THP.

TOP HOTEL PROJECTS

Hotel Pipeline Report

EUROPE

October 2023

Regions

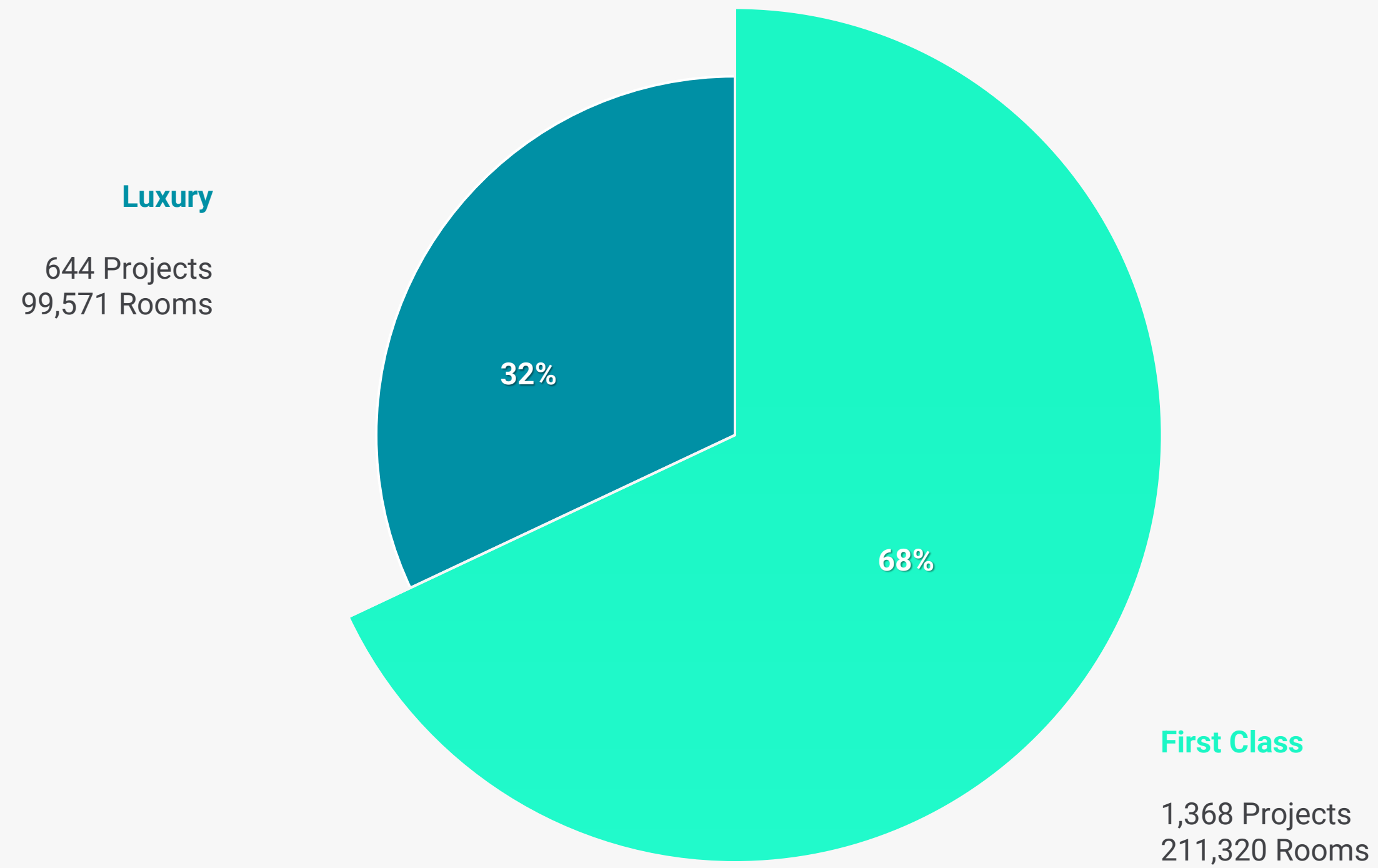**Europe**
2,012 Projects

North America
1,891 Projects

Middle East
571 Projects

Asia Pacific
2,647 Projects

7,593
Projects

1,520,779
Rooms

Latin America
176 Projects

Africa
295 Projects

Categories

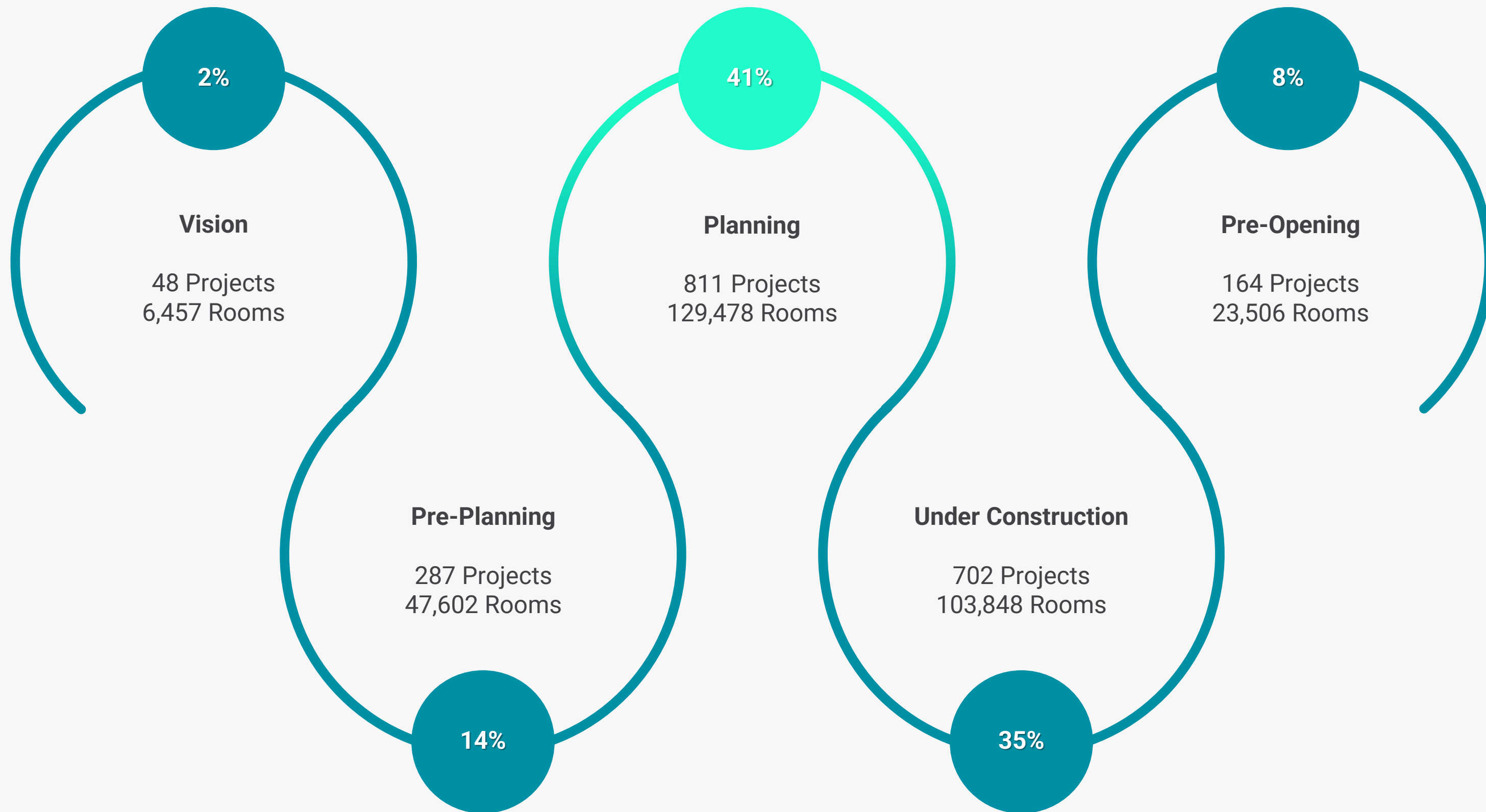69% of all 2,021 hotel projects that are currently arising in Europe will be four-star hotels.

Luxury

644 Projects
99,571 Rooms

32%

68%

First Class

1,368 Projects
211,320 Rooms

Year of Opening

36%

32%

20%

12%

2023

245 Projects
33,083 Rooms

2024

639 Projects
90,725 Rooms

2025

735 Projects
119,631 Rooms

2026+

393 Projects
67,452 Rooms

Construction

Vision

48 Projects
6,457 Rooms

2%

Pre-Planning

287 Projects
47,602 Rooms

14%

Planning

811 Projects
129,478 Rooms

41%

Under Construction

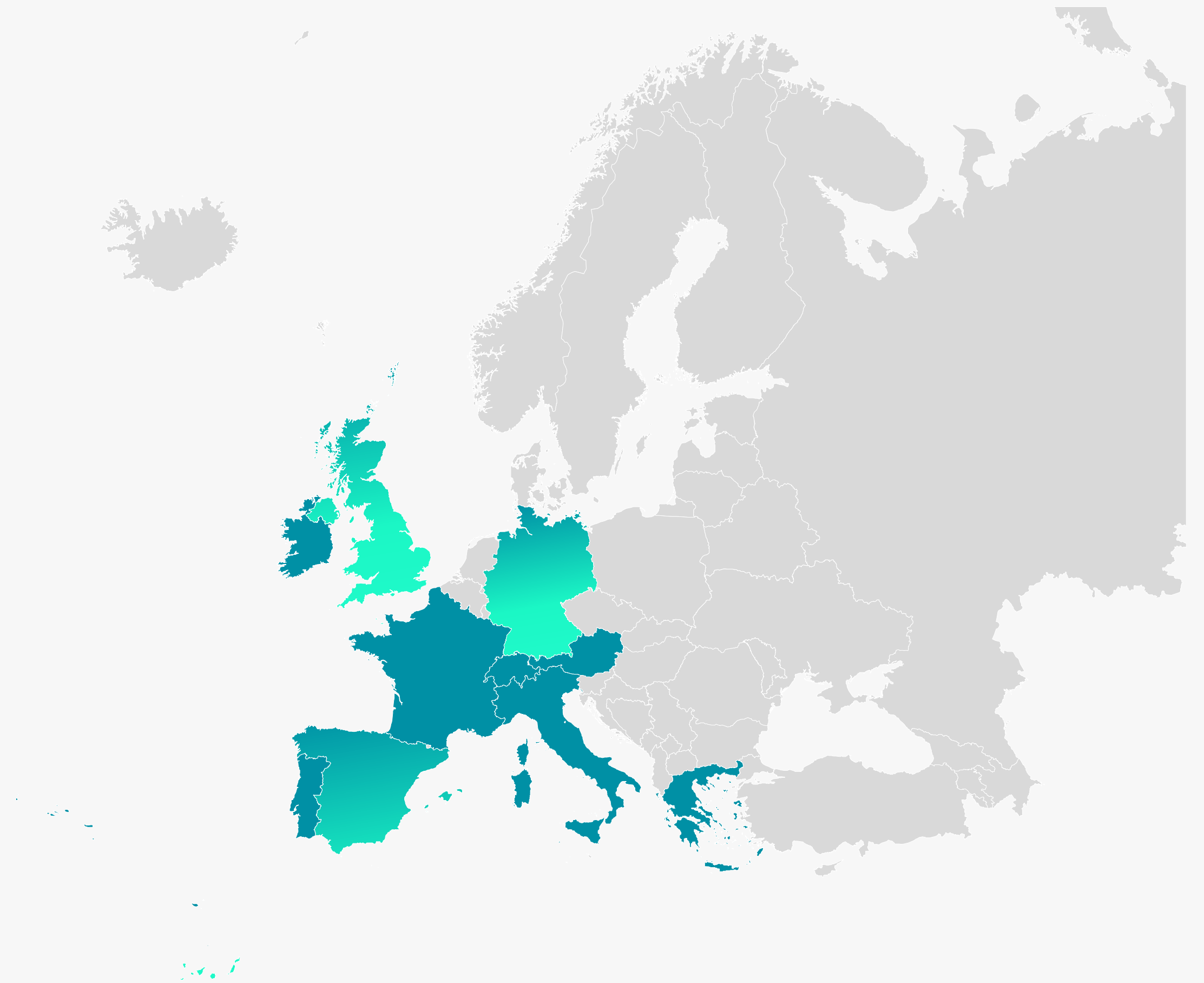702 Projects
103,848 Rooms

35%

Pre-Opening

164 Projects
23,506 Rooms

8%
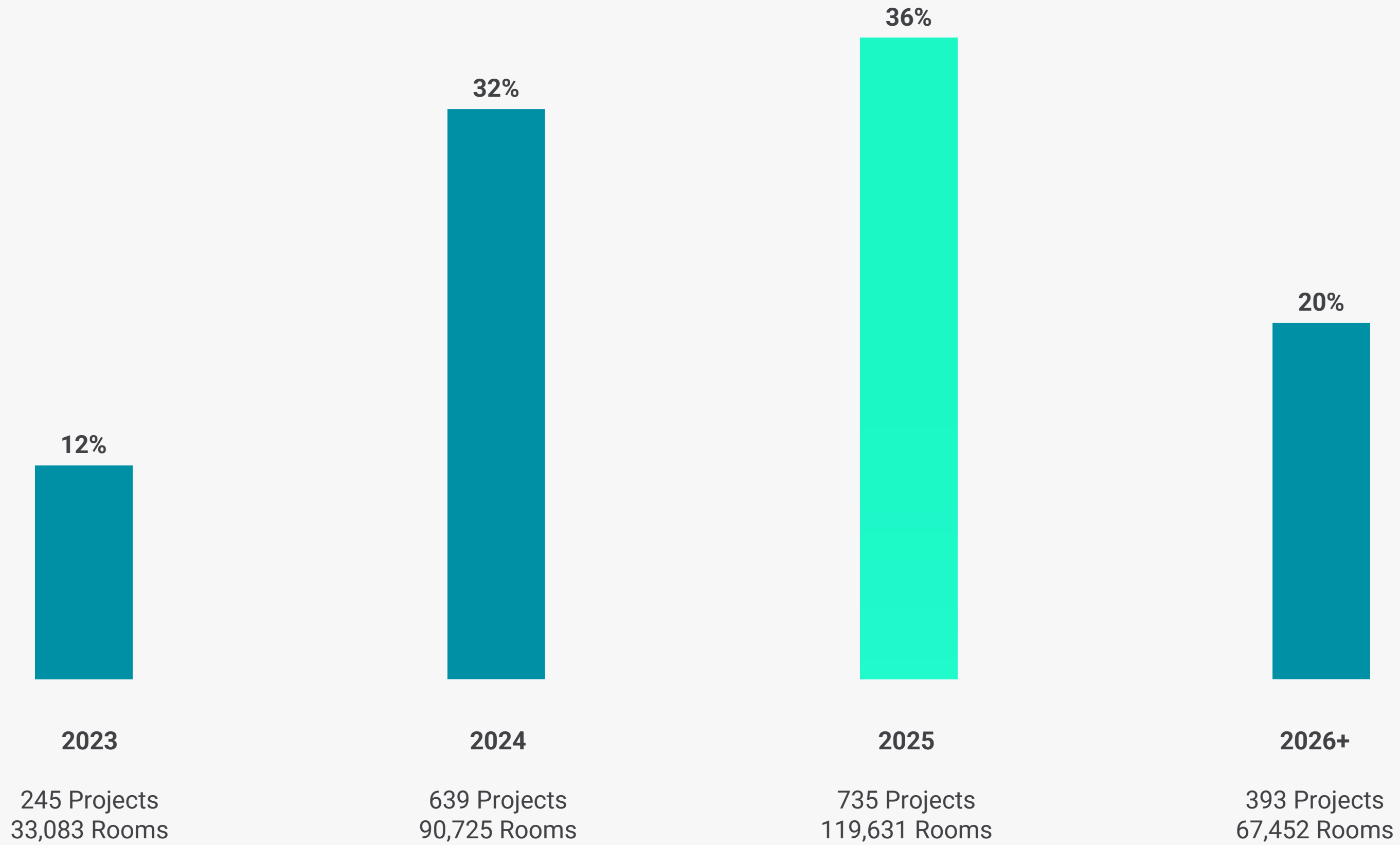
Countries

While the global hotel industry is a vibrant one, changing year to year in many surprising and interesting ways, when it comes to the top 10 countries for hotel construction in Europe, the list is perhaps less surprising that one might think. With more than 462 projects, the United Kingdom is currently leading in terms of new hotel projects in the pipeline.
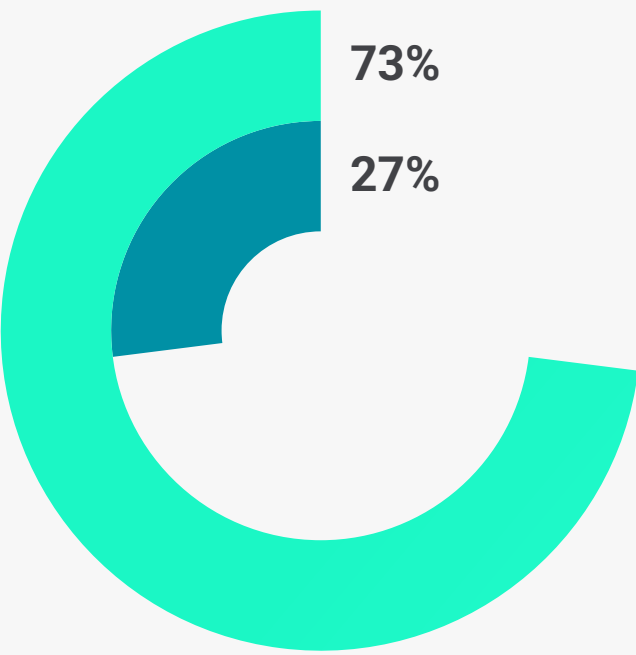
	Country	Projects	Rooms
1.	United Kingdom	462	61,510
2.	Germany	319	48,575
3.	Spain	158	22,265
4.	Italy	117	15,187
5.	France	88	13,400
6.	Ireland	82	11,719
7.	Portugal	65	10,930
8.	Austria	61	8,849
9.	Switzerland	58	6,367
10.	Greece	52	8,121

United Kingdom

462
Projects

61,510
Rooms

73%
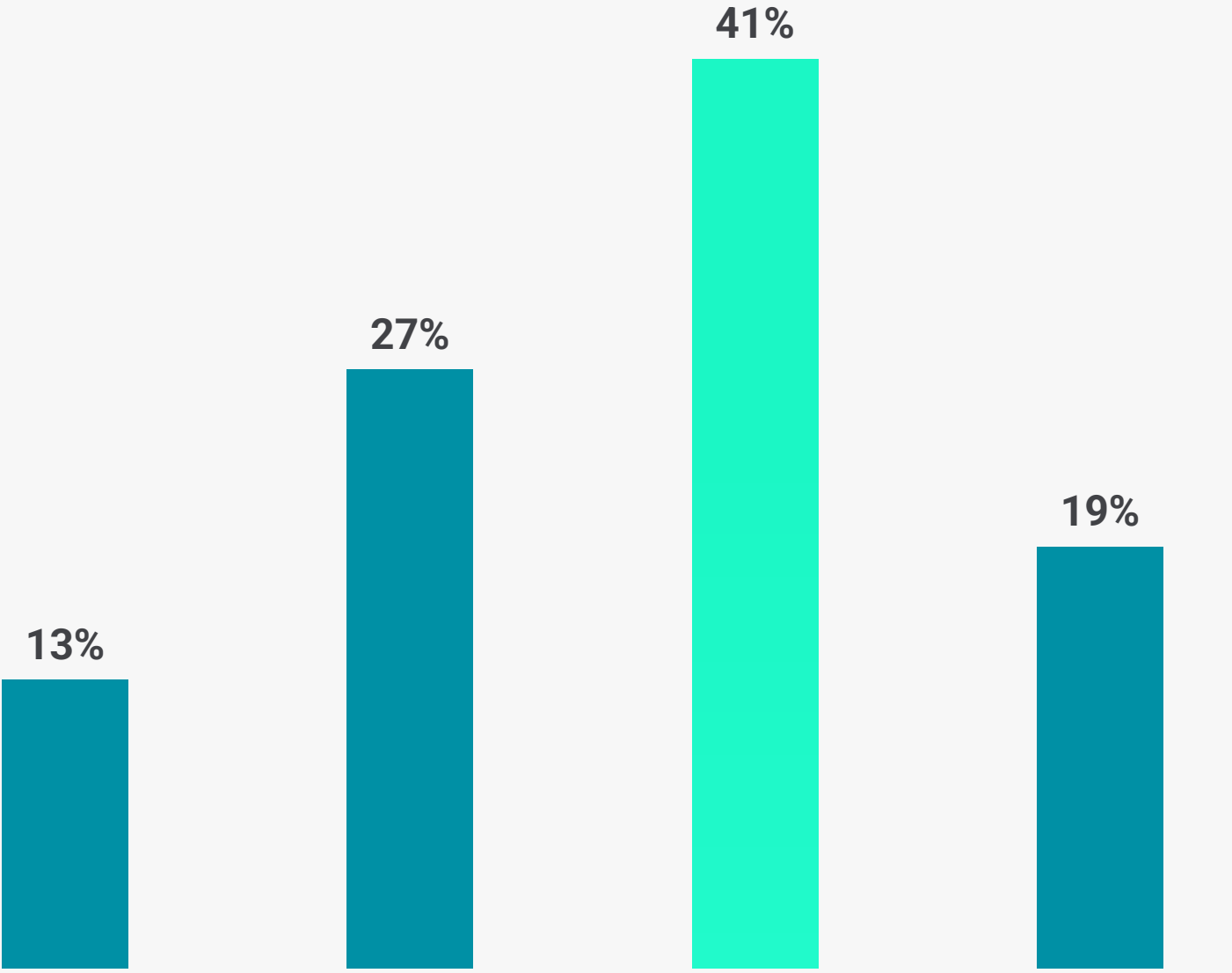
27%

13%

27%

41%

19%

First Class

339 Projects
46,974 Rooms

Luxury

123 Projects
14,536 Rooms

2023

58 Projects
6,506 Rooms

2024

127 Projects
16,049 Rooms

2025

190 Projects
26,928 Rooms

2026+

87 Projects
12,027 Rooms

1. London

95 Projects
16,878 Rooms

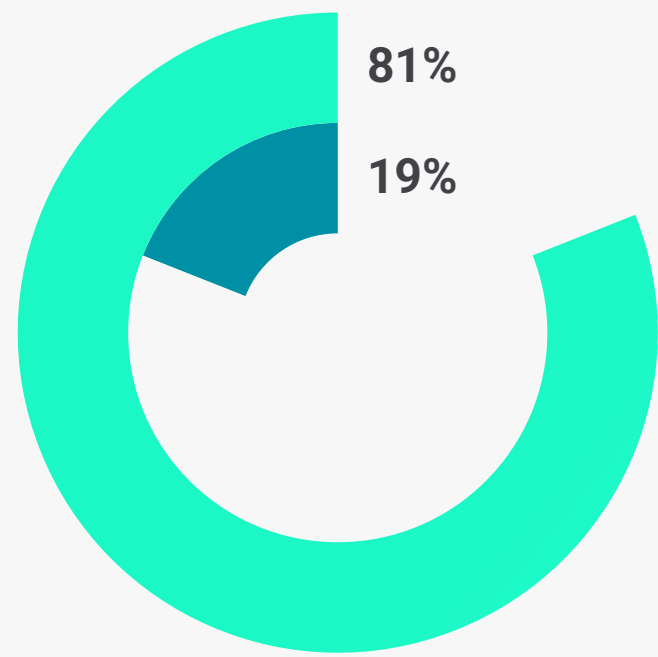**2. Manchester**

24 Projects
4,581 Rooms

3. Edinburgh

24 Projects
3,843 Rooms

Germany

319
Projects

48,575
Rooms

81%
19%

9%
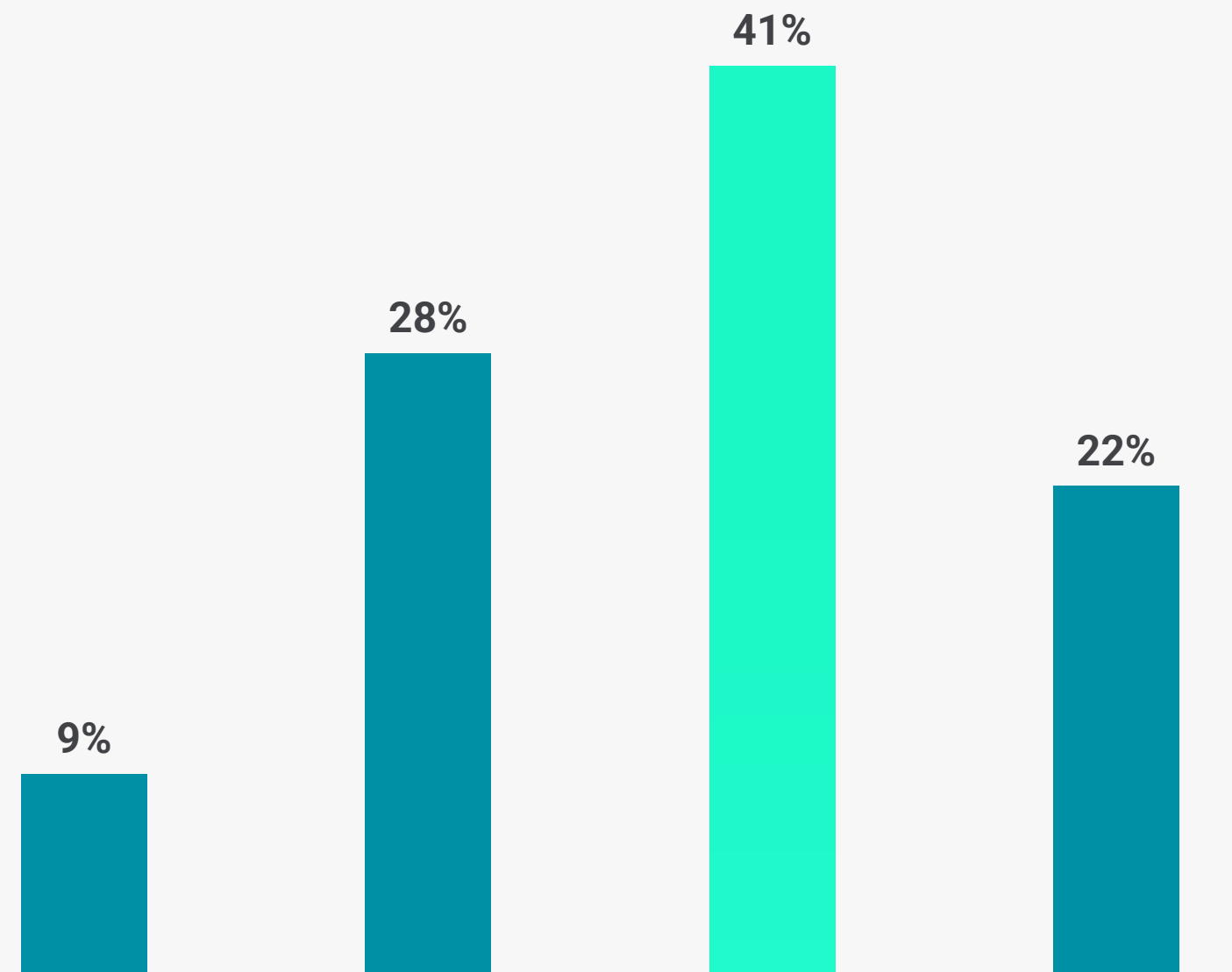28%
41%
22%

First Class

257 Projects
38,000 Rooms

Luxury

62 Projects
10,575 Rooms

2023

30 Projects
5,281 Rooms

2024

90 Projects
11,964 Rooms

2025

129 Projects
20,909 Rooms

2026+

70 Projects
10,421 Rooms

1. Hamburg

23 Projects
4,439 Rooms

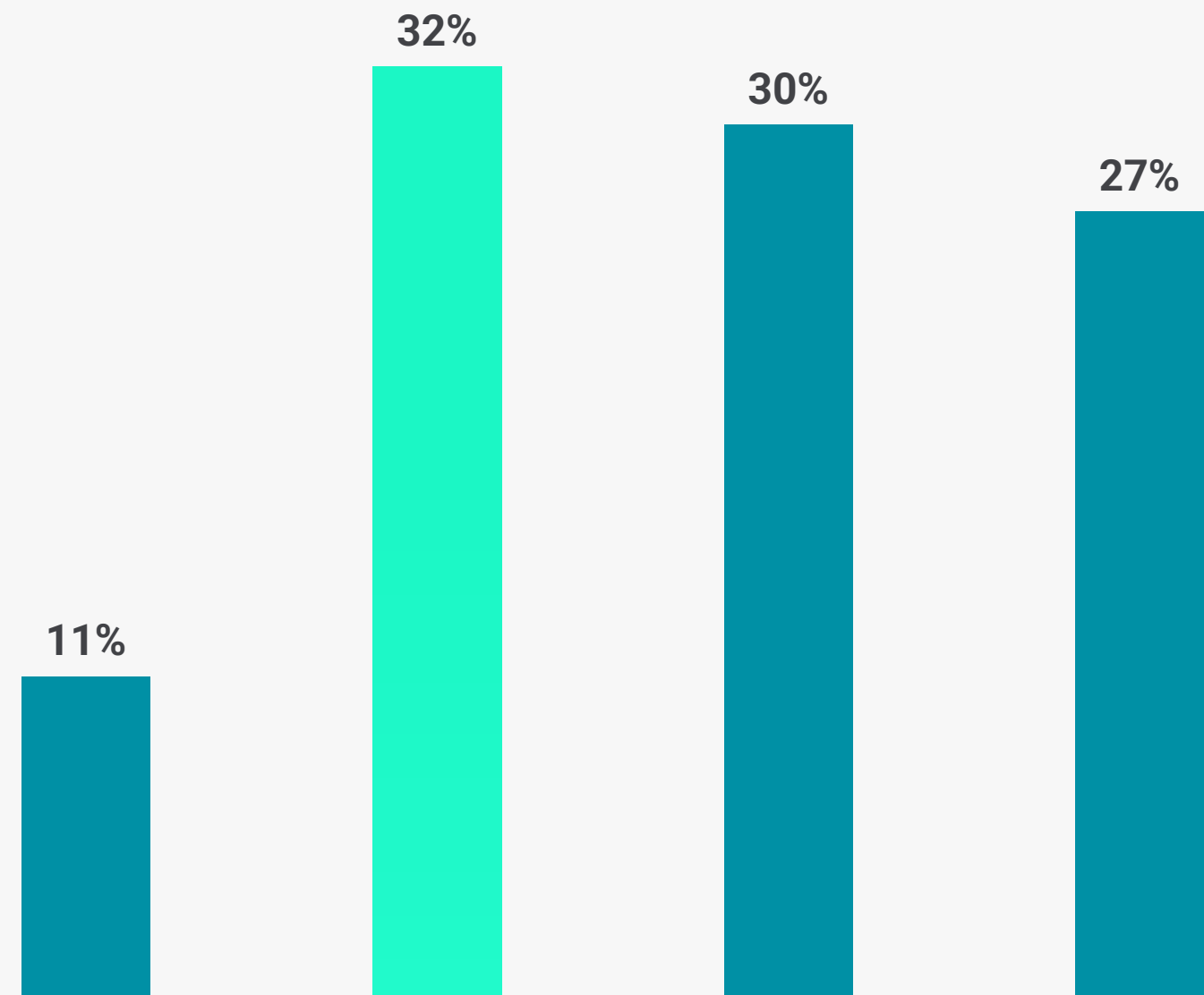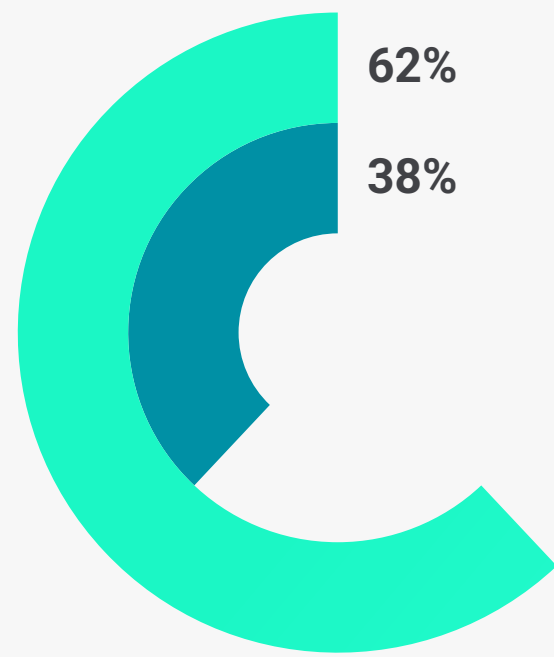**2. Frankfurt am Main**

19 Projects
4,472 Rooms

3. Berlin

18 Projects
4,613 Rooms

Spain

158
Projects

22,265
Rooms

62%

38%

32%

30%

27%

11%

First Class	Luxury
98 Projects	60 Projects
12,004 Rooms	10,261 Rooms

2023	2024	2025	2026+
17 Projects	51 Projects	47 Projects	43 Projects
2,305 Rooms	7,870 Rooms	5,496 Rooms	6,594 Rooms

1. Madrid	2. Cordoba	3. Cádiz
16 Projects	8 Projects	7 Projects
2,378 Rooms	485 Rooms	1,109 Rooms

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 Europe, this ranking should not come as a surprise. With 95 hotels in the pipeline London is still a pioneer in expanding its hotel industry strongly.

	City	Projects	Rooms
1.	London	95	16,878
2.	Dublin	44	6,726
3.	Paris	28	5,370
4.	Manchester	24	4,581
5.	Hamburg	23	4,439
6.	Edinburgh	22	3,736
7.	Helsinki	21	4,533
8.	Vienna	21	3,862
9.	Budapest	21	3,162
10.	Lisbon	20	3,485

London

95
Projects

16,878
Rooms

56%

44%
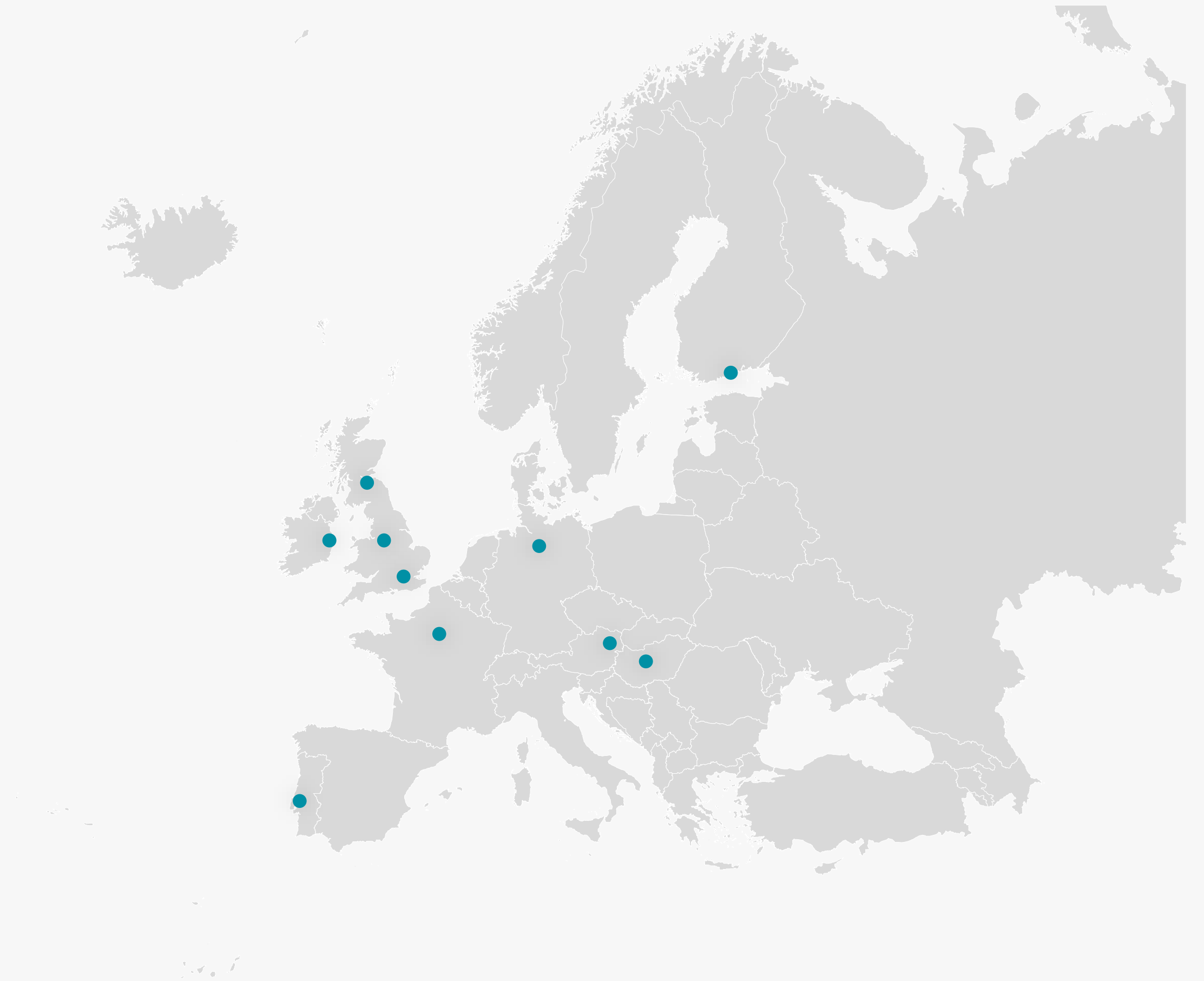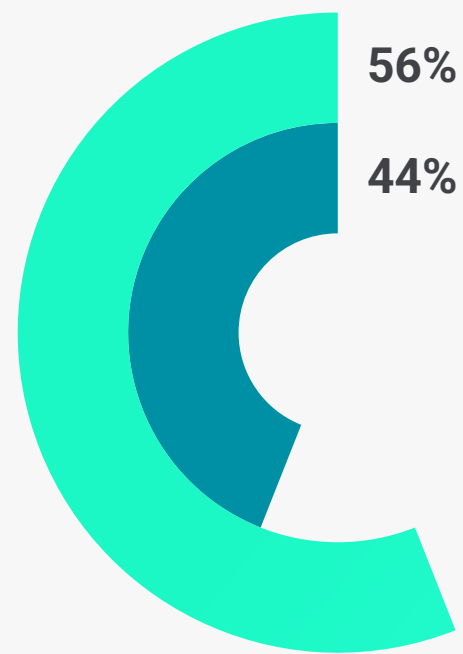
First Class

53 Projects
10,539 Rooms

Luxury

42 Projects
6,339 Rooms

22%
30%
33%
15%
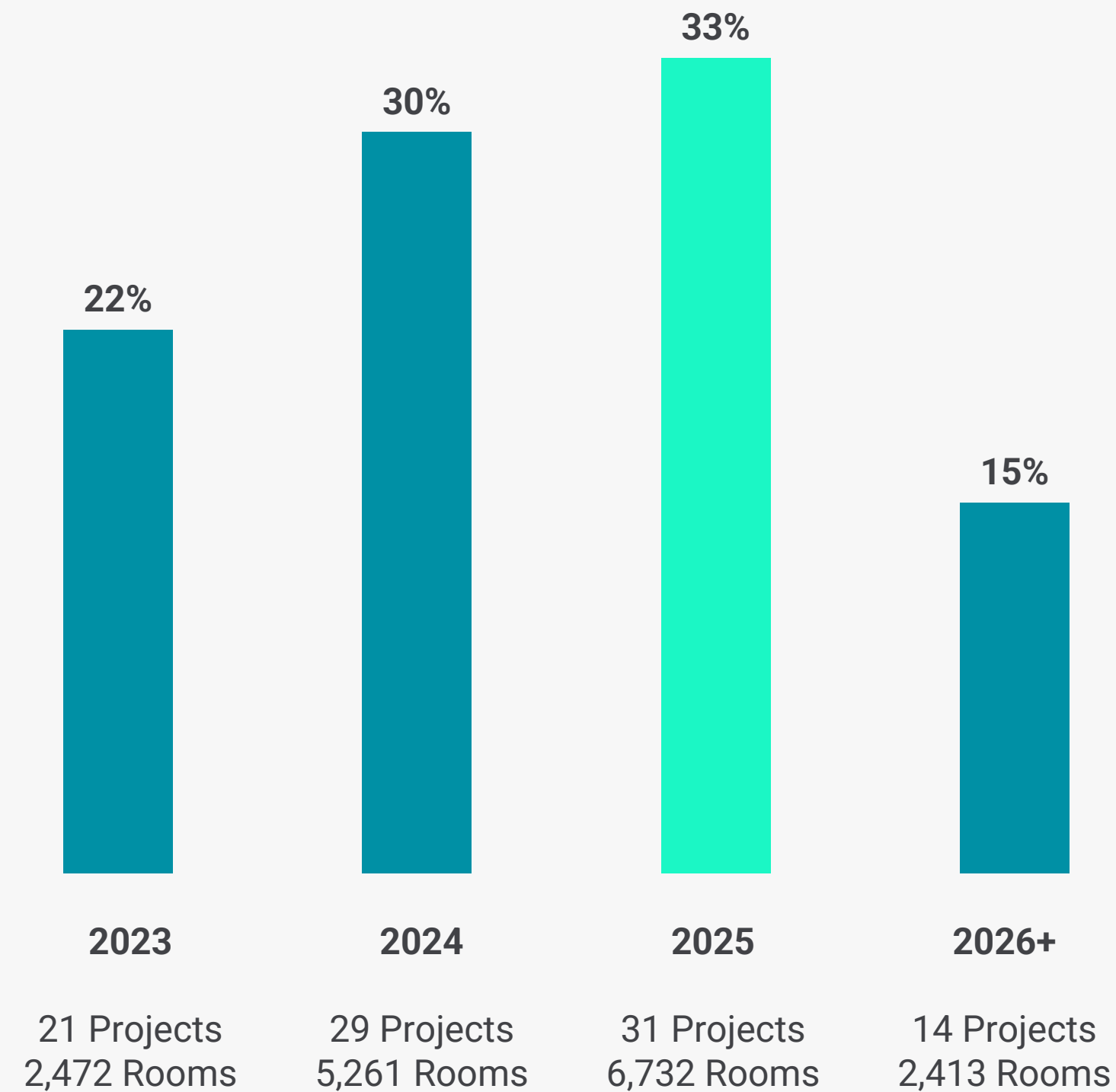
2023

21 Projects
2,472 Rooms

2024

29 Projects
5,261 Rooms

2025

31 Projects
6,732 Rooms

2026+

14 Projects
2,413 Rooms
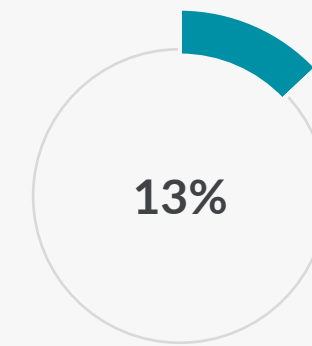
13% **Pre-planning**

13 Projects
2,383 Rooms
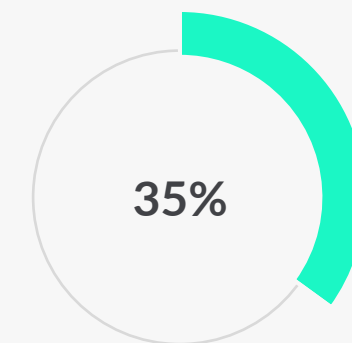
35% **Planning**

33 Projects
6,920 Rooms
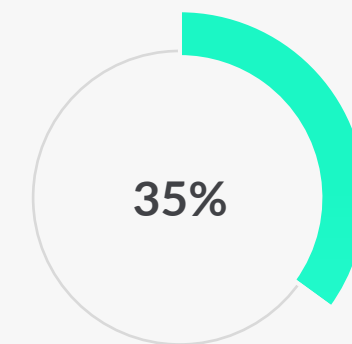
35% **Construction**

33 Projects
5,315 Rooms
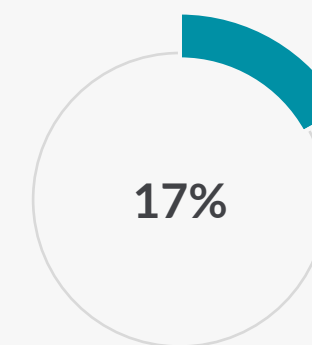
17% **Pre-opening**

16 Projects
2,260 Rooms

Dublin

44
Projects

6,726
Rooms

First Class / Luxury

86%

14%
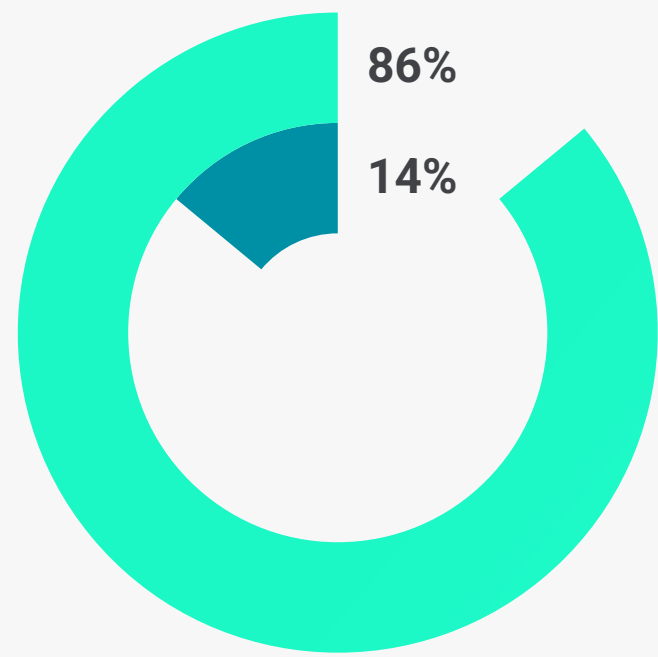
First Class

38 Projects
5,827 Rooms

Luxury

6 Projects
988 Rooms

Timeline
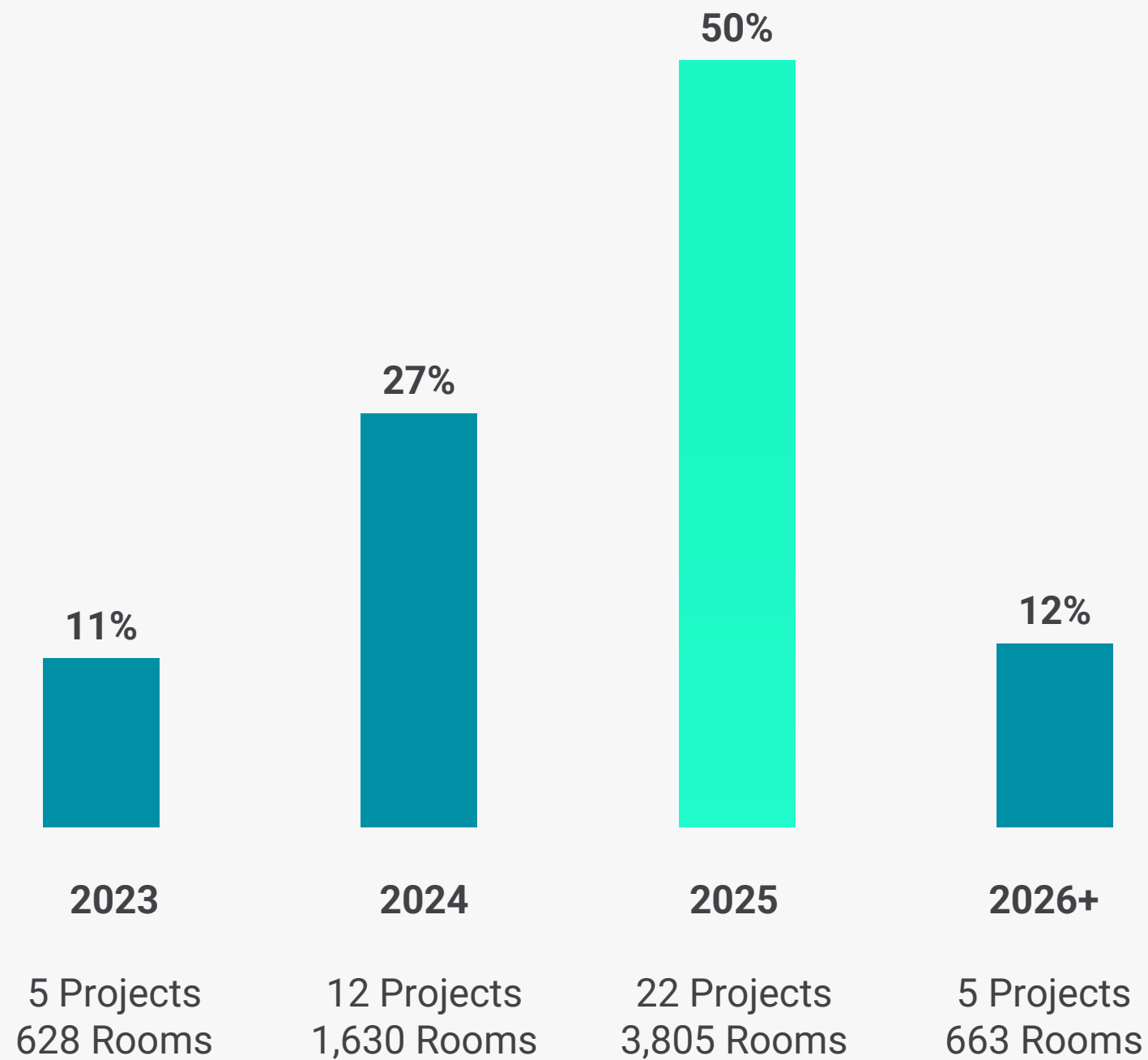
11%
2023
5 Projects
628 Rooms

27%
2024
12 Projects
1,630 Rooms

50%
2025
22 Projects
3,805 Rooms

12%
2026+
5 Projects
663 Rooms

Status
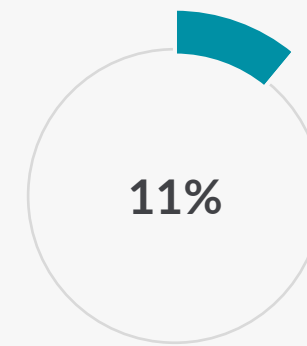
11%
Pre-planning
5 Projects
613 Rooms
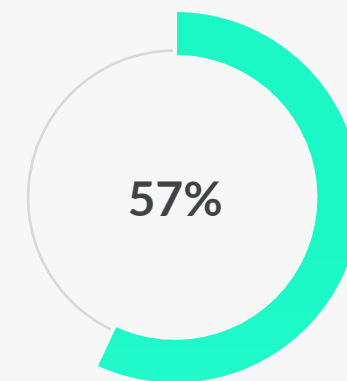
57%
Planning
25 Projects
4,255 Rooms
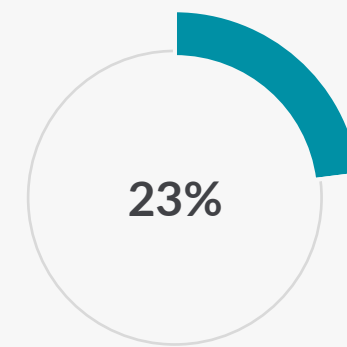
23%
Construction
10 Projects
1,417 Rooms
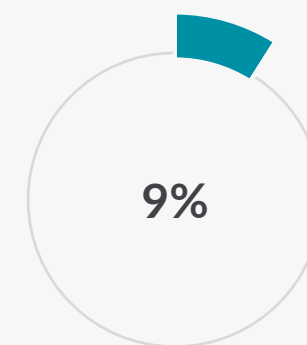
9%
Pre-opening
4 Projects
441 Rooms

Paris

28
Projects

5,370
Rooms

61%

39%
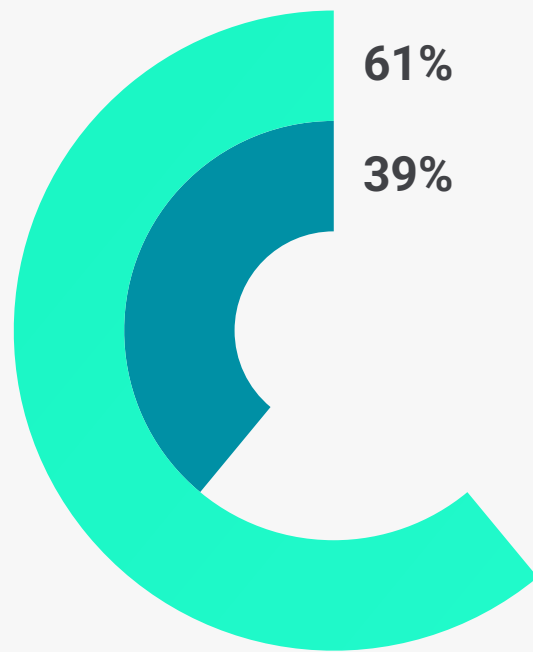
First Class

17 Projects
3,733 Rooms

Luxury

11 Projects
1,637 Rooms

21%

43%

4%

32%
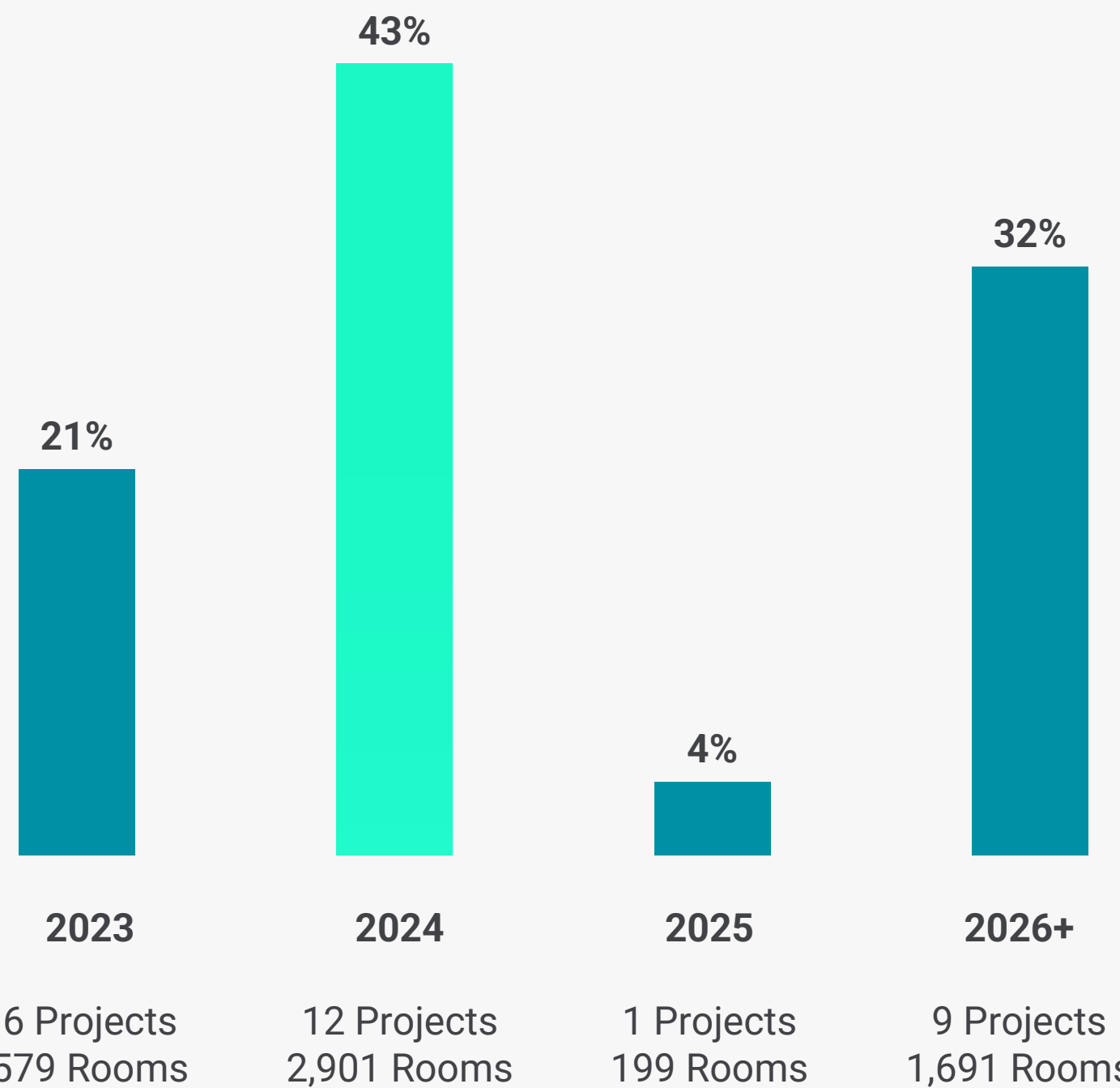
2023

6 Projects
579 Rooms

2024

12 Projects
2,901 Rooms

2025

1 Projects
199 Rooms

2026+

9 Projects
1,691 Rooms

11%
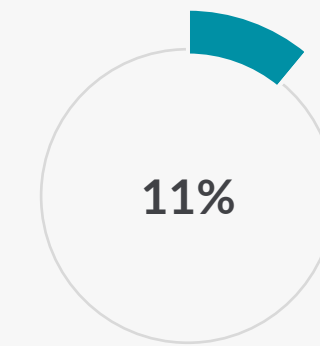
Pre-planning

3 Projects
550 Rooms

25%
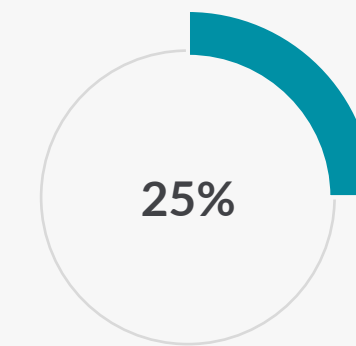
Planning

7 Projects
1,448 Rooms

57%
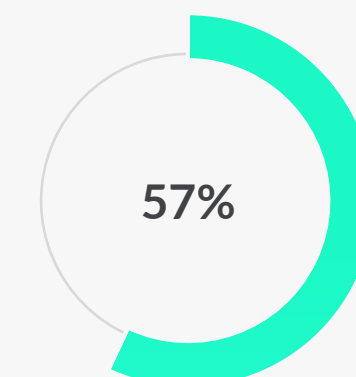
Construction

16 Projects
3,135 Rooms

7%
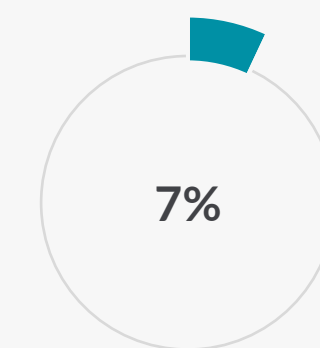
Pre-opening

2 Projects
237 Rooms

Hotel Groups

Accor	Hilton Worldwide	IHG Hotels & Resorts	Marriott International	Radisson Hotel Group
108 Projects	105 Projects	82 Projects	78 Projects	56 Projects
17,389 Rooms	15,807 Rooms	12,560 Rooms	13,165 Rooms	10,223 Rooms

Accor

108
Projects

17,389
Rooms

	Country	Projects	Rooms
1.	Poland	11	2,265
2.	Romania	11	1,386
3.	United Kingdom	10	1,812
4.	Germany	8	1,455
5.	Montenegro	8	1,230
6.	Italy	8	1,112

17%
42%
28%
13%

2023
18 Projects
2,016 Rooms

2024
46 Projects
8,327 Rooms

2025
30 Projects
5,002 Rooms

2026+
14 Projects
2,044 Rooms

68%
32%

First Class
73 Projects
11,314 Rooms

Luxury
35 Projects
6,075 Rooms
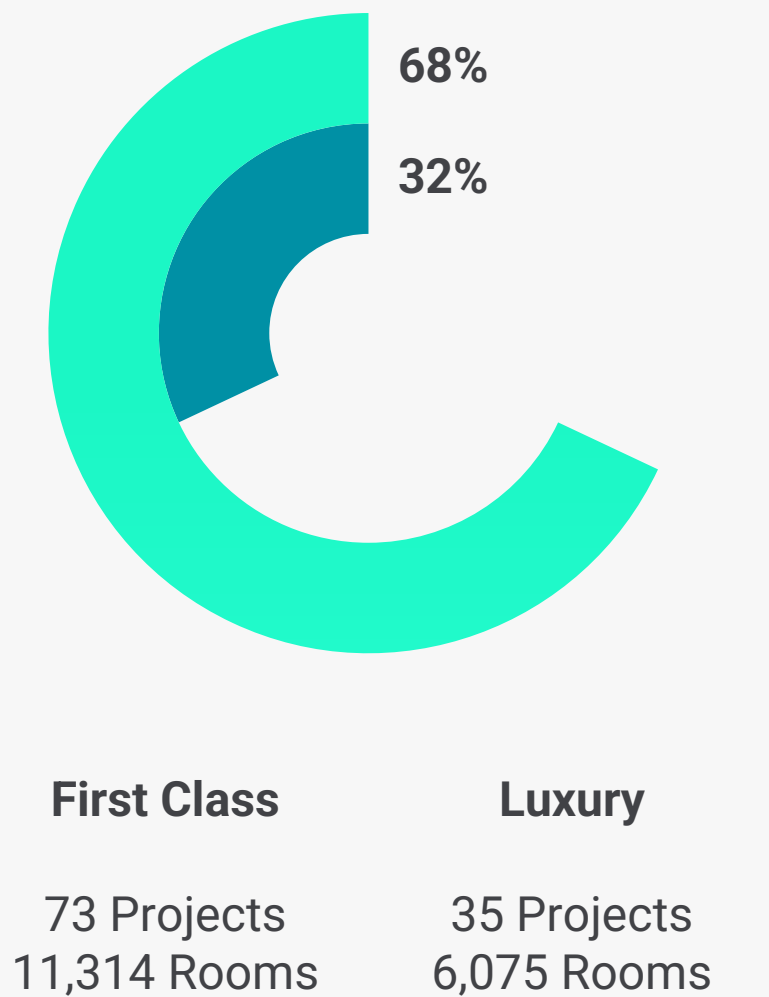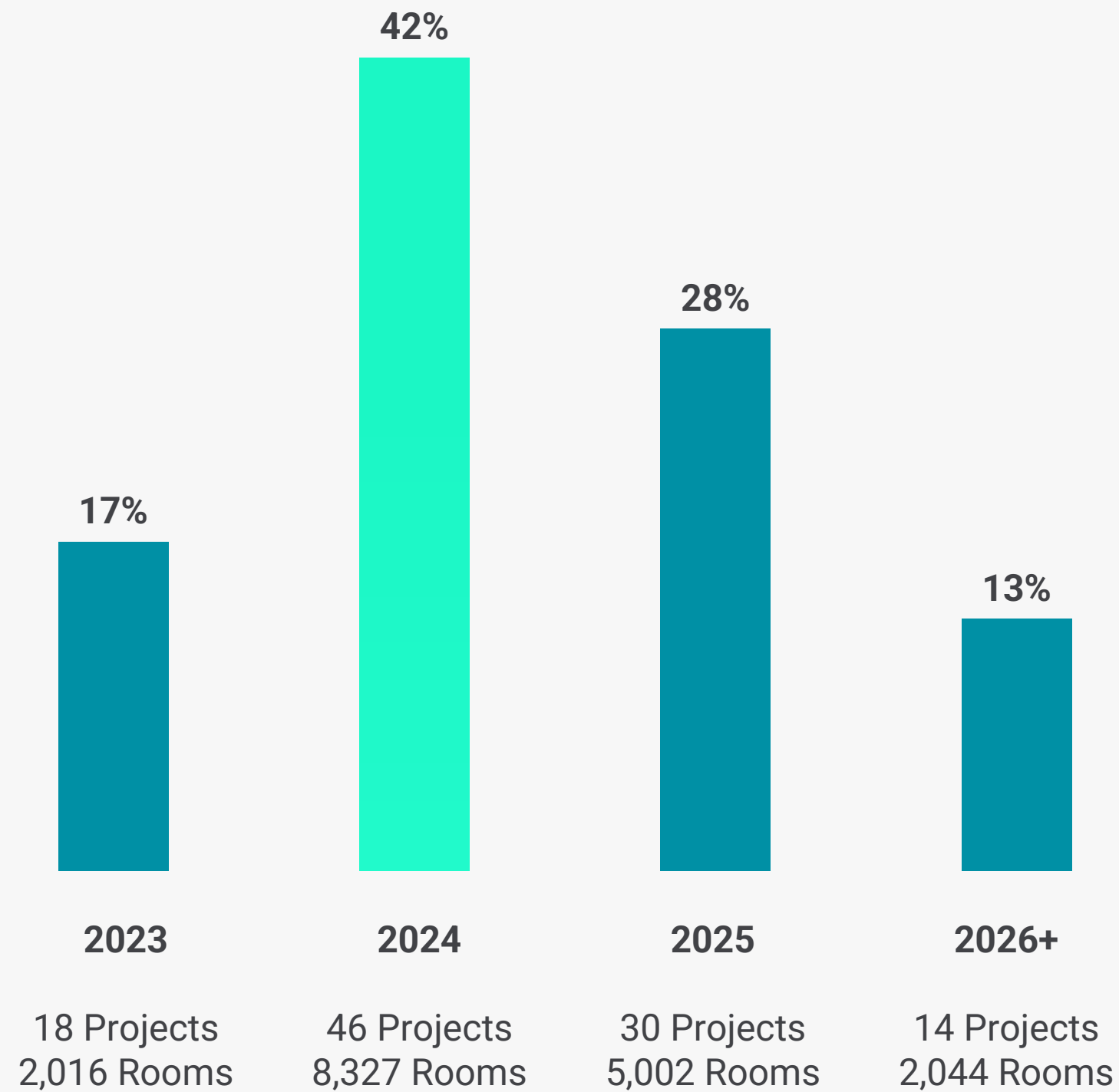
Hilton Worldwide

105
Projects

15,807
Rooms

	Country	Projects	Rooms
1.	United Kingdom	25	4,042
2.	Germany	11	1,941
3.	France	10	1,584
4.	Poland	8	984
5.	Spain	7	818
6.	Italy	6	1,012

18%
37%
38%
7%

2023
19 Projects
2,663 Rooms

2024
39 Projects
6,416 Rooms

2025
40 Projects
5,915 Rooms

2026+
7 Projects
813 Rooms

71%
29%

First Class
75 Projects
11,858 Rooms

Luxury
30 Projects
3,949 Rooms
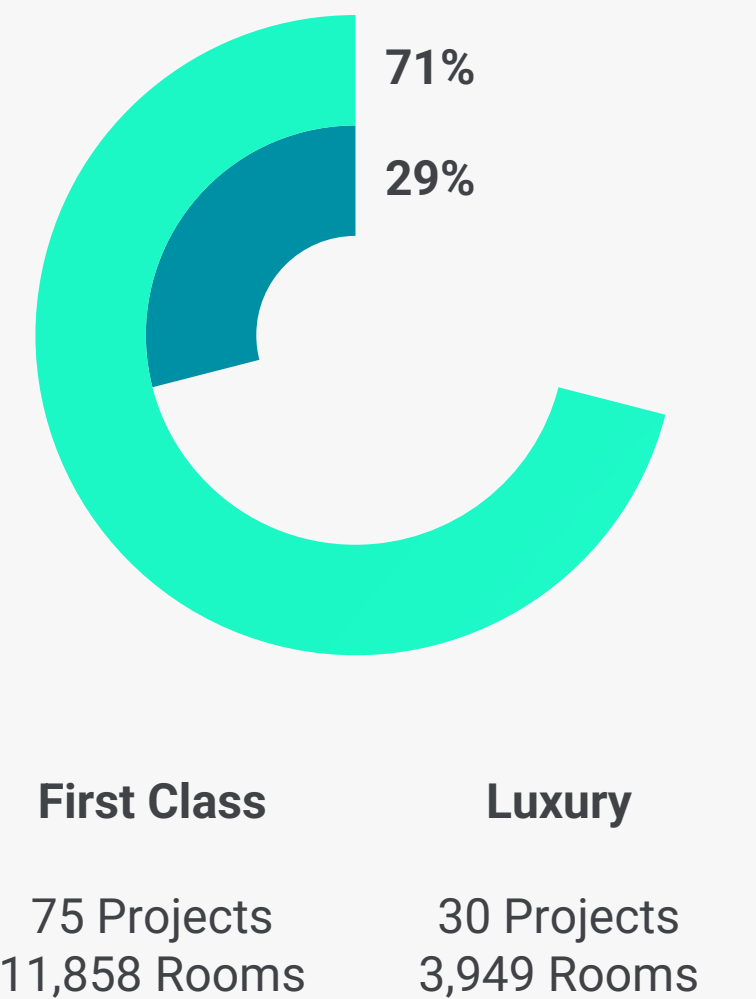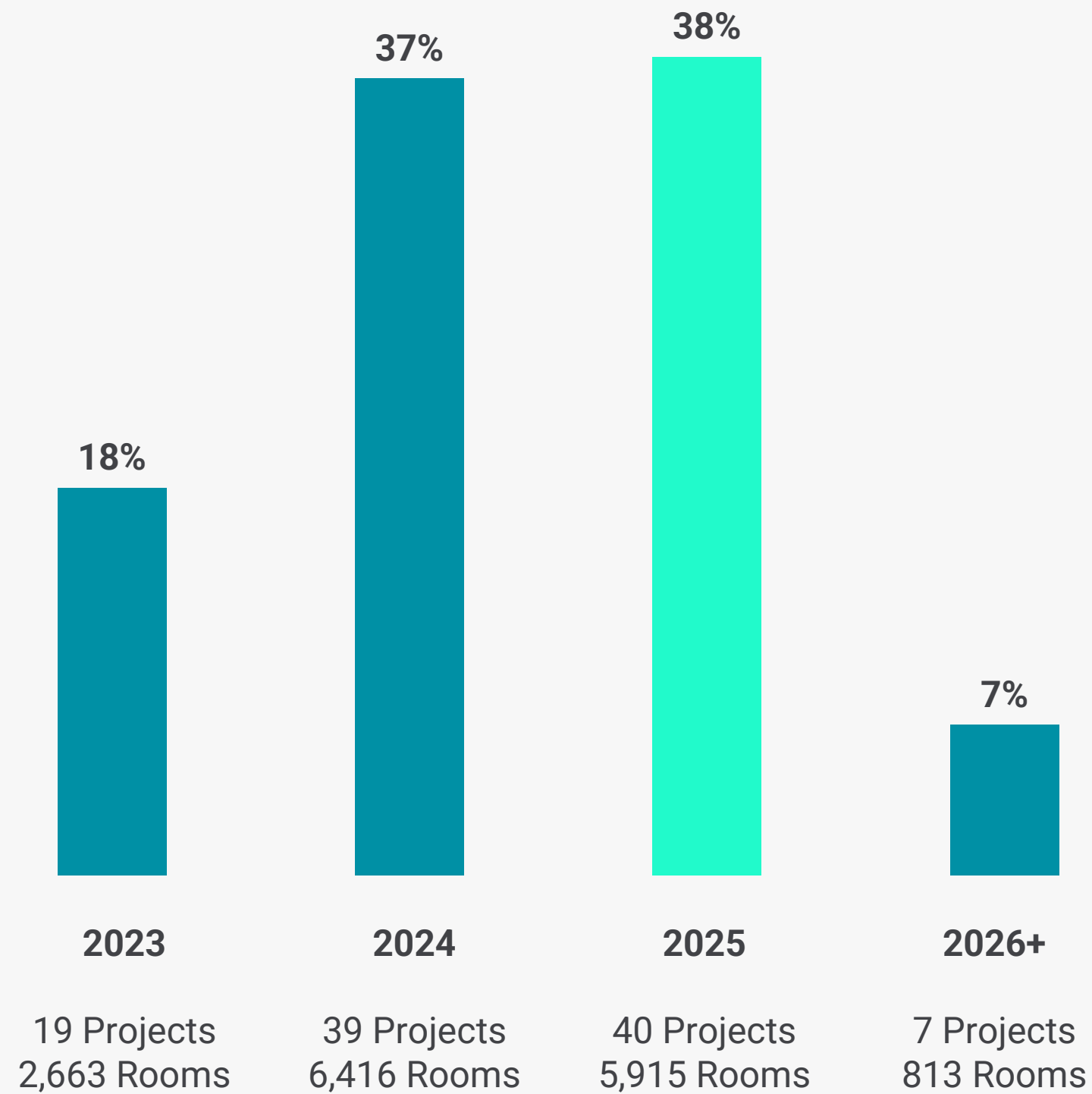
IHG Hotels & Resorts

82
Projects

12,560
Rooms

	Country	Projects	Rooms
1.	United Kingdom	17	2,121
2.	France	9	1,171
3.	Spain	7	1,077
4.	Germany	6	1,546
5.	Poland	6	1,292
6.	Portugal	5	609

17%
36%
32%
15%

2023
14 Projects
2,376 Rooms

2024
30 Projects
4,182 Rooms

2025
26 Projects
4,293 Rooms

2026+
12 Projects
1,709 Rooms

67%
33%

First Class
55 Projects
7,710 Rooms

Luxury
27 Projects
4,850 Rooms
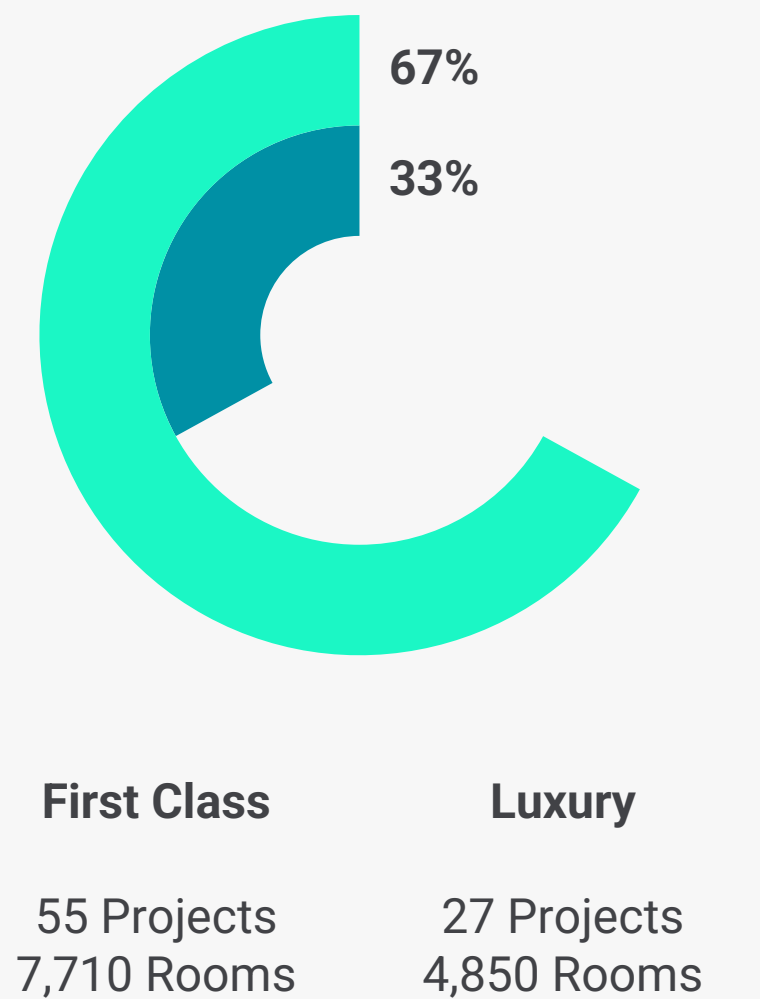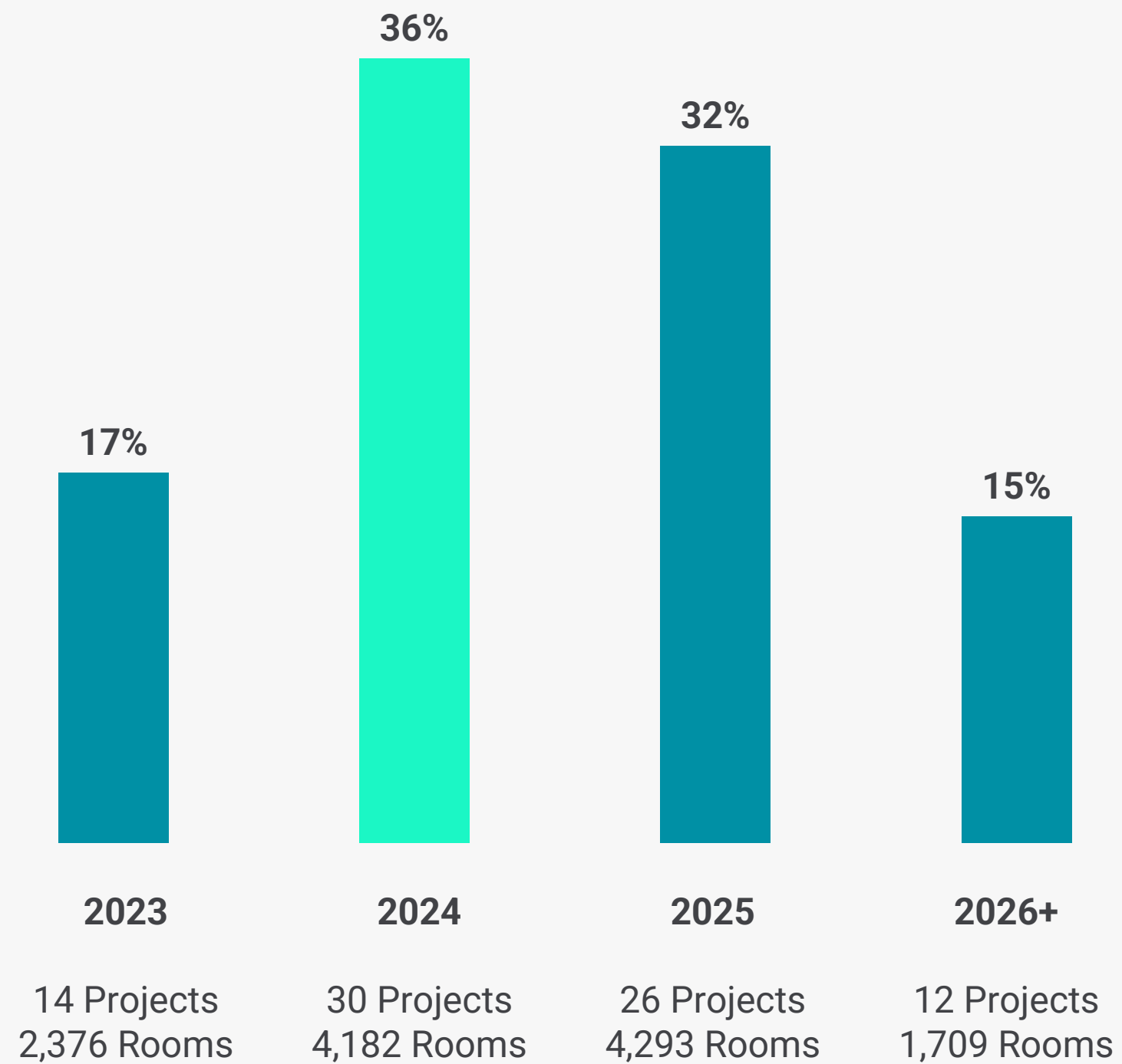
Hotel Brands

Hampton by Hilton

33 Projects
5,331 Rooms

Radisson Blu Hotels & Resorts

19 Projects
3,624 Rooms

Hilton Garden Inn

19 Projects
2,878 Rooms

Hotel Indigo

17 Projects
2,248 Rooms

Curio – A Collection by Hilton

17 Projects
1,705 Rooms

Melia Hotels

15 Projects
2,889 Rooms

Mercure Hotels

15 Projects
1,806 Rooms

Radisson Red

14 Projects
2,591 Rooms

TRIBE

13 Projects
2,412 Rooms

Marriott Hotels & Resorts

12 Projects
1,991 Rooms

Hampton by Hilton

33
Projects

5,331
Rooms

48% — **Planning**
16 Projects
2,897 Rooms

40% — **Construction**
13 Projects
2,122 Rooms

12% — **Pre-opening**
4 Projects
612 Rooms

	Country	Projects	Rooms
1.	United Kingdom	10	1,481
2.	Germany	8	1,249
3.	Poland	3	353
4.	France	2	459

9%
2023
3 Projects
505 Rooms

45%
2024
15 Projects
2,480 Rooms

40%
2025
13 Projects
2,118 Rooms

6%
2026+
2 Projects
228 Rooms
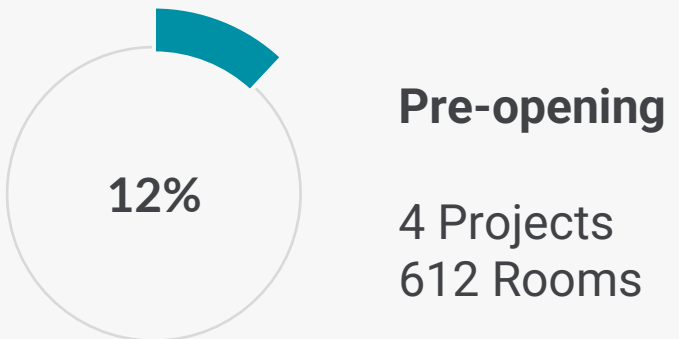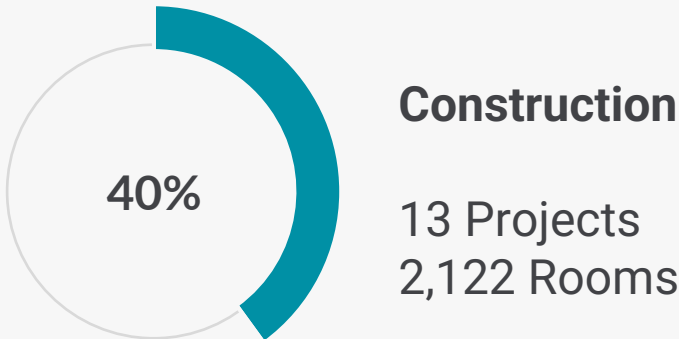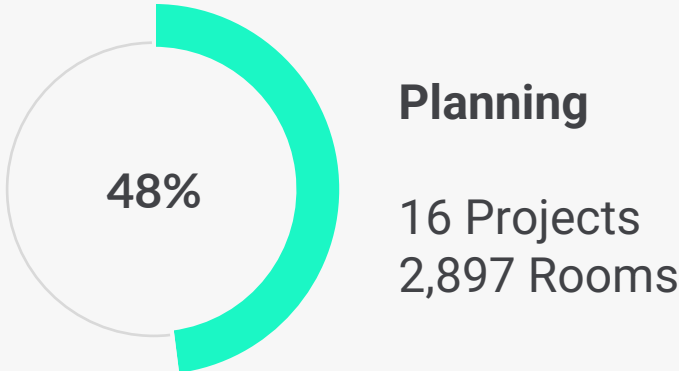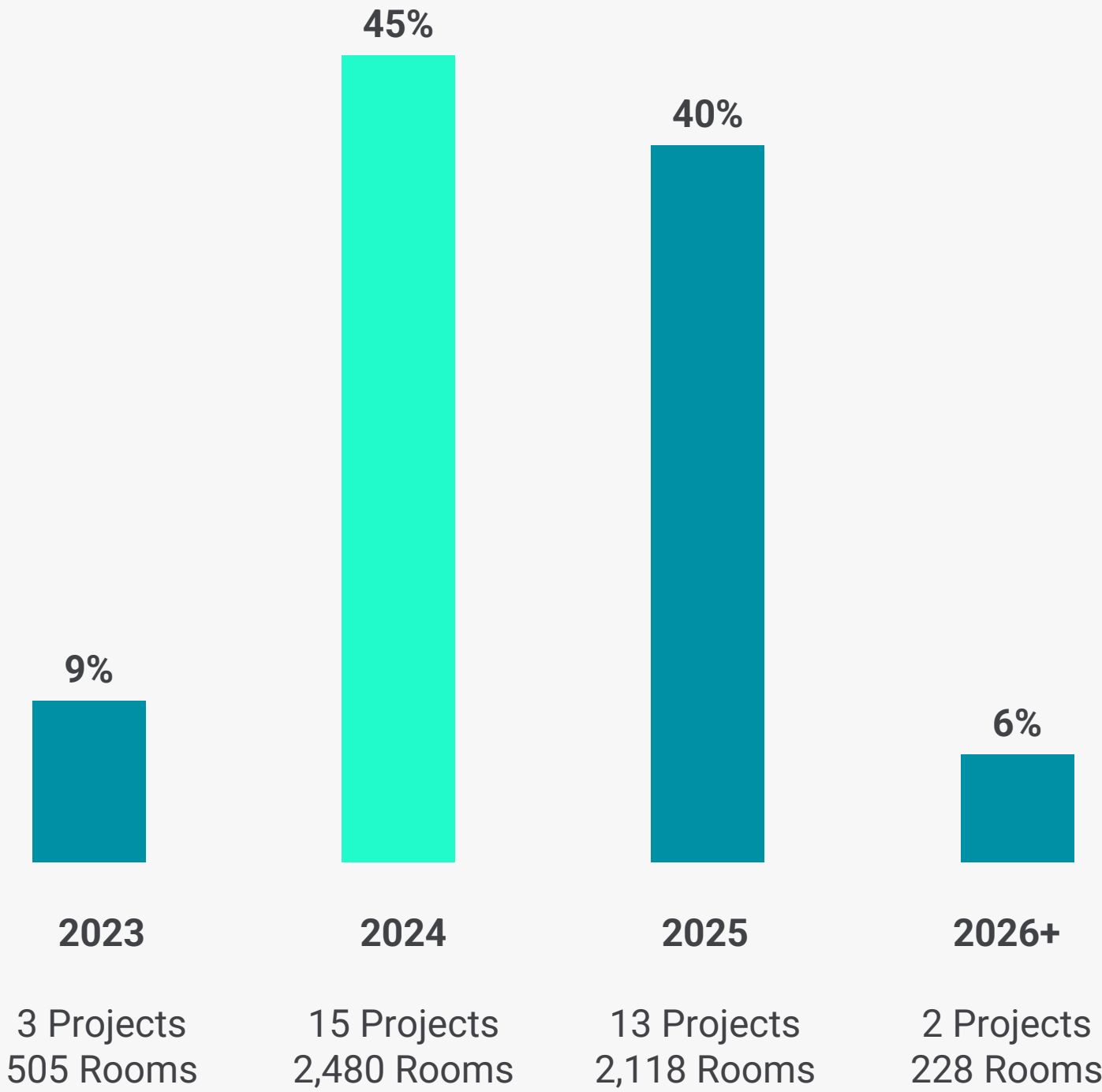
Radisson Blu Hotels & Resorts

19
Projects

3,624
Rooms

	Country	Projects	Rooms
1.	Ireland	3	428
2.	Italy	2	618
3.	Switzerland	2	580
4.	Poland	2	372
5.	Cyprus	2	330

21% **37%** **26%** **16%**

2023
4 Projects
654 Rooms

2024
7 Projects
1,746 Rooms

2025
5 Projects
858 Rooms

2026+
3 Projects
366 Rooms

5% Pre-planning
1 Projects
157 Rooms

37% Planning
7 Projects
1,190 Rooms

42% Construction
8 Projects
1,792 Rooms

16% Pre-opening
3 Projects
485 Rooms
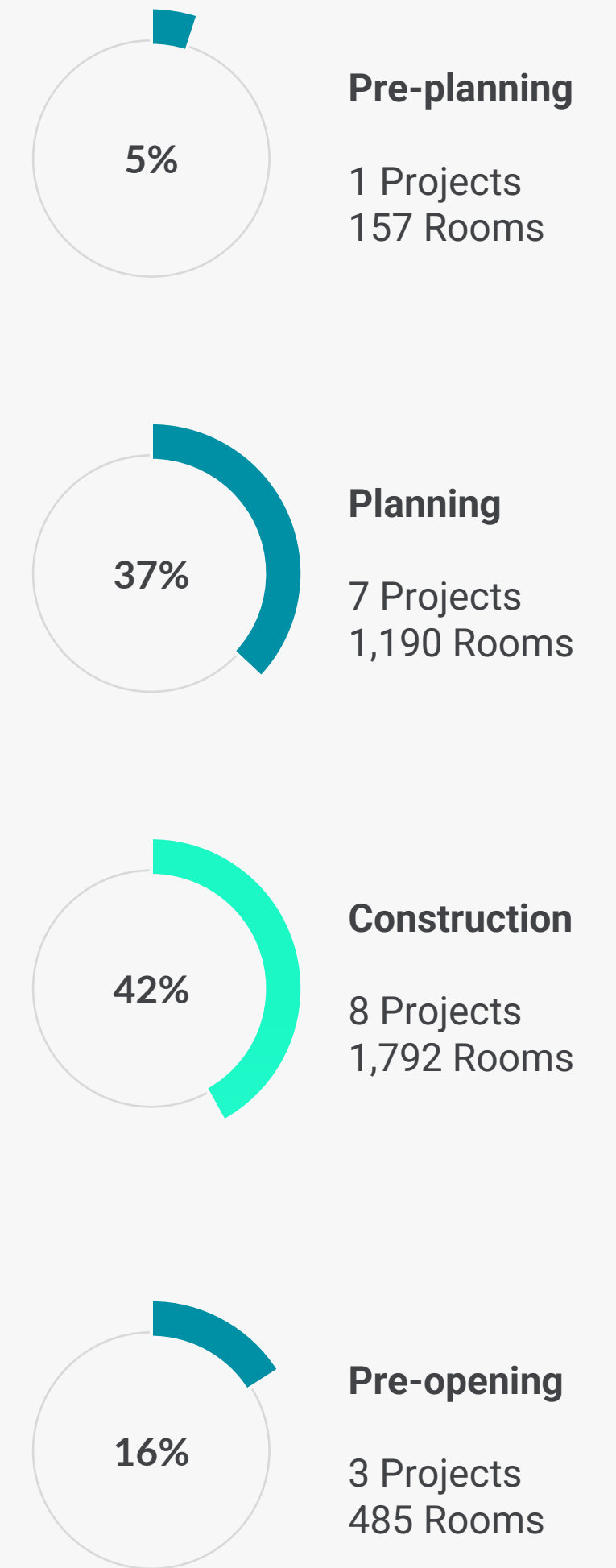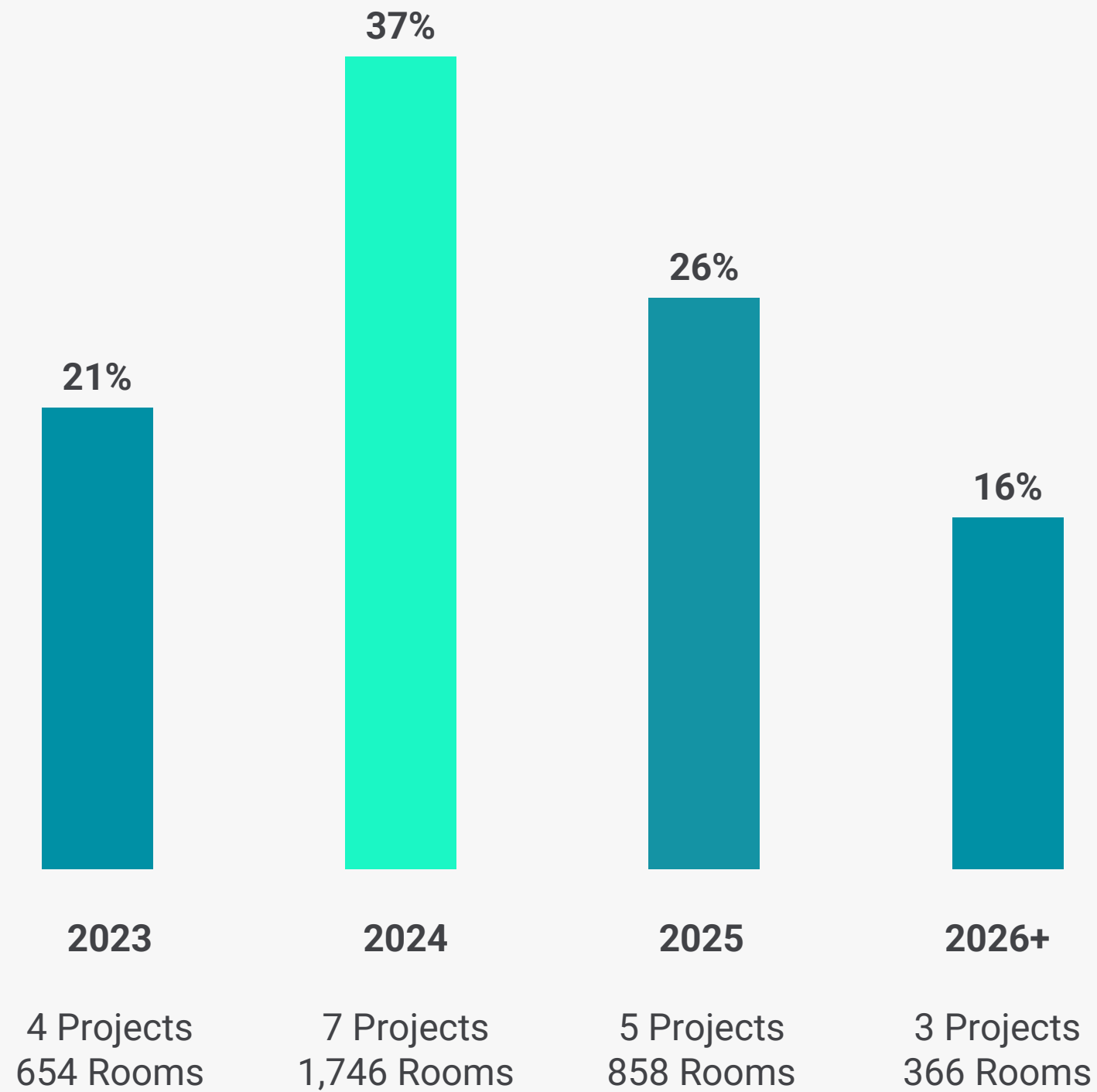
Hilton Garden Inn

19
Projects

2,787
Rooms

	Country	Projects	Rooms
1.	United Kingdom	4	608
2.	Poland	4	531
3.	France	2	409

37%

26%

32%

5%

2023
7 Projects
902 Rooms

2024
5 Projects
944 Rooms

2025
6 Projects
882 Rooms

2026+
1 Projects
150 Rooms

5%
Pre-planning
1 Projects
150 Rooms

37%
Planning
7 Projects
972 Rooms

42%
Construction
8 Projects
1,430 Rooms

16%
Pre-opening
3 Projects
326 Rooms

THP.

TOP HOTEL PROJECTS