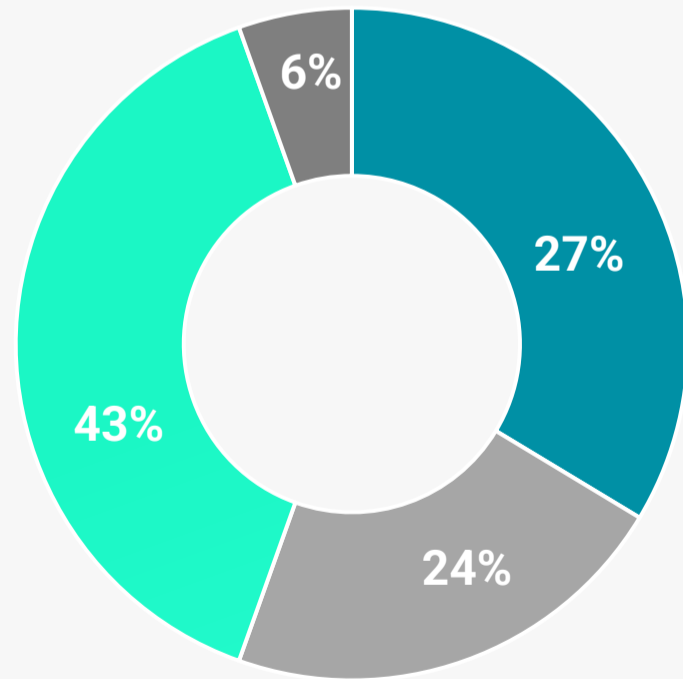


Budget / Economy

Midscale

5 Projects
506 Rooms

25 Projects
2,666 Rooms



First Class

Luxury

39 Projects
6,081 Rooms

22 Projects
2,768 Rooms

14%

39%

35%

12%

2023

2024

2025

2026+

13 Projects
1,498 Rooms

35 Projects
4,221 Rooms

32 Projects
5,191 Rooms

11 Projects
1,111 Rooms

1. Vienna

2. Salzburg

3. Innsbruck

27 Projects
4,965 Rooms

6 Projects
686 Rooms

3 Projects
436 Rooms

PROJECT PIPELINE
Switzerland

80
 Projects

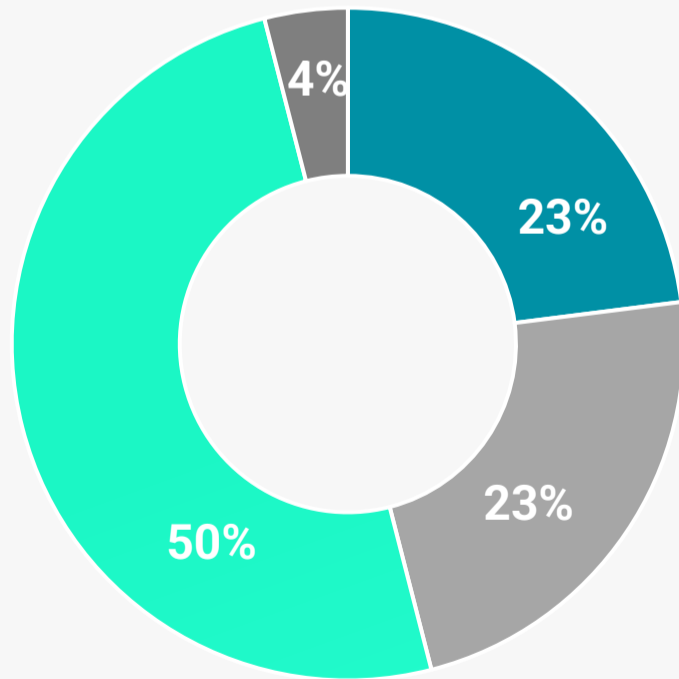
8,610
 Rooms

Budget / Economy

Midscale

4 Projects
 284 Rooms

18 Projects
 1,959 Rooms

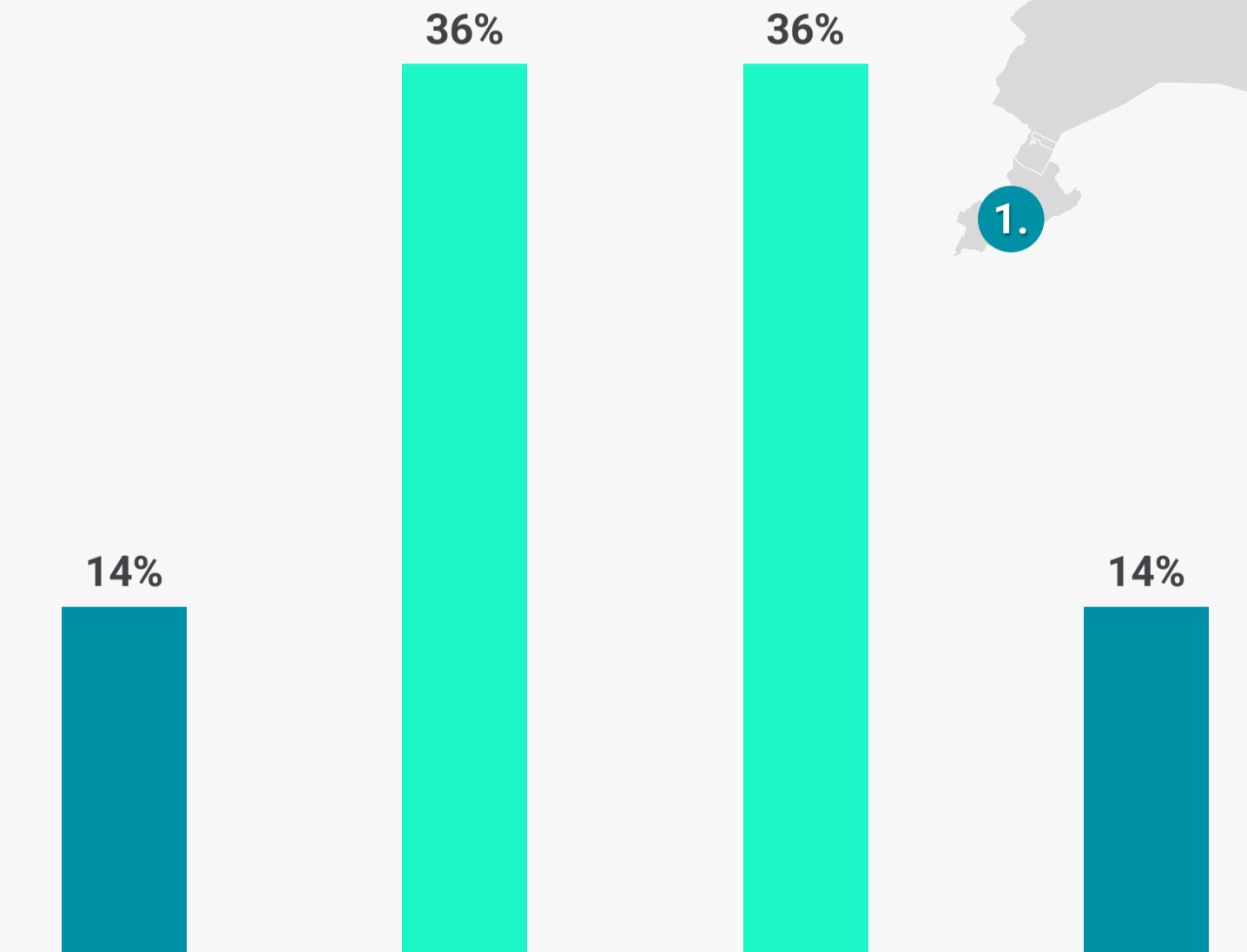


First Class

Luxury

40 Projects
 4,257 Rooms

18 Projects
 2,110 Rooms



2023

2024

2025

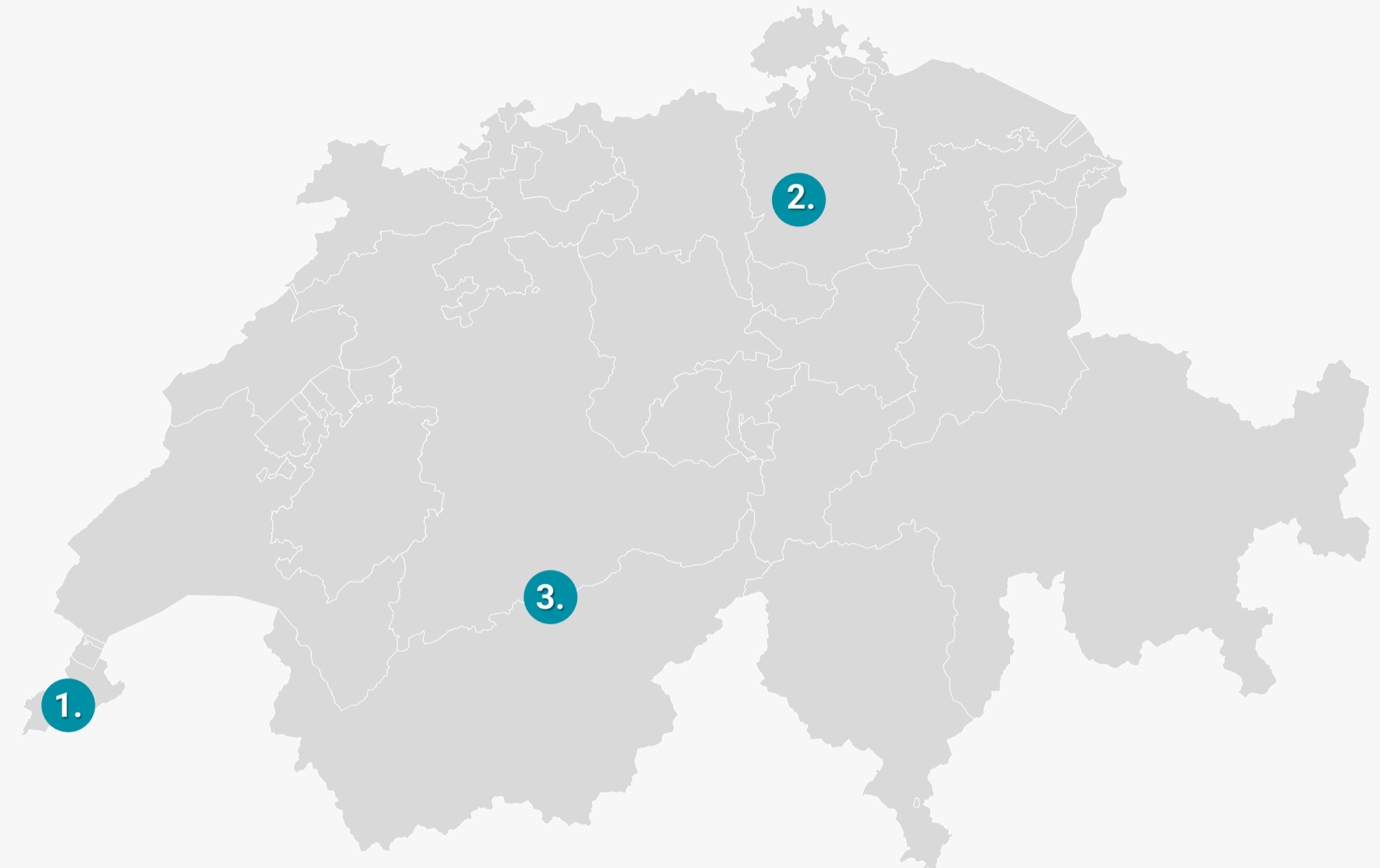
2026+

11 Projects
 1,106 Rooms

29 Projects
 2,576 Rooms

29 Projects
 3,773 Rooms

11 Projects
 1,155 Rooms



1. Geneva

2. Zurich

3. Grindelwald

4 Projects
 871 Rooms

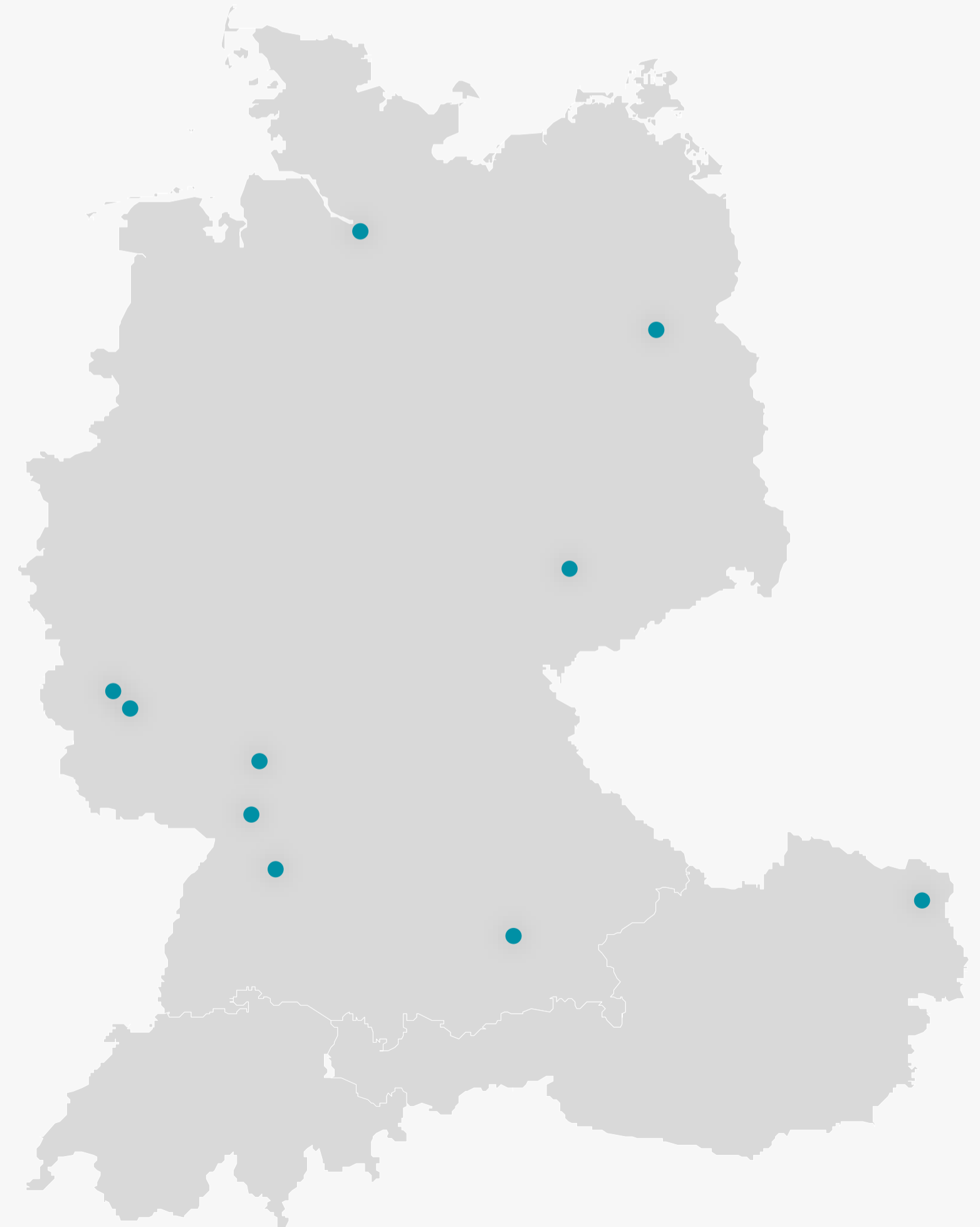
4 Projects
 353 Rooms

3 Projects
 383 Rooms

TOP 10 Cities

Around the world, the hospitality industry shows no signs of slowing growth. When it comes to the top 10 cities for hotel construction in the DACH region, this ranking should not come as a surprise. With 45 hotels in the pipeline Hamburg is still a pioneer in expanding its hotel industry strongly.

	City	Projects	Rooms
1.	Hamburg	45	8,134
2.	Berlin	34	7,217
3.	Vienna	27	4,965
4.	Frankfurt am Main	25	5,268
5.	Munich	21	3,195
6.	Dusseldorf	14	2,654
7.	Leipzig	14	2,519
8.	Cologne	12	1,987
9.	Stuttgart	9	1,452
10.	Heidelberg	7	1,209



PROJECT PIPELINE

Hamburg

45
Projects

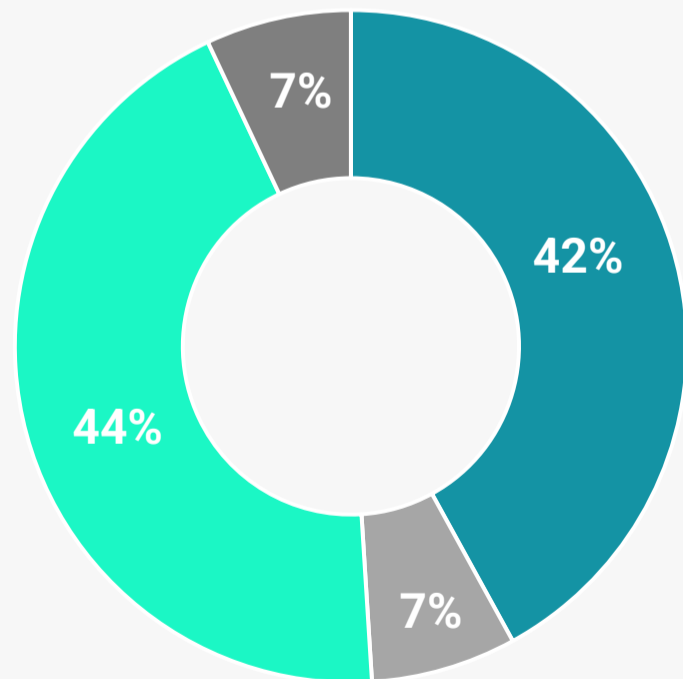
8,134
Rooms

Budget / Economy

Midscale

3 Projects
445 Rooms

19 Projects
3,250 Rooms

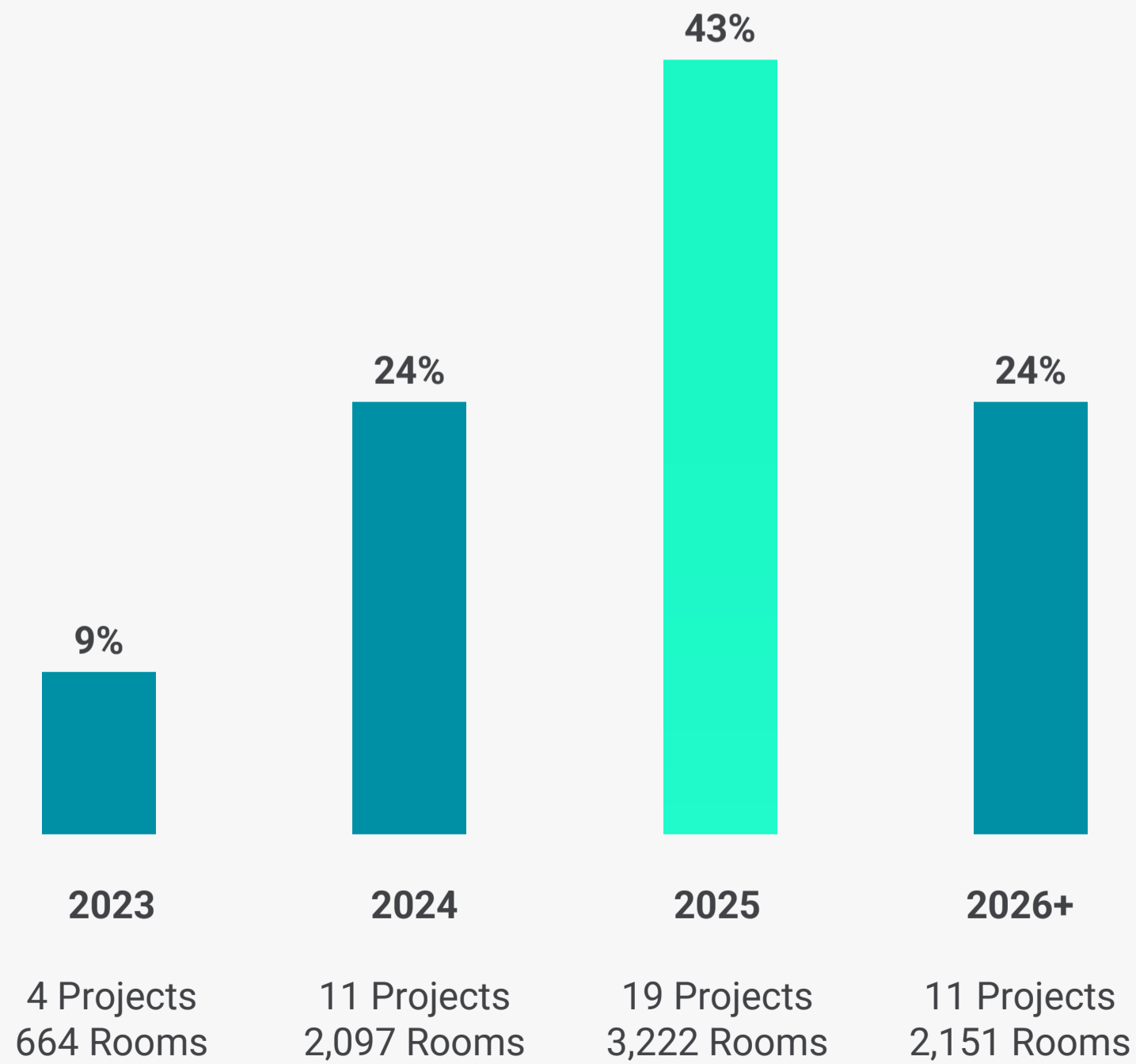


First Class

Luxury

20 Projects
3,773 Rooms

3 Projects
666 Rooms



2023

2024

2025

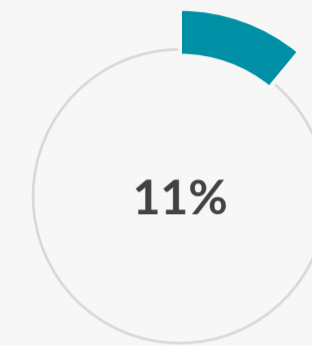
2026+

4 Projects
664 Rooms

11 Projects
2,097 Rooms

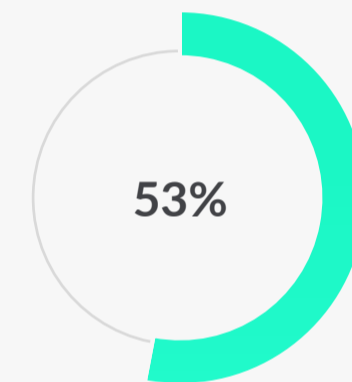
19 Projects
3,222 Rooms

11 Projects
2,151 Rooms



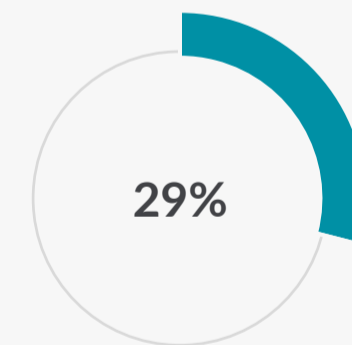
Pre-planning

5 Projects
855 Rooms



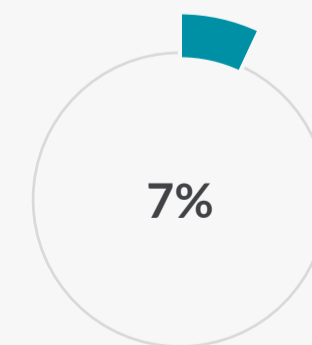
Planning

24 Projects
4,093 Rooms



Construction

13 Projects
2,537 Rooms



Pre-opening

3 Projects
649 Rooms

PROJECT PIPELINE

Berlin

34
Projects

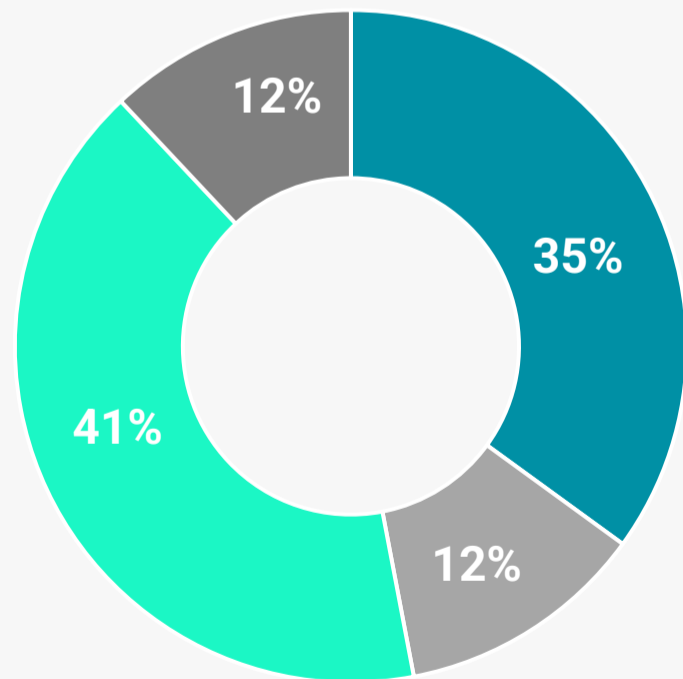
7,217
Rooms

Budget / Economy

4 Projects
594 Rooms

Midscale

12 Projects
2,010 Rooms

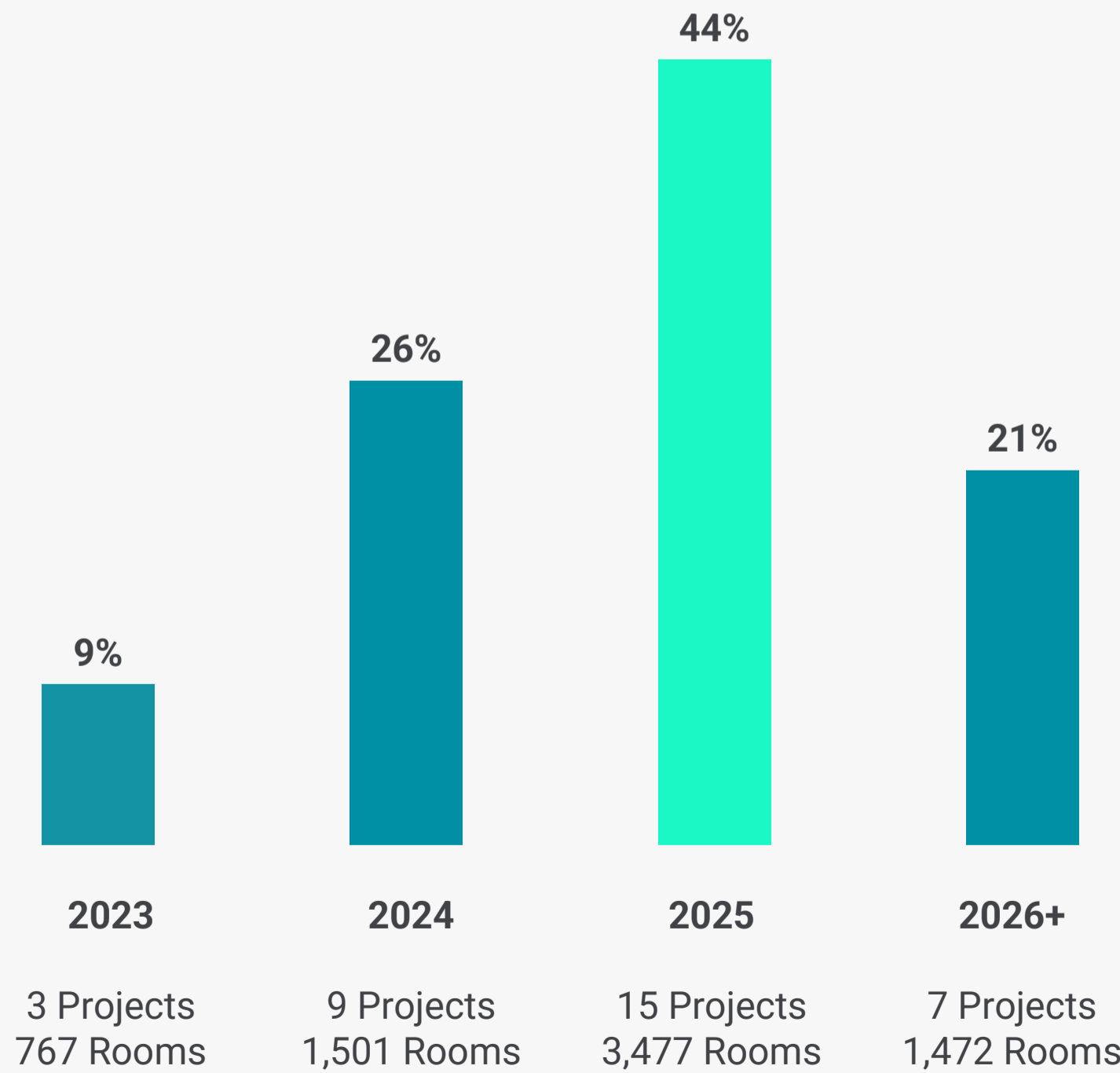


First Class

14 Projects
2,949 Rooms

Luxury

4 Projects
1,664 Rooms



2023

3 Projects
767 Rooms

2024

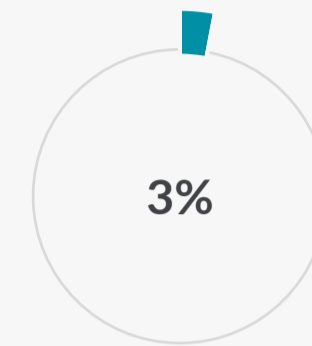
9 Projects
1,501 Rooms

2025

15 Projects
3,477 Rooms

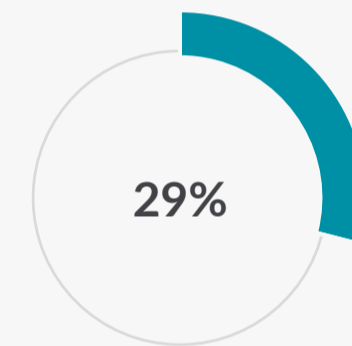
2026+

7 Projects
1,472 Rooms



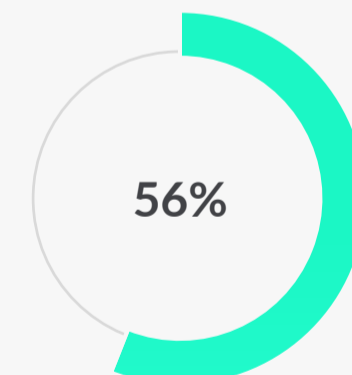
Pre-planning

1 Projects
200 Rooms



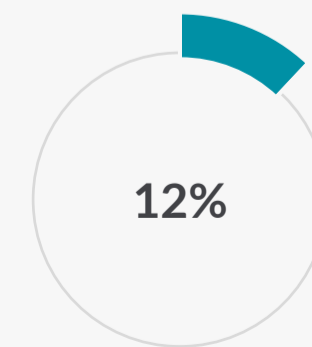
Planning

10 Projects
2,289 Rooms



Construction

19 Projects
3,787 Rooms



Pre-opening

4 Projects
941 Rooms

PROJECT PIPELINE

Vienna

27
Projects

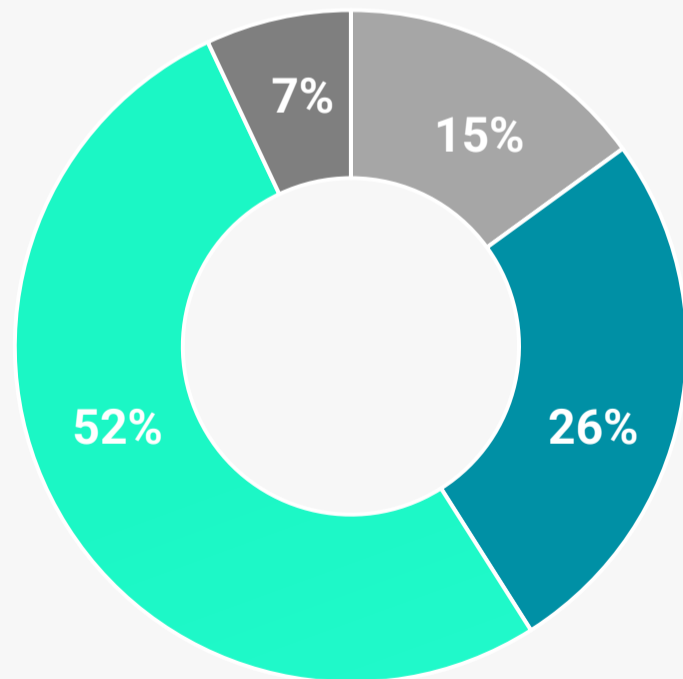
4,965
Rooms

Budget / Economy

Midscale

2 Projects
368 Rooms

4 Projects
735 Rooms

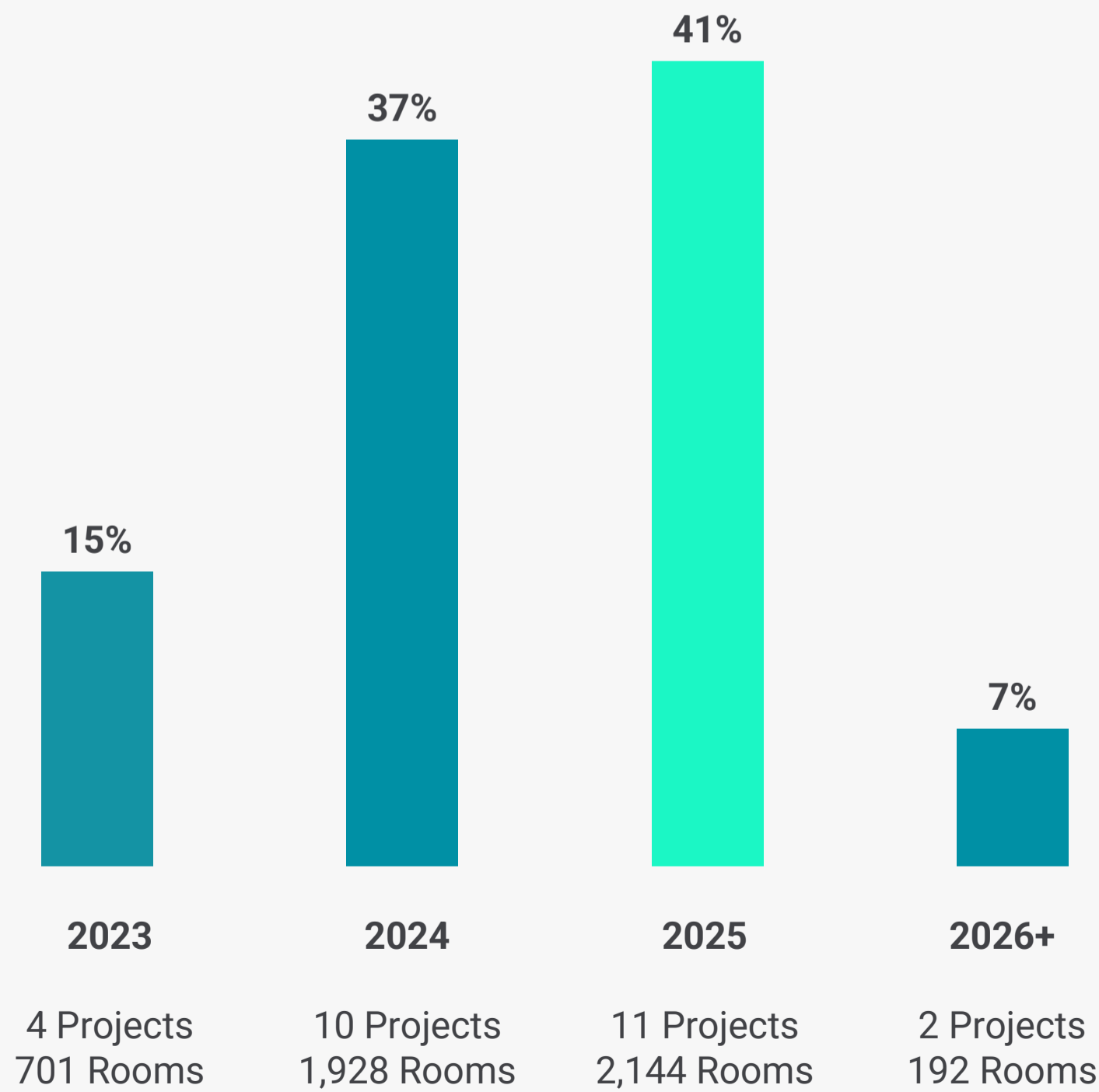


First Class

Luxury

14 Projects
2,660 Rooms

7 Projects
1,202 Rooms



2023

2024

2025

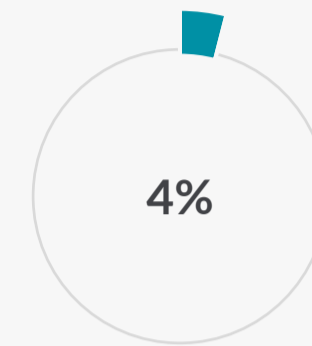
2026+

4 Projects
701 Rooms

10 Projects
1,928 Rooms

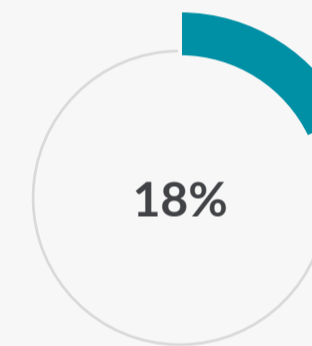
11 Projects
2,144 Rooms

2 Projects
192 Rooms



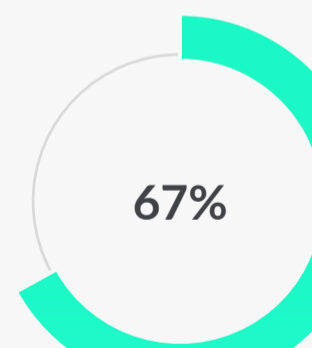
Pre-planning

1 Projects
78 Rooms



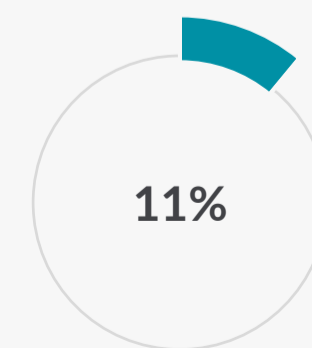
Planning

5 Projects
1,102 Rooms



Construction

18 Projects
3,225 Rooms



Pre-opening

3 Projects
560 Rooms

TOP 5
Hotel Groups



Marriott International

29 Projects
4,753 Rooms



Accor

23 Projects
4,061 Rooms

WHITBREAD

Whitbread Group

23 Projects
4,037 Rooms



Deutsche Hospitality

20 Projects
3,971 Rooms



IHG Hotels & Resorts

19 Projects
3,846 Rooms

TOP 10
Hotel Brands



Premier Inn

23 Projects
4,037 Rooms



B&B Hotels

11 Projects
1,113 Rooms



Hampton by Hilton

10 Projects
1,719 Rooms

Dorint
Hotels & Resorts

Dorint Hotels & Resorts

10 Projects
1,647 Rooms



Holiday Inn Express

10 Projects
1,602 Rooms



the niu

9 Projects
2,130 Rooms



Moxy Hotels

9 Projects
1,237 Rooms

L!NDNER
HOTELS & RESORTS

Lindner Hotels & Resorts

8 Projects
1,241 Rooms

InterCityHotel

InterCityHotel

7 Projects
1,472 Rooms

Zleep
HOTELS

Zleep Hotels

7 Projects
1,061 Rooms

