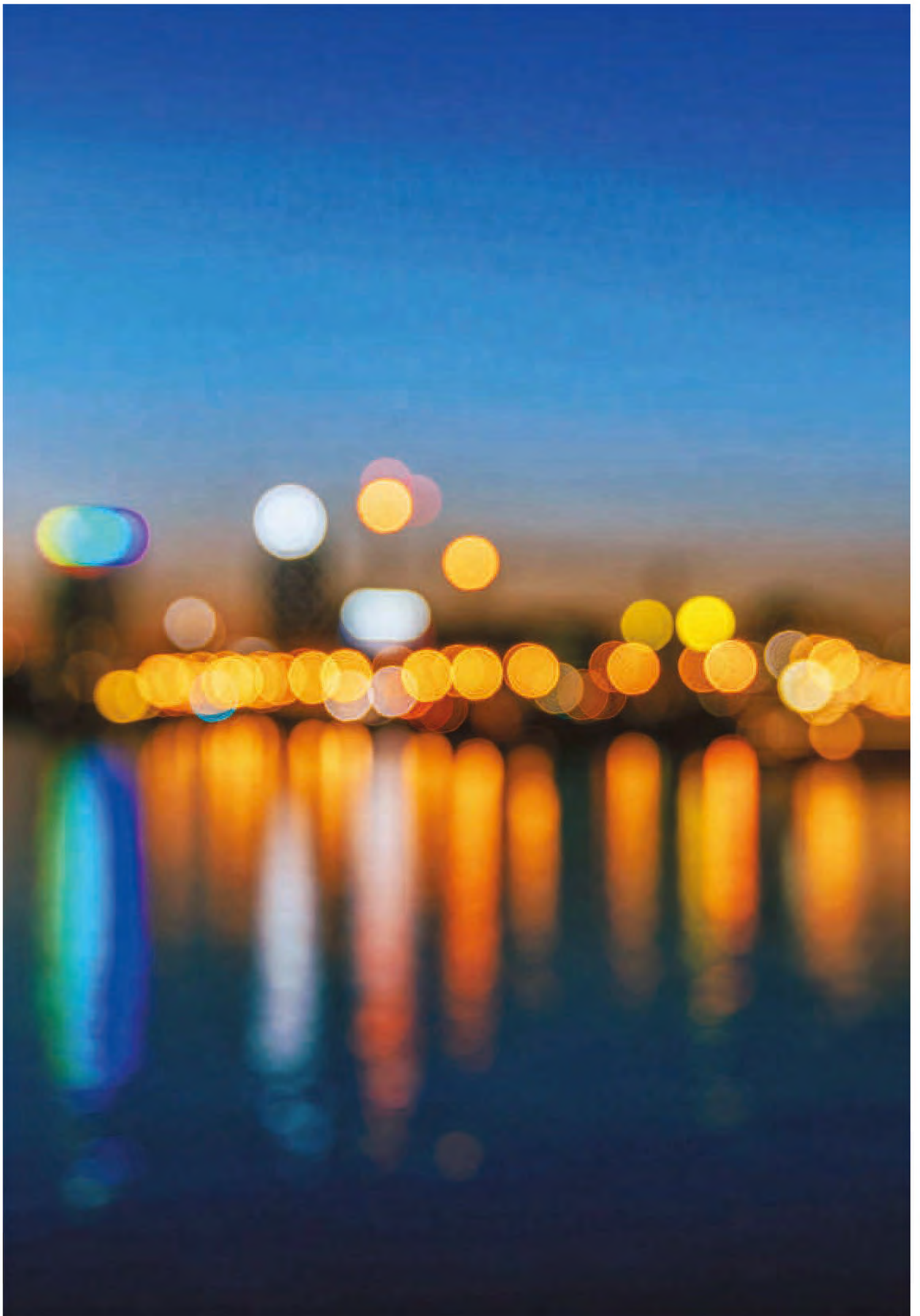




Horwath HTL™

Hotel, Tourism and Leisure

European
Hotels & Chains
Report 2017



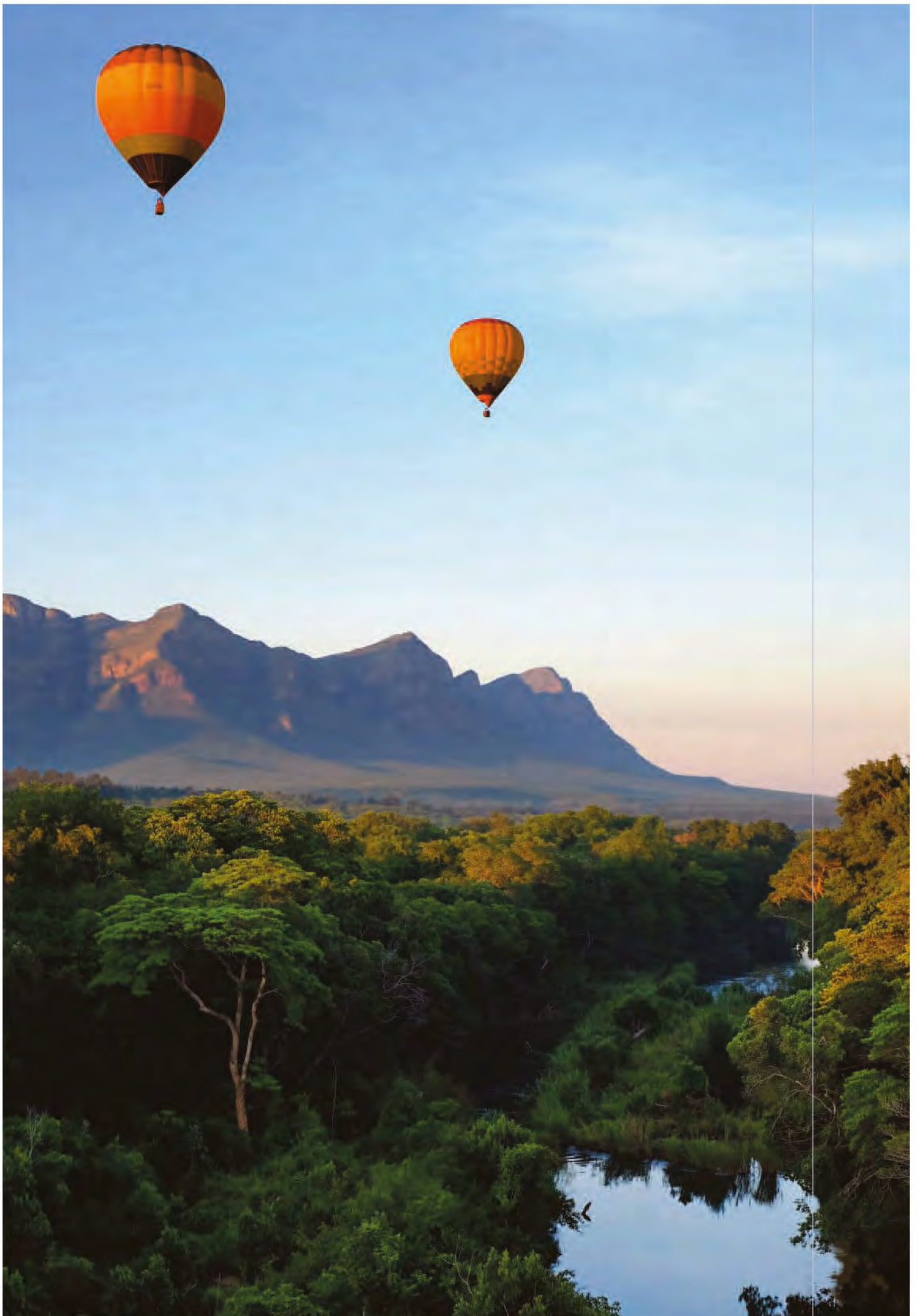
Welcome to Horwath HTL,
the global leader in hospitality
consulting.

We are the industry choice;
a global brand providing
quality solutions for hotel,
tourism & leisure projects.



CONTENTS

6	FOREWORD
8	INTRODUCTION
14	AUSTRIA
20	CROATIA
26	CYPRUS
30	FRANCE
36	GERMANY
42	HUNGARY
48	IRELAND
54	ITALY
60	NETHERLANDS
66	POLAND
72	SPAIN
78	SWITZERLAND
84	UNITED KINGDOM



FOREWORD

“The goal behind the report was to try and accurately shed light on the current situation and see how markets were evolving. Investors need transparency and brands need to know what the competitive landscape looks like.”

A few years ago, our team in Rome decided to put together a report on the state of hotel chains in Italy, no easy task as you can imagine.

What became clear as we investigated the market was that it was complicated and opaque, a labyrinth of family ownership and local brands many of whom were unheard of outside of their local city, let alone Italy itself.

The goal behind the report was to try and accurately shed light on the current situation and see how markets were evolving. Investors need transparency and brands need to know what the competitive landscape looks like.

This Italian report has become respected and incredibly well received in the local market and we decided as a group to expand our scope to the key markets in Europe, building on the database year by year to provide a comprehensive view of the branded versus independent hotel situation.

Some of this data exists elsewhere of course, there are a number of countries that have good amounts of data on their hospitality industry, some for sale and some free to access.

A surprising number of countries do not however, and we saw an opportunity to consolidate much of this data in one place to make it easier to have a holistic view of the market. This is our first attempt and we will continue to build on the information every year, making it more accurate and adding to the number of ways this data can be shown and looked at.

The most positive stat for our industry is how many of these brands are growing and expanding, a good indicator that the industry is in rude health and attracting significant levels of investment. Much of this makes for fascinating reading, we certainly hope you enjoy reading it as much as we enjoyed putting it together.

James Chappell
Horwath HTL Global Business Director



INTRODUCTION

“In 2016, the Italian hotel industry showed signs of recovery, worldwide international arrivals continued to rise and the Bel Paese trend is currently aligned with global data.”

Giorgio Palmucci, President, Associazione Italiana Confindustria Alberghi

In the compilation of the data, we asked our offices to not just rely on available local data, but to create our own databases from scratch. We were then able to make a sanity check with reputable data providers like Eurostat which, although a few years old, have comprehensive numbers on hotels, restaurants, hostels, pensions and all the rest.

We then dug deeper into each market to get an understanding of the players and what size and scope they have. We looked at overall ranking by size in each country, by overall group (hotels and rooms) and by brand.

We broke the information down by domestic and international groups and brands and then by scale/style of hotels.

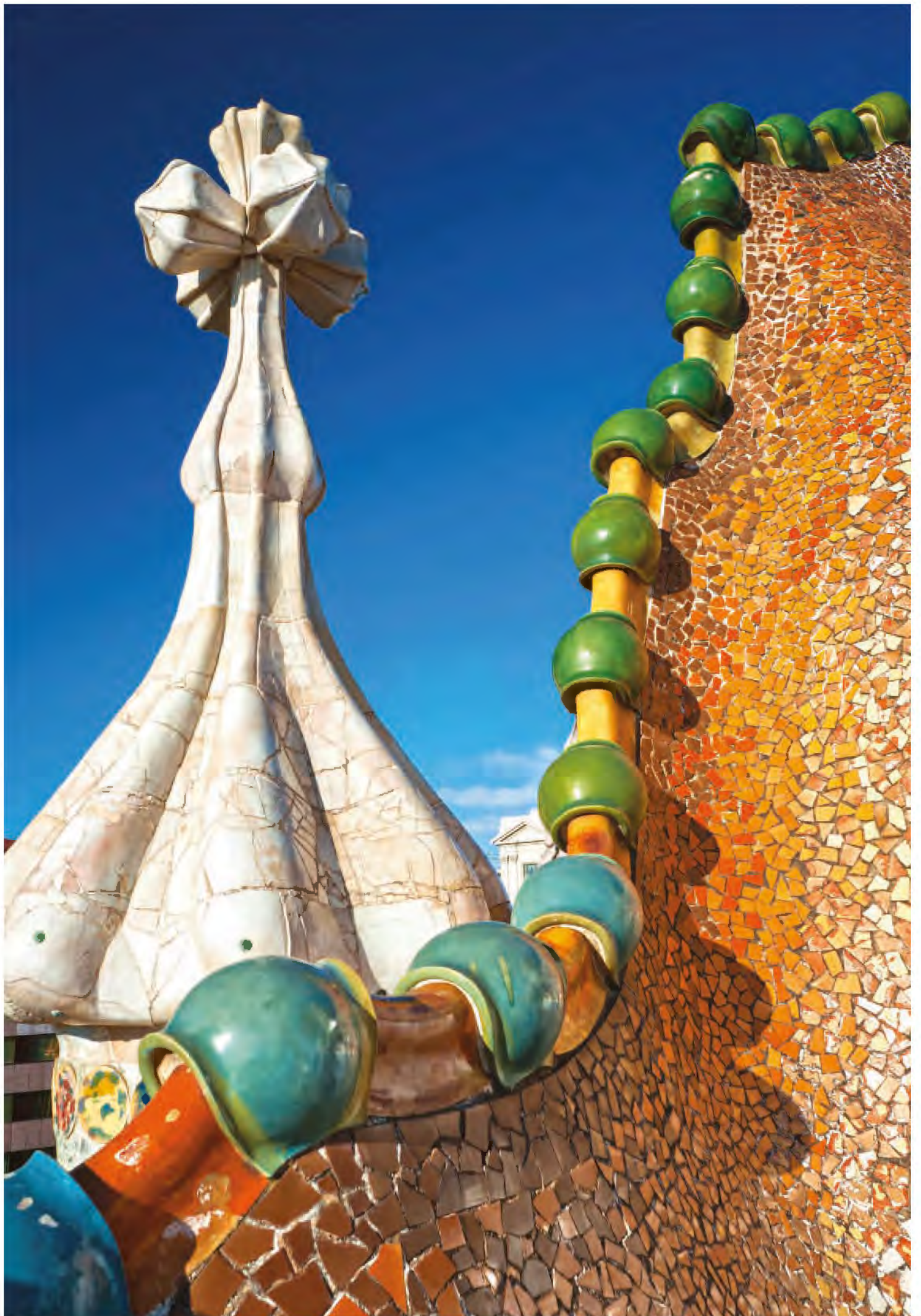
Finally, for this edition, we broke each country down to major cities or destinations to give a deeper understanding of what chain penetration is.

For future editions, we will look at including more ownership details, including business model and any pipeline coming into a destination.

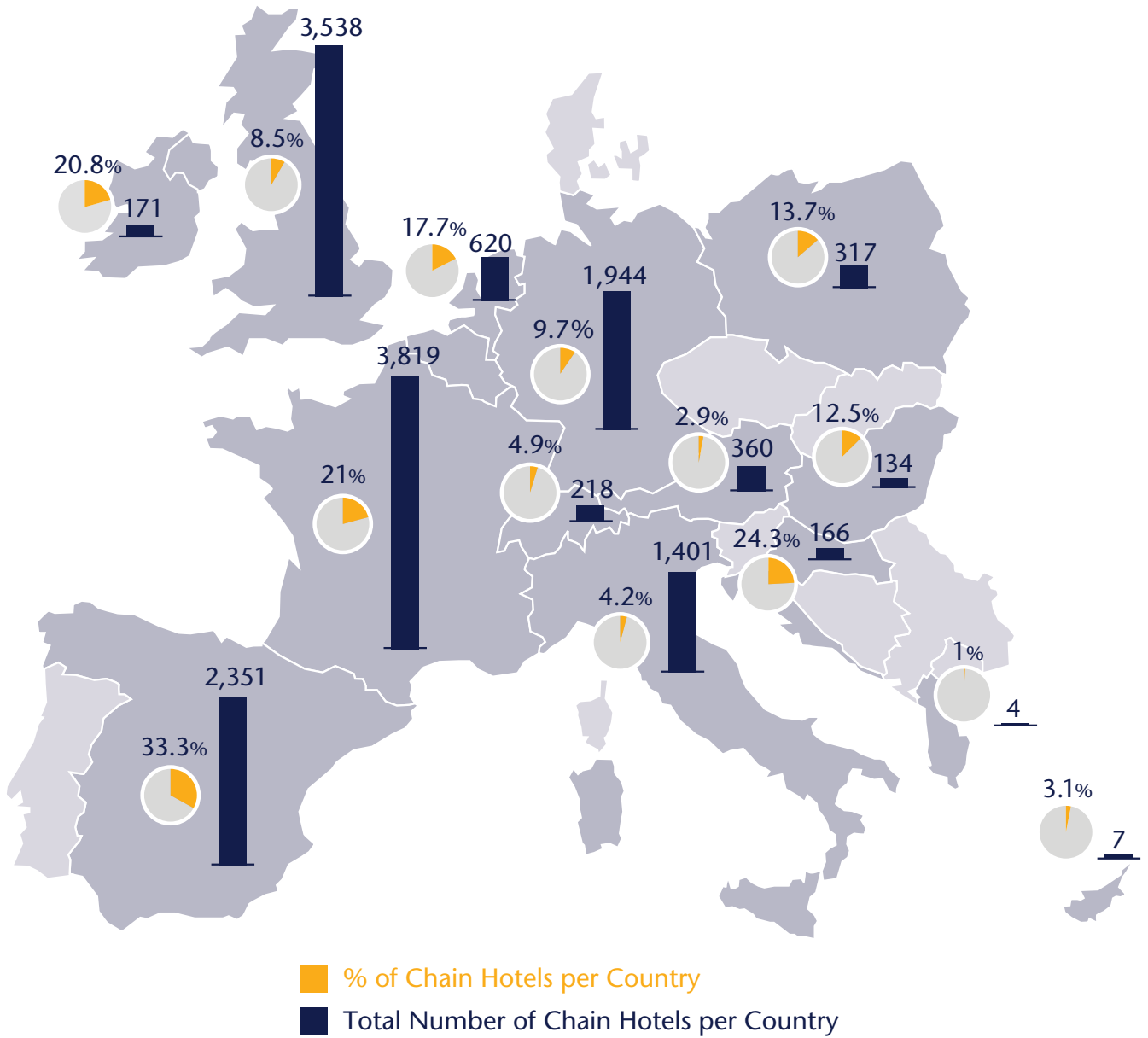
In order to standardize the data, we looked at the same KPIs across all countries using the same methodology.

We looked at the following KPIs:

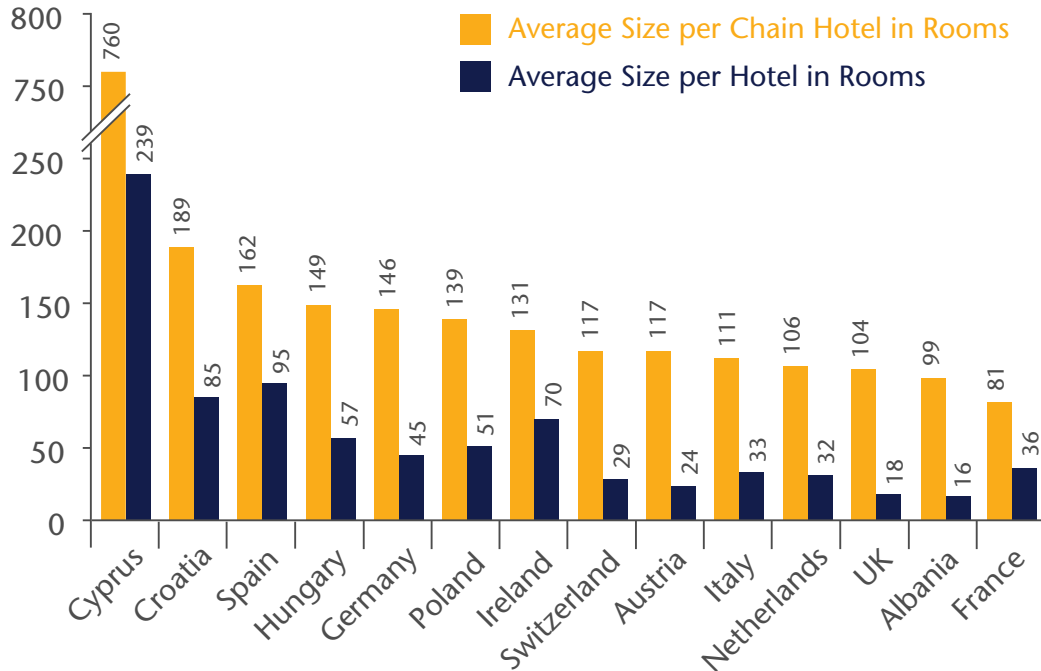
- Total number of chain hotels
- Total number of chain rooms
- Average size per chain hotel in rooms
- Country hotels stock (*overall supply*)
- Country rooms stock (*overall supply*)
- Average size per hotel in rooms
- Chain penetration % by hotels
- Chain penetration % by keys
- Total number of brands
- Domestic brands
- International brands
- Second tier operated hotels
- International chain hotels (*including double counting*)
- Domestic chain hotels (*including double counting*)
- International chain rooms (*including double counting*)
- Domestic chain rooms (*including double counting*)



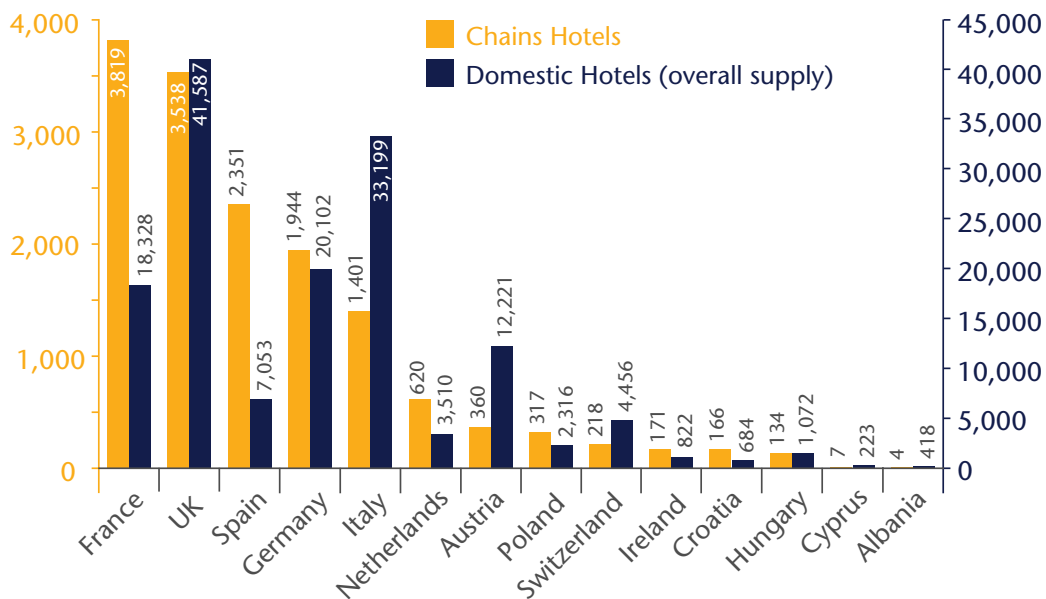
EUROPE: European Chain Penetration



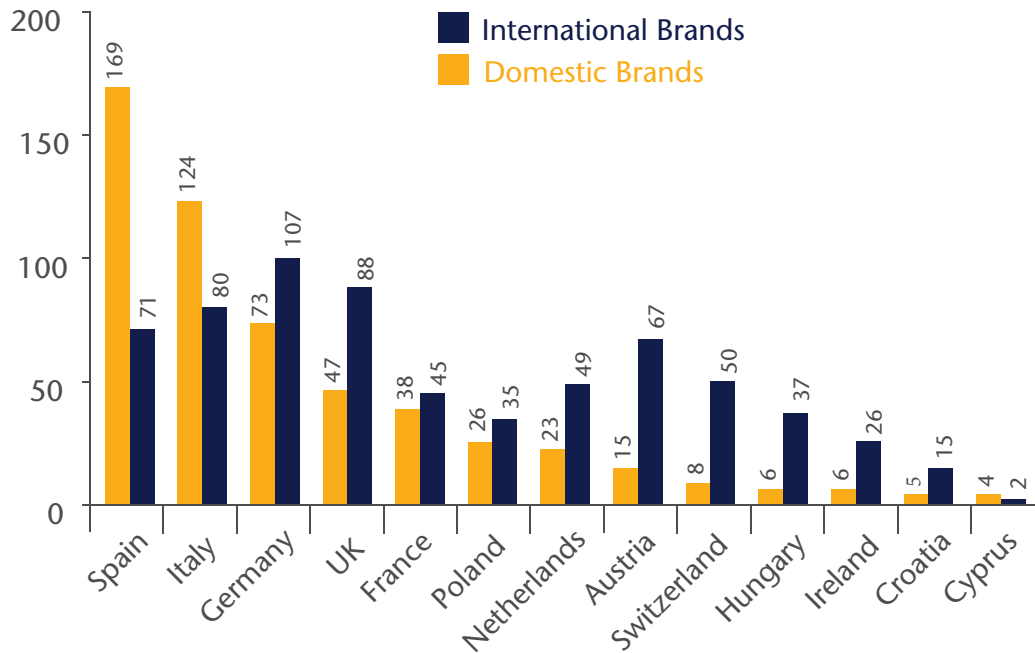
EUROPE: Average Rooms per Hotel (Chain versus Non-Chain)



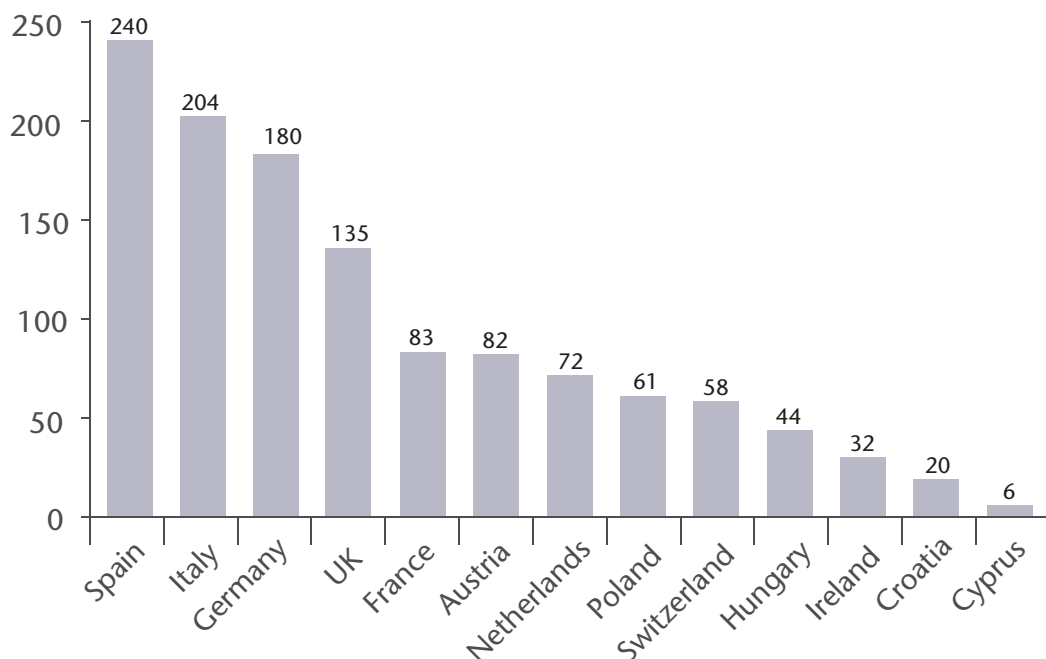
EUROPE: Chain Hotels versus Domestic Hotels



EUROPE: Total International Brands versus Domestic Brands



EUROPE: Total Number of Brands





AUSTRIA

“Austria is dominated by independent hotels as only 2.9% of all hotels and 14.8% of all hotel rooms are affiliated with a chain.

From the 82 brands currently represented, more than 80% are international. In recent years, several new exciting brands have entered the Austrian market and we expect the share of chain hotels to increase further given the low existing penetration rate.”

Heribert Gangl, Managing Director, Horwath HTL Austria

KEY STATISTICS	2016
Chain Hotels	360
Chain Rooms	41,928
Average Size per Chain Hotel in Rooms	116
Country Hotels Stock (overall supply)*	12,221
Country Rooms Stock (overall supply)*	282,630
Average Size per Hotel in Rooms	23
Chain penetration % by Hotels	2.9%
Chain penetration % by Keys	14.8%
Total Number of Brands	83
Domestic Brands	15
International Brands	68
Second Tier Operated Hotels	18
International Chain Hotels (including double counting)	186
Domestic Chain Hotels (including double counting)	192
International Chain Rooms (including double counting)	27,743
Domestic Chain Rooms (including double counting)	16,694

*Source: Statistik Austria/WKO - Zahlen im Mai 2016, Hotels and similar accommodation

AUSTRIA: Overall ranking by size

CHAINS		RANK BY ROOMS	
Rank	Top 10 Chain Groups	Hotels	Rooms
1	AccorHotels	33	4,469
2	Austria Trend	25	4,281
3	Marriott International	12	2,307
4	Jufa Hotels	45	2,091
5	Motel One	6	1,991
6	Falkensteiner	15	1,756
7	Hilton	4	1,376
8	NH Hotel Group	6	1,183
9	Star Inn	6	931
10	Vamed Vitality World	6	907

BRANDS		RANK BY ROOMS	
Rank	Top 10 Chain Brands	Hotels	Rooms
1	Austria Trend	23	4,075
2	Jufa Hotels	45	2,091
3	Motel One	6	1,991
4	Falkensteiner	15	1,756
5	Mercure	12	1,513
6	Hilton	4	1,376
7	ibis	10	1,242
8	NH Hotels	5	1,110
9	Vamed	6	907
10	A&O Hotel	4	890

CHAINS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Groups	Hotels	Rooms
1	Austria Trend	25	4,281
2	Jufa Hotels	45	2,091
3	Falkensteiner	15	1,756
4	Vamed Vitality World	6	907
5	Arcotel Hotels	4	832
6	Weitzer Hotels	5	713
7	Amedia Hotel	7	690
8	Kaltschmid Hotels	8	664
9	Oekotel	5	500
10	Gerstner Imperial Hospitality Group	4	447

BRANDS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Brands	Hotels	Rooms
1	Austria Trend	23	4,075
2	Jufa Hotels	45	2,091
3	Falkensteiner	15	1,756
4	Vamed	6	907
5	Arcotel	4	832
6	Amedia	7	690
7	Oekotel	5	500
8	Harry's Home	4	313
9	Alpenpark Hotels & Residences	9	283
10	Cordial Hotels	4	240

CHAINS		RANK BY ROOMS	
Rank	Top 10 International Chain Groups	Hotels	Rooms
1	AccorHotels	33	4,469
2	Marriott International	12	2,307
3	Motel One	6	1,991
4	Hilton	4	1,376
5	NH Hotel Group	6	1,183
6	Star Inn	6	931
7	TUI Group	6	902
8	A&O Hotels & Hostels	4	890
9	InterContinental Hotels Group	3	792
10	Deutsche Hospitality	4	692

BRANDS		RANK BY ROOMS	
Rank	Top 10 International Chain Brands	Hotels	Rooms
1	Motel One	6	1,991
2	Mercure	12	1,513
3	Hilton	4	1,376
4	ibis	10	1,242
5	NH Hotels	5	1,110
6	A&O Hotel	4	890
7	Robinson Club	5	795
8	Renaissance	2	674
9	ibis budget	4	667
10	Star Inn	9	602

AUSTRIA: Overall ranking by scale *(domestic & international)*

BRANDS		RANK BY ROOMS		BRANDS		RANK BY ROOMS		BRANDS		RANK BY ROOMS	
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Jufa Hotels	45	2091	1	Austria Trend	23	4,075	1	InterContinental	1	459
2	Motel One	6	1991	2	Falkensteiner	13	1,511	2	JJW Hotels	2	273
3	Mercure	11	1315	3	Hilton	4	1,376	3	Kempinski	2	308
4	ibis	10	1242	4	NH Hotels	5	1,110	4	Park Hyatt	1	143
5	A&O Hotel	4	890	5	Vamed	6	907	5	Sofitel	1	182
6	ibis budget	4	667	6	Arcotel	4	832	6	Luxury Collection	4	468
7	Best Western	9	602	7	Robinson Club	5	795	7	The Ritz-Carlton	1	202
8	Star Inn	4	560	8	Renaissance	2	674	8	-	-	-
9	Oekotel	5	500	9	Marriott Courtyard	3	605	9	-	-	-
10	Sonnenhotel	3	473	10	Steigenberger	3	513	10	-	-	-

AUSTRIA: Ranking per scale & size *(domestic & international)*

CHAINS HOTELS AND ROOMS BY SCALE	HOTELS	%	ROOMS	AVG SIZE	CHAIN HOTELS		CHAIN ROOMS	
					INTL.	DOM.	INTL.	DOM.
Budget & Economy	87	24.2%	7,968	92	26	61	4,875	3,093
Midscale	111	30.8%	10,700	96	68	43	7,353	3,347
Upscale & Upper-Upscale	150	41.7%	21,225	142	62	88	10,971	10,254
Luxury	12	3.3%	2,035	170	12	-	2,035	-
TOTAL	360	100.0%	41,928	116	168	192	25,234	16,694

DOMESTIC HOTELS AND ROOMS	HOTELS	%
Budget & Economy	2,534	20.7%
Midscale	5,152	42.2%
Upper-Upscale & Luxury	4,535	37.1%
TOTAL	12,221	100.0%

Source:

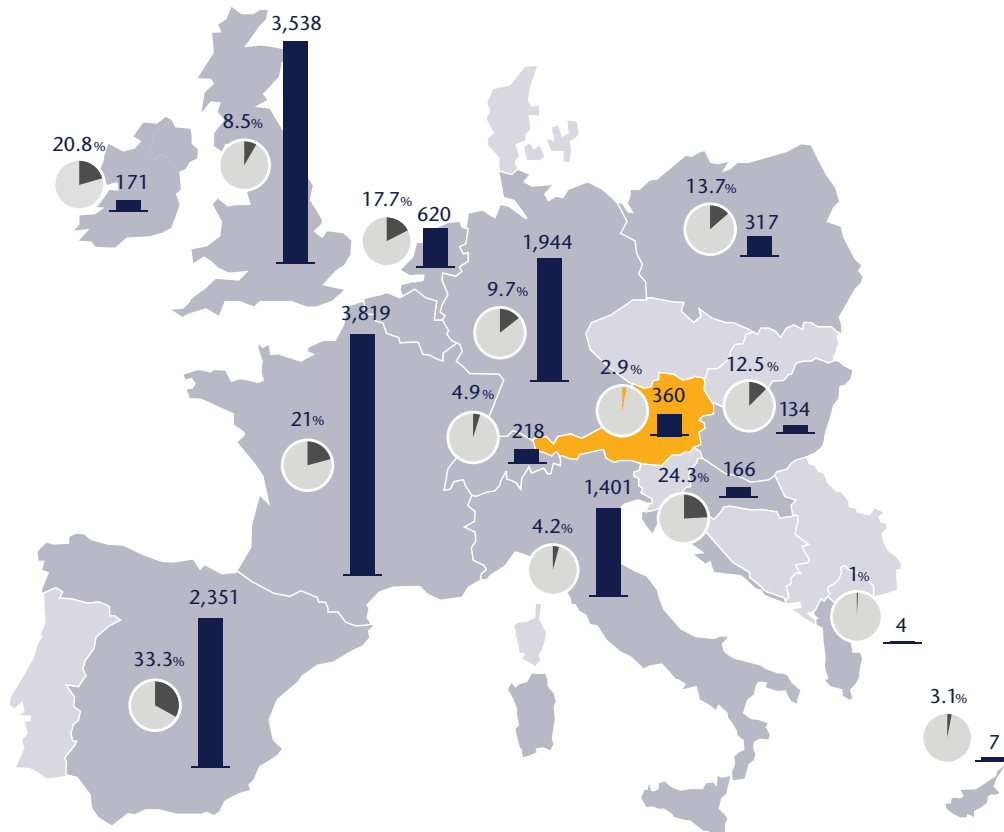
Statistics Austria, Tourismus in Zahlen Mai 2016

AUSTRIA: Overall ranking by location

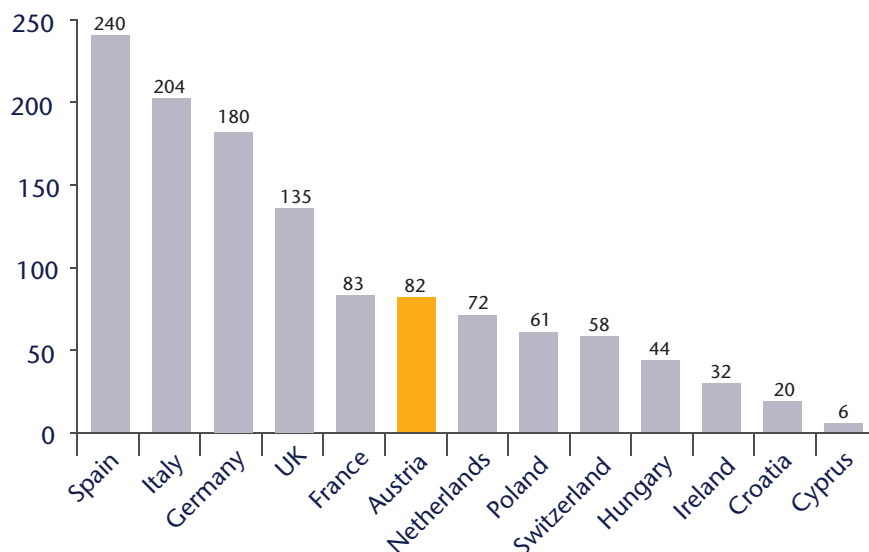
Rank	Destination	By Hotels 2016	Rank	Destination	By Hotels 2016
1	Wien	20,969	1	Wien	121
2	Salzburg	3,399	2	Salzburg	28
3	Graz	1,408	3	Graz	13
4	Linz	1,266	4	Bad Gastein	10
5	Seefeld in Tirol	946	5	Seefeld in Tirol	9
6	Innsbruck	670	6	Linz	9
7	Vösendorf	562	7	Innsbruck	7
8	Hermagor	538	8	Zell am See	6
9	Bad Gastein	514	9	Hermagor	4
10	Zell am See	429	10	Bregenz	4

DESTINATION	TOTAL			
	HOTELS	%	ROOMS	%
City	201	56%	29,689	71%
Ski / Sports	111	31%	7,455	18%
Thermal	34	9%	3,313	8%
Sun / Lake	14	4%	1,471	4%
Total	360	100%	41,928	100%

AUSTRIA: European Chain Penetration



EUROPE: Total number of brands





CROATIA

“Even though Croatia has a relatively high percentage of chain hotels, international hotel brands have been slow to enter the market. Domestic hotel chains have been well performing in such circumstances, but the foreseeable investment cycle will be increasingly reliant on international hotel brands, adding to further internationalization of the Croatian hotel industry.”

Siniša Topalović, Managing Director, Horwath HTL Croatia

KEY STATISTICS	2016
Chain Hotels	166
Chain Rooms	31,443
Average Size per Chain Hotel in Rooms	189
Country Hotels Stock (overall supply)	684
Country Rooms Stock (overall supply)	58,070
Average Size per Hotel in Rooms	84.9
Chain penetration % by Hotels	24.3%
Chain penetration % by Keys	54.1%
Total Number of Brands	20
Domestic Brands	5
International Brands	15
Second Tier Operated Hotels	65
International Chain Hotels (including double counting)	58
Domestic Chain Hotels (including double counting)	120
International Chain Rooms (including double counting)	13,191
Domestic Chain Rooms (including double counting)	20,550

CROATIA: Ranking by size

CHAINS		RANK BY ROOMS	
Rank	Top 10 Chain Groups	Hotels	Rooms
1	Valamar Riviera	31	5,667
2	Plava Laguna	11	3,295
3	Liburnia Riviera	15	2,324
4	Istraturist	9	2,200
5	Meliá Hotels	9	2,200
6	Bluesun H&R	11	2,163
7	Maistra	10	2,036
8	UGO-Grupa	10	1,846
9	Arenaturist	6	1,580
10	HUP- Zagreb	8	1,580

BRANDS		RANK BY ROOMS	
Rank	Top 10 Chain Brands	Hotels	Rooms
1	Valamar Riviera	31	5,667
2	Remisens	15	2,324
3	Meliá Hotels	9	2,200
4	Bluesun H&R	11	2,163
5	Park Plaza Hotels	6	1,580
6	Adriatic Luxury Hotels	8	1,569
7	Falkensteiner	6	1,310
8	Radisson Blu	2	451
9	Le Meridien Lav	1	381
10	Karisma Hotels	2	335

CHAINS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Groups	Hotels	Rooms
1	Valamar Riviera	31	5,667
2	Plava Laguna	11	3,295
3	Liburnia Riviera	15	2,324
4	Istraturist	9	2,200
5	Bluesun H&R	11	2,163
6	Maistra	10	2,036
7	UGO-Grupa	10	1,846
8	Arenaturist	6	1,580
9	HUP- Zagreb	8	1,580
10	Adriatic Luxury Hotels	8	1,569

BRANDS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Brands	Hotels	Rooms
1	Valamar Riviera	31	5,667
2	Remisens	15	2,324
3	Bluesun H&R	11	2,163
4	Adriatic Luxury Hotels	8	1,569
5	Ilirija H&R	5	446
6	-		
7	-		
8	-		
9	-		
10	-		

CHAINS		RANK BY ROOMS	
Rank	Top 10 International Chain Groups	Hotels	Rooms
1	Meliá Hotels	9	2,200
2	PPHE	6	1,580
3	Falkensteiner	6	1,310
4	Marriott-Starwood	3	978
5	Hilton	3	515
6	Carlson Rezidor	2	451
7	Karisma Hotels	2	335
8	Rixos	1	254
9	Holleis Hotels	2	221
10	Kempinski	1	186

BRANDS		RANK BY ROOMS	
Rank	Top 10 International Chain Brands	Hotels	Rooms
1	Meliá Hotels	9	2,200
2	Park Plaza Hotels	6	1,580
3	Falkensteiner	6	1,310
4	Radisson Blu	2	451
5	Le Meridien Lav	1	381
6	Karisma Hotels	2	335
7	Sheraton	1	306
8	Hilton	1	294
9	Westin	1	291
10	Arcotel	1	151

CROATIA: Ranking by scale *(domestic & international)*

BRANDS RANK BY ROOMS				BRANDS RANK BY ROOMS				BRANDS RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Valamar Riviera	13	2,508	1	Valamar Riviera	17	2,867	1	Adriatic Luxury Hotels	5	1211
2	Bluesun H&R	6	1171	2	Meliá Hotels	5	1,442	2	Marriott-Starwood	3	978
3	Remisens	9	1149	3	Remisens	5	995	3	Hilton	2	294
4	Park Plaza Hotels	3	595	4	Bluesun H&R	5	992	4	Valamar Riviera	1	292
5	Falkensteiner	3	592	5	Park Plaza Hotels	3	985	5	Rixos	1	254
6	Sol Meliá	3	508	6	Falkensteiner	2	508	6	Meliá Hotels	1	250
7	Karisma Hotels	2	335	7	Carlson Rezidor	1	250	7	Falkensteiner	1	210
8	-	-	-	8	Holleis Hotels	2	221	8	Carlson Rezidor	1	201
9	-	-	-	9	Arcotel	1	151	9	Remisens	1	180
10	-	-	-	10	D Hotels	1	69	10	-	-	-

DOMESTIC RANK BY ROOMS				DOMESTIC RANK BY ROOMS				DOMESTIC RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Valamar Riviera	13	2,508	1	Valamar Riviera	17	2,867	1	Adriatic Luxury Hotels	5	1211
2	Bluesun H&R	6	1171	2	Remisens	5	995	2	Valamar Riviera	1	292
3	Remisens	9	1149	3	Bluesun H&R	5	992	3	Remisens	1	180
4	-	-	-	4	-	-	-	4	-	-	-
5	-	-	-	5	-	-	-	5	-	-	-
6	-	-	-	6	-	-	-	6	-	-	-
7	-	-	-	7	-	-	-	7	-	-	-
8	-	-	-	8	-	-	-	8	-	-	-
9	-	-	-	9	-	-	-	9	-	-	-
10	-	-	-	10	-	-	-	10	-	-	-

INTERNATIONAL RANK BY ROOMS				INTERNATIONAL RANK BY ROOMS				INTERNATIONAL RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Park Plaza Hotels	3	595	1	Meliá Hotels	5	1,442	1	Marriott-Starwood	3	978
2	Falkensteiner	3	592	2	Park Plaza Hotels	3	985	2	Hilton	2	294
3	Sol Meliá	3	508	3	Falkensteiner	2	508	3	Rixos	1	254
4	Karisma Hotels	2	335	4	Carlson Rezidor	1	250	4	Meliá Hotels	1	250
5	-	-	-	5	Holleis Hotels	2	221	5	Falkensteiner	1	210
6	-	-	-	6	Arcotel	1	151	6	Carlson Rezidor	1	201
7	-	-	-	7	D Hotels	1	69	7	-	-	-
8	-	-	-	8	Brown	1	25	8	-	-	-
9	-	-	-	9	-	-	-	9	-	-	-
10	-	-	-	10	-	-	-	10	-	-	-

CROATIA: Ranking per scale & size

CHAINS HOTELS AND ROOMS				
	HOTELS	%	ROOMS	AVG SIZE
Budget & Economy	18	10.8%	2,683	149
Midscale	51	30.7%	8,691	170
Upscale & Upper-Upscale	74	44.6%	14,939	202
Luxury	23	13.9%	5,130	223
TOTAL	166	100.0%	31,443	189

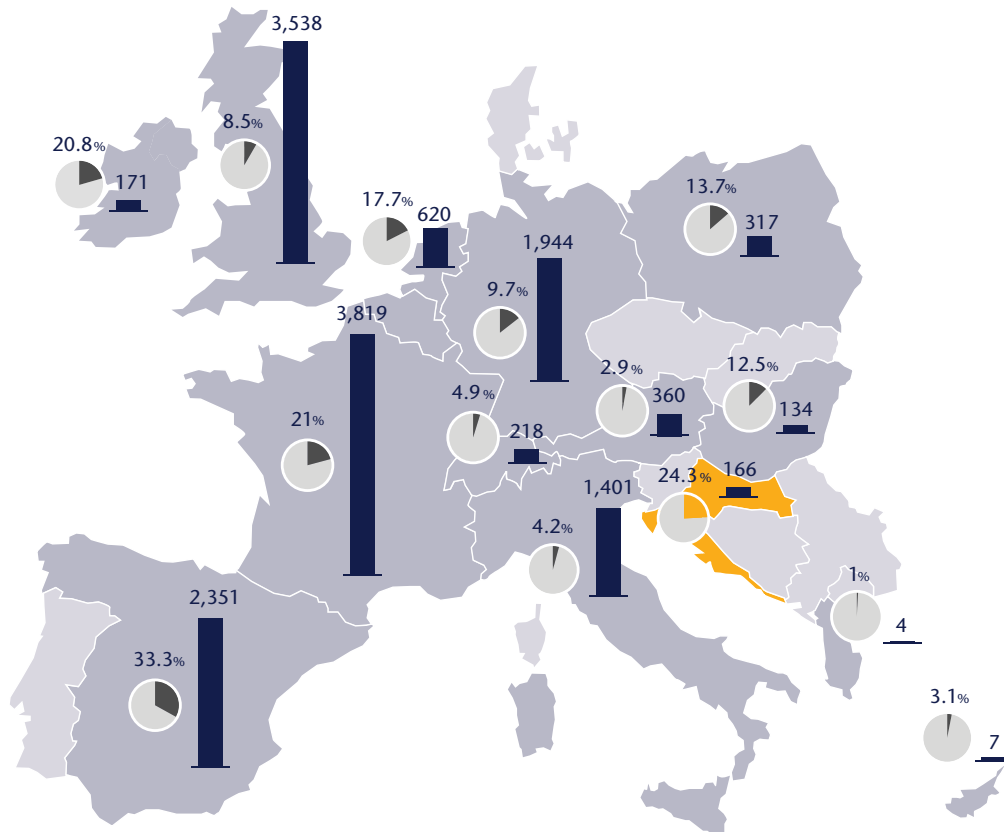
DOMESTIC HOTELS AND ROOMS				
	HOTELS	%	ROOMS	AVG SIZE
Budget & Economy	75	11.0%	6,524	87
Midscale	317	46.3%	21,008	66
Upscale & Upper-Upscale	256	37.4%	25,261	99
Luxury	36	5.3%	5,277	147
TOTAL	684	100.0%	58,070	85

CROATIA: Ranking by location

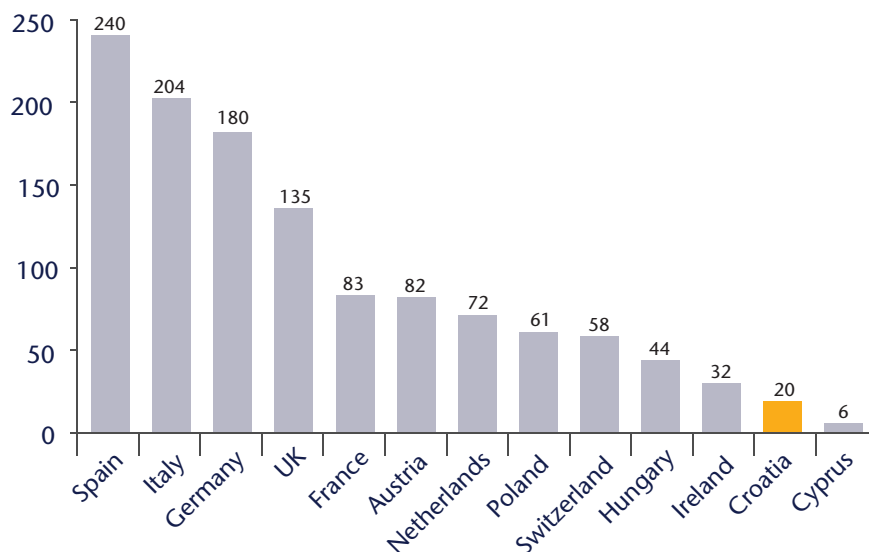
Rank	Destination	By Rooms 2016	Rank	Destination	By Hotels 2016
1	Poreč	5,128	1	Poreč	23
2	Dubrovnik	3,415	2	Dubrovnik	18
3	Rovinj	1,940	3	Opatija	15
4	Opatija	1,798	4	Rovinj	9
5	Umag	1,689	5	Umag	9
6	Zagreb	1,485	6	Zagreb	8
7	Šibenik	1,394	7	Rabac	8
8	Rabac	1,345	8	Crikvenica	7
9	Cavtat	1,133	9	Šibenik	6
10	Mali Lošinj	905	10	Hvar	5

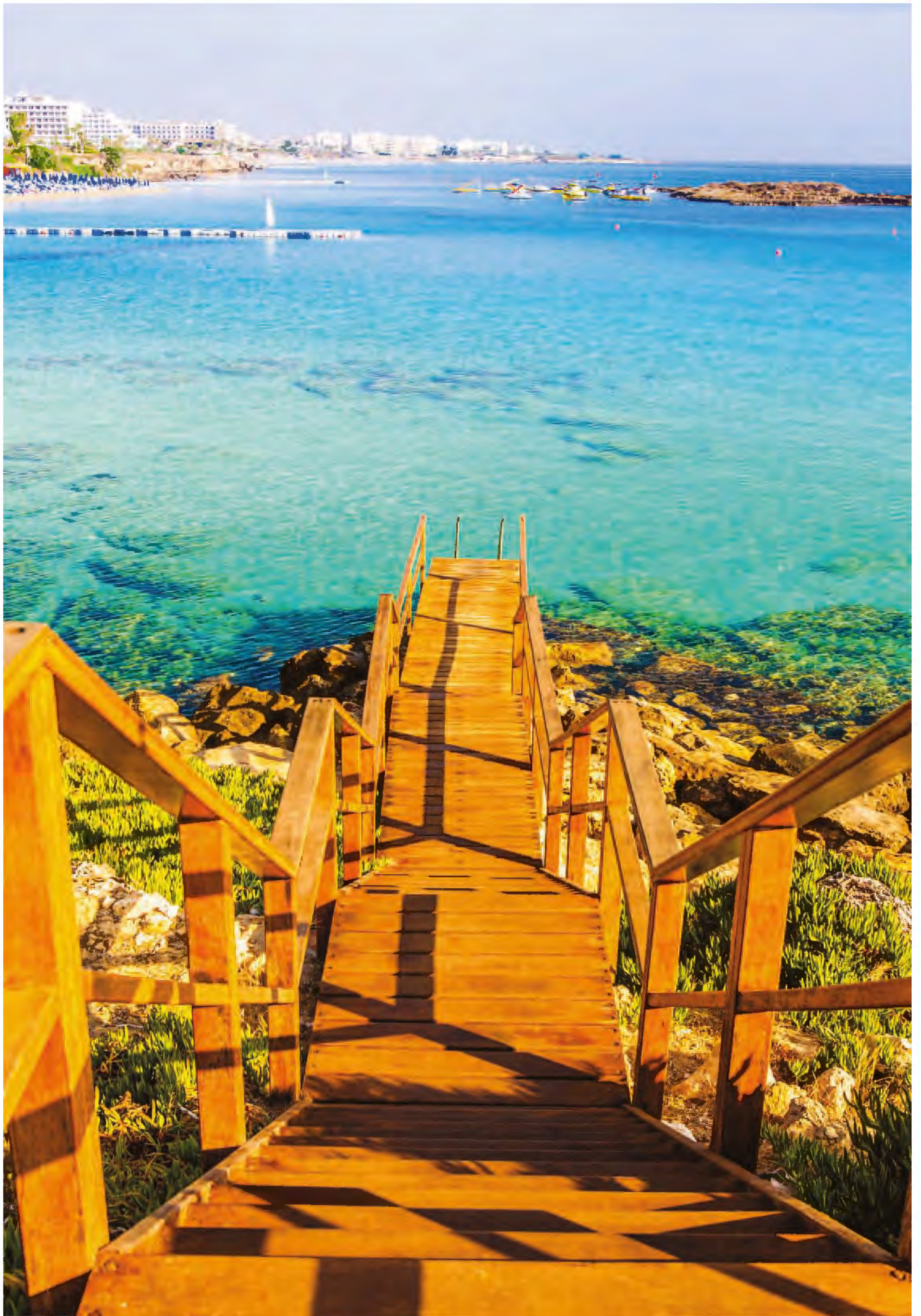
DESTINATION	HOTELS	ROOMS	HOTELS	ROOMS
Arts & Business	6	1,171	2	303
Business Focus	-	-	-	-
Other Leisure	-	-	-	-
Ski	-	-	-	-
Sun & Beach	120	20,550	56	12,767
Thermal	-	-	-	-

CROATIA: European Chain Penetration



EUROPE: Total number of brands





CYPRUS

“Cyprus is a destination dominated by resorts, a fact that is represented by our average room size which is much larger than the European average. The market is still dominated by local brands and groups, with some International players slow to enter the market although there are signs of change. Growth levels for the island are positive though as the financial crisis settles down and FDI is made.”

Christos Michaelides, Managing Director, Horwath HTL Cyprus

KEY STATISTICS	2016
Chain Hotels	7
Chain Rooms	5,319
Average Size per Chain Hotel in Rooms	760
Country Hotels Stock (overall supply)	223
Country Rooms Stock (overall supply)	53,278
Average Size per Hotel in Rooms	238.9
Chain penetration % by Hotels	3.1%
Chain penetration % by Keys	10.0%
Total Number of Brands	6
Domestic Brands	4
International Brands	2
Second tier operated hotels	1

CYPRUS: Ranking by scale (domestic & international)

BRANDS RANK BY ROOMS				BRANDS RANK BY ROOMS				BRANDS RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	A. Tsokkos Hotels	2	316	1	A. Tsokkos Hotels	3	425	1	A. Tsokkos Hotels	1	149
2	Atlantica Hotels	2	536	2	Atlantica Hotels	3	645	2	Atlantica Hotels	2	549
3	Kanika Olympic	1	19	3	Kanika Olympic	3	643	3	Kanika Olympic	1	276
4	Louis Hotels	1	422	4	Louis Hotels	3	697	4	Louis Hotels	1	204
5	-			5	-			5	Hilton Cyprus	1	294

CYPRUS: Ranking per scale & size

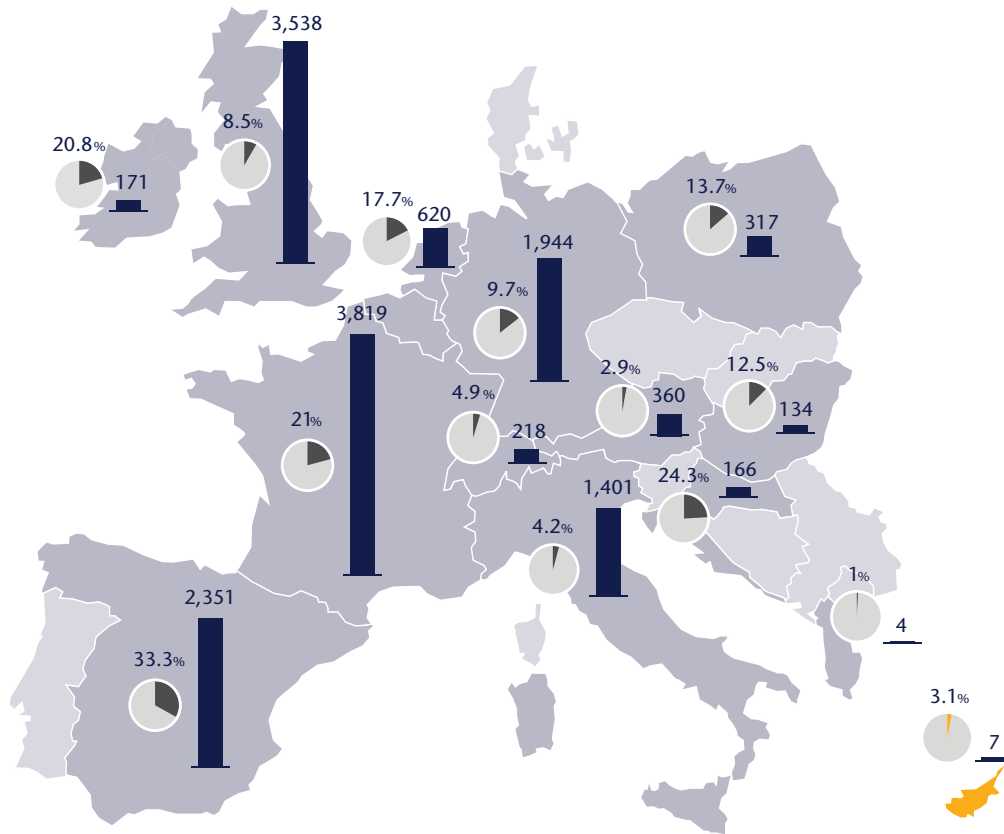
CHAINS HOTELS AND ROOMS	HOTELS	%	ROOMS	AVG SIZE	CHAIN HOTELS		CHAIN ROOMS	
					INTL.	DOM.	INTL.	DOM.
Budget & Economy	1	4%	19	19	-	1	-	19
Midscale	5	20%	1,274	255	-	5	-	255
Upscale & Upper-Upscale	13	52.0%	2,554	196	1	12	144	2,410
Luxury	6	24%	1,472	245	1	5	294	1,178
TOTAL	25	100%	5,319	213	2	23	438	3,862

DOMESTIC HOTELS AND ROOMS	HOTELS	%	ROOMS	AVG SIZE	CHAIN HOTELS		CHAIN ROOMS	
					INTL.	DOM.	INTL.	DOM.
Budget & Economy	65	29.1%	4,597	71		65	-	19
Midscale	76	34.1%	15,579	205		76	-	255
Upscale & Upper-Upscale	57	25.6%	21,540	378	2	55	144	2,410
Luxury	25	11.2%	11,562	462	1	24	294	1,178
TOTAL	223	100%	53,278	239	3	220	438	3,862

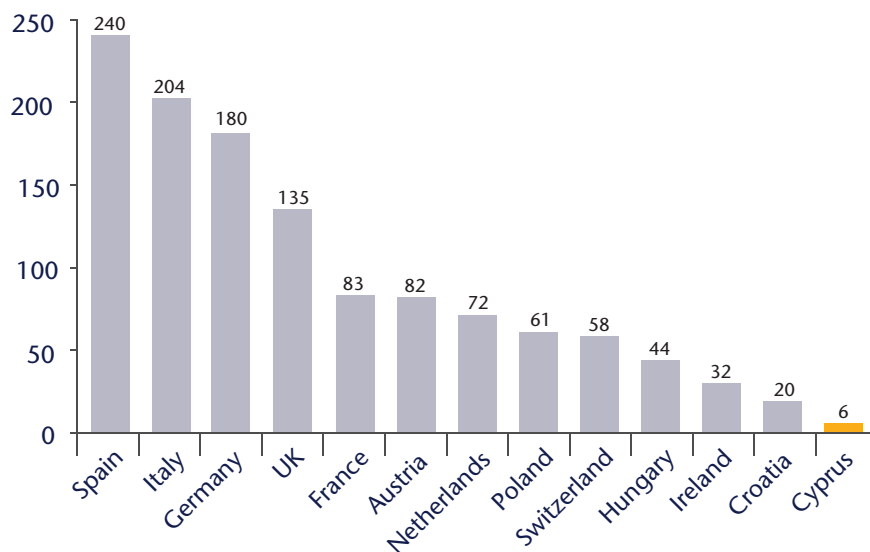
CYPRUS: Ranking by location

Rank	Destination	By Rooms 2016	Rank	Destination	By Hotels 2016
1	Famagusta	18,535	1	Famagusta	73
2	Pafos	17,076	2	Pafos	56
3	Limassol	9,255	3	Limassol	31
4	Larnaca	4,231	4	Larnaca	24
5	Nicosia	2,710	5	Nicosia	20
6	-		6	-	
7	-		7	-	
8	-		8	-	
9	-		9	-	
10	-		10	-	

CYPRUS: European Chain Penetration



EUROPE: Total number of brands





FRANCE

“The French market accounts for an overall room supply of about 650,000, of which 150,000, are in the greater Paris region alone. Although most French hotels are small, resulting in an average of only 36 rooms, France has one of the highest levels of chain penetration among the key European hotel markets. Of the national players AccorHotels and Louvre Hotel Group lead the market with a focus in the mid-market tier. The recently created, ibis megabrand is by far the market leader, whereas Mercure and Novotel dominate the Middle tier. International brands are mainly in the top tier, with market presence mostly concentrated in Paris and the Riviera.”

Philippe Doizelet, Managing Director, Horwath HTL France

KEY STATISTICS	2016
Chain Hotels	3,819
Chain Rooms	310,487
Average Size per Chain Hotel in Rooms	81
Country Hotels Stock (overall supply)	18,328
Country Rooms Stock (overall supply)	652,346
Average Size per Hotel in Rooms	36
Chain penetration % by Hotels	21.0%
Chain penetration % by Keys	48.0%
Total number of Brands	83
Domestic Brands	38
International Brands	45
Second Tier Operated Hotels	54
International Chain Hotels (including double counting)	675
Domestic Chain Hotels (including double counting)	3,144
International Chain Rooms (including double counting)	55,292
Domestic Chain Rooms (including double counting)	255,195

FRANCE: Ranking by size

CHAINS		RANK BY ROOMS	
Rank	Top 10 Chain Groups	Hotels	Rooms
1	AccorHotels	1,603	144,659
2	Louvre Hotels Group	820	52,499
3	B&B Hôtels	252	18,742
4	Best Western	288	15,276
5	Appart' City	117	13,393
6	Choice Hotels	104	6,790
7	Marriott-Starwood	29	6,820
8	Disneyland Hotels	9	5,760
9	InterContinental Hotels Group	53	5,718
10	Dynamique Hôtels Management	73	5,598

BRANDS		RANK BY ROOMS	
Rank	Top 10 Chain Brands	Hotels	Rooms
1	ibis family	869	70,336
2	Mercure	239	23,411
3	Campanile	314	20,164
4	B&B Hotels	252	18,742
5	Hotel F1	238	17,860
6	Novotel	131	17,589
7	Première Classe	244	17,584
8	Best Western (Family)	288	15,276
9	Appart' City	117	13,393
10	Kyriad	238	13,365

CHAINS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Groups	Hotels	Rooms
1	AccorHotels	1,603	144,959
2	Louvre Hotels Group	820	52,499
3	B&B Hôtels	252	18,742
4	Appart' City	117	13,393
5	Dynamique Hôtels Management	73	5,598
6	Odalys	33	3,121
7	Oceania Hotels	26	2,205
8	Groupe Barrière	16	2,116
9	ACE Hôtel	21	1,041
10	Les Hotels de Paris	21	998

BRANDS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Brands	Hotels	Rooms
1	ibis family	869	70,336
2	Mercure	239	23,411
3	Campanile	314	20,164
4	B&B Hotels	252	18,742
5	Hotel F1	238	17,860
6	Novotel	131	17,589
7	Première Classe	244	17,584
8	Appart' City	117	13,393
9	Kyriad	238	13,365
10	Adagio	73	7,845

CHAINS		RANK BY ROOMS	
Rank	Top 10 International Chain Groups	Hotels	Rooms
1	Best Western	288	15,276
2	Choice Hotels	104	6,790
3	Marriott-Starwood	29	6,820
4	Disneyland Hotels	9	5,760
5	InterContinental Hotels Group	53	5,718
6	Carlson Rezidor	13	2,995
7	The Ascott Limited	28	2,928
8	Hyatt Hotel Corporation	6	2,173
9	Hilton	8	1,758
10	Boscolo Hotels	4	528

BRANDS		RANK BY ROOMS	
Rank	Top 10 International Chain Brands	Hotels	Rooms
1	Best Western (Family)	288	15,276
2	Disneyland Hotels	9	5,760
3	Comfort	75	4,050
4	Holiday Inn	42	3,571
5	Citadines	28	2,928
6	Radisson Blu	11	2,717
7	Quality	24	2,370
8	Marriott International	6	1,838
9	Hilton	7	1,559
10	InterContinental Hotels Group	5	1,177

FRANCE: Ranking by scale *(domestic & international)*

BRANDS		RANK BY ROOMS		BRANDS		RANK BY ROOMS		BRANDS		RANK BY ROOMS	
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	ibis family	869	70,336	1	Novotel	131	17,589	1	Barrière	16	2,116
2	Mercure	239	26,411	2	Best Western	288	15,276	2	MGallery	24	1,756
3	Campanile	314	20,164	3	Appart'City	117	13,393	3	Sofitel	11	1,509
4	B&B Hotels	252	18,742	4	Disneyland Hotels	9	5,760	4	Boscolo	4	528
5	Hotel F1	238	17,860	5	Pullman	13	3,652	5	Grand Hyatt	1	409
6	Première Classe	244	17,589	6	Radisson Blu	11	2,717	6	Marriott International	1	261
7	Kyriad	238	13,365	7	Oceania	26	2,205	7	Baverez	3	230
8	Balladins	73	5,598	8	Club Med	6	2,024	8	Four Seasons	1	245
9	Adagio	73	7,845	9	Châteauform'	33	1,982	9	Peninsula	1	200
10	Comfort Hotels	75	4,050	10	Marriott International	6	1,838	10	Raffles	1	149

DOMESTIC		RANK BY ROOMS		DOMESTIC		RANK BY ROOMS		DOMESTIC		RANK BY ROOMS	
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	ibis family	869	70,336	1	Novotel	131	17,589	1	Barrière	16	2,116
2	Mercure	239	26,411	2	Appart'City	117	13,393	2	Mgallery	24	1,756
3	Campanile	314	20,164	3	Pullman	13	3,652	3	Sofitel	11	1,509
4	B&B Hotels	252	18,742	4	Club Med	6	2,024	4	Raffles	1	149
5	Hotel F1	238	17,860	5	Châteauform'	33	1,982	5	Lux	1	174
6	Première Classe	244	17,584	6	Honotel	29	1,806	6	-	-	-
7	Kyriad	238	13,365	7	Le Meridien	2	1,343	7	-	-	-
8	Adagio	73	7,845	8	Les Hôtels de Paris	21	998	8	-	-	-
9	Balladins	73	5,598	9	Mama Shelter	4	552	9	-	-	-
10	Odalys	33	3,121	10	Elegancia	15	531	10	-	-	-

INTERNATIONAL		RANK BY ROOMS		INTERNATIONAL		RANK BY ROOMS		INTERNATIONAL		RANK BY ROOMS	
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Comfort Hotels	75	4,050	1	Best Western	288	15,276	1	Boscolo	4	528
2	Holiday Inn	42	3,571	2	Disneyland Hotels	9	5,760	2	Grand Hyatt	1	409
3	Citadines	28	2,928	3	Radisson Blu	11	2,717	3	Marriott	1	261
4	Quality	24	2,370	4	Marriott International	6	1,838	4	Four Seasons	1	245
5	Park Inn	2	278	5	Hilton	7	1,559	5	Peninsula	1	200
6	Yotel	1	80	6	Hyatt Regency	3	1,525	6	Park Hyatt	1	153
7	-	-	-	7	InterContinental	-	-	7	Rosewood Hotels	1	147
8	-	-	-		Hotels & Resorts	5	1,177	8	Mandarin Oriental	1	138
9	-	-	-	8	Crowne Plaza	5	913	9	Shangri-La	1	101
10	-	-	-	9	Marriott Courtyard	6	912	10	Derby Hotel	-	-
				10	Renaissance	6	907		Collection	1	94

FRANCE: Ranking per scale & size

CHAINS HOTELS AND ROOMS BY SCALE	HOTELS	%	ROOMS	AVG SIZE	CHAIN HOTELS		CHAIN ROOMS	
					INTL.	DOM.	INTL.	DOM.
Budget & Economy	830	21.7%	60,691	73	-	830	-	60,691
Midscale	2,270	59.4%	169,257	75	460	1,810	28,553	140,704
Upscale & Upper-Upscale	647	16.9%	71,859	111	185	463	19,336	52,523
Luxury	72	1.9%	8,680	121	19	53	2,976	5,704
TOTAL	3,819	100%	310,487	81	664	3,156	50,865	259,622

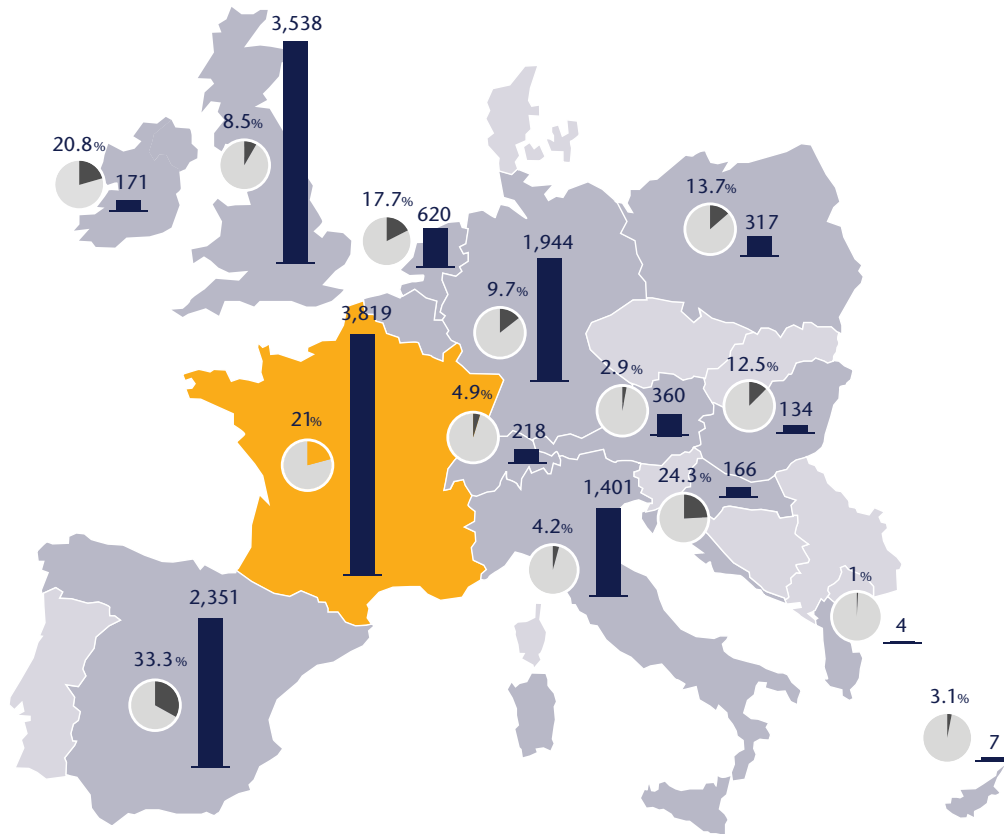
DOMESTIC HOTELS AND ROOMS	HOTELS	%	ROOMS	AVG SIZE
Budget & Economy	10,404	56.8%	272,834	26
Midscale	5,945	32.4%	243,269	26
Upscale & Upper-Upscale	1,676	9.1%	119,200	71
Luxury	303	1.7%	20,639	68
TOTAL	18,328	100%	655,942	36

FRANCE: Ranking by location

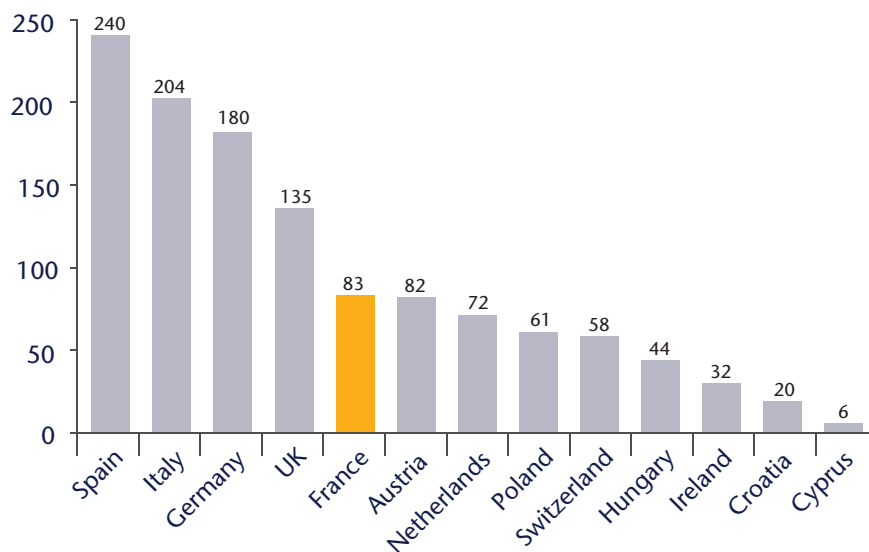
Rank	Destination	By Rooms 2016	Rank	Destination	By Hotels 2016
1	Paris	48,085	1	Paris	572
2	Lyon	6,722	2	Lyon	74
3	Marseille	5,843	3	Marseille	66
4	Roissy	5,450	4	Nice	51
5	Nice	5,291	5	Toulouse	44
6	Bordeaux	3,844	6	Bordeaux	39
7	Toulouse	3,681	7	Strasbourg	33
8	Cannes	3,191	8	Nantes	31
9	Nantes	3,003	9	Cannes	27
10	Strasbourg	2,817	10	Roissy	25

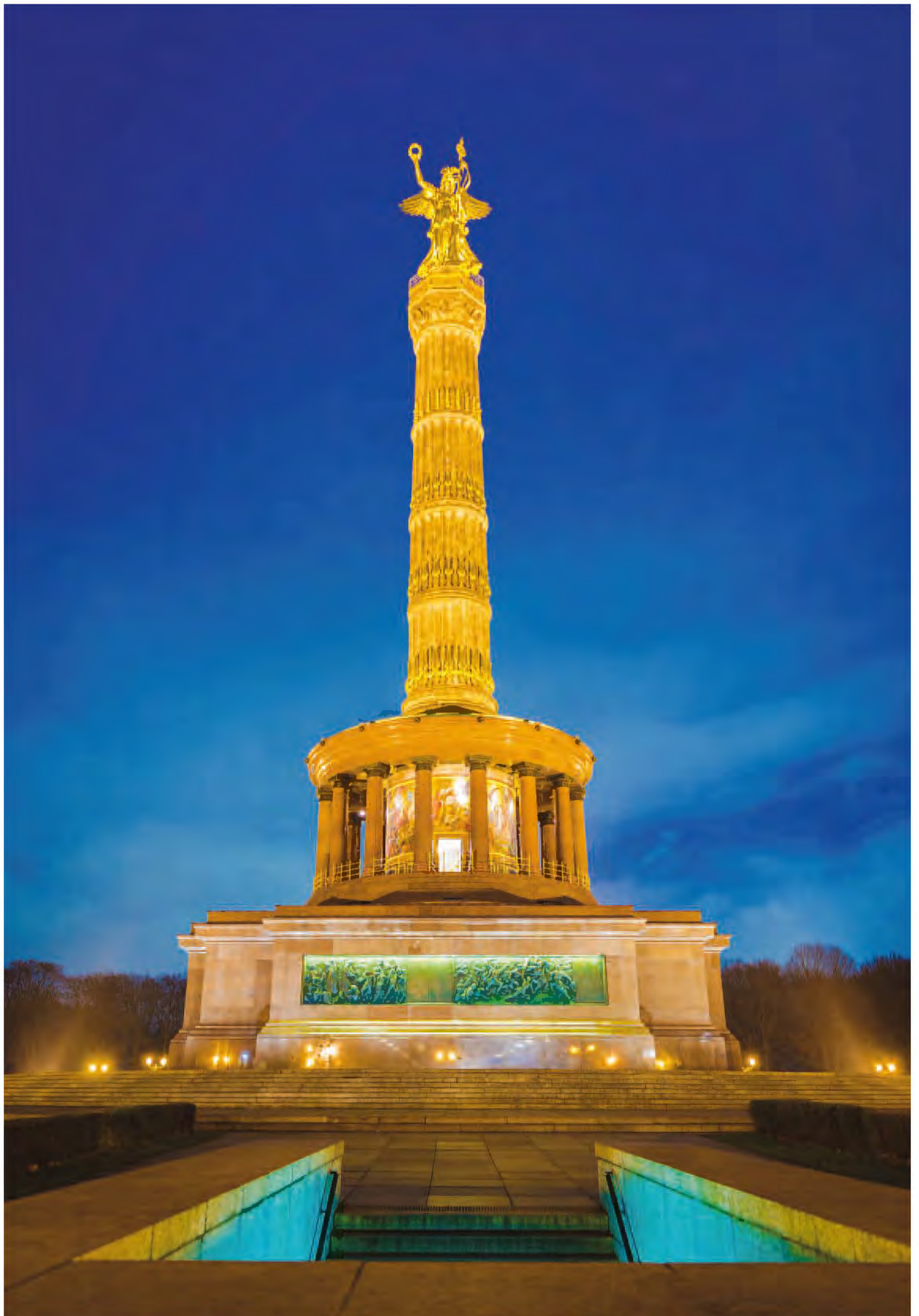
DESTINATION	DOMESTIC		INTERNATIONAL	
	HOTELS	ROOMS	HOTELS	ROOMS
Arts & Business	1,941	168,867	424	33,116
Business Focus	1,047	78,499	136	10,349
Other Leisure	69	4,554	43	2,681
Ski	29	2,088	39	3,402
Sea Coast	53	4,558	21	1,317
Thermal	17	1,056	-	-

FRANCE: European Chain Penetration



EUROPE: Total number of brands





GERMANY

“The German hotel market used to be dominated by independently-operated hotels, but the booming tourism market of the last few decades has heavily increased the importance of chain hotels. This census, the first of its kind in Germany, reveals a powerful German chain hotel market with a diverse range of locations and a variety of chain groups and brands. Incredibly, Germany is now home to almost 180 different brands. Around 35.5% of the total hotel room supply is provided by chains, both domestic and international. This market sector is still growing, especially in top city destinations, with many projects in the pipeline.”

Christian Ott-Sessay, Managing Director, Horwath HTL Germany

KEY STATISTICS	2016
Chain Hotels	1,944
Chain Rooms	283,441
Average Size per Chain Hotel in Rooms	146
Country Hotels Stock (overall supply) July 2016	20,102
Country Rooms Stock (overall supply) July 2016	798,651
Average Size per Hotel in Rooms	45.1
Chain penetration % by Hotels	9.7%
Chain penetration % by Keys	35.5%
Total Number of Brands	180
Domestic Brands	73
International Brands	107

GERMANY: Ranking by size

CHAINS		RANK BY ROOMS	
Rank	Top 10 Chain Groups	Hotels	Rooms
1	AccorHotels	357	47,905
2	Best Western	183	18,334
3	Marriot International	65	16,225
4	Wyndham Hotel Group	96	13,896
5	InterContinental Hotels Group	65	13,191
6	Deutsche Hospitality	74	13,187
7	Rezidor Hotel Group	52	11,444
8	NH Hotel Group	59	10,452
9	Motel One	40	10,264
10	Maritim Hotelgesellschaft	34	9,920

BRANDS		RANK BY ROOMS	
Rank	Top 10 Chain Brands	Hotels	Rooms
1	Mercure	107	14,885
2	Best Western	128	11,963
3	ibis	88	11,773
4	Motel One	40	10,264
5	Maritim	34	9,920
6	B&B Hotels	90	9,131
7	NH Hotel	52	8,794
8	ibis budget	84	8,221
9	IntercityHotels	38	6,632
10	Steigenberger Hotels & Resorts	36	6,555

CHAINS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Groups	Hotels	Rooms
1	Deutsche Hospitality	74	13,187
2	Motel One GmbH	40	10,264
3	Maritim Hotelgesellschaft	34	9,920
4	Novum Group	80	6,238
5	Neue Dorint	35	6,045
6	A&O Hotels And Hostels	24	4,837
7	Lindner Hotels	25	3,311
8	Achat Hotel	27	3,155
9	Hospitality Alliance/H-Hotels	15	2,347
10	Derag Livinghotels	12	2,098

BRANDS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Brands	Hotels	Rooms
1	Motel One	40	10,264
2	Maritim	34	9,920
3	IntercityHotels	38	6,632
4	Steigenberger Hotels & Resorts	36	6,555
5	Dorint Hotels & Resorts	35	6,045
6	A&O Hotels And Hostels	24	4,837
7	Novum Hotels	67	4,643
8	Lindner Hotels & Resorts	25	3,311
9	Derag Livinghotels	12	2,098
10	Kempinski	9	1,916

CHAINS		RANK BY ROOMS	
Rank	Top 10 International Chain Groups	Hotels	Rooms
1	AccorHotels	357	47,905
2	Best Western	183	18,334
3	Marriot International	65	16,225
4	Wyndham Hotel Group	96	13,896
5	InterContinental Hotels Group	65	13,191
6	Rezidor Hotel Group	52	11,444
7	NH Hotel Group	59	10,452
8	B&B Hotels	90	9,131
9	Fattal Hotels Management	45	7,818
10	Hilton	20	5,649

BRANDS		RANK BY ROOMS	
Rank	Top 10 International Chain Brands	Hotels	Rooms
1	Mercure	107	14,885
2	Best Western	128	11,963
3	ibis	88	11,773
4	B&B Hotels	90	9,131
5	NH Hotel	52	8,794
6	ibis budget	84	8,221
7	Radisson Blu	22	6,044
8	Holiday Inn	25	5,870
9	Ramada Hotels	33	5,323
10	Leonardo Hotels	34	5,278

GERMANY: Ranking by scale *(domestic & international)*

BRANDS RANK BY ROOMS				BRANDS RANK BY ROOMS				BRANDS RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Mercure	107	14,885	1	Maritim	34	9,920	1	Steigenberger		
2	ibis	88	11,773	2	NH Hotel	49	8,477		Hotels & Resorts	16	3,316
3	Motel One	40	10,264	3	Best Western	75	6,981	2	Hilton	5	2,187
4	B&B Hotels	90	9,131	4	Holiday Inn	23	5,554	3	Innside By Meliá	12	1,924
5	ibis budget	84	8,221	5	Radisson Blu	20	5,393	4	Kempinski	9	1,916
6	Best Western	53	4,982	6	Ramada Hotels	25	4,606	5	Westin Hotels/Resorts	4	1,642
7	A&O Hotels/Hostels	24	4,837	7	Dorint Hotels/Resorts	26	4,564	6	Sheraton	3	1,563
8	Novotel	21	4,544	8	Leonardo Hotels	29	4,438	7	Marriott International	3	1,331
9	Holiday Inn Express	29	4,252	9	IntercityHotels	23	4,209	8	Intercontinental		
10	Novum Hotels	54	3,670	10	Best Western Plus	31	3,552		Hotels & Resorts	3	1,312
								9	Sofitel	5	1,190
								10	Le Meridien	4	1,141

DOMESTIC RANK BY ROOMS				DOMESTIC RANK BY ROOMS				DOMESTIC RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Motel One	40	10,264	1	Maritim	34	9,920	1	Steigenberger		
2	A&O Hotels/Hostels	24	4,837	2	Dorint Hotels/Resorts	26	4,564		Hotels & Resorts	16	3,316
3	Novum Hotels	54	3,670	3	IntercityHotels	23	4,209	2	Kempinski	9	1,916
4	IntercityHotels	15	2,423	4	Steigenberger			3	Dorint Hotels/Resorts	6	1,061
5	Achat Comfort	13	1,355		Hotels & Resorts	19	3,160	4	A-ROSA	3	514
6	Morada Hotels			5	Lindner Hotels			5	Althoff Hotel	4	464
	Resorts	11	1,335		& Resorts	23	3,157	6	Fleming's Hotels		
7	Meininger Hotels	9	1,249	6	Dormero Hotels	12	1,789		& Restaurants	2	359
8	Commundo			7	Welcome Hotels	11	1,564	7	Vila Vita Hotels	1	178
	Tagungshotels	6	1,217	8	Atlantic Hotels	10	1,442	8	Derag Livinghotels	1	170
9	Star Inn Hotels	9	1,115	9	Derag Livinghotels	9	1,353	9	Arcadia Hotels	1	160
10	Ghotel Hotel	7	1,060	10	Relexa Hotels	9	1,305	10	Victor's Residenz	1	105

INTERNATIONAL RANK BY ROOMS				INTERNATIONAL RANK BY ROOMS				INTERNATIONAL RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Mercure	107	14,885	1	NH Hotel	49	8,477	1	Hilton	5	2,187
2	ibis	88	11,773	2	Best Western	75	6,981	2	Innside By Meliá	12	1,924
3	B&B Hotels	90	9,131	3	Holiday Inn	23	5,554	3	Westin Hotels/Resorts	4	1,642
4	ibis budget	84	8,221	4	Radisson Blu	20	5,393	4	Sheraton	3	1,563
5	Best Western	53	4,982	5	Ramada Hotels	25	4,606	5	Marriott International	3	1,331
6	Novotel	21	4,544	6	Leonardo Hotels	29	4,438	6	Intercontinental		
7	Holiday Inn Express	29	4,252	7	Best Western Plus	31	3,552		Hotels & Resorts	3	1,312
8	ibis styles	31	2,772	8	Radisson Park Inn	15	3,049	7	Sofitel	5	1,190
9	Tryp Hotels	15	2,013	9	Best Western Premier	22	2,706	8	Le Meridien	4	1,141
10	IFA-Hotels	3	1,361	10	Marriott Courtyard	12	2,244	9	Hyatt Regency	3	877
								10	Radisson Blu	2	651

GERMANY: Ranking per scale & size

CHAINS HOTELS AND ROOMS					CHAIN HOTELS		CHAIN ROOMS	
	HOTELS	%	ROOMS	AVG SIZE	INTL.	DOM.	INTL.	DOM.
Budget & Economy	369	19.0%	46,326	126	310	59	33,713	12,613
Midscale	569	29.3%	69,878	123	333	236	43,530	26,348
Upscale & Upper-Upscale	896	46.1%	142,195	159	525	371	87,959	54,236
Luxury	110	5.7%	25,042	228	55	55	15,547	9,495
TOTAL	1,944	100.0%	283,441	146	1,223	721	180,749	102,692

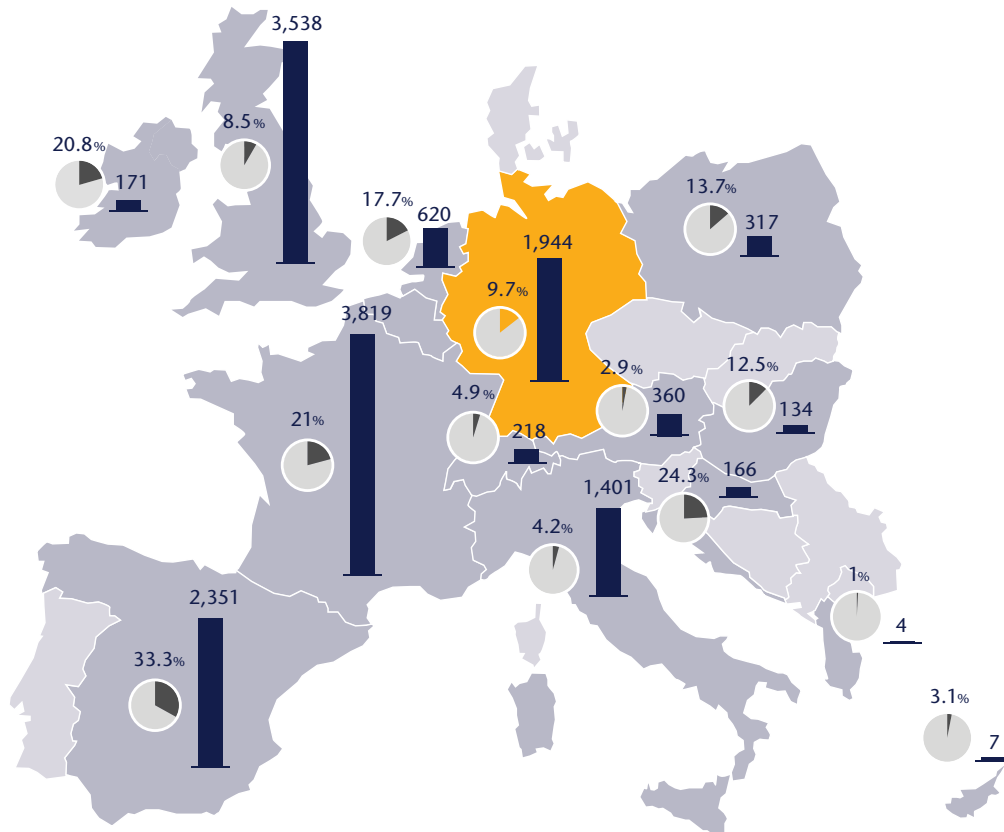
DOMESTIC HOTELS AND ROOMS	HOTELS	%
Budget & Economy	636	4.8%
Midscale	5,092	38.4%
Upscale & Upper-Upscale	2,661	20.0%
Luxury	132	1.0%
not DEHOGA classified	4,752	35.8%
TOTAL	13,273	100.0%

GERMANY: Ranking by location

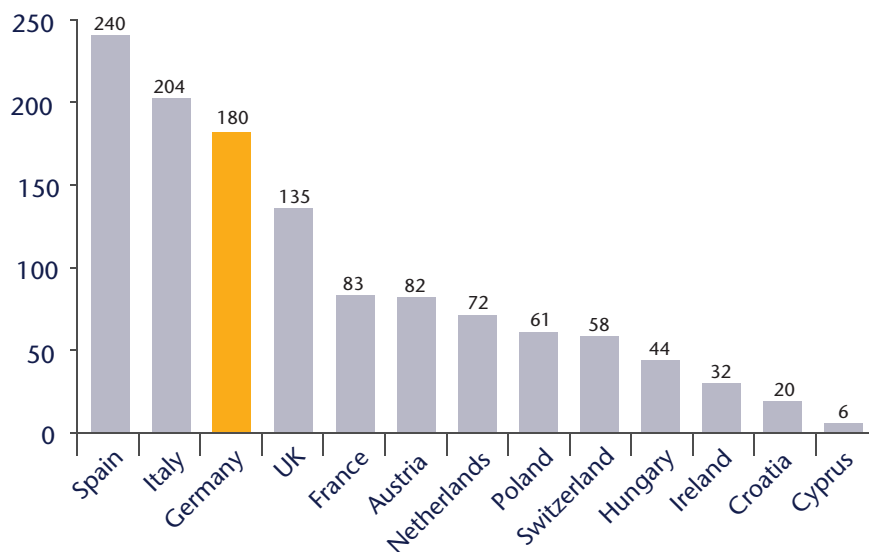
Rank	Destination	By Rooms	Rank	Destination	By Hotels
1	Berlin	40,791	1	Berlin	205
2	Munich	23,897	2	Munich	127
3	Frankfurt	20,863	3	Hamburg	110
4	Hamburg	18,454	4	Frankfurt	100
5	Dusseldorf	11,050	5	Dusseldorf	71
6	Cologne	7,752	6	Cologne	45
7	Dresden	7,713	7	Stuttgart	42
8	Stuttgart	7,463	8	Dresden	40
9	Hannover	5,265	9	Leipzig	34
10	Leipzig	5,236	10	Nuremberg	32

DESTINATION	OVERALL		INTERNATIONAL		DOMESTIC	
	HOTELS	ROOMS	HOTELS	ROOMS	HOTELS	ROOMS
Arts & Business	743	126,541	487	85,194	256	41,347
Business Focus	792	112,024	556	75,715	236	36,309
Other Leisure	210	20,884	102	10,408	108	10,476
Mountain	71	7,911	34	3,896	37	4,015
Sun & Beach	69	9,357	21	3,127	48	6,230
Thermal	59	6,724	23	2,409	36	4,315

GERMANY: European Chain Penetration



EUROPE: Total number of brands





HUNGARY

“Hungary has a relatively high chain penetration index. In contrast to many CEE countries, hotel brands are not limited to the capital city, albeit, international chain growth will be notable in Budapest. There are exciting times ahead for Hungary, as an increasing number of international brands, from all sectors, are all scheduled to enter the market in the near future.”

Marius Gomola, Managing Director, Horwath HTL Hungary

KEY STATISTICS	2016
Chain Hotels	134
Chain Rooms	19,910
Average Size per Chain Hotel in Rooms	149
Country Hotels Stock (overall supply)	1,072
Country Rooms Stock (overall supply)	61,369
Average Size per Hotel in Rooms	57.2
Chain penetration % by Hotels	12.5%
Chain penetration % by Keys	32.4%
Total number of Brands	44
Domestic Brands	6
International Brands	37
Second Tier Operated Hotels	35
International Chain Hotels	52
Domestic Chain Hotels	82
International Chain Rooms	10,732
Domestic Chain Rooms	9,178

HUNGARY: Ranking by size

CHAINS		RANK BY ROOMS	
Rank	Top 10 Chain Groups	Hotels	Rooms
1	Danubius Hotels Group	20	4,962
2	Hunguest Hotels	20	3,339
3	AccorHotels	17	3,271
4	Marriott International	6	1,365
5	Accent Hotel Management	16	1,349
6	Service4You	17	879
7	Mellow Mood Hotels	12	857
8	InterContinental Hotels Group	2	566
9	Corinthia Hotels	1	414
10	Carlson Rezidor Hotel Group	2	361

BRANDS		RANK BY ROOMS	
Rank	Top 10 Chain Brands	Hotels	Rooms
1	Danubius	18	4,394
2	Hunguest	20	3,339
3	Accent	15	1263
4	Mercure	3	1038
5	Novotel	5	952
6	Mellow Mood	12	857
7	ibis	5	584
8	Hilton	2	551
9	Service4You	9	504
10	Corinthia	1	414

CHAINS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Brands	Hotels	Rooms
1	Danubius Hotels Group	20	4,962
2	Hunguest Hotels	20	3,339
3	Accent Hotel Management	16	1349
4	Service4You	17	879
5	Mellow Mood Hotels	12	857
6	-	-	-
7	-	-	-
8	-	-	-
9	-	-	-
10	-	-	-

BRANDS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Brands	Hotels	Rooms
1	Danubius	18	4,394
2	Hunguest	20	3,339
3	Accent	15	1263
4	Mellow Mood	12	857
5	Service4You	9	504
6	Optimum Hotels	8	375
7	-	-	-
8	-	-	-
9	-	-	-
10	-	-	-

CHAINS		RANK BY ROOMS	
Rank	Top 10 International Chain Groups	Hotels	Rooms
1	AccorHotels	17	3,271
2	Marriott International	6	1,365
3	InterContinental Hotels Group	2	566
4	Corinthia Hotels	1	414
5	Carlson Rezidor Hotel Group	2	361
6	Kempinski	1	349
7	Hilton	1	230
8	K+K	1	200
9	Leonardo Hotels	1	182
10	Four Seasons Hotels & Resorts	1	179

BRANDS		RANK BY ROOMS	
Rank	Top 10 International Chain Brands	Hotels	Rooms
1	Mercure	3	1,038
2	Novotel	5	952
3	ibis	5	584
4	Hilton	2	551
5	Corinthia	1	414
6	InterContinental Hotels Group	1	402
7	Marriott International	1	364
8	Radisson Park Inn	2	361
9	Sofitel	1	357
10	Kempinski	1	349

HUNGARY: Ranking by scale *(domestic & international)*

BRANDS		RANK BY ROOMS		BRANDS		RANK BY ROOMS		BRANDS		RANK BY ROOMS	
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Hunguest	11	1,716	1	Danubius	14	3,488	1	Hilton	2	551
2	Danubius	4	906	2	Hunguest	9	1,623	2	Corinthia	1	414
3	ibis	5	584	3	Mercure	3	1,038	3	InterContinental	1	402
4	Mellow Mood	6	363	4	Novotel	5	952	4	Marriott International	1	364
5	Accent	4	338	5	Accent	10	884	5	Sofitel	1	357
6	Optimum Hotels	6	308	6	Service4You	8	442	6	Kempinski	1	349
7	ibis styles	2	260	7	Mellow Mood	5	392	7	Autograph Collection/Boscolo	1	323
8	Star Inn	1	125	8	Radisson Park Inn	2	361	8	Ritz Carlton	1	200
9	Service4You	1	62	9	Radisson Blu	1	247	9	Four Seasons	1	179
10	EasyHotel	1	59	10	Marriott Courtyard	1	234	10	Mellow Mood/ Budda Bar Hotel	1	102

DOMESTIC		RANK BY ROOMS		DOMESTIC		RANK BY ROOMS		DOMESTIC		RANK BY ROOMS	
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Hunguest	11	1,716	1	Danubius	14	3,488	1	Accent	1	41
2	Danubius	4	906	2	Hunguest	9	1,623	2	Mellow Mood/ Budda Bar Hotel	1	102
3	Mellow Mood	6	363	3	Accent	10	847	3	-	-	-
4	Accent	4	338	4	Service4You	8	442	4	-	-	-
5	Optimum Hotels	6	308	5	Mellow Mood	5	392	5	-	-	-
6	Service4You	1	62	6	Optimum Hotels	2	67	6	-	-	-
7	-	-	-	7	-	-	-	7	-	-	-
8	-	-	-	8	-	-	-	8	-	-	-
9	-	-	-	9	-	-	-	9	-	-	-
10	-	-	-	10	-	-	-	10	-	-	-

INTERNATIONAL		RANK BY ROOMS		INTERNATIONAL		RANK BY ROOMS		INTERNATIONAL		RANK BY ROOMS	
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	ibis	5	584	1	Mercure	3	1,038	1	Hilton	2	551
2	ibis styles	2	260	2	Novotel	5	952	2	Corinthia	1	414
3	Star Inn	1	125	3	Radisson Park Inn	2	361	3	InterContinental	1	402
5	EasyHotel	1	59	4	Radisson Blu	1	247	4	Marriott International	1	364
6	The Three Corners	1	36	5	Marriott Courtyard	1	234	5	Sofitel	1	357
7	-	-	-	6	K+K	1	200	6	Kempinski	1	349
8	-	-	-	7	Leonardo	1	182	7	Autograph Collection/Boscolo	1	323
9	-	-	-	8	Eurostars	1	175	8	Ritz Carlton	1	200
10	-	-	-	9	art'otel	1	165	9	Four Seasons	1	179
				10	Holiday Inn	1	164	10	Iberostar	1	50

HUNGARY: Ranking per scale & size

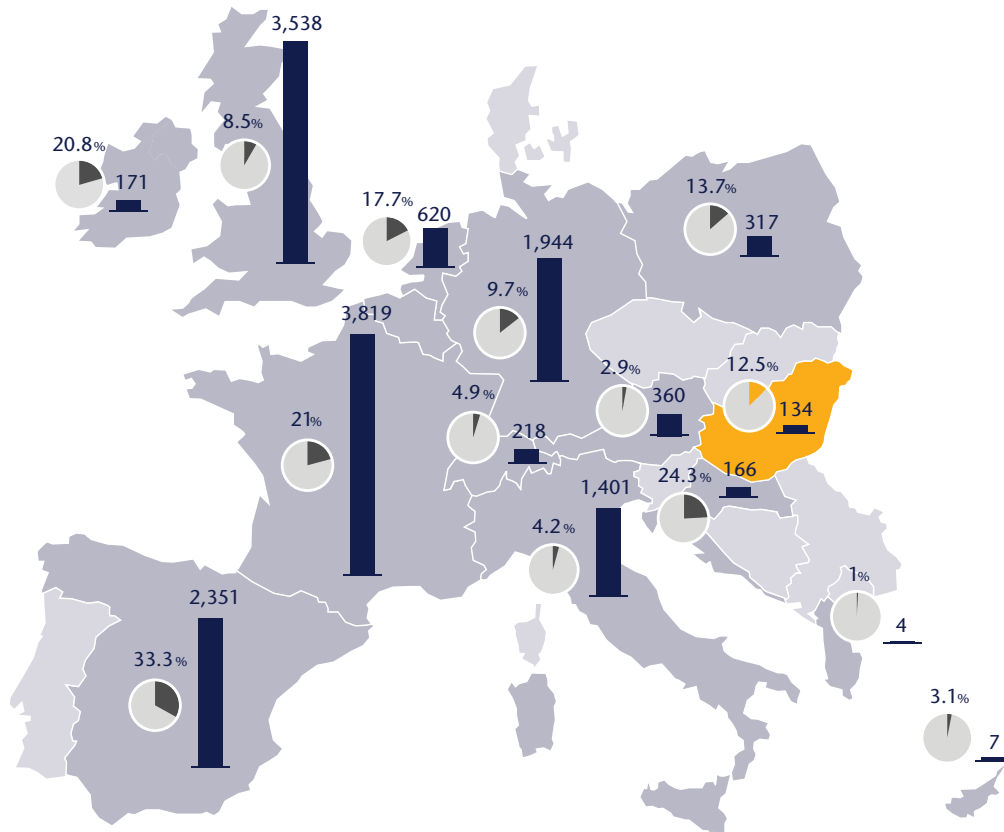
CHAINS HOTELS AND ROOMS	HOTELS	%	ROOMS	AVG SIZE	CHAIN HOTELS		CHAIN ROOMS	
					INTL.	DOM.	INTL.	DOM.
Budget & Economy	3	2.2%	169	56	1	2	59	110
Midscale	39	29.1%	4,588	118	9	30	1,005	3,583
Upscale & Upper-Upscale	78	58.2%	11,772	151	30	48	4,876	6,896
Luxury	14	10.4%	3,381	242	12	2	3,238	143
TOTAL	134	100.0%	19,910	149	52	82	9,178	10,732

HUNGARY: Ranking by location

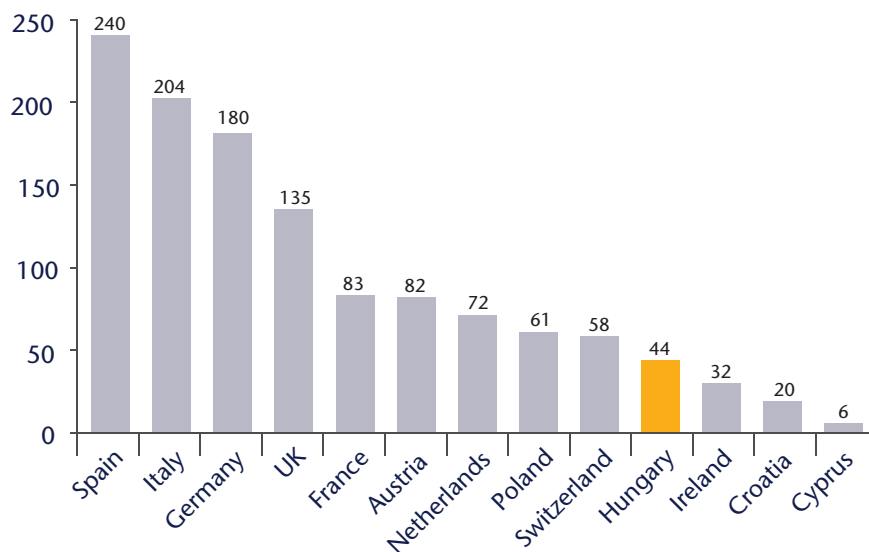
Rank	Destination	By Rooms 2016	Rank	Destination	By Hotels 2016
1	Budapest	12,497	1	Budapest	74
2	Hévíz	918	2	Hévíz	5
3	Bükfürdő	758	3	Bükfürdő	4
4	Balatonfüred	689	4	Hajdúszoboszló	4
5	Hajdúszoboszló	565	5	Szeged	4
6	Szeged	446	6	Siófok	4
7	Sárvár	359	7	Győr	3
8	Győr	354	8	Zalakaros	3
9	Gyula	331	9	Balatonfüred	2
10	Zalakaros	234	10	Sárvár	2

DESTINATION	DOMESTIC		INTERNATIONAL	
	HOTELS	ROOMS	HOTELS	ROOMS
Arts & Business	49	8,723	32	4,495
Business Focus	2	232	6	649
Other Leisure	-	-	6	361
Sun & Beach	-	-	11	1,369
Thermal	1	223	24	3,611
Wine	-	-	3	247
Total	52	9,178	82	10,732

HUNGARY: European Chain Penetration



EUROPE: Total number of brands





IRELAND

“The level of international brand penetration in the Irish market is relatively low, accounting for about 3% of hotels nationally and 13% of Dublin hotels. There are a large number of domestic brands, which represent a greater share of the market - accounting for 16% of all hotels and 29% of Dublin hotels. Of the top 10 Brands in the Irish market, half of them are headquartered here with a combined 38 hotels and over 6,100 rooms.

The Dublin market is entering a development phase again, with the potential for up to 5,000 rooms to be delivered in the next 5 years. The fundamentals for the sector are strong with record levels of international visitors and one of the fastest growing economies in Europe. We see great opportunities for new brands as well as new hotel concepts to enter the marketplace in the coming years as this new pipeline comes on stream.

Naoise Cosgrove, Managing Director, Horwath HTL Ireland

KEY STATISTICS	2016
Chain Hotels	171
Chain Rooms	22,469
Average Size per Chain Hotel in Rooms	131
Country Hotels Stock (overall supply)	822
Country Rooms Stock (overall supply)	57,838
Average Size per Hotel in Rooms	70.4
Chain penetration % by Hotels	20.8%
Chain penetration % by Keys	38.8%
Total number of Brands	32
Domestic Brands	6
International Brands	26
Second Tier Operated Hotels	15
International Chain Hotels (including double counting)	41
Domestic Chain Hotels (including double counting)	145
International Chain Rooms (including double counting)	6,307
Domestic Chain Rooms (including double counting)	18,937

IRELAND: Ranking by size

CHAINS		RANK BY ROOMS	
Rank	Top 10 Chain Groups	Hotels	Rooms
1	Dalata Hotel Group	32	6,133
2	Tifco	23	2,389
3	Rezidor Hotel Group	11	1,717
4	Great National Hotels	24	1,693
5	Tetrarch	8	1,629
6	MHL Hotel Collection	10	1,576
7	InterContinental Hotels Group	7	1,130
8	Hilton	6	1,054
9	Amaris Hospitality	5	937
10	Prem Group	12	915

BRANDS		RANK BY ROOMS	
Rank	Top 10 Chain Brands	Hotels	Rooms
1	Clayton Hotels	11	2,908
2	Maldron Hotels	12	1,646
3	Radisson	10	1,603
4	Travelodge	10	768
5	Jurys Inn	4	698
6	Crowne Plaza	3	521
7	Great National Hotels	7	505
8	Hilton	3	479
9	Clarion Hotels	2	459
10	O'Callaghan Hotels	4	390

CHAINS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Groups	Hotels	Rooms
1	Dalata Hotel Group	32	6,133
2	Tifco	23	2,389
3	Great National Hotels	24	1,693
4	Tetrarch	8	1,629
5	MHL Hotel Collection	10	1,576
6	Amaris Hospitality	5	937
7	Prem Group	12	915
8	McGettigan Group	8	888
9	Windward Management	6	863
10	The Doyle Collection	3	619

BRANDS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Brands	Hotels	Rooms
1	Clayton Hotels	11	2,908
2	Maldron Hotels	12	1,646
3	Jurys Inn	4	698
4	Great National Hotels	7	505
5	O'Callaghan Hotels	4	390
6	The Talbot Collection	3	334
7	-		
8	-		
9	-		
10	-		

CHAINS		RANK BY ROOMS	
Rank	Top 10 International Chain Groups	Hotels	Rooms
1	Rezidor Hotel Group	11	1,717
2	InterContinental Hotels Group	7	1,130
3	Hilton	6	1,054
4	Choice Hotel International	5	640
5	Marriott International	2	465
6	-		
7	-		
8	-		
9	-		
10	-		

BRANDS		RANK BY ROOMS	
Rank	Top 10 International Chain Brands	Hotels	Rooms
1	Radisson	10	1,603
2	Travelodge	10	768
3	Crowne Plaza	3	521
4	Hilton	3	479
5	Clarion Hotels	2	459
6	-		
7	-		
8	-		
9	-		
10	-		

IRELAND: Ranking by scale *(domestic & international)*

BRANDS RANK BY ROOMS				BRANDS RANK BY ROOMS				BRANDS RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Maldron Hotels	12	1646	1	Clayton Hotels	11	2908	1	Renaissance Hotels	1	265
2	Travelodge	10	768	2	Radisson	9	1452	2	Marriott Autograph	1	200
3	Jurys Inn	4	698	3	Crowne Plaza	3	521	3	InterContinental		
4	Great National Hotels	5	378	4	Hilton	3	479		Hotels and Resorts	1	197
5	Holiday Inn Express	2	312	5	Clarion Hotels	2	459	4	Conrad Hotels	1	191
6	-			6	-			5	Westin	1	172
7	-			7	-			6	-		
8	-			8	-			7	-		
9	-			9	-			8	-		
10	-			10	-			9	-		
								10	-		

DOMESTIC RANK BY ROOMS				DOMESTIC RANK BY ROOMS				DOMESTIC RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Maldron Hotels	12	1646	1	Clayton Hotels	11	2908	1	-		
2	Jurys Inn	4	698	2	O'Callaghan Hotels	4	390	2	-		
3	Great National Hotels	5	378	3	The Talbot Collection	3	334	3	-		
4	-			4	Great National Hotels	2	127	4	-		
5	-			5	-			5	-		
6	-			6	-			6	-		
7	-			7	-			7	-		
8	-			8	-			8	-		
9	-			9	-			9	-		
10	-			10	-			10	-		

INTERNATIONAL RANK BY ROOMS				INTERNATIONAL RANK BY ROOMS				INTERNATIONAL RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Travelodge	10	768	1	Radisson	9	1,452	11	Renaissance Hotels	1	265
2	Holiday Inn Express	2	312	2	Crowne Plaza	3	521	2	Marriott Autograph	1	200
3	Hilton	1	239	3	Hilton	3	479	3	InterContinental		
4	Premier Inn	1	155	4	Clarion Hotels	2	459		Hotels and Resorts	1	197
5	ibis	0	0	5	Riu	1	319	4	Conrad Hotels		
6	-			6	-				and Resorts	1	191
7	-			7	-			5	Westin	1	172
8	-			8	-			6	-		
9	-			9	-			7	-		
10	-			10	-			8	-		
								9	-		
								10	-		

IRELAND: Ranking per scale & size

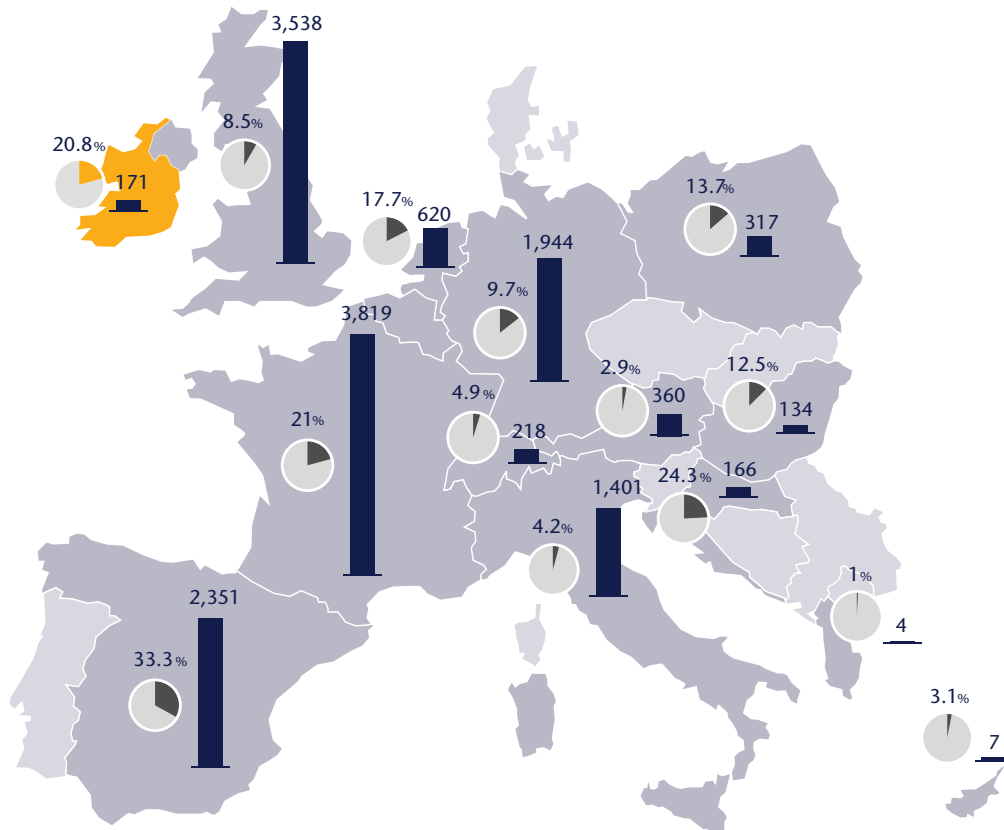
CHAINS HOTELS AND ROOMS	HOTELS	%	ROOMS	AVG SIZE	CHAIN HOTELS		CHAIN ROOMS	
					INTL.	DOM.	INTL.	DOM.
Budget & Economy	2	1.2%	160	80	1	1	150	10
Midscale	72	42.1%	7,396	103	20	52	1,911	5485
Upscale & Upper-Upscale	83	48.5%	12,787	154	21	62	3,602	9185
Luxury	14	8.2%	2,126	152	9	5	1,412	714
TOTAL	171	100.0%	22,469	131	51	120	7,075	15,394

DOMESTIC HOTELS				
AND ROOMS	HOTELS	%	ROOMS	AVG SIZE
Budget & Economy	138	80.7%	2,741	20
Midscale	353	206.4%	21,976	62
Upscale & Upper-Upscale	295	172.5%	29,010	98
Luxury	36	21.1%	4,111	114
TOTAL	822	480.7%	57,838	70

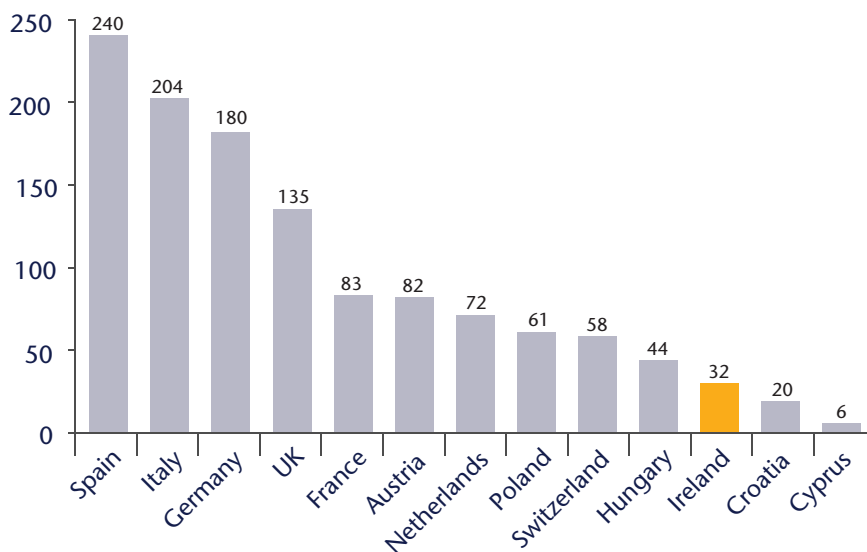
IRELAND: Ranking by location

Rank	Destination	By Rooms 2016	Rank	Destination	By Hotels 2016
1	Dublin	12,108	1	Dublin	63
2	Cork	1,939	2	Cork	20
3	Galway	1,333	3	Galway	11
4	Limerick	1,144	4	Limerick	9
5	Wexford	531	5	Wexford	6
6	-		6	-	
7	-		7	-	
8	-		8	-	
9	-		9	-	
10	-		10	-	

IRELAND: European Chain Penetration



EUROPE: Total number of brands





ITALY

“Despite the relatively low penetration rate, which is stuck at less than 15% of room stock, there are still more than 200 hotel brands. This is mostly due to the very strong number of domestic and regional groups. We expect this solid base of brands will continue to grow, with an acceleration in 2017-2020.”

Zoran Bacic, Managing Director, Horwath HTL Italy

KEY STATISTICS	2016
Chain Hotels	1,401
Chain Rooms	155,505
Average Size per Chain Hotel in Rooms	111
Country Hotels Stock (overall supply)	33,199
Country Rooms Stock (overall supply)	1,091,569
Average Size per Hotel in Rooms	32.9
Chain penetration % by Hotels	4.2%
Chain penetration % by Keys	14.2%
Total number of Brands	204
Domestic Brands	124
International Brands	80
Second Tier Operated Hotels	65
International Chain Hotels (including double counting)	515
Domestic Chain Hotels (including double counting)	951
International Chain Rooms (including double counting)	64,280
Domestic Chain Rooms (including double counting)	100,559

ITALY: Overall ranking by size

CHAINS		RANK BY ROOMS	
Rank	Top 10 Chain Groups	Hotels	Rooms
1	Best Western	164	12,458
2	AccorHotels	77	10,015
3	Marriott International	46	8,890
4	NH Hotels	52	7,992
5	Una-Ata	43	5,467
6	Valtur	15	4,990
7	InterContinental Hotels Group	31	4,911
8	Hilton	19	4,399
9	ITI Hotels	31	3,824
10	Starhotels	24	3,671

BRANDS		RANK BY ROOMS	
Rank	Top 10 Chain Brands	Hotels	Rooms
1	Best Western	132	9,684
2	NH Hotels	41	6,386
3	Valtur	15	4,990
4	Blu Hotels	30	3,394
5	Aeroviaggi	15	3,273
6	Bluserena	8	3,130
7	Mercure	32	2,991
8	Marriott-Starwood	17	2,774
9	JSH	14	2,698
10	Holiday Inn	16	2,621

CHAINS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Groups	Hotels	Rooms
1	Una-Ata	43	5,467
2	Valtur	15	4,990
3	ITI Hotels	31	3,824
4	Star Hotels	24	3,671
5	Blu Hotels	30	3,394
6	Aeroviaggi	15	3,273
7	Bluserena	8	3,130
8	JSH	14	2,698
9	TH Resorts	14	2,472
10	Geturhotels	14	2,004

BRANDS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Brands	Hotels	Rooms
1	Valtur	15	4,990
2	Blu Hotels	30	3,394
3	Aeroviaggi	15	3,273
4	Bluserena	8	3,130
5	Star Hotels	17	2,774
6	JSH	14	2,698
7	Atahotels	13	2,615
8	TH Resorts	14	2,472
9	Una Hotels & Resorts	25	2,192
10	ITI Hotels-Marina H&R	17	2,145

CHAINS		RANK BY ROOMS	
Rank	Top 10 International Chain Groups	Hotels	Rooms
1	Best Western	164	12,458
2	AccorHotels	77	10,015
3	Marriott International	46	8,890
4	NH Hotels	52	7,992
5	InterContinental Hotels Group	31	4,911
6	Hilton	19	4,399
7	B&B Hotels	24	2,262
8	Club Med	4	1,672
9	Choice Hotels	15	1,246
10	Louvre	8	1,199

BRANDS		RANK BY ROOMS	
Rank	Top 10 International Chain Brands	Hotels	Rooms
1	Best Western	132	9,684
2	NH Hotels	41	6,386
3	Mercure	32	2,991
4	Holiday Inn	16	2,621
5	B&B Hotels	24	2,262
6	Sheraton	6	2,229
7	Novotel	13	2,200
8	Hilton	6	2,065
9	ibis	11	1,860
10	Best Western Plus	18	1,682

ITALY: Overall ranking by scale *(domestic & international)*

BRANDS RANK BY ROOMS				BRANDS RANK BY ROOMS				BRANDS RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	B&B Hotels	24	2,262	1	Best Western	100	7,829	1	Westin	4	899
2	Valtur	7	2,071	2	NH Hotels	41	6,386	2	Luxury Collection	7	880
3	ibis	11	1,860	3	Bluserena	8	3,130	3	ITI Hotels- Colonna Lux.	4	818
4	Best Western	32	1,855	4	Blu Hotels	23	2,920	4	Mgallery By Sofitel	4	577
5	Geturhotels	7	1,330	5	Mercure	26	2,794	5	GB Thermae Hotels	3	542
6	Club Med	2	1,268	6	Starhotels	17	2,774	6	Delphina	3	541
7	Chincherini Holiday Group	10	1,170	7	Valtur	7	2,661	7	Marriott Autograph	3	458
8	Aeroviaggi	2	772	8	Holiday Inn	16	2,621	8	Boscolo	3	458
9	ibis styles	8	749	9	Aeroviaggi	13	2,501	9	Select	3	451
10	Holiday Inn Express	6	664	10	Atahotels	11	2,439	10	Meliá Hotels	4	449

DOMESTIC RANK BY ROOMS				DOMESTIC RANK BY ROOMS				DOMESTIC RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Valtur	7	2,071	1	Bluserena	8	3,130	1	ITI Hotels- Colonna Lux.	4	818
2	Geturhotels	7	1,330	2	Blu Hotels	23	2,920	2	GB Thermae Hotels	3	542
3	Chincherini Holiday Group	10	1,170	3	Starhotels	17	2,774	3	Delphina	3	541
4	Aeroviaggi	2	772	4	Valtur	7	2,661	4	Boscolo	3	458
5	Bianchi Hotels	10	626	5	Aeroviaggi	13	2,501	5	Select	3	451
6	Meditur	12	623	6	Atahotels	11	2,439	6	JSH	2	405
7	Apogia Hotels Group	12	618	7	JSH	12	2,293	7	Baglioni	6	398
8	Rimini Residence	18	534	8	TH Resorts	11	2,135	8	Giorgio Mazzella Group	2	397
9	Azzurro Club	10	516	9	Una Hotels and Resorts	24	2,127	9	Allegroitalia	4	395
10	Aurum	2	508	10	ITI Hotels- Marina H&R	16	2,127	10	Sina	5	392

INTERNATIONAL RANK BY ROOMS				INTERNATIONAL RANK BY ROOMS				INTERNATIONAL RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	B&B Hotels	24	2,262	1	Best Western	100	7,829	1	Westin	4	899
2	ibis	11	1,860	2	NH Hotels	41	6,386	2	Luxury Collection	7	880
3	Best Western	32	1,855	3	Mercure	26	2,794	3	Mgallery By Sofitel	4	577
4	Club Med	2	1,268	4	Holiday Inn	16	2,621	4	Marriott Autograph	3	458
5	ibis styles	8	749	5	Novotel	13	2,200	5	Meliá Hotels	4	449
6	Holiday Inn Express	6	664	6	Sheraton	5	2,133	6	Rocco Forte	3	427
7	Tulip Inn	4	445	7	Hilton	5	1,686	7	Dorchester Collection	2	422
8	Mercure	2	210	8	Best Western Plus	15	1,551	8	Belmond	6	412
9	Moxy	1	162	9	Crowne Plaza	7	1,476	9	Hilton	1	379
10	Ferienverein	1	159	10	Hilton Garden Inn	8	1,300	10	Waldorf Astoria	1	370

ITALY: Ranking per scale and size

CHAINS HOTELS AND ROOMS	HOTELS	%	ROOMS	AVG SIZE	CHAIN HOTELS		CHAIN ROOMS	
					INTL.	DOM.	INTL.	DOM.
Budget & Economy	15	1.1%	616	41	2	13	107	509
Midscale	322	23.0%	25,850	80	94	228	9,514	16,336
Upscale & Upper-Upscale	917	65.5%	113,118	123	304	613	39,369	73,749
Luxury	147	10.5%	15,921	108	55	92	6,723	9,198
TOTAL	1,401	100.0%	155,505	111	455	946	55,713	99,792

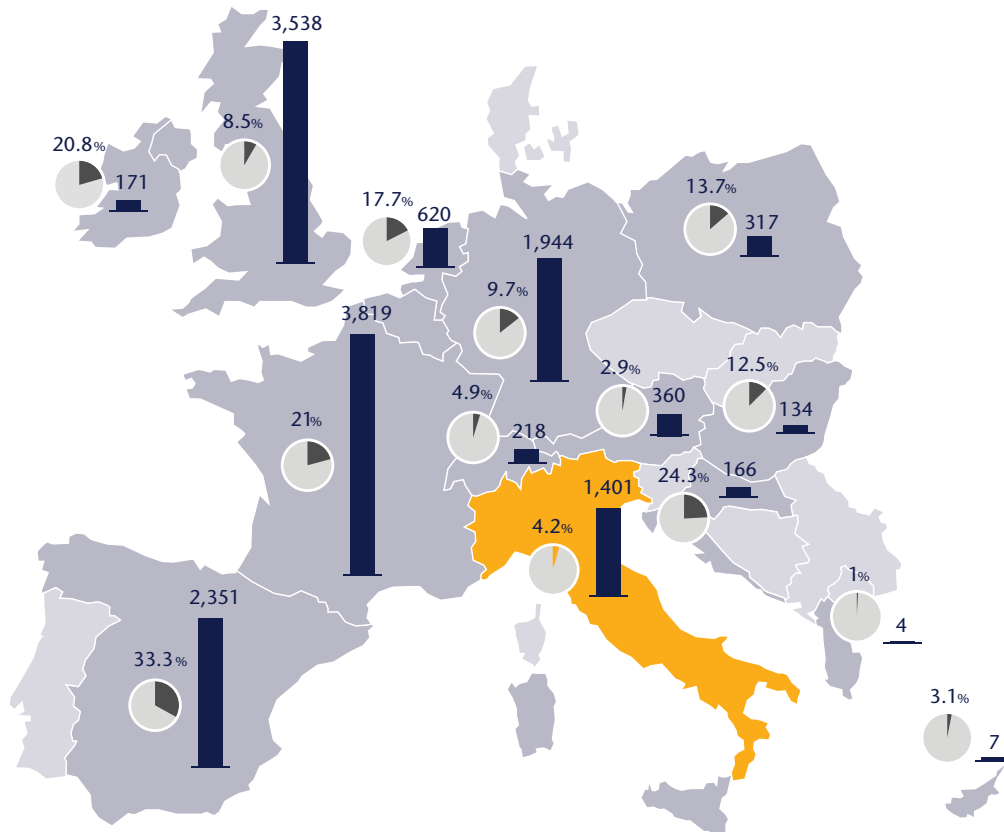
DOMESTIC HOTELS AND ROOMS	HOTELS	%	ROOMS	AVG SIZE
Midscale	15,355	50.5%	477,554	31
Upscale & Upper-Upscale	5,609	18.5%	362,553	65
Luxury	442	1.5%	32,729	74
TOTAL	30,379	100.0%	1,011,238	33

ITALY: Ranking per location

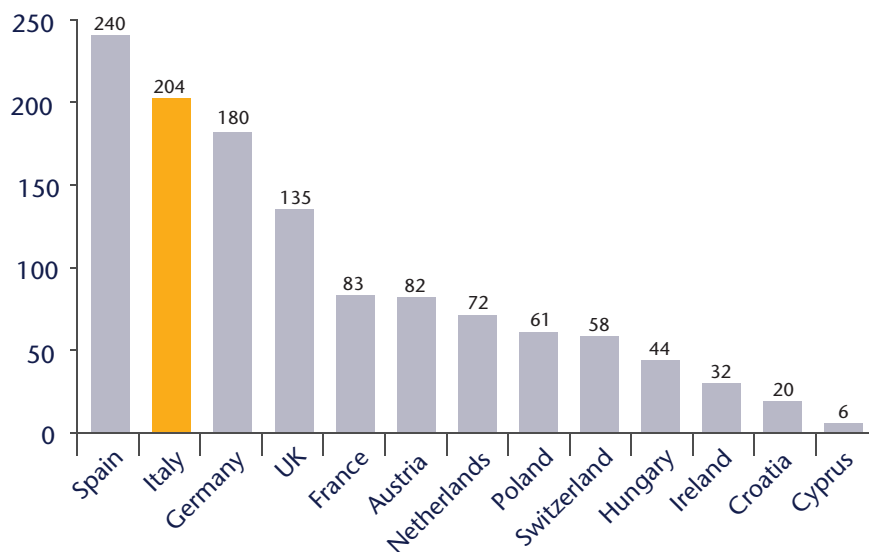
Rank	Destination	By Rooms 2016	Rank	Destination	By Hotels 2016
1	Rome	18,965	1	Rome	160
2	Milan	14,794	2	Milan	111
3	Venice	4,898	3	Florence	58
4	Florence	4,560	4	Venice	54
5	Bologna	3,082	5	Rimini	35
6	Turin	2,585	6	Turin	24
7	Naples	2,337	7	Bologna	23
8	Budoni	2,170	8	Genoa	19
9	Genoa	1,979	9	Naples	15
10	Taormina	1,688	10	Jesolo	15

DESTINATION	DOMESTIC		INTERNATIONAL	
	HOTELS	ROOMS	HOTELS	ROOMS
Arts & Business	171	22,104	225	20,720
Business Focus	175	20,915	136	14,952
Golf	2	473	13	2,161
Other Leisure	58	5,859	146	13,437
Ski	15	1,092	80	6,698
Sun & Beach	30	4,974	326	39,516
Thermal	4	296	20	2,308

ITALY: European Chain Penetration



EUROPE: Total number of brands





NETHERLANDS

“Domestic chains have grown stronger and expanded in The Netherlands, whereas the international chains have remained more or less at the same level. In only a few year, Fletcher Hotels increased to over 80 properties and Van der Valk expanded to well over 60. Nevertheless, the larger international brands such as Hilton, Marriott and Hyatt have achieved serious expansion with several of their new brands throughout the country.”

Ewout G. Hoogendoorn, Managing Director, Horwath HTL Netherlands

KEY STATISTICS	2016
Chain Hotels	620
Chain Rooms	65,446
Average Size per Chain Hotel in Rooms	106
Country Hotels Stock (overall supply)	3,510
Country Rooms Stock (overall supply)	113,813
Average Size per Hotel in Rooms	32.4
Chain penetration % by Hotels	17.7%
Chain penetration % by Keys	57.5%
Total number of Brands	72
Domestic Brands	23
International Brands	49
International Chain Hotels (including double counting)	253
Domestic Chain Hotels (including double counting)	367
International Chain Rooms (including double counting)	35,172
Domestic Chain Rooms (including double counting)	30,274

NETHERLANDS: Ranking by size

CHAINS		RANK BY ROOMS	
Rank	Top 10 Chain Groups	Hotels	Rooms
1	Van der Valk (NL)	61	8,357
2	NH Hotels	36	6,826
3	AccorHotels	43	6,717
4	Louvre	61	4,955
5	Hampshire Hospitality (NL)	71	4,867
6	Best Western Hotels	43	3,156
7	InterContinental Hotel Group	18	3,018
8	Bastion Hotel Group (NL)	31	2,992
9	Fletcher Hotels (NL)	61	2,818
10	Hilton	9	2,274

BRANDS		RANK BY ROOMS	
Rank	Top 10 Chain Brands	Hotels	Rooms
1	Van der Valk (NL)	61	8,357
2	NH Hotels	35	6,548
3	Hampshire Hospitality (NL)	47	3,241
4	Fletcher Hotels(NL)	61	2,818
5	Bastion Hotel Group (NL)	30	2,799
6	Golden Tulip	30	2,744
7	Best Western Hotels	39	2,604
8	ibis	12	2,207
9	Westcord (NL)	16	1,789
10	Novotel	9	1,782

CHAINS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Groups	Hotels	Rooms
1	Van der Valk	61	8,357
2	Hampshire Hospitality	71	4,867
3	Bastion Hotel Groep	31	2,992
4	Fletcher Hotels	61	2,818
5	European Hotel Management	12	1,806
6	WestCord Hotels	16	1,789
7	Bilderberg	18	1,726
8	The Vincent Hotel Group	9	1,463
9	Amrâth Hotelgroep	16	1,339
10	Inntel Hotels	6	1,136

BRANDS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Brands	Hotels	Rooms
1	Van der Valk	58	8,019
2	Hampshire	44	2,970
3	Fletcher	60	2,774
4	Bastion	29	2,614
5	Bilderberg	18	1,726
6	WestCord	15	1,535
7	Amrâth	13	1,161
8	Apollo	8	738
9	Inntel	4	729
10	Hampshire Eden	5	701

CHAINS		RANK BY ROOMS	
Rank	Top 10 International Chain Groups	Hotels	Rooms
1	AccorHotels	41	6,547
2	NH Hotels	35	6,548
3	Louvre Hotels Group	60	4,837
4	Best Western Hotels	44	3,424
5	InterContinental Hotels Group	18	3,018
6	Hilton	8	2,020
7	Carlson Rezidor Hotel Group	8	1,682
8	Interstate Hotels & Resorts	8	1,209
9	Marriott International	3	943
10	PPHE Hotels Group	4	906

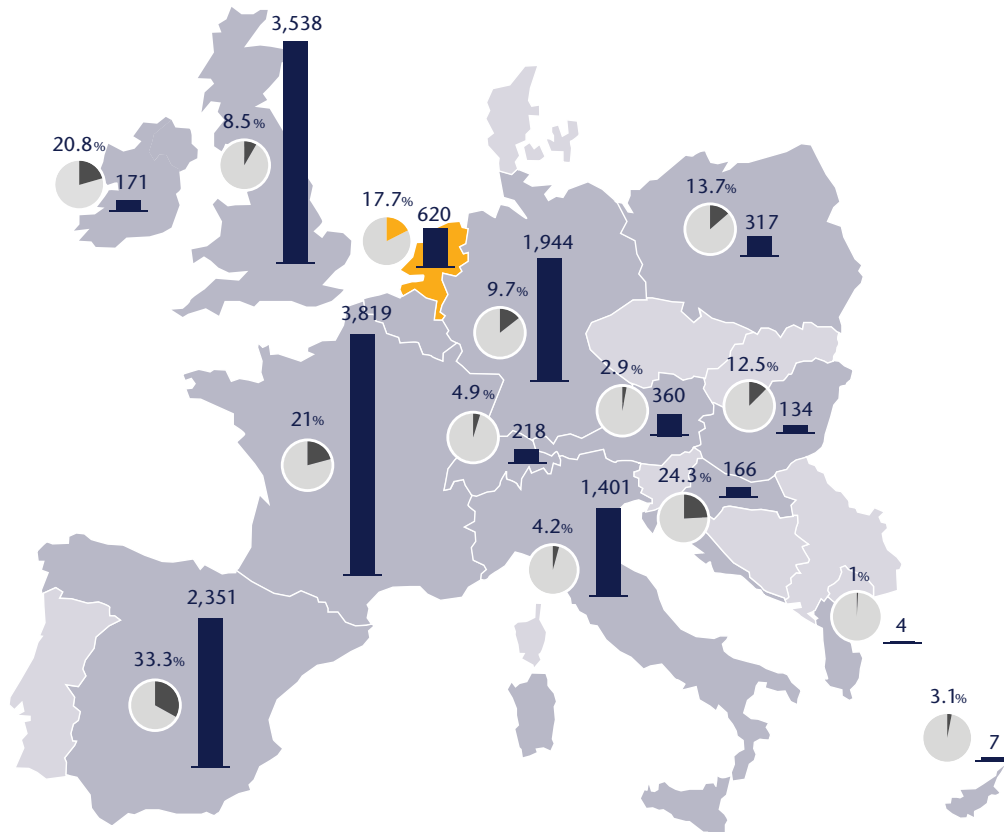
BRANDS		RANK BY ROOMS	
Rank	Top 10 International Chain Brands	Hotels	Rooms
1	NH Hotels	35	6,548
2	Best Western	41	2,958
3	Golden Tulip	29	2,617
4	ibis	12	2,207
5	Novotel	9	1,782
6	Mercure	14	1,701
7	Interstate Hotels & Resorts	8	1,209
8	Tulip Inn	15	1,113
9	Hilton	5	1,113
10	Holiday Inn Express	8	1,090

NETHERLANDS: Ranking per scale & size

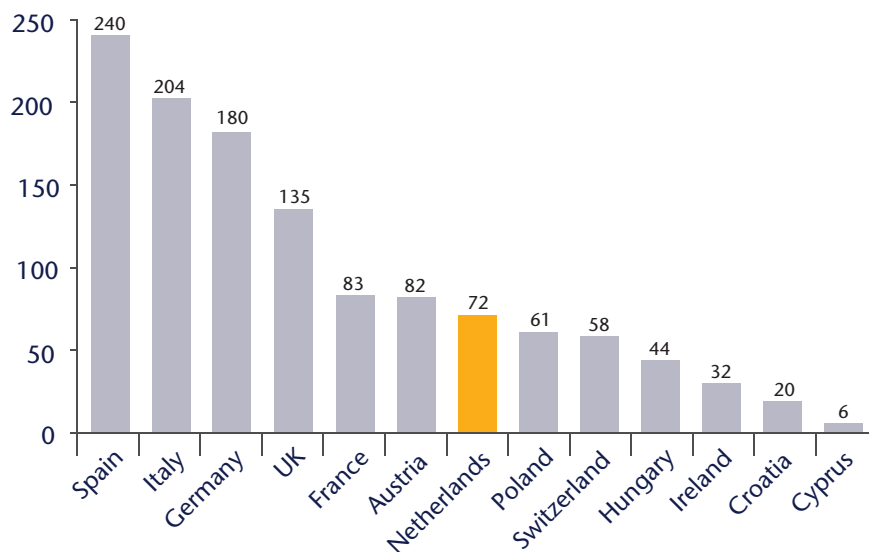
CHAINS HOTELS				
AND ROOMS	HOTELS	%	ROOMS	AVG SIZE
Budget & Economy	6	0.3%	504	154
Midscale	197	8.8%	13,659	69
Upscale & Upper-Upscale	357	15.9%	42,565	119
Luxury	17	0.8%	3,793	223
TOTAL	2,246	100.0%	60,521	105

DOMESTIC HOTELS		
AND ROOMS	HOTELS	%
Budget & Economy	615	27.4%
Midscale	1,041	46.3%
(Upper-)Upscale & Luxury	590	26.3%
TOTAL	2,246	100.0%

NETHERLANDS: European Chain Penetration



EUROPE: Total number of brands







POLAND

“The Polish hotel market has been one of the stars of Europe recently and there is no doubt that it has good prospects for the future. The proliferation of hotel chains in the hospitality market has been increasing and there are hopes for new hotel brands to enter the country soon.”

Dariusz Futoma, Managing Director, Horwath HTL Poland

KEY STATISTICS	2016
Chain Hotels	317
Chain Rooms	43,907
Average Size per Chain Hotel in Rooms	139
Country Hotels Stock (overall supply)	2,316
Country Rooms Stock (overall supply)	117,448
Average Size per Hotel in Rooms	50.7
Chain penetration % by Hotels	13.7%
Chain penetration % by Keys	37.4%
Total Number of Brands	61
Domestic Brands	26
International Brands	35
International Chain Hotels (including double counting)	173
Domestic Chain Hotels (including double counting)	144
International Chain Rooms (including double counting)	27,726
Domestic Chain Rooms (including double counting)	16,159

Data regarding chain hotels is from the Hotel GuideBook report published by Horwath HTL Poland in October 2016.

POLAND: Overall ranking by size

CHAINS		RANK BY ROOMS	
Rank	Top 10 Chain Groups	Hotels	Rooms
1	AccorHotels	71	12,085
2	Hilton	14	2,652
3	Marriott International	9	2,477
4	Best Western	25	2,337
5	Golebiewski	4	2,331
6	Louvre Hotels Group	17	2,042
7	Rezidor	8	1,823
8	Qubus	14	1,465
9	InterContinental Hotels Group	8	1,398
10	Gromada	10	1,287

BRANDS		RANK BY ROOMS	
Rank	Top 10 Chain Brands	Hotels	Rooms
1	ibis	31	4,195
2	Mercure	23	3,709
3	Novotel	13	3,403
4	Best Western	25	2,337
5	Golebiewski	4	2,331
6	Radisson	6	1,607
7	Qubus	14	1,465
8	Gromada	10	1,287
9	Wam	15	1,113
10	Satoria Group	7	1,110

CHAINS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Groups	Hotels	Rooms
1	Golebiewski	4	2,331
2	Qubus	14	1,465
3	Gromada	10	1,287
4	WAM	15	1,113
5	Satoria Group	7	1110
6	Diament	14	960
7	Trip	4	794
8	Arche	6	738
9	Zdrojowa Invest	7	667
10	Focus	7	657

BRANDS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Brands	Hotels	Rooms
1	Golebiewski	4	2,331
2	Qubus	14	1,465
3	Gromada	10	1,287
4	WAM	15	1,113
5	Satoria Group	7	1,110
6	Diament	14	960
7	Trip	4	794
8	Arche	6	738
9	Zdrojowa Invest	7	667
10	Focus	7	657

CHAINS		RANK BY ROOMS	
Rank	Top 10 International Chain Groups	Hotels	Rooms
1	AccorHotels	71	12,085
2	Hilton	14	2,652
3	Marriott International	9	2,477
4	Best Western	25	2,337
5	Louvre Hotels Group	17	2,042
6	Rezidor	8	1,823
7	InterContinental Hotels Group	8	1,398
8	Vienna House	5	1,052
9	B&B	5	641
10	Puro Hotels	4	469

BRANDS		RANK BY ROOMS	
Rank	Top 10 International Chain Brands	Hotels	Rooms
1	ibis	31	4,195
2	Mercure	23	3,709
3	Novotel	13	3,403
4	Best Western	25	2,337
5	Radisson	6	1,607
6	Campanille	10	1,106
7	Hilton Doubletree	4	981
8	Sheraton	4	951
9	Holiday Inn	6	928
10	Hilton Hampton	5	797

POLAND: Overall ranking by scale *(domestic & international)*

BRANDS RANK BY ROOMS				BRANDS RANK BY ROOMS				BRANDS RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	ibis	31	4195	1	Novotel	9	2775	1	Sheraton	4	951
2	Mercure	13	1736	2	Gołębiewski	4	2331	2	Radisson Blu	4	803
3	Gomada	10	1287	3	Mercure	11	2076	3	Sofitel	3	675
4	Best Western	16	1251	4	Best Western	9	1086	4	Marriott	1	523
5	Wam	15	1113	5	Qubus	8	1058	5	Hilton	2	464
6	Campanille	10	1106	6	Radisson Blu	2	804	6	Intercontinental	1	414
7	Hampton By Hilton	5	797	7	Hilton Double Tree	3	792	7	Westin	1	361
8	B&B	5	641	8	Trip	2	697	8	Zdrojowa Invest	3	337
9	Novotel	4	628	9	Golden Tulip	5	674	9	Likus	4	311
10	Elbest	5	504	10	Diament	7	663	10	Holiday Inn	1	237

DOMESTIC RANK BY ROOMS				DOMESTIC RANK BY ROOMS				DOMESTIC RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Gromada	10	1,287	1	Gołębiewski	4	2,331	1	Zdrojowa Invest	3	337
2	Wam	15	1,113	2	Qubus	8	1,058	2	Likus	4	311
3	Elbest	5	504	3	Trip	2	697	3	Trip	1	53
4	Focus	5	501	4	Diament	7	663	4	Dominirski	2	44
5	Satoria Group	3	500	5	Anders Group	3	409	5	-	-	-
6	Arche	4	451	6	Interferie	2	390	6	-	-	-
7	Hotel 500	3	413	7	Q Hotels	3	331	7	-	-	-
8	Qubus	6	407	8	Boutique Hotels	3	326	8	-	-	-
9	Hotel Centrum	3	373	9	Zdrojowa Invest	4	317	9	-	-	-
10	Syrena	2	325	10	Malinowe Hotele	3	278	10	-	-	-

INTERNATIONAL RANK BY ROOMS				INTERNATIONAL RANK BY ROOMS				INTERNATIONAL RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	ibis	31	4,195	1	Novotel	9	2,775	1	Sheraton	4	951
2	Mercure	13	1,736	2	Mercure	11	2,076	2	Radisson Blu	4	803
3	Best Western	16	1,251	3	Best Western	9	1,086	3	Sofitel	3	675
4	Campanille	10	1,106	4	Radisson Blu	2	804	4	Marriott	1	523
5	Hilton Hampton	5	797	5	Hilton Double Tree	3	792	5	Hilton	2	464
6	B&B	5	641	6	Golden Tulip	5	674	6	InterContinental	1	414
7	Novotel	4	628	7	Holiday Inn	4	567	7	Westin	1	361
8	Premiere Class	2	262	8	Andels	2	437	8	Holiday Inn	1	237
9	Puro	2	238	9	Marriott Courtyard	2	436	9	Bristol	1	206
10	Vienna House Easy	1	220	10	Hilton Garden Inn	3	410	10	Hilton Double Tree	1	189

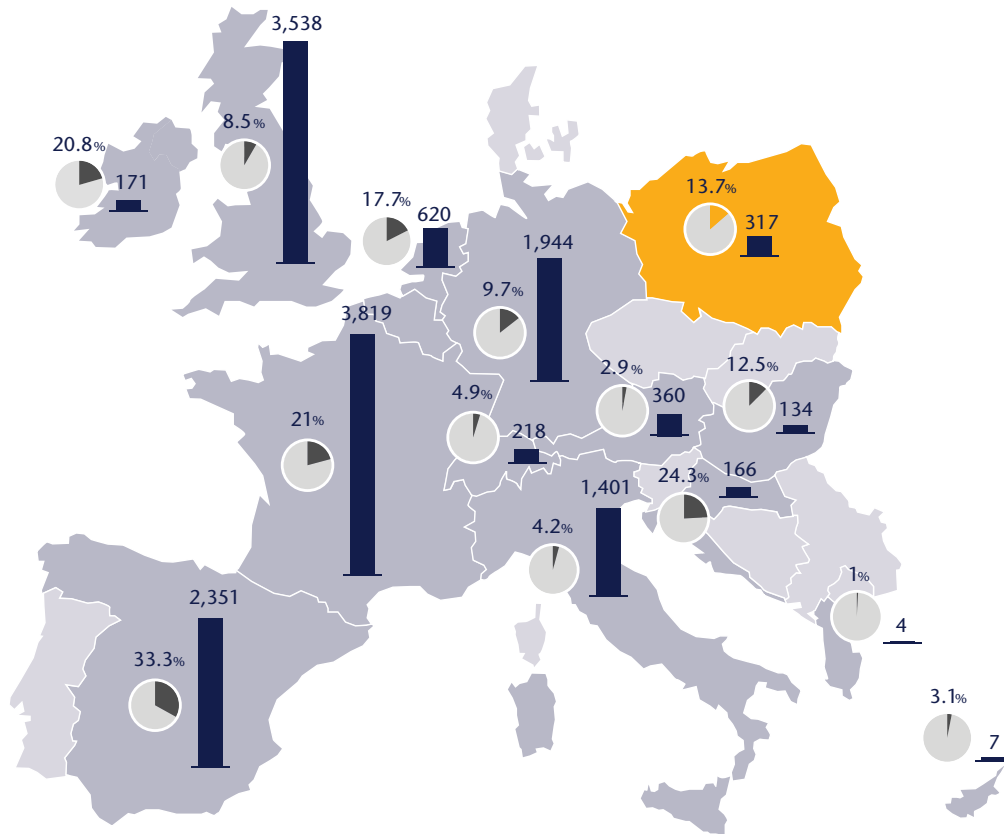
POLAND: Ranking per scale & size

CHAINS HOTELS				
AND ROOMS	HOTELS	%	ROOMS	AVG SIZE
Budget & Economy	861	33.0%	27,763	32
Midscale	1,335	51.2%	57,203	43
Upscale & Upper-Upscale	344	13.2%	34,421	100
Luxury	67	2.6%	8,772	131
TOTAL	2,607	100.0%	128,159	49

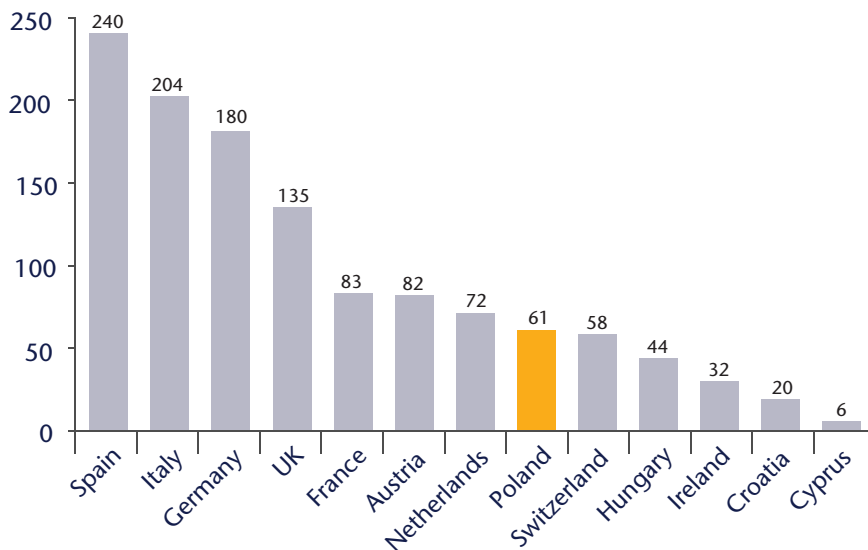
POLAND: Ranking by location

Rank	Destination	By Rooms 2016	Rank	Destination	By Hotels 2016
1	Warszawa	10,763	1	Warszawa	47
2	Kraków	5,202	2	Kraków	41
3	Wrocław	3,293	3	Wrocław	24
4	Gdańsk	2,211	4	Gdańsk	17
5	Poznań	2,163	5	Łódź	15
6	Łódź	2,057	6	Poznań	14
7	Katowice	1,496	7	Katowice	11
8	Karpacz	1,006	8	Szczecin	8
9	Szczecin	983	9	Karpacz	2
10	Mikołajki	689	10	Mikołajki	1

POLAND: European Chain Penetration



EUROPE: Total number of brands





SPAIN

“Spain continues to expand its hotel supply, fuelled by the momentum created by Spain’s ever-growing tourism sector, which in 2016 again beat all previous records. Hoteliers with existing properties continue to develop, and as many international groups do not have a significant presence, there is still room for growth in the Spanish market.”

Development of new hotels is still limited by the availability of both equity and bank finance, although there are signs that this is changing. However, there has been little change in the country’s overall hotel operating business model which remains heavily biased towards independent ownership and management.”

Philip Bacon, Director, Horwath HTL Spain

KEY STATISTICS	2016
Chain Hotels	2,351
Chain Rooms	379,935
Average Size per Chain Hotel in Rooms	162
Country Hotels Stock (overall supply)	7,053
Country Rooms Stock (overall supply)	667,259
Average Size per Hotel in Rooms	95
Chain penetration % by Hotels	33.3%
Chain penetration % by Keys	56.9%
Total Number of Brands	240
Domestic Brands	169
International Brands	71
Second Tier Operated Hotels	66
International Chain Hotels (including double counting)	457
Domestic Chain Hotels (including double counting)	1,894
International Chain Rooms (including double counting)	73,658
Domestic Chain Rooms (including double counting)	306,277

SPAIN: Ranking by size

CHAINS		RANK BY ROOMS	
Rank	Top 10 Chain Groups	Hotels	Rooms
1	Meliá Hotels International	78	23,510
2	NH Hotel Group	134	16,833
3	Barceló Hotels & Resorts	54	13,856
4	Marriott International	88	13,285
5	AccorHotels	92	11,162
6	Eurostars Hotel Company	99	10,731
7	Iberostar Hotels & Resorts	35	10,407
8	H10 Hotels	46	10,113
9	RIU Hotels & Resorts	29	9,751
10	Best Hotels	28	8,657

BRANDS		RANK BY ROOMS	
Rank	Top 10 Chain Brands	Hotels	Rooms
1	Meliá Hotels	39	11,520
2	H10 Hotels	46	10,113
3	NH Hotels	82	9,388
4	Sol by Meliá	27	9,186
5	Barceló	29	8,082
6	Best	23	7,847
7	Eurostars	60	6,825
8	Marriott Autograph	60	6,668
9	Globales	27	6,634
10	Tryp by Wyndham	46	6,563

CHAINS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Groups	Hotels	Rooms
1	Meliá Hotels International	78	23,510
2	NH Hotel Group	134	16,833
3	Barceló Hotels & Resorts	54	13,856
4	Eurostars Hotel Company/Hotusa	99	10,731
5	Iberostar Hotels & Resorts	35	10,407
6	H10 Hotels	46	10,113
7	RIU Hotels & Resorts	29	9,751
8	Best Hotels	28	8,657
9	Playa Senator	33	6,950
10	Hoteles Globales	27	6,634

BRANDS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Brands	Hotels	Rooms
1	Meliá Hotels	39	11,520
2	H10 Hotels	46	10,113
3	NH Hotels	82	9,388
4	Sol by Meliá	27	9,186
5	Barceló	29	8,082
6	Best	23	7,847
7	Eurostars	60	6,825
8	Globales	27	6,634
9	Catalonia	52	6,206
10	Parador	95	6,065

CHAINS		RANK BY ROOMS	
Rank	Top 10 International Chain Groups	Hotels	Rooms
1	Marriott International	88	13,285
2	AccorHotels	92	11,162
3	Wyndham Hotel Group	47	6,826
4	Princess Hotels & Resorts	16	5,897
5	Allsun Hotels	30	5,890
6	InterContinental Hotels Group	30	3,887
7	Thomas Cook	18	3,554
8	TUI Hotels & Resorts	7	2,693
9	Labranda Hotels & Resorts	17	2,623
10	Hilton	13	2,163

BRANDS		RANK BY ROOMS	
Rank	Top 10 International Chain Brands	Hotels	Rooms
1	Marriott Autograph	60	6,668
2	Tryp by Wyndham	46	6,563
3	Princess	16	5,897
4	Allsun	30	5,890
5	ibis	41	4,385
6	Labranda	17	2,623
7	Novotel	11	2,599
8	ibis budget	21	1,957
9	Holiday Inn Express	18	1,942
10	B&B	19	1,909

SPAIN: Ranking by scale *(domestic & international)*

BRANDS RANK BY ROOMS				BRANDS RANK BY ROOMS				BRANDS RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Sol by Meliá	27	9,186	1	Meliá Hotels	39	11,520	1	NH Collection	22	3,367
2	Best	23	7,847	2	H10 Hotels	46	10,113	2	Gran Meliá	7	1,676
3	Globales	27	6,634	3	NH Hotels	82	9,388	3	Hilton	4	1,093
4	Tryp by Wyndham	46	6,563	4	Barceló	29	8,082	4	Sheraton	4	956
5	Catalonia	52	6,206	5	Eurostars	60	6,825	5	The Ritz-Carlton	2	953
6	ibis	41	4,385	6	Marriott Autograph	60	6,668	6	Hard Rock Hotels	2	944
7	H Top	18	4,176	7	Parador	95	6,065	7	Grand Palladium	2	841
8	OH! Tels	12	2,735	8	Princess	16	5,897	8	RIU Palace	2	783
9	Novotel	11	2,599	9	Allsun	30	5,890	9	Westin	3	775
10	Exe	33	2,485	10	Hipotels	27	5,848	10	Me by Meliá	3	723

DOMESTIC RANK BY ROOMS				DOMESTIC RANK BY ROOMS				DOMESTIC RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Sol by Meliá	27	9,186	1	Meliá Hotels	39	11,520	1	NH Collection	22	3,367
2	Best	23	7,847	2	H10 Hotels	46	10,113	2	Gran Meliá	7	1,676
3	Globales	27	6,634	3	NH Hotels	82	9,388	3	Grand Palladium	2	841
4	Catalonia	52	6,206	4	Barceló	29	8,082	4	RIU Palace	2	783
5	H Top	18	4,176	5	Eurostars	60	6,825	5	Me by Meliá	3	723
6	OH! Tels	12	2,735	6	Parador	95	6,065	6	Vincci Selección	6	637
7	Exe	33	2,485	7	Hipotels	27	5,848	7	Iberostar Grand Collection	4	479
8	Evenia	14	2,468	8	Grupotel	33	5,821	8	Hospes	9	472
9	Blue Sea	15	2,358	9	Occidental	21	5,665	9	Royal Hideaway	3	387
10	Alegria	13	1,881	10	Servigroup	16	4,350	10	Be Live Collection	2	294

INTERNATIONAL RANK BY ROOMS				INTERNATIONAL RANK BY ROOMS				INTERNATIONAL RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	Tryp by Wyndham	46	6,563	1	Marriott Autograph	60	6,668	1	Hilton	4	1,093
2	ibis	41	4,385	2	Princess	16	5,897	2	Sheraton	4	956
3	Novotel	11	2,599	3	Allsun	30	5,890	3	The Ritz-Carlton	2	953
4	ibis budget	21	1,957	4	Labranda	17	2,623	4	Hard Rock Hotels	2	944
5	Holiday Inn Express	18	1,942	5	Universal	12	1,861	5	Westin	3	775
6	B&B	19	1,909	6	Seaside	4	1,208	6	Luxury Collection	4	494
7	Smartline	5	1,089	7	Sentido	5	992	7	W Hotels	1	473
8	Holiday Inn	6	1,016	8	Mercure	9	825	8	Marriott Autograph	6	445
9	Campanile	7	852	9	Smartline	4	789	9	Fairmont	1	432
10	ibis styles	8	644	10	Hilton DoubleTree	6	742	10	Le Meridien	2	374

SPAIN: Ranking per scale & size

CHAINS HOTELS AND ROOMS	HOTELS		ROOMS	AVG SIZE	CHAIN HOTELS		CHAIN ROOMS	
	HOTELS	%			INTL.	DOM.	INTL.	DOM.
Budget & Economy	163	6.9%	13,095	80	59	104	5,791	7,304
Midscale	644	27.4%	88,983	138	111	533	14,683	74,300
Upscale & Upper-Upscale	1,349	57.4%	241,293	179	231	1,118	29,248	212,045
Luxury	195	8.3%	36,564	188	56	139	10,485	26,079
TOTAL	2,351	100.0%	379,935	162	457	1,894	60,207	319,728

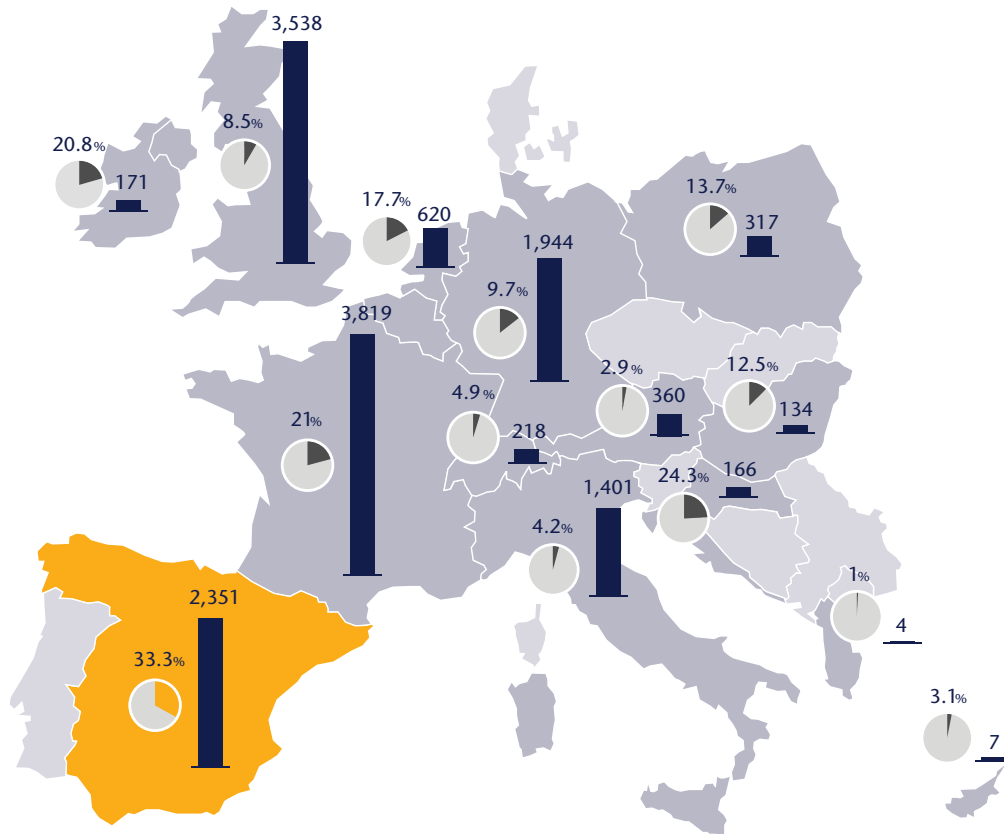
DOMESTIC HOTELS AND ROOMS	HOTELS		ROOMS	AVG SIZE	CHAIN HOTELS		CHAIN ROOMS	
	HOTELS	%			INTL.	DOM.	INTL.	DOM.
Budget & Economy	2,043	29.0%	74,703	37	68	1,975	6,124	68,579
Midscale	2,280	32.3%	196,550	86	147	2,133	17,779	178,771
Upscale & Upper-Upscale	2,403	34.1%	348,326	145	297	2,106	38,815	309,511
Luxury	327	4.6%	47,680	146	60	267	11,069	36,611
TOTAL	7,053		667,259	95	572	6,481	73,787	593,472

SPAIN: Ranking by location

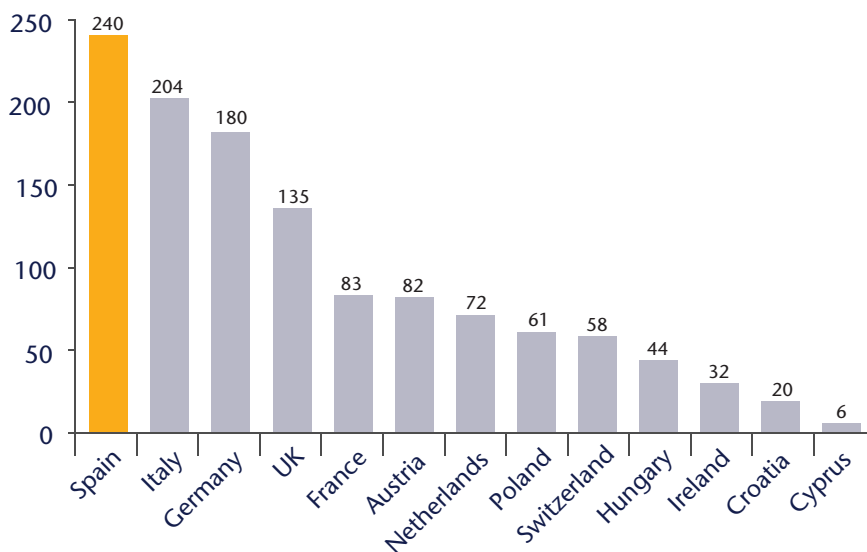
Rank	Destination	By Rooms 2016	Rank	Destination	By Hotels 2016
1	Barcelona	48,148	1	Barcelona	370
2	Madrid	37,255	2	Madrid	271
3	Palma-Calviá	30,631	3	Palma-Calviá	155
4	Costa del Sol	24,349	4	Costa del Sol	120
5	West of Tenerife	23,256	5	Costa Brava	86
6	South of Gran Canaria	17,316	6	West of Tenerife	77
7	Costa Blanca	13,963	7	Costa Blanca	61
8	Costa Daurada	13,783	8	Sevilla	53
9	Costa Brava	12,274	9	South of Gran Canaria	50
10	Sevilla	7,741	10	Costa Daurada	48

DESTINATION	DOMESTIC		INTERNATIONAL	
	HOTELS	ROOMS	HOTELS	ROOMS
Urban	494	61,287	132	20,880
Suburban	356	33,308	166	17,474
Rural	130	6,867	7	765
Beach	843	196,361	119	28,025
Golf	29	5,158	10	2,060
Ski & Mountain	27	2,397	2	211
Airport	5	586	16	2,105
Motel	10	313	0	0
Theme Park	0	0	5	2,138

SPAIN: European Chain Penetration



EUROPE: Total number of brands





SWITZERLAND

“Although domestic brands are very limited in numbers, they still hold an incredible share of the Swiss luxury market.

Hotels affiliated with domestic chains tend to be smaller than international chain hotels by number of rooms. Nevertheless, their average size still exceeds that of the national average by more than 300%.”

Heinz Wehrle, Managing Director, Horwath HTL Switzerland

KEY STATISTICS	2016
Chain Hotels	218
Chain Rooms	25,448
Average Size of Hotel (Rooms)	117
Swiss Hotel Stock	4,456
Swiss Room Stock	127,939
Average Size of Hotel (Rooms)	28.7
Chain penetration by Hotels	4.9%
Chain penetration by Rooms	19.9%
Total Number of Brands	58
Domestic Brands	8
International Brands	50
Top 10 Chain Total Hotels	140
Top 10 Chain Total Rooms	17,537
Top 10 Chain Hotels %	3.1%
Top 10 Chain Rooms %	13.7%
International Chain Hotels (including double counting)	173
Domestic Chain Hotels (including double counting)	144
International Chain Rooms (including double counting)	27,726
Domestic Chain Rooms (including double counting)	16,159

Data does not include Best Western.

SWITZERLAND: Ranking by size

CHAINS		RANK BY ROOMS	
Rank	Top 10 Chain Groups	Hotels	Rooms
1	AccorHotels	57	6,914
2	Interconti	11	2,149
3	Marriott International	12	1,852
4	Mövenpick Hotels	5	1,306
5	Wyndham	10	1,086
6	Sunstar Hotels	11	1,025
7	MRH	8	886
8	Sorell Hotels	16	861
9	Rezidor	4	848
10	Manotel	6	610

BRANDS		RANK BY ROOMS	
Rank	Top 10 Chain Brands	Hotels	Rooms
1	ibis	23	2,314
2	ibis budget	11	1,495
3	Mövenpick Hotels	5	1,306
4	Novotel (& Suites)	8	1,185
5	Sunstar Hotels	11	1,025
6	Ramada	8	951
7	Sorell Hotels	16	861
8	Radisson Blu	4	848
9	Crowne Plaza	3	791
10	Kempinski	2	596

CHAINS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Groups	Hotels	Rooms
1	Mövenpick Hotels	5	1,306
2	Sunstar Hotels	11	1,025
3	MRH	8	886
4	Sorell Hotels	16	861
5	Manotel	6	610
6	Kempinski	2	596
7	Ferienverein	4	507
8	Fassbind Hotels	5	469
9	Aargauhotels	11	418
10	Tschuggen Hotel Group	4	314

BRANDS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Brands	Hotels	Rooms
1	Mövenpick Hotels	5	1,306
2	Sunstar Hotels	11	1,025
3	Sorell Hotels	16	861
4	Kempinski	2	596
5	VJC	5	593
6	Giardino	4	260
7	-	-	-
8	-	-	-
9	-	-	-
10	-	-	-

CHAINS		RANK BY ROOMS	
Rank	Top 10 International Chain Groups	Hotels	Rooms
1	AccorHotels	57	6,914
2	Interconti	11	2,149
3	Marriott International	12	1,852
4	Wyndham	10	1,086
5	Carlson-Rezidor	4	848
6	Hilton	4	585
7	Club Med	2	575
8	NH Hoteles	4	522
9	Hotusa	6	368
10	Dorint	2	363

BRANDS		RANK BY ROOMS	
Rank	Top 10 International Chain Brands	Hotels	Rooms
1	ibis	23	2,314
2	ibis budget	11	1,495
3	Novotel (& Suites)	8	1,185
4	Ramada	8	951
5	Radisson Blu	4	848
6	Crowne Plaza	3	791
7	Swissotel	2	585
8	Club Med	2	575
9	Interconti	2	549
10	NH Hotels	4	522

SWITZERLAND: Ranking by scale *(domestic & international)*

BRANDS RANK BY ROOMS				BRANDS RANK BY ROOMS				BRANDS RANK BY ROOMS			
Rank	Economy & Midscale	Hotels	Rooms	Rank	Upscale & Upper Upscale	Hotels	Rooms	Rank	Luxury	Hotels	Rooms
1	ibis	23	2,314	1	Novotel	7	1,099	1	Kempinski	2	596
3	ibis budget	11	1,495	3	Sunstar Hotels	10	956	3	VJC	5	593
2	Sorell Hotels	14	745	2	Mövenpick Hotels	4	956	2	Interconti	2	549
5	Holiday Inn Express	3	419	5	Radisson Blu	4	848	5	Mövenpick Hotels	1	350
8	Club Med	1	358	8	Ramada	6	769	8	Giardino HG	4	260
4	ibis styles	4	273	4	Crowne Plaza	2	731	4	Fairmont	1	236
7	Tulip Inn	2	228	7	Swissotel	2	585	7	Mandarin Oriental	1	189
6	Ramada	2	182	6	Hilton	2	534	6	Seiler Hotels	1	150
9	Motel One	1	146	9	NH Hotels	4	522	9	Steigenberger	1	126
10	Comfort Hotels	2	135	10	Holiday Inn	3	390	10	W Hotels	1	123

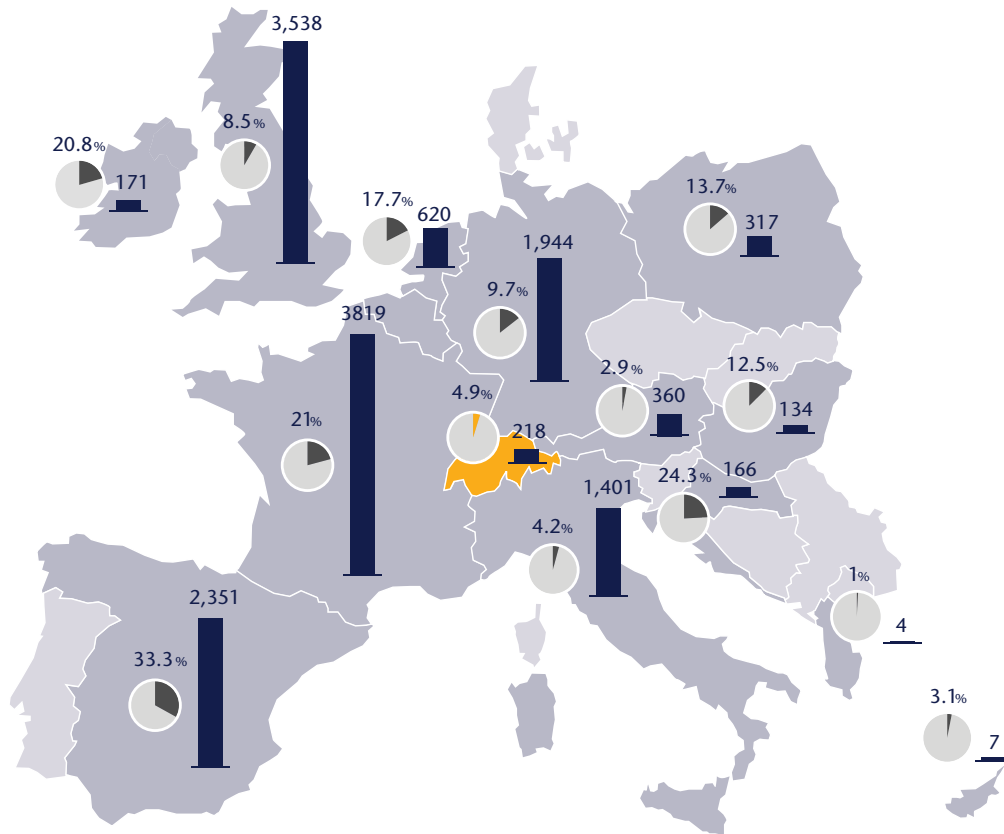
SWITZERLAND: Ranking per scale & size

CHAINS HOTELS AND ROOMS	HOTELS			ROOMS		CHAIN HOTELS		CHAIN ROOMS	
	HOTELS	%	ROOMS	AVG SIZE	INTL.	DOM.	INTL.	DOM.	
Budget & Economy	36	16.5%	4,053	113	34	2	4,034	19	
Midscale	61	28.0%	4,335	71	24	37	2,179	2,156	
Upscale & Upper-Upscale	88	40.4%	10,548	120	61	27	9,350	3,043	
Luxury	33	15.1%	4,667	141	16	17	2,331	2,336	
TOTAL	218	100.0%	23,603	108	135	83	17,894	7,554	

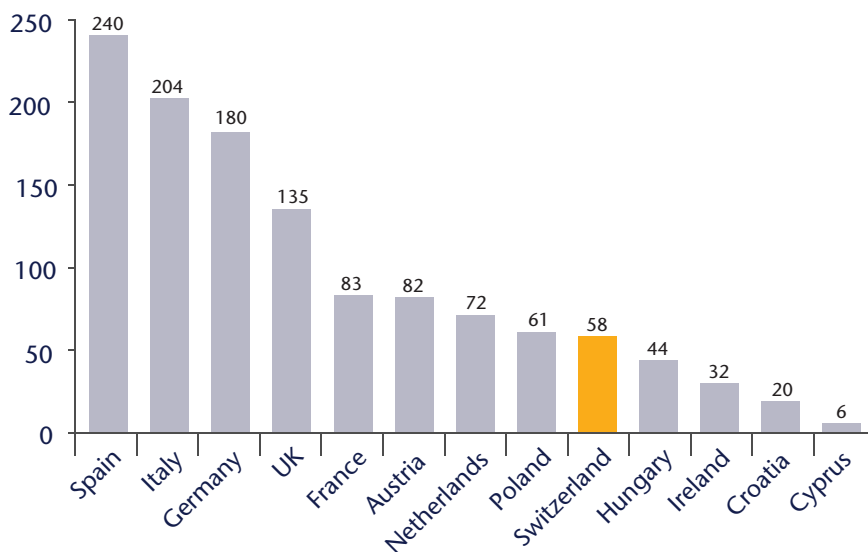
SWITZERLAND: Ranking by location

Rank	Destination	By Rooms 2016	Rank	Destination	By Hotels 2016
1	Zürich Region	7,562	1	Zürich Region	54
2	Geneva	4,970	2	Geneva	35
3	Grisons	2,769	3	Grisons	22
4	Basle Region	1,749	4	Aargau Region	16
5	Lake Geneva Area (Vaud)	1,679	5	Bernese Oberland	13
6	Lucerne / Vierwaldstättersee	1,247	6	Lucerne / Vierwaldstättersee	12
7	Bernese Oberland	1,166	7	Ticino	12
8	Berne Region	969	8	Basle Region	11
9	Aargau Region	840	9	Lake Geneva Area (Vaud)	11
10	Ticino	829	10	Berne Region	11

SWITZERLAND: European Chain Penetration



EUROPE: Total number of brands







UNITED KINGDOM

“Unsurprisingly, given that it has topped the pipeline charts for the last few years now, the United Kingdom has seen significant change in hotel supply over the last year. Not only have we seen new supply come into the market, we have also seen some of the older supply, of which there is a significant volume, drop out. Also significant this year, we continue to see a trend towards white label management companies with the established operators growing their portfolios and an increasing number of smaller players.”

With an estimated 216 new hotels (36,500 new rooms) in the pipeline for the next couple of years and Brexit just around the corner we expect further churn, affecting both the quantum of overall supply and the mix of operators. With smaller companies perhaps most at risk of the almost certain economic squeeze, expect further consolidation.”

Patrick Angwin, Director, Horwath HTL UK

KEY STATISTICS	2016
Chain Hotels	3,538
Chain Rooms	366,202
Average Size of Hotel (Rooms)	104
UK Hotel Stock	41,587
UK Room Stock	746,750
Average Size of Hotel (Rooms)	18.0
Chain penetration by Hotels	8.5%
Chain penetration by Rooms	49.0%
Total Number of Brands	135
Domestic Brands	47
International Brands	88
Top 10 Chain Total Hotels	2,419
Top 10 Chain Total Rooms	262,396
Top 10 Chain Hotels %	68.4%
Top 10 Chain Rooms %	71.7%

UNITED KINGDOM: Ranking by size

CHAINS		RANK BY ROOMS	
Rank	Top 10 Chain Groups	Hotels	Rooms
1	Whitbread	736	64,444
2	InterContinental Hotels Group	320	44,298
3	Travelodge	532	39,779
4	AccorHotels	227	31,386
5	Hilton	132	28,246
6	Marriott International	82	15,767
7	Best Western	250	14,341
8	Carlson Rezidor	24	9,804
9	Jurys Inn	36	8,102
10	Wyndham	79	6,180

BRANDS		RANK BY ROOMS	
Rank	Top 10 Chain Brands	Hotels	Rooms
1	Premier Inn	736	64,444
2	Travelodge	532	39,779
3	Holiday Inn	137	20,098
4	Holiday Inn Express	137	16,141
5	Hilton	57	14,717
6	ibis	98	13,693
7	Best Western	192	9,613
8	Marriott International	49	9,047
9	Mercure	80	8,657
10	Hilton Double Tree	43	8,530

CHAINS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Groups	Hotels	Rooms
1	Whitbread	736	64,444
2	Travelodge	532	39,779
3	Britannia Hotels	52	10,085
4	Jurys Inn	36	8,102
5	The Principal Company	29	4,167
6	Macdonald Hotels	43	3,714
7	QHotels	26	3,677
8	Imperial London Hotels	7	3,389
9	WA Shearings Hotels	42	3,216
10	Grange Hotels	17	2,063

BRANDS		RANK BY ROOMS	
Rank	Top 10 Domestic Chain Brands	Hotels	Rooms
1	Premier Inn	736	64,444
2	Travelodge	532	39,779
3	Britannia Hotels	52	10,085
4	Jurys Inn	36	8,102
5	Macdonald Hotels	43	3,714
6	QHotels	24	3,400
7	Imperial London Hotels	7	3,389
8	WA Shearings Hotels	42	3,216
9	Warner Holidays	13	2,704
10	Grange Hotels	17	2,063

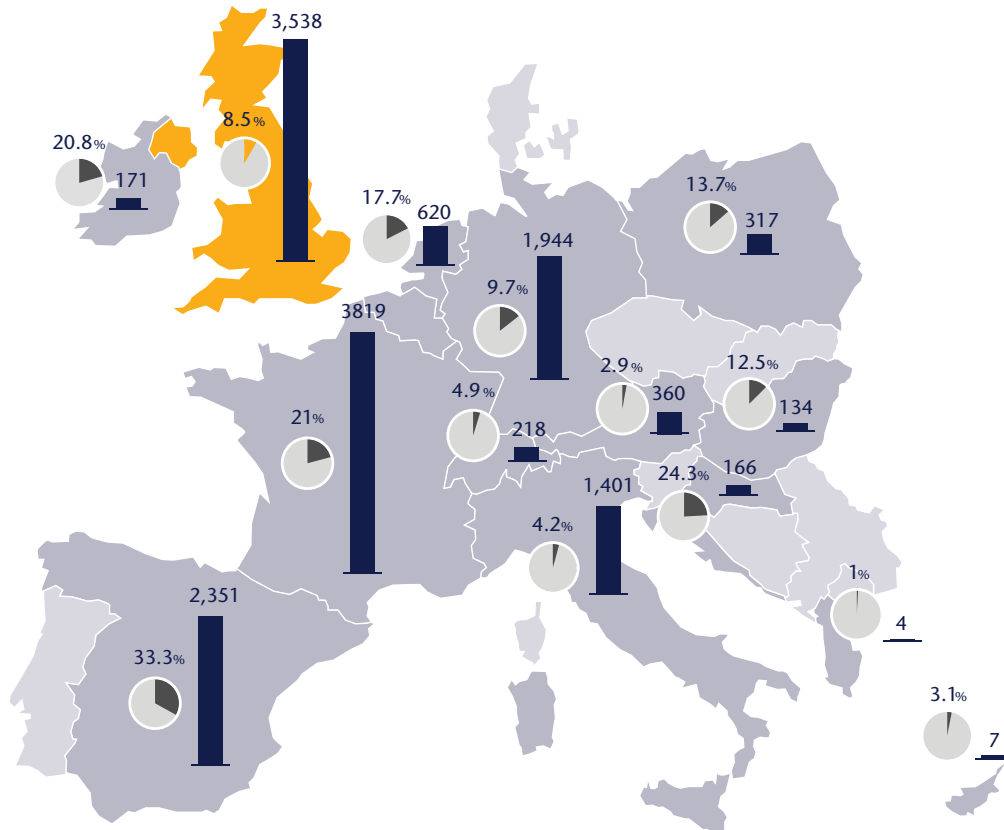
UNITED KINGDOM: Ranking by scale *(domestic & international)*

BRANDS		RANK BY ROOMS	
Rank	Economy & Midscale	Hotels	Rooms
1	Premier Inn	736	64,444
2	Travelodge	532	39,779
3	Holiday Inn	137	20,098
4	Holiday Inn Express	137	16,141
5	ibis	98	13,693
6	Britannia Hotels	52	10,085
7	Best Western	192	9,613
8	Mercure	80	8,657
9	Jurys Inn	36	8,102
10	Novotel	33	5,761

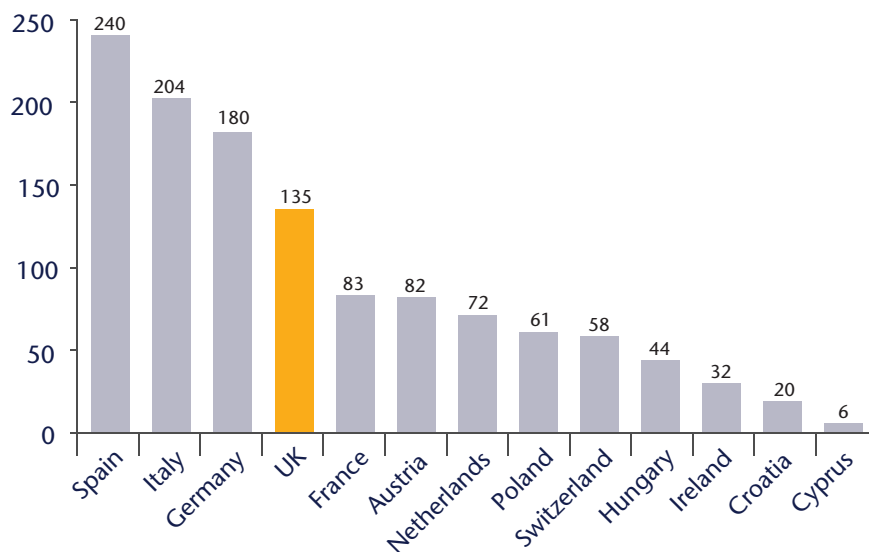
BRANDS		RANK BY ROOMS	
Rank	Upscale & Upper Upscale	Hotels	Rooms
1	Hilton	57	14,717
2	Marriott International	49	9,047
3	Hilton Double Tree	43	8,530
4	QHotels	24	3,400
5	Radisson Blu	11	3,293
6	Macdonald Hotels	36	3,149
7	Radisson Red	3	2,897
8	Partner	14	1,722
9	Sheraton	4	1,347
10	Hilton Garden Inn	7	1,331

BRANDS		RANK BY ROOMS	
Rank	Luxury	Hotels	Rooms
1	Sofitel	3	1,306
2	InterContinental	2	900
3	Marriott International	2	496
4	Fairmont	2	475
5	The Luxury Collection	2	437
6	Wyndham Grand	2	345
7	Conrad	1	256
8	Partner	2	242
9	Waldorf Astoria	1	241
10	W Hotels	1	192

UNITED KINGDOM: European Chain Penetration




EUROPE: Total number of brands



Further Information

For further information, please contact one of the team via:
www.horwathhtl.com

 Horwath HTL

 @HorwathHTLcorp

 Horwath HTL

All data as of 31 Dec 2016.
Report Produced: 31 March 2017.
Report Edited: 6 April 2017

This report is distributed free and its publishers received neither public nor private funding. We did our utmost to ensure accuracy of information, however we take no responsibility for any omissions and minor errors that may occur. Scanning and photocopying prohibited.

For extracts of this report, please contact:
jchappell@horwathhtl.com

Global Leader in Hotels, Tourism and Leisure Consulting

Horwath HTL is the world's largest hospitality consulting brand with 45 offices across the world providing expert local knowledge. Since 1915 we have been providing impartial, specialist advice to our clients and are recognized as the founding contributor of the Uniform System of Accounts which subsequently has become the industry standard for hospitality accounting.

We focus one hundred percent on hotels, tourism and leisure consulting and have successfully completed over 16,000 projects. When our clients work with us, it is because they need answers to very specific questions. We know that every project is different and reaches a point where expert advice will mean the difference between success and failure.

With over two hundred professionals and membership of a top ten accounting network, we are the number one choice for companies and financial institutions looking to invest and develop in the industry.

Horwath HTL is a member of Crowe Horwath International, a professional association of accounting and management consulting firms founded in New York in 1915. Crowe Horwath International is currently ranked among the top ten international professional service groups with offices in 586 cities in 108 countries.