Deutschland Market Performance Übersicht

Montag, 12. Mai 2025

Denise Seeholzer| Senior Account Manager- DACH

The most comprehensive commercial real estate data.

The most influential network of CRE professionals.

$5B+ invested in research and technology	**38** years of experience	**6,400** team members
246K CoStar subscribers	**29** brands	**3B** Visitors to our websites annually

No other provider comes close to our directly-sourced global sample.

40

years of partnership with the industry

87K+

participating hotels around the world

11M+

Rooms in our global sample

78%

of branded rooms globally

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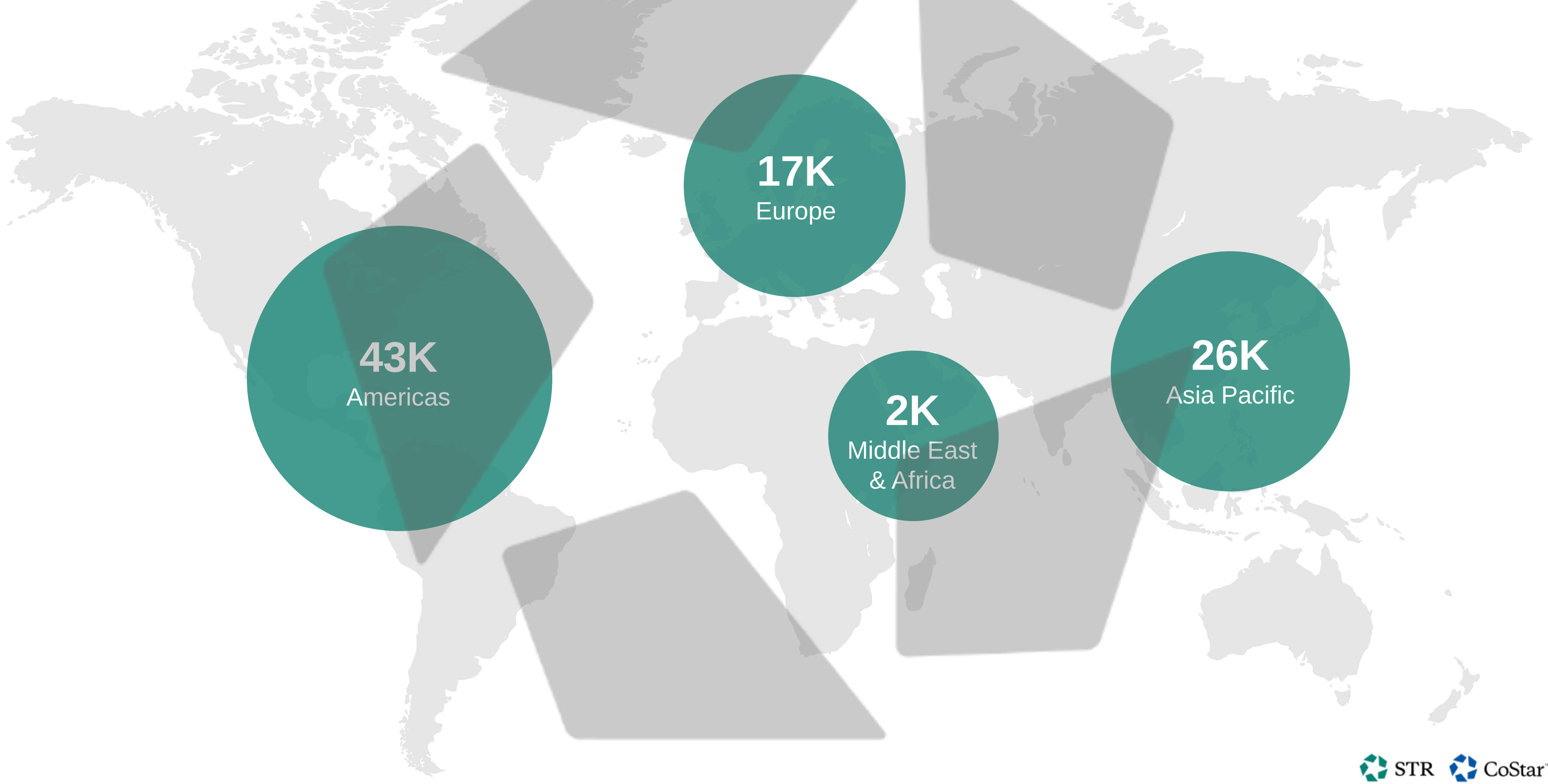
Sample über den Globe verteilt

Historical data participants



Agenda

Globale Übersicht

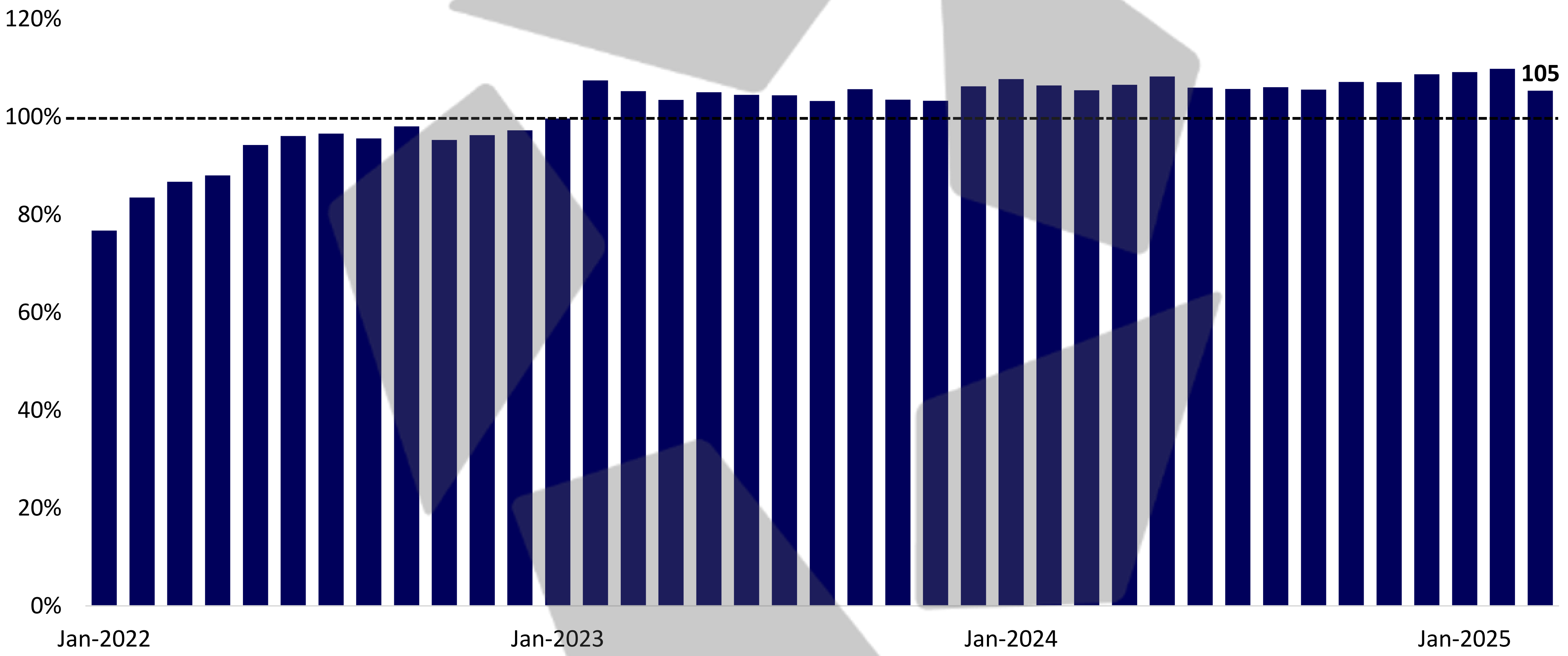
Fokus Deutschland

Was bringt die Zukunft

Globale Übersicht

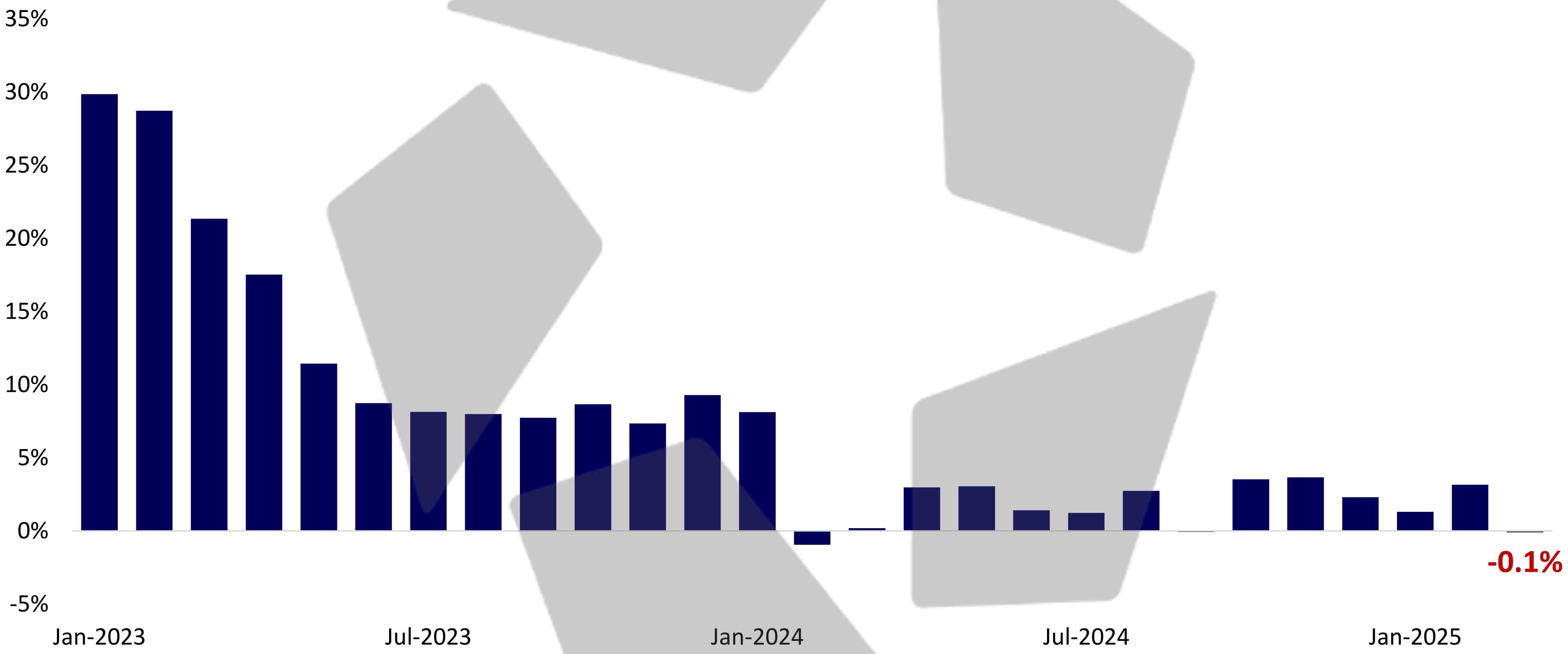
Globale Nachfrage konstant über 2019 Level

Global Demand **indexed to 2019**, Jan 2022 – Mar 2025



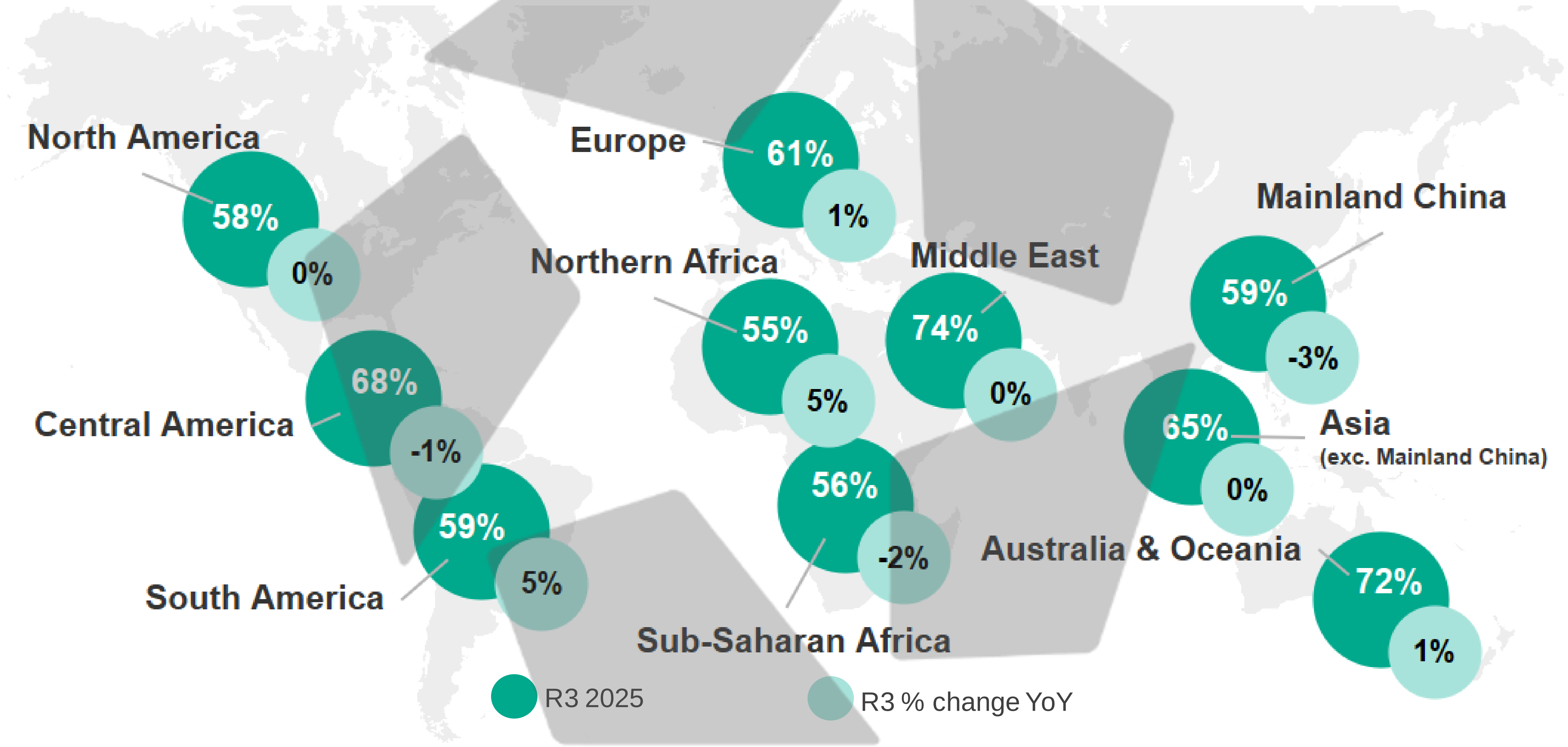
März nicht “on track”, warum?

Global demand % chg. YoY, Jan 2023 – Mar 2025



Während die Nachfrage weiter wächst so steigt parallel die Auslastung

Occupancy, YTD Mar 2025



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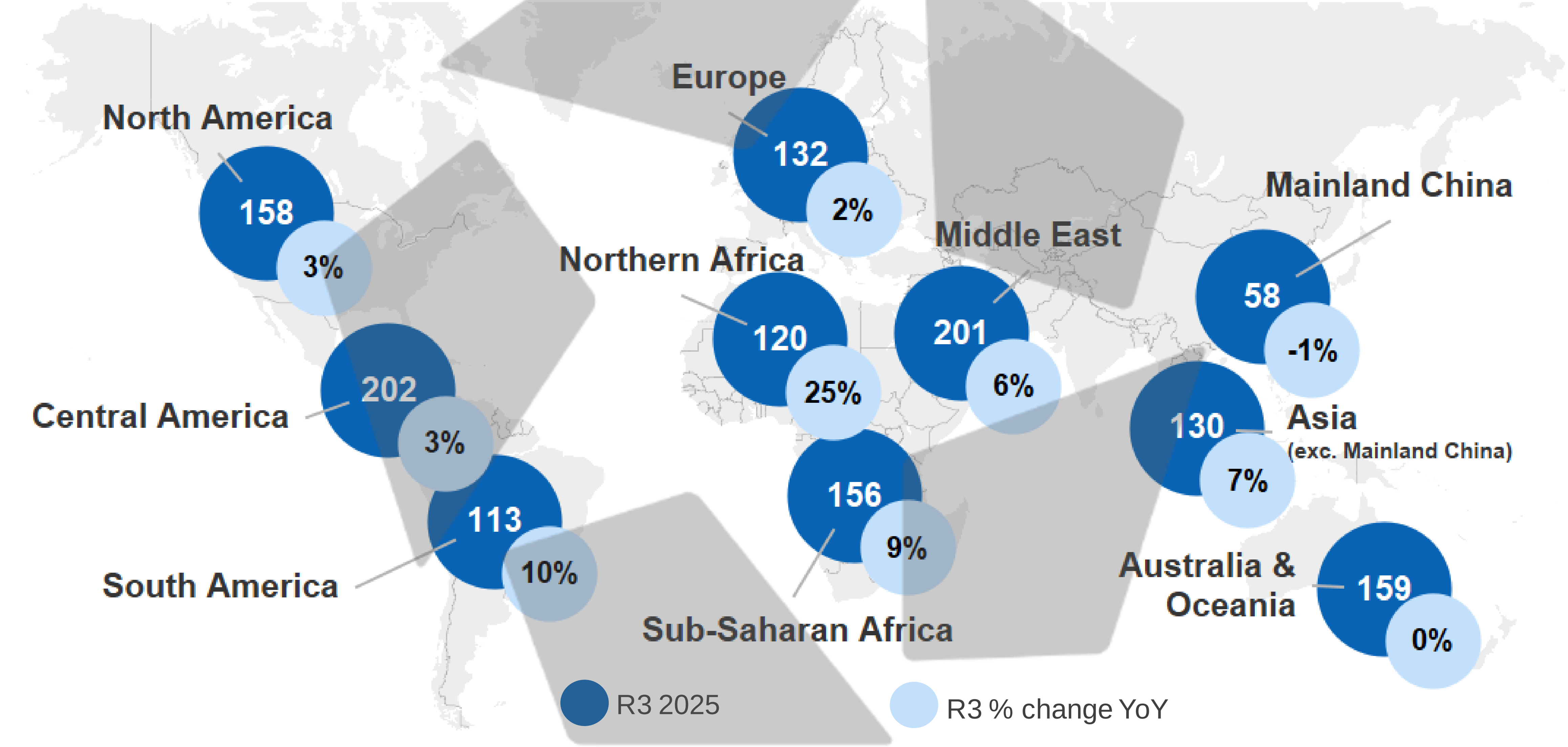
… dies wiederum hat eine weitere Ratensteigerung zur Folge.

ADR, USD & CC, YTD Mar 2025



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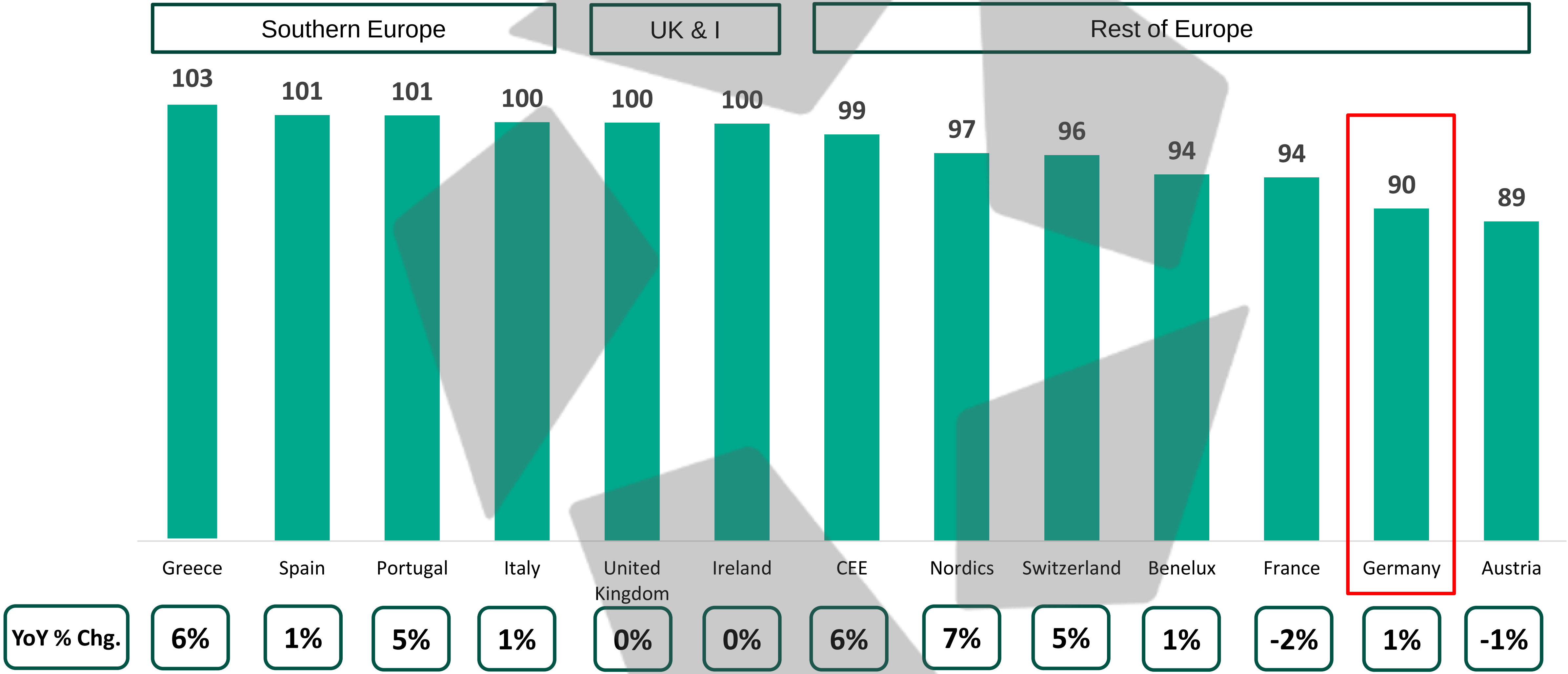
Die europäischen Unterschiede sind da aber CEE schliesst die Lücke langsam

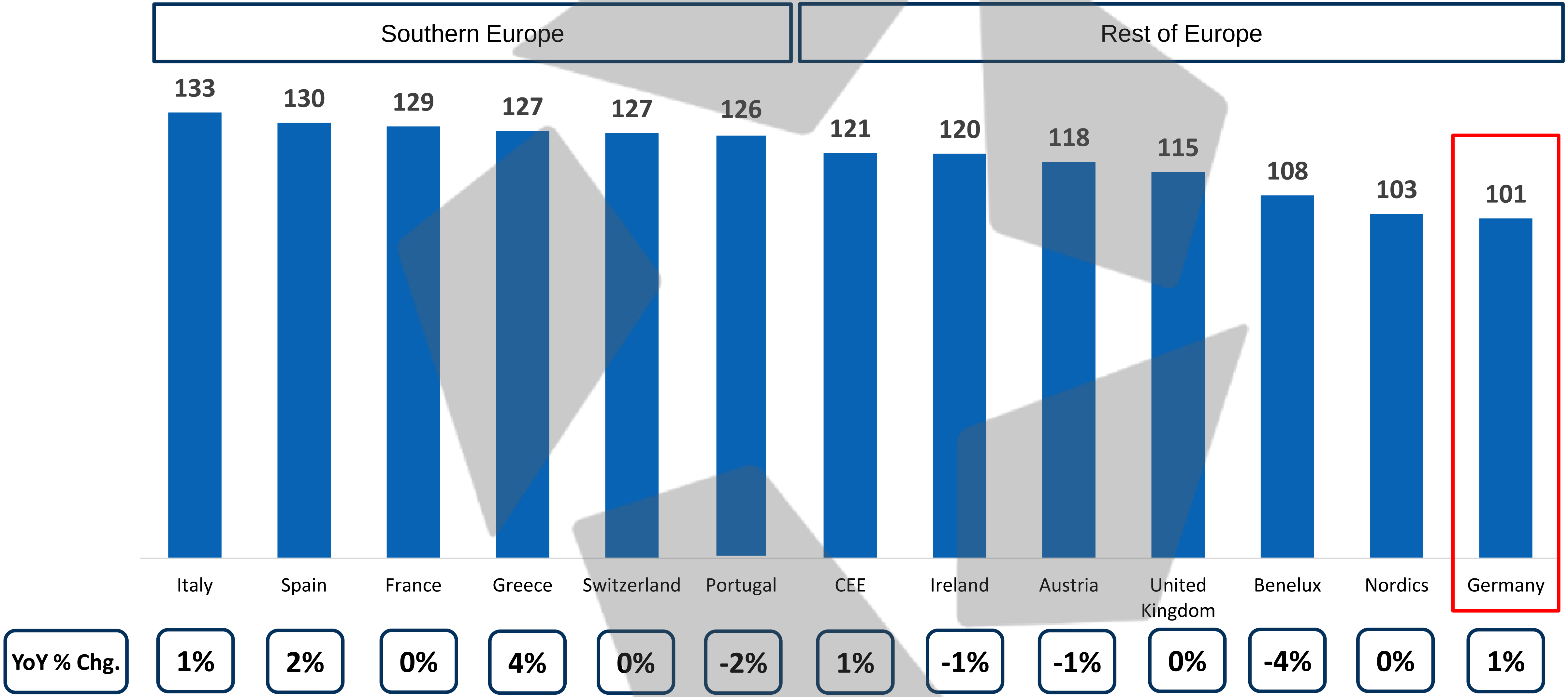
<u>Occupancy,</u> YTD March 2025 **<u>indexed to YTD March 2019</u>**



Nordics = Denmark, Finland, Iceland, Norway, Sweden
CEE = Bulgaria, Czech Republic, Estonia, Hungary, Lithuania, Latvia, Poland, Romania, Slovenia, Slovakia

Südeuropa immer noch im ADR Wachstum im Jahresvergleich

ADR (local currency), YTD March 2025 **indexed to YTD March 2019**

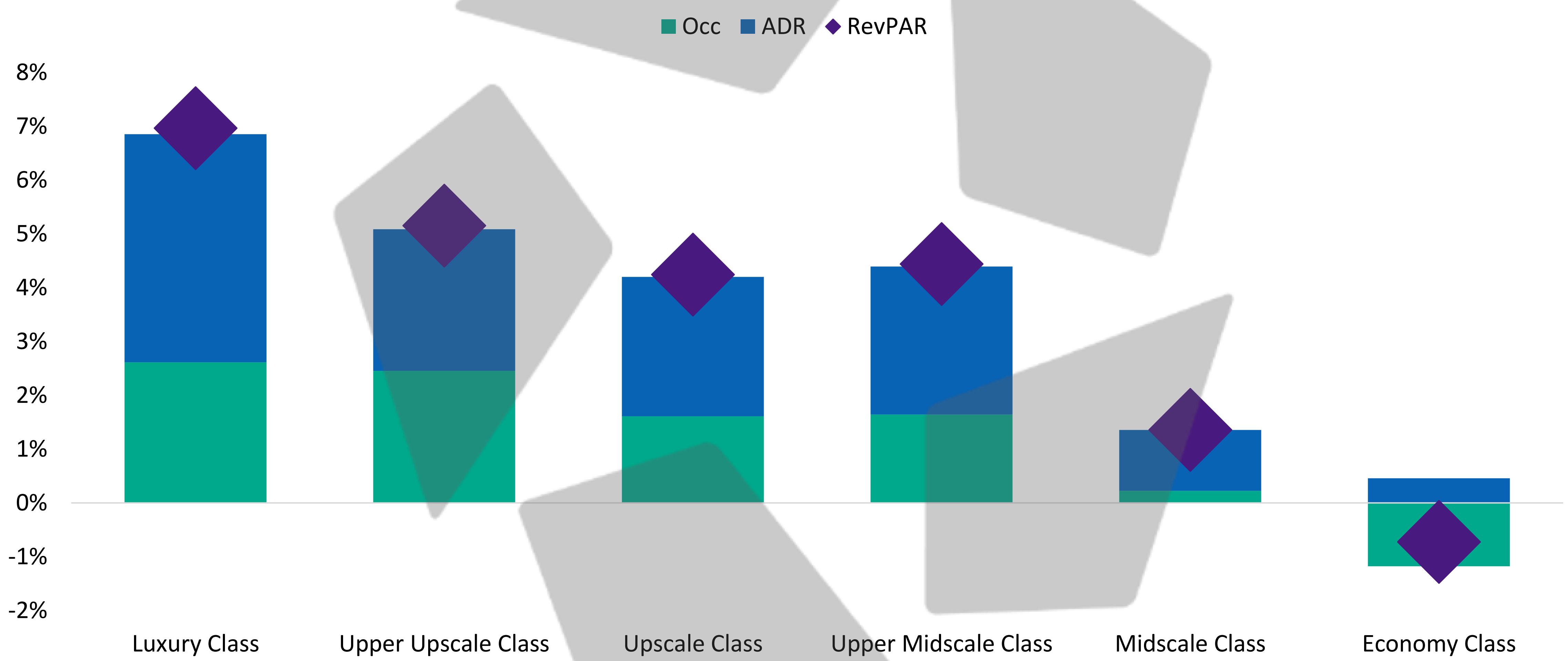


Nordics = Denmark, Finland, Iceland, Norway, Sweden

CEE = Bulgaria, Czech Republic, Estonia, Hungary, Lithuania, Latvia, Poland, Romania, Slovenia, Slovakia

Ein globaler Trend und Europa ist dabei keine Ausnahme

Europe, KPI (EUR, CC) % chg. YoY, R12 March 2025



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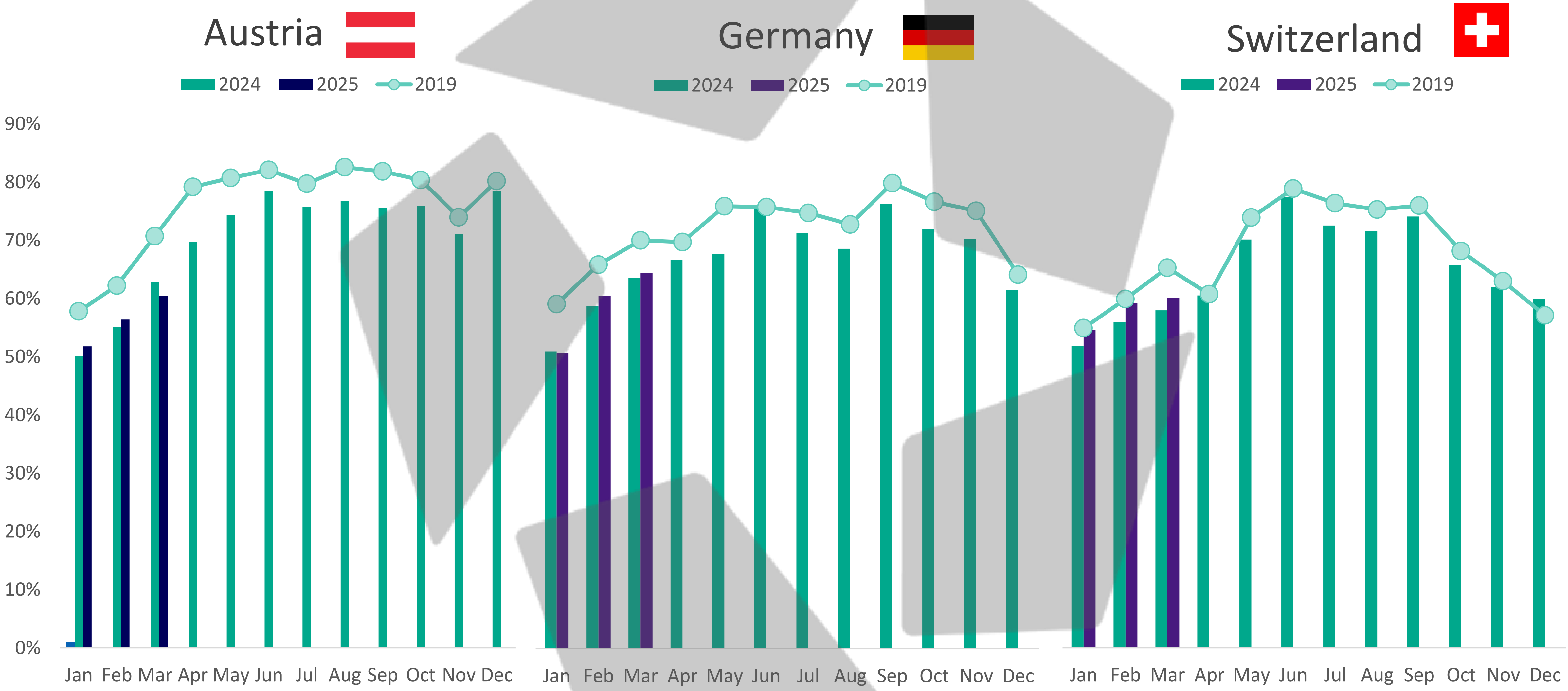
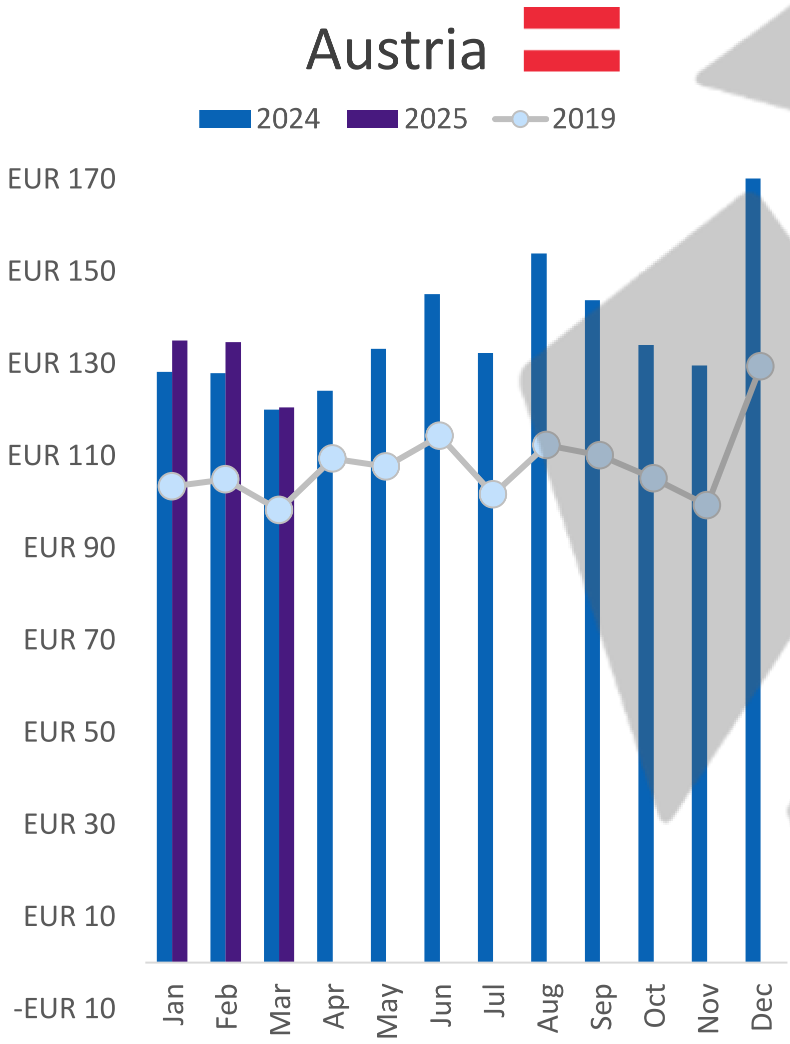
Auslastung in DACH Region im Vergleich

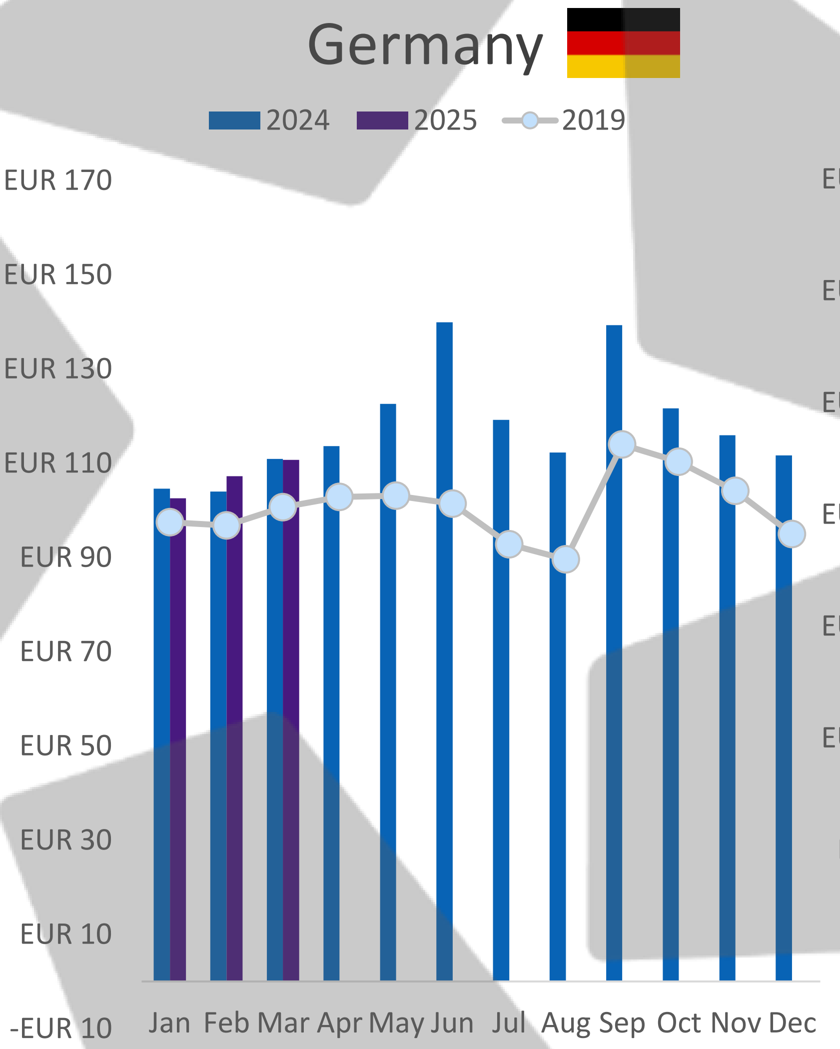
Austria, Germany & Switzerland, Occupancy % by month, Full Year 2019, 2024 and YTD March 2025

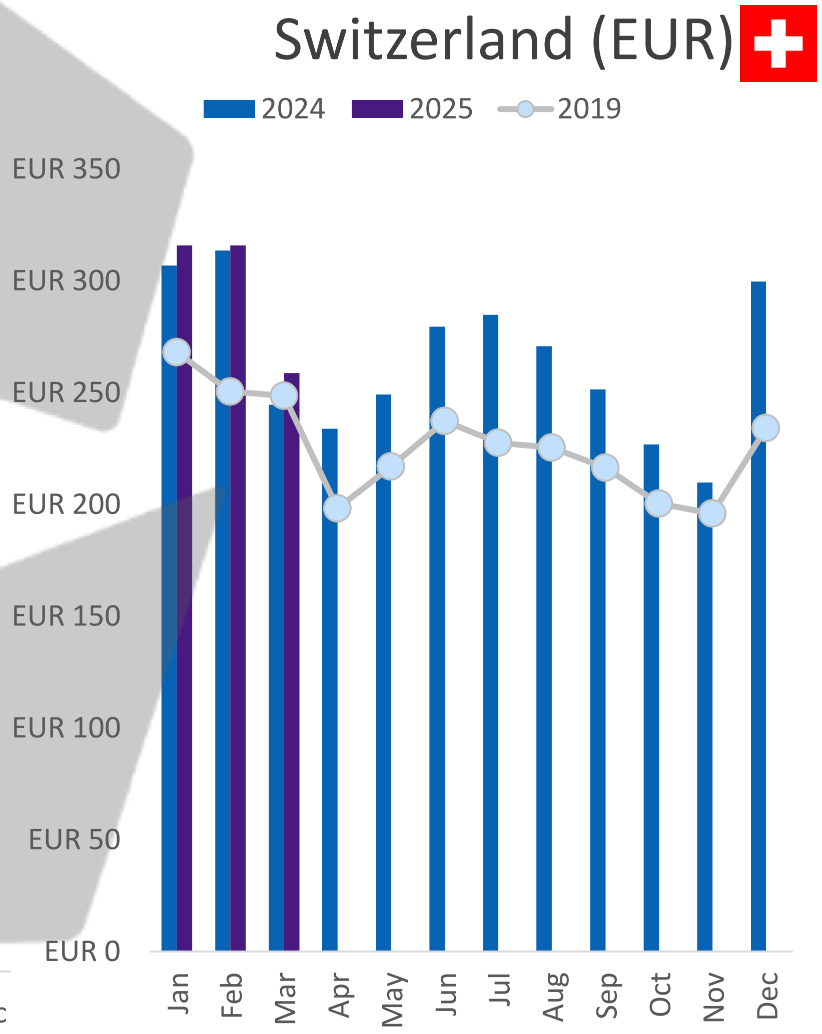


Wachstum der Rate pro Land sehr unterschiedlich

<u>Austria, Germany & Switzerland, ADR by month,</u> Full years, 2019, 2024 & YTD March 2025 (Euros)







Entwicklung der Schlüsselkennzahlen im Vergleich

Germany, Full year performance data 2019, 2023 & 2024

	2019	2023	2024	
Occupancy	71.4%	64.9%	66.8%	✗
Occ % Change		11.7%	2.9%	✓
ADR	€100.90	€114.38	€118.9	✓
ADR % Change		5.9%	3.9%	✓
RevPAR	€72.10	€74.27	€79.4	✓
RevPAR % Change		18.3%	6.9%	✓

1. Quartal mehr Wachstum im Bereich Auslastung

Deutschland, Occupancy, ADR and RevPAR (EUR), March YTD 2025 and % change to 2024

58.4%

Occupancy

vs FY 2024 +1.4%

€107.2

ADR

vs FY 2024 0.8%

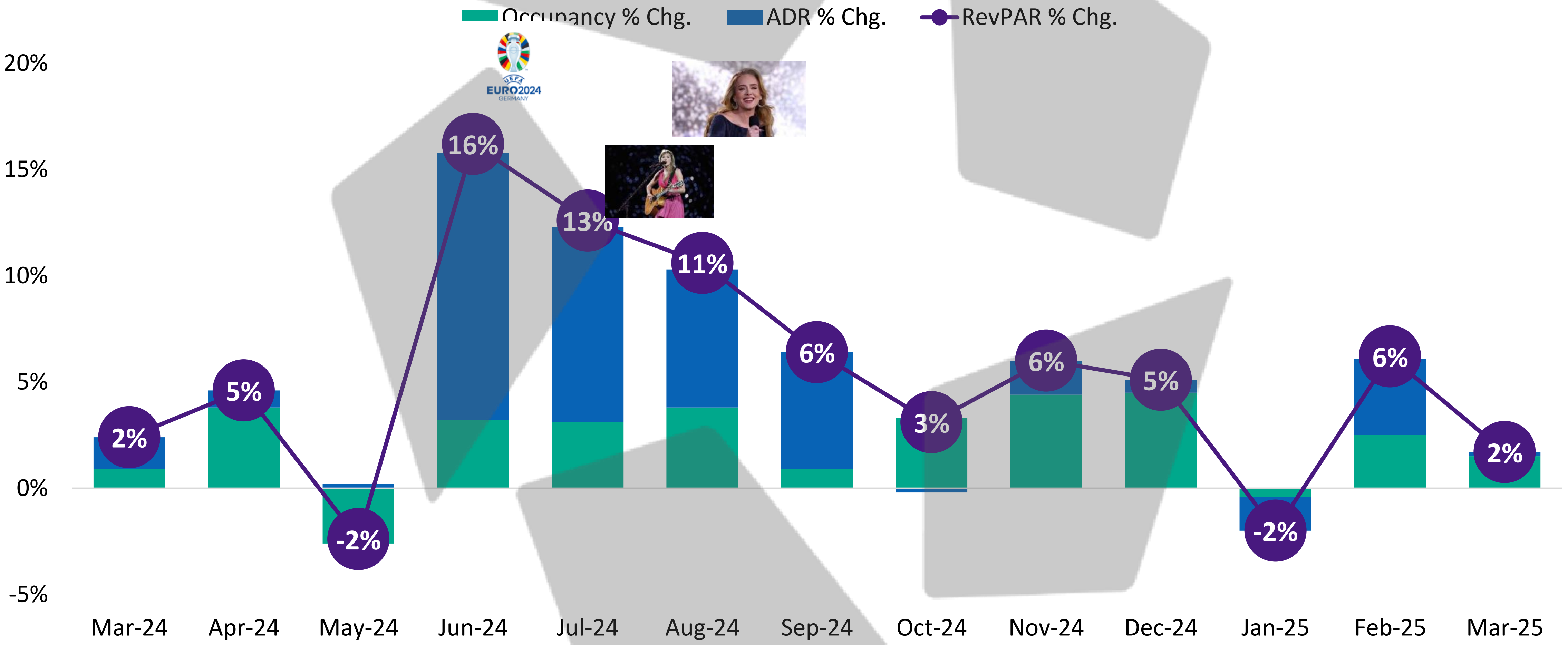
€ 62.5

RevPAR

vs FY 2024 +1.3%

2024 endete solide – 2025 muss sich erst wieder beweisen

Germany, KPI % change YoY, March 2024 – March 2025



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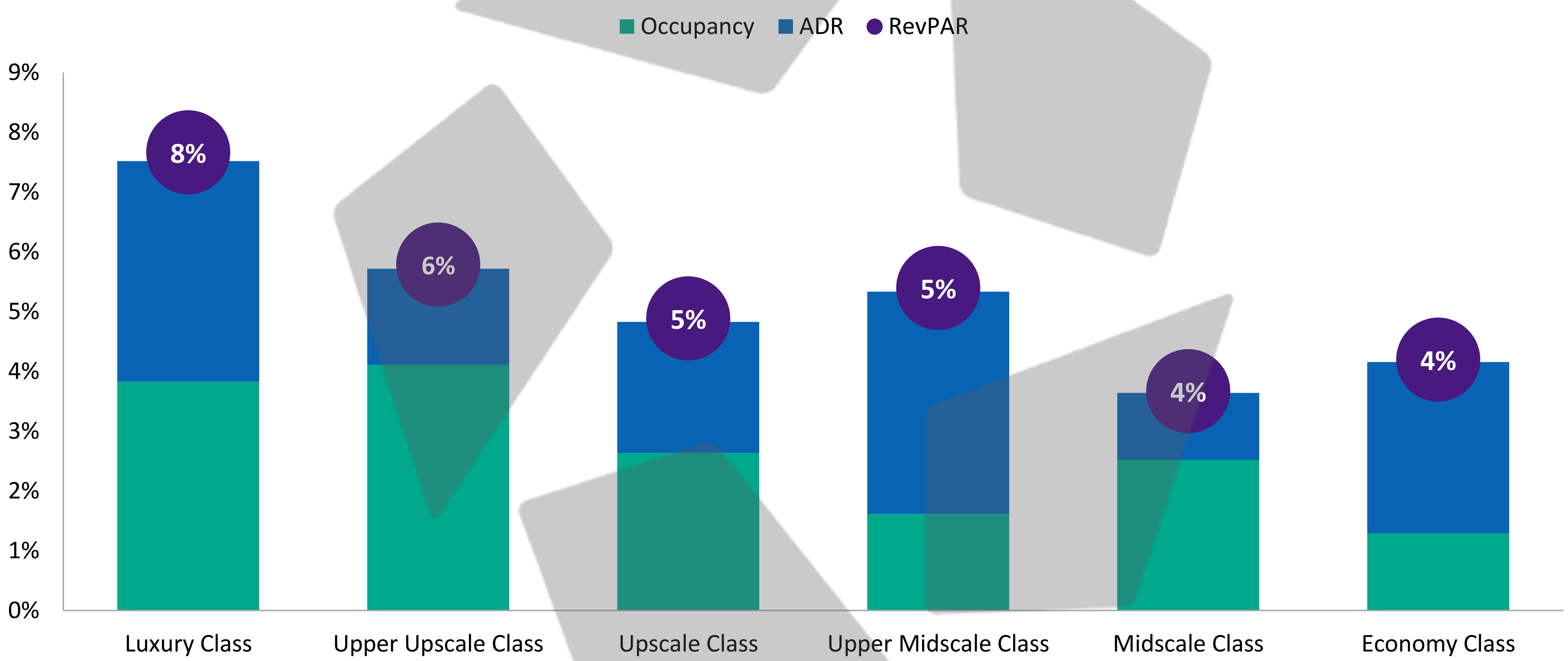
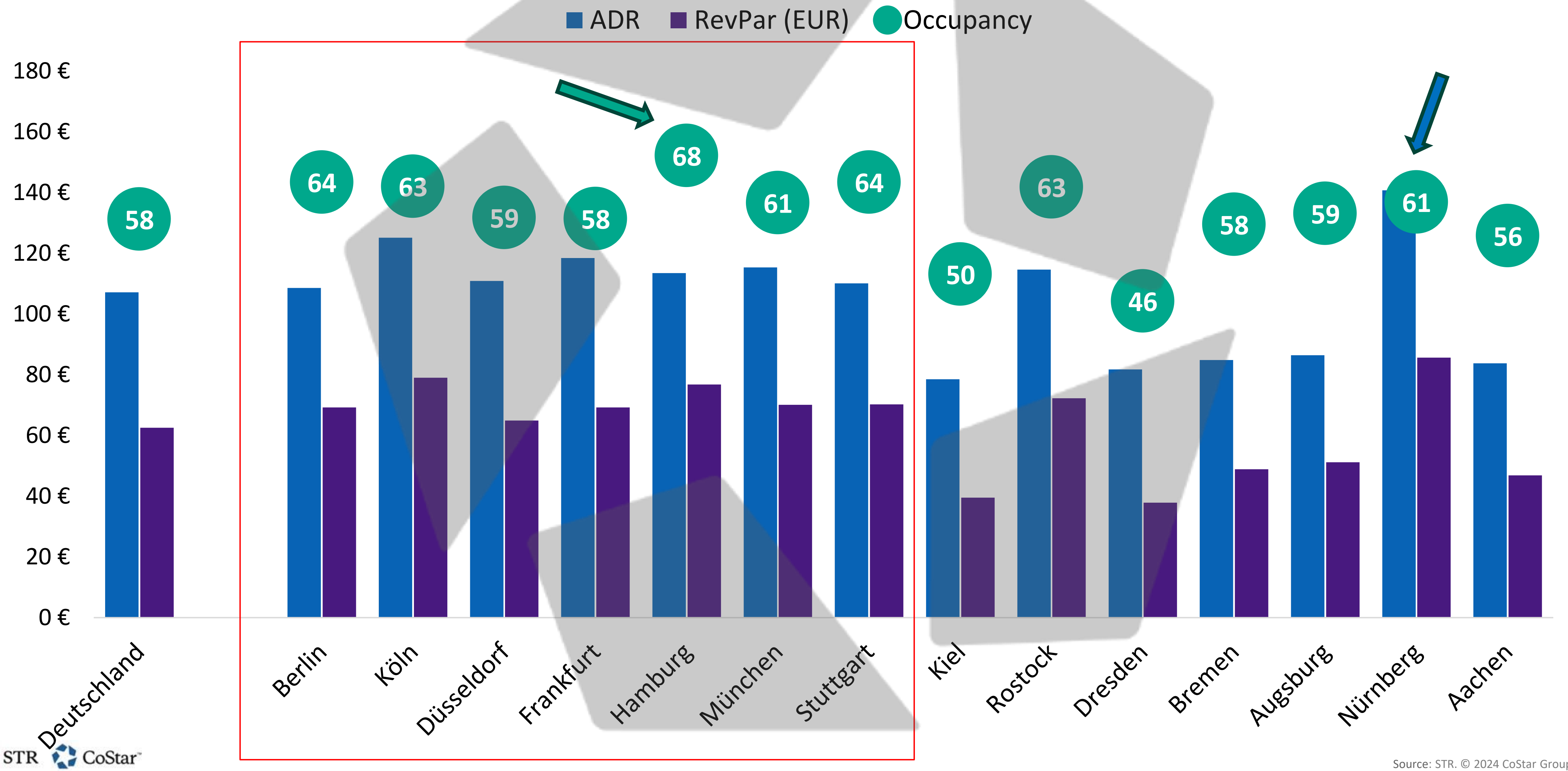
Ähnliche Trennung auf Klassenebene, aber nicht so deutlich wie in Europa

Germany, KPI % change YoY, R12 ending March 2025



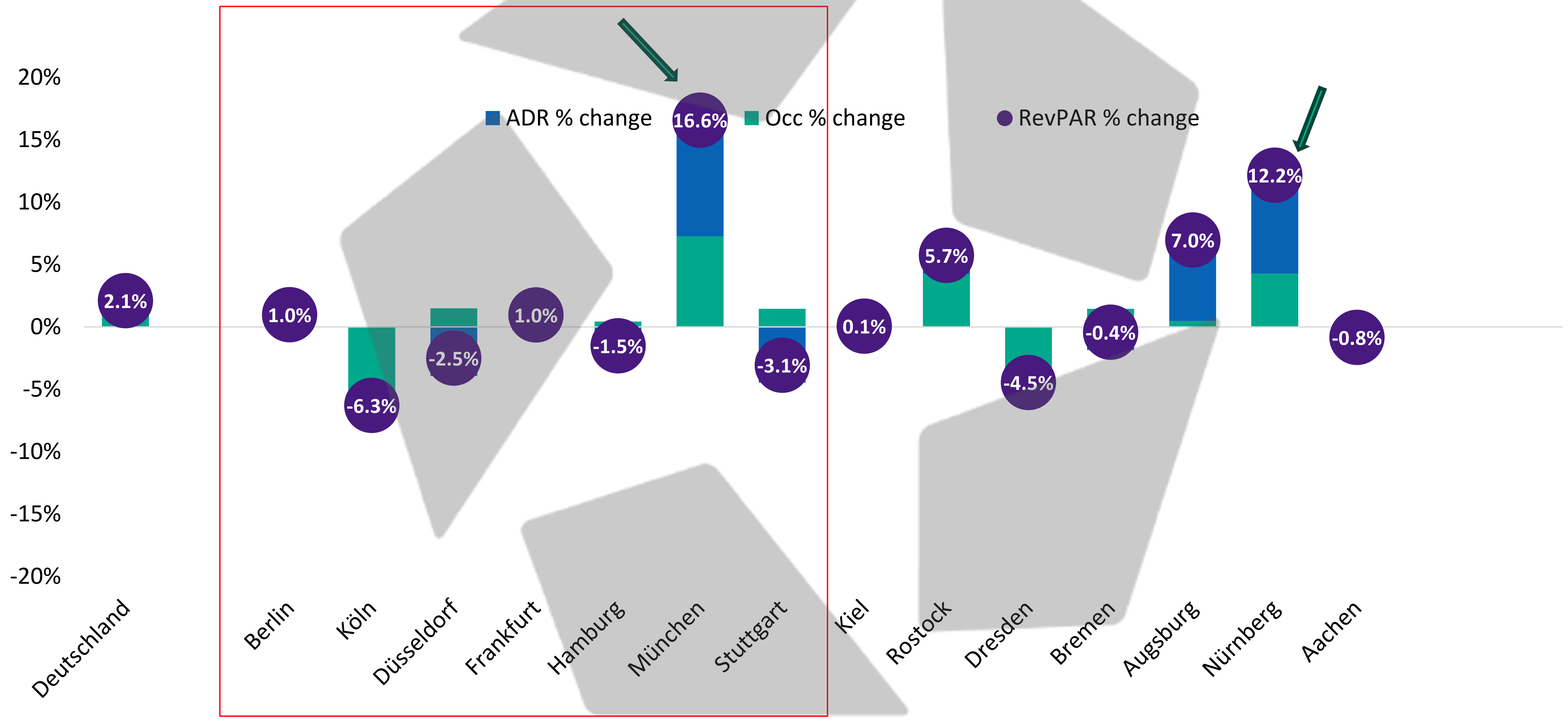
Auslastung und ADR zeigt im ersten Quartal durchzogene Werte

German Markets Occupancy, ADR & RevPAR (Euro currency), **YTD March 2025**



Aber im Wachstum hat München die Nase vorn

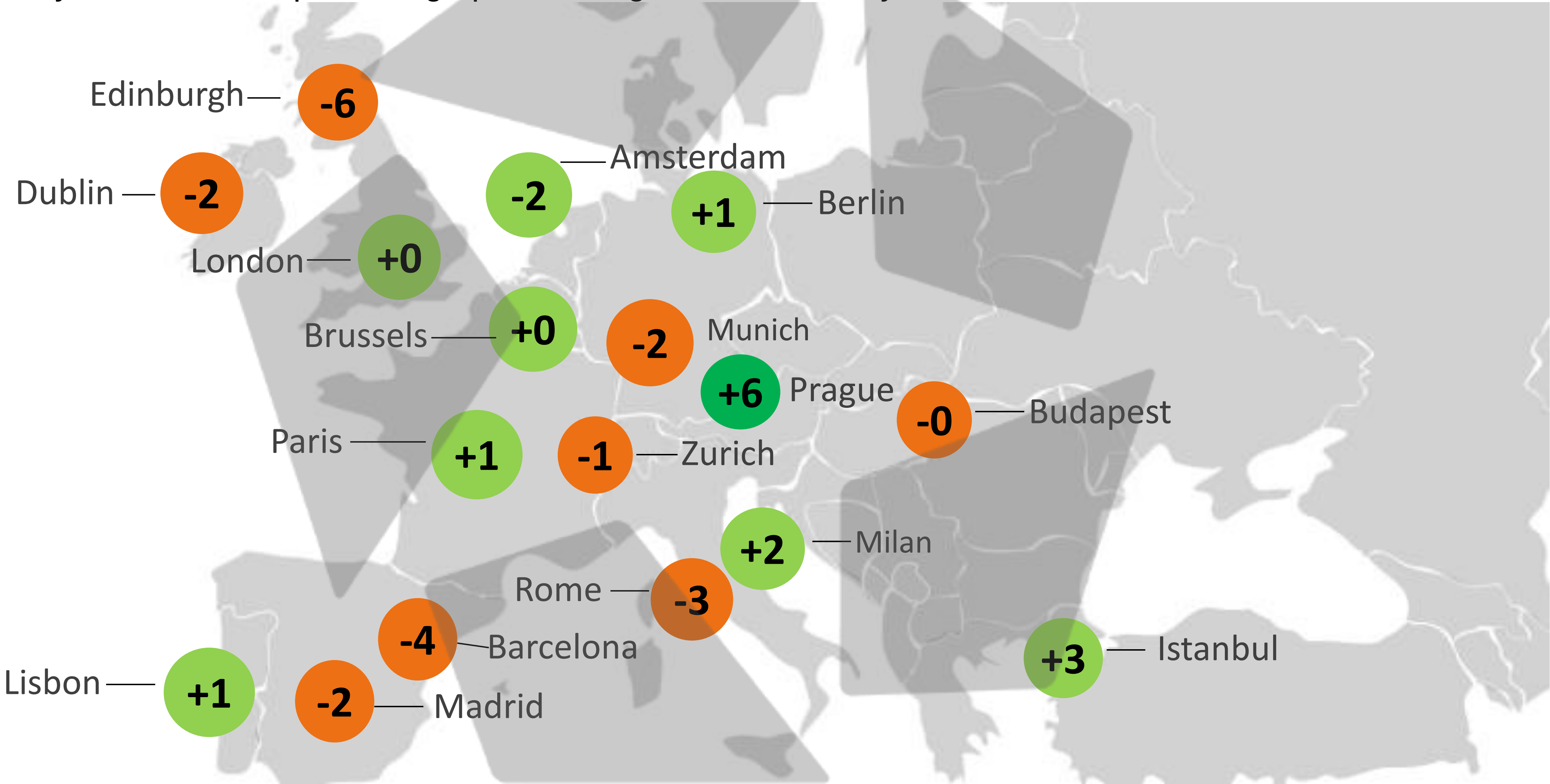
German Markets Occupancy, ADR & RevPAR % chg (Euro currency), **YoY %chg YTD March 2025**



Was bringt die Zukunft

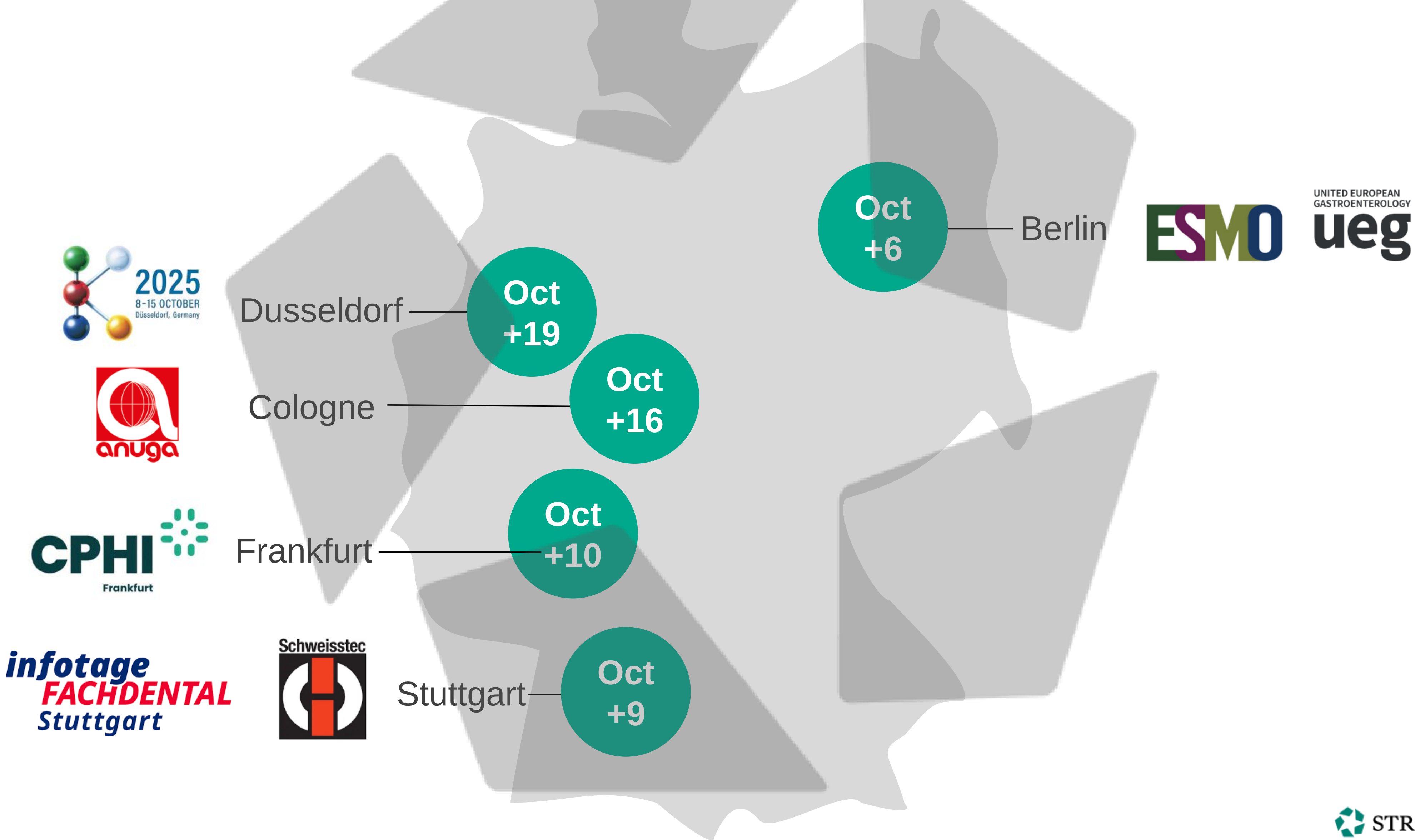
Ein durchmischtes Bild für Europa in Bezug auf die Business on the books

Occupancy on the books, percentage point change for next 90 days vs. STLY as of 5 Mai 2025



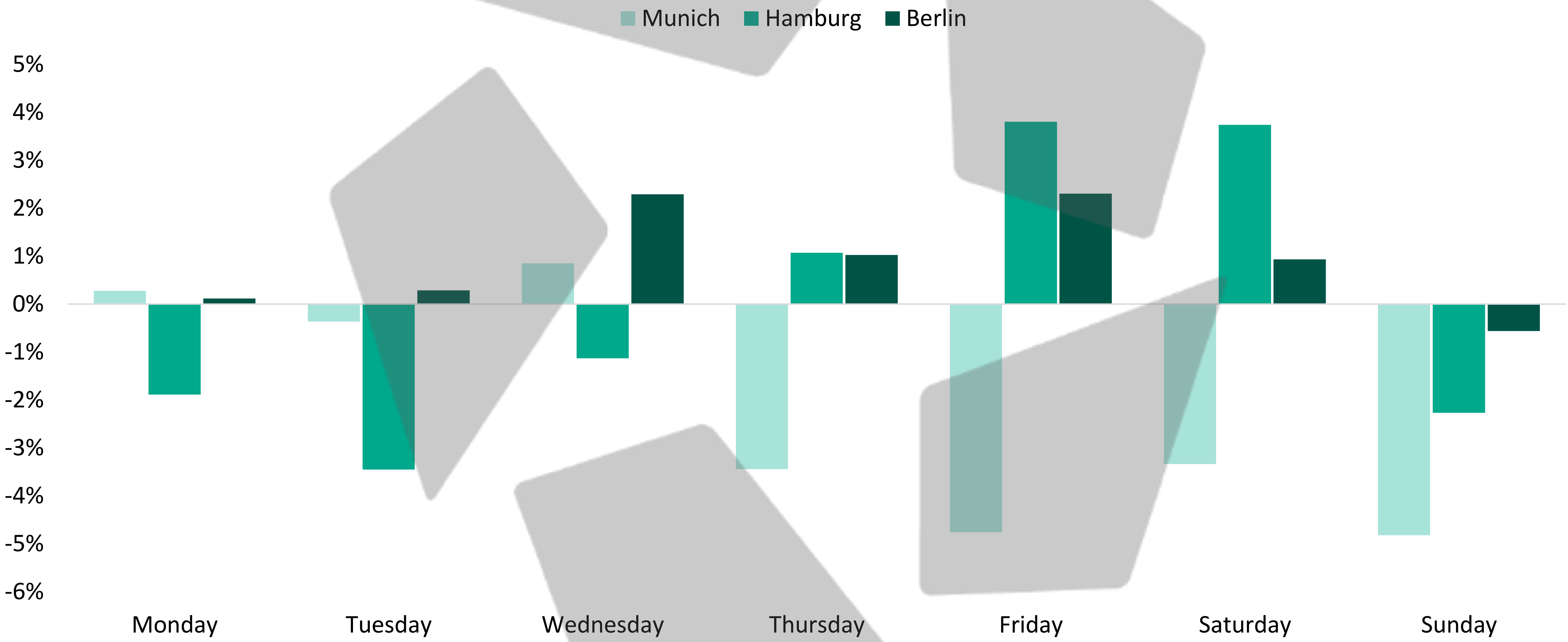
Dieses Jahr werden die Messen erneut ein wichtiger Faktor sein

Highest ppts difference in monthly occupancy on books vs STLY, as of 5 May 2025



Destinationsabhängig wie sich die Märkte unter der Woche entwickeln

Occupancy on the books for the next 90 days, YoY differential as of 5 May 2025



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Der Sommer kommt…

Average occupancy on the books for June – August 2025 vs STLY, as of 5 May 2025

Deutscher Sommer	June – August 2025	Ppts vs STLY
Baltic Coast Germany	51.1%	-1%
Bayern Regional	37.2%	+5%
Baden Würtemberg	28.1%	-6%
Balearen	58.6%	+1%
Kanarische Inseln	53.3%	+1%

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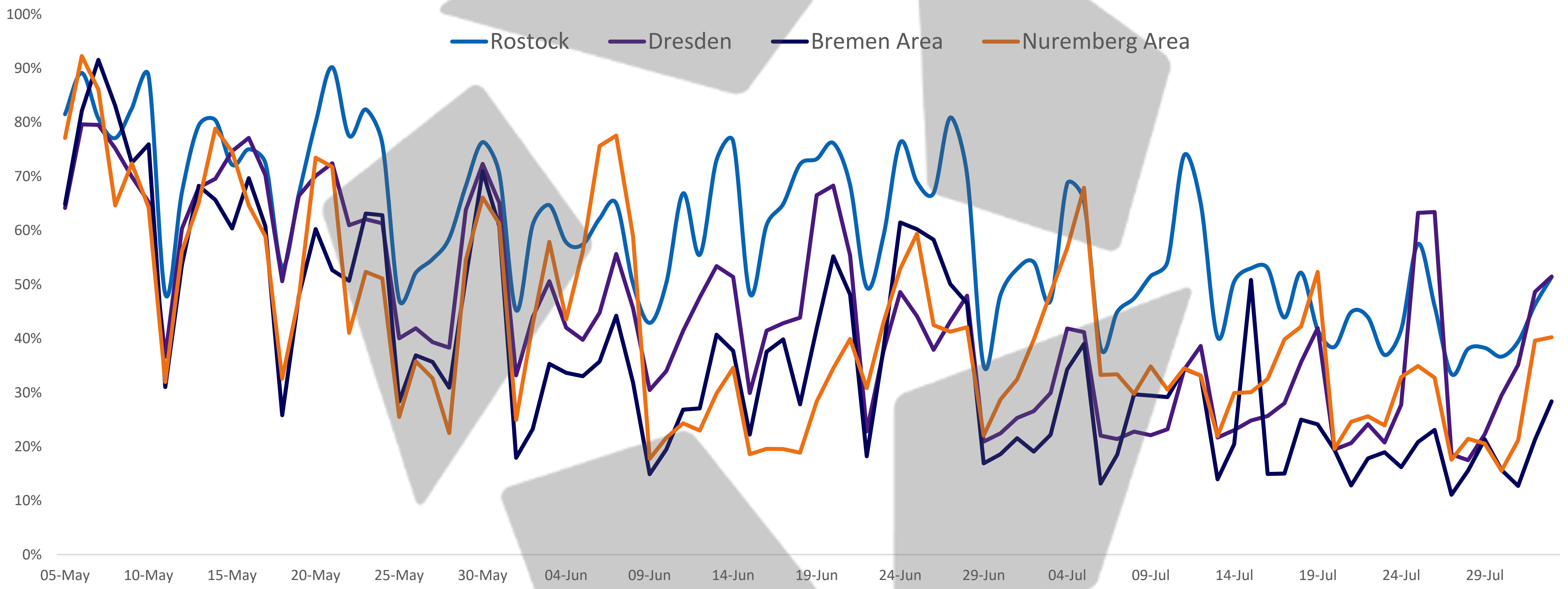
Und was machen die kleineren Städte?

Occupancy on the books for the next 90 days as at 5th May 2025



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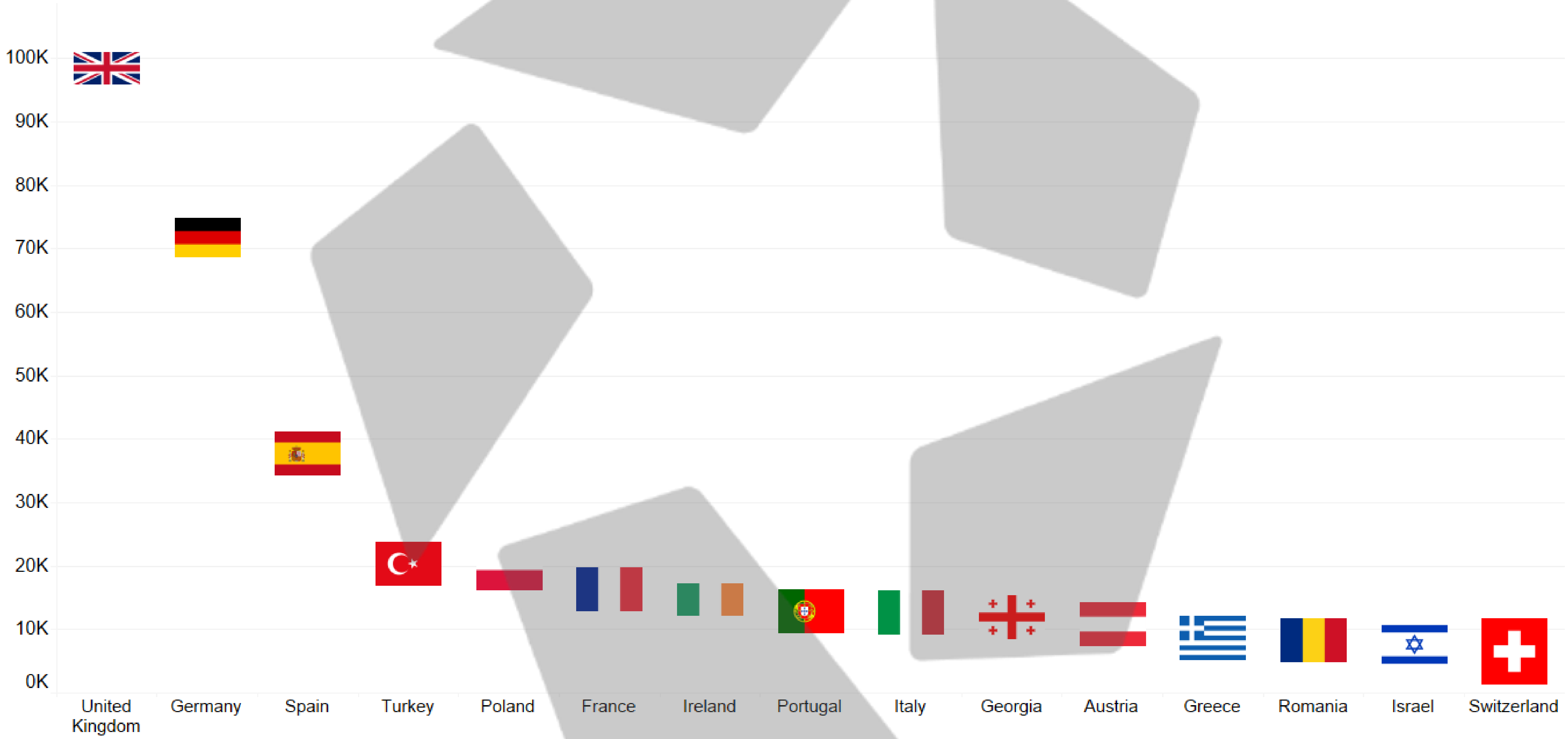
Deutschland auf Platz 2 in der Pipeline

European countries, Rooms in the pipeline, March 2025 update



Source: STR. © 2025 CoStar Group

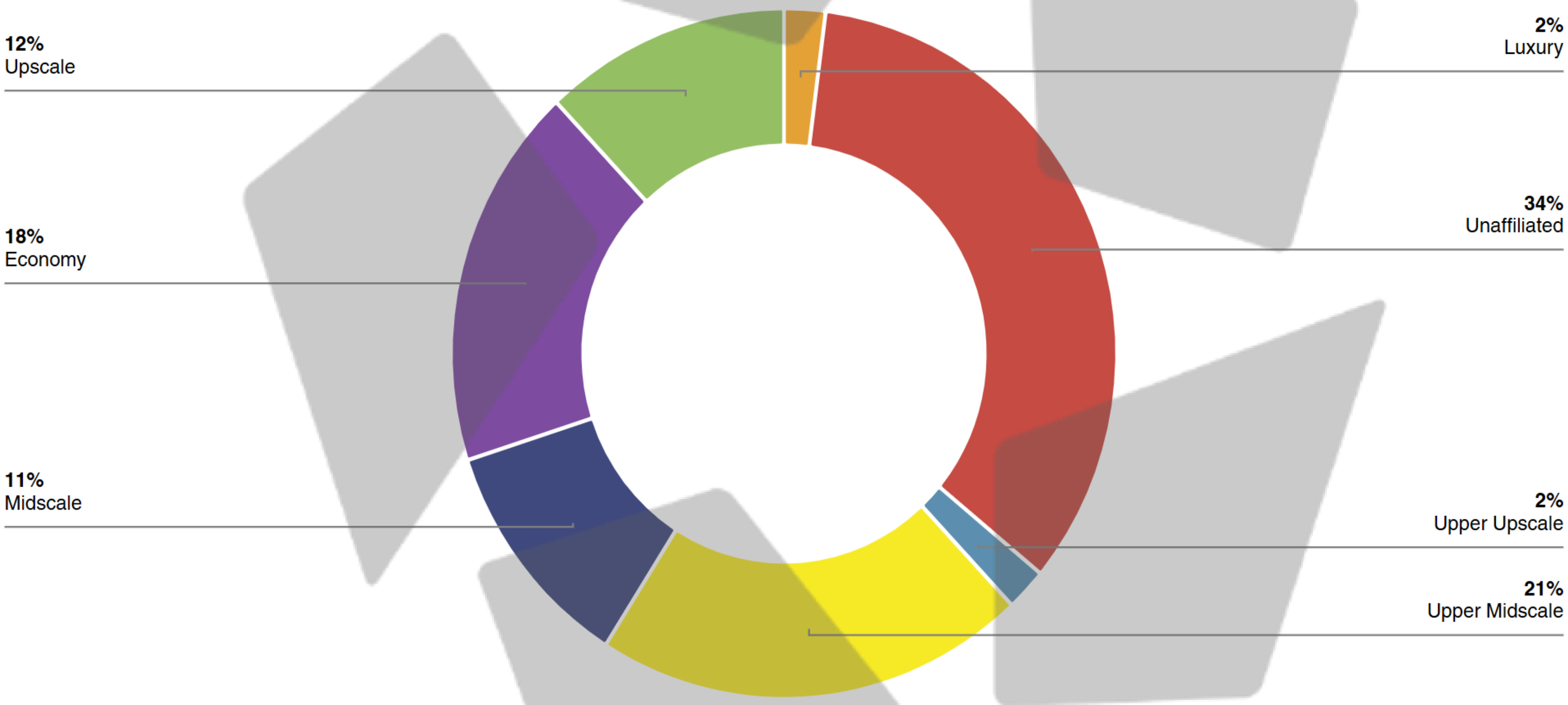
Was ist seit Januar 2025 geschehen?

Germany, Rooms in pipeline until 2029

Phase	2025
In Construction	**23 556 /** (2 838 rooms opened)
Final Planning	**5 159 /** (662 started construction)
Proposed	**37 975**
Total	**66 690 rooms**

66% branded vs 34% independent – die Zukunft ist Branded

Total rooms under construction % by scale Germany March 2025



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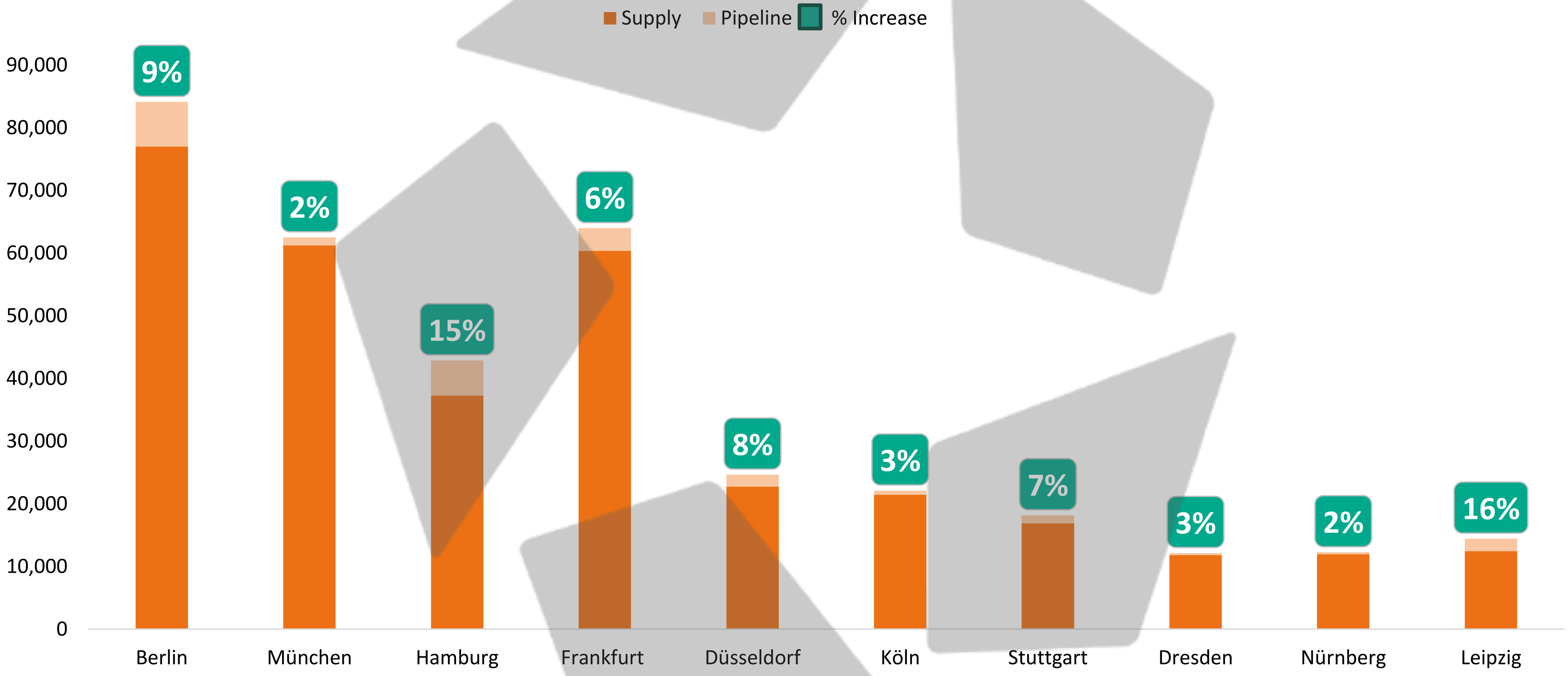
Die Top 7 Märkte führen wie erwartet

German Cities, Rooms, Supply and active pipeline March 2025 (2025-2029)



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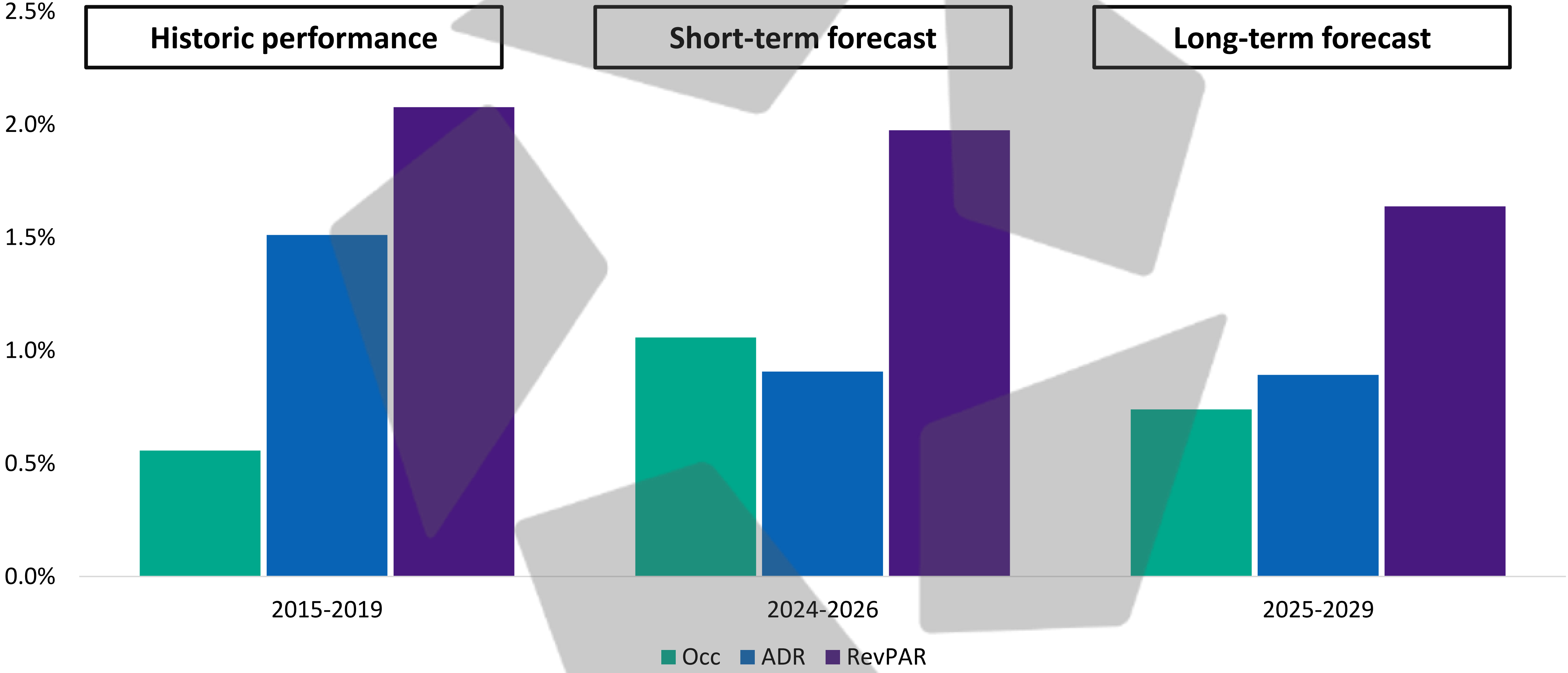
Längerfristig Rückkehr zum preisorientierten RevPAR

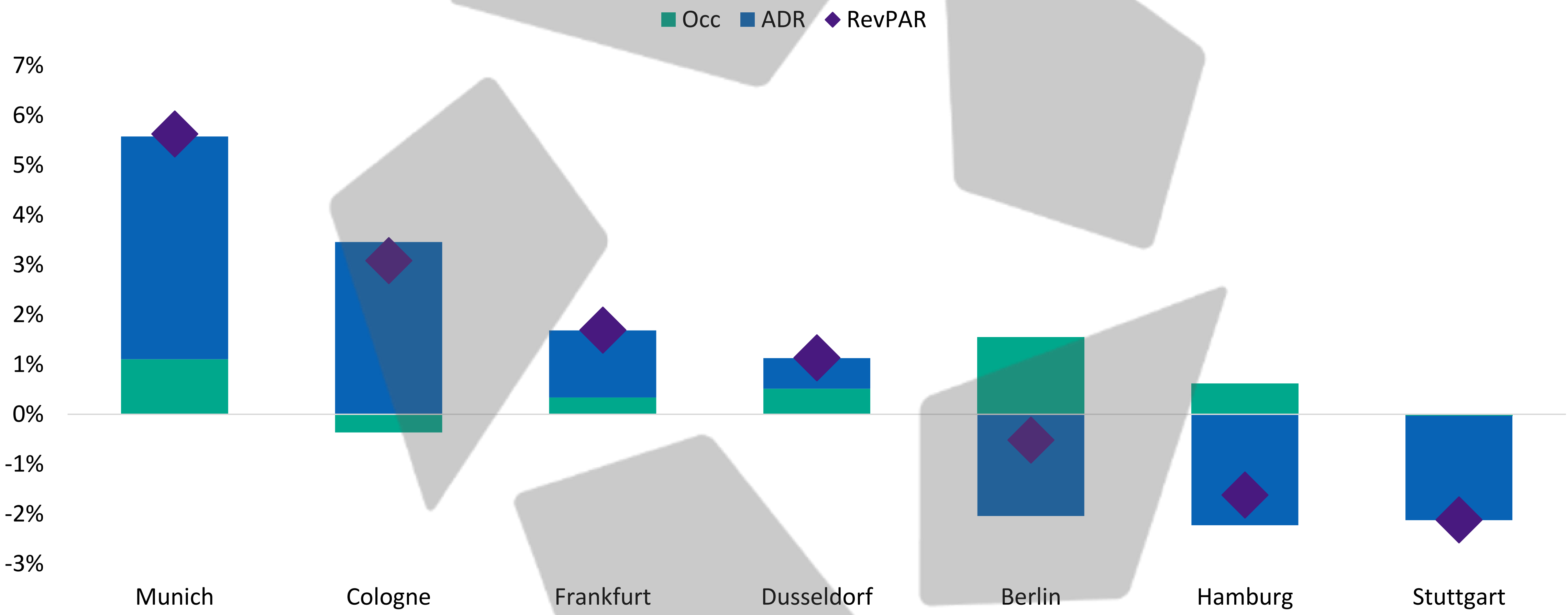
European forecast markets*, KPI (EUR, CC) CAGR



*Aggregated performance of Amsterdam, Barcelona, Belfast, Berlin, Birmingham, Brussels, Budapest, Cologne, Dublin, Dusseldorf, Edinburgh, Frankfurt, Glasgow, Hamburg, Leeds, Lisbon, London, Madrid, Manchester, Milan, Munich, Paris, Prague, Rome, Stuttgart, Vienna, Warsaw, Zurich

RevPAR Wachstum in 2025 etwas gedämpfter

Germany TOP 7 Markets KPI (EUR), % chg. YoY, 2025F



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Take aways

Auswirkungen geopolitischer Ereignisse
Unsicherheit erschwert Plannung

2025 zeigt erste Dynamik
Peaks sind zu erwarten

Pipeline in Deutschland ist gross
Wachstumspotential weiter vorhanden
Umsetzung bestimmt Tempo

Vielen Dank!

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