

2nd EMEA Cornell Hospitality Summit '09

Saturday, April 25, 2009

“A view into the future of the hotel industry in Berlin”

Berlin 2009

Willy Weiland

Future of the Hotel Industry Berlin



□ Berlin's Inventory today

- **615 hotels/guest houses**
- **98,500 hotel beds**
 - ❖ **5-star hotels: 22 - 12.500**
 - ⇒ **4-star hotels: 100 - 33.500**
 - ⇒ **3-star hotels: 147 - 20.500**
 - ⇒ **2-star hotels: 70 - 10.000**
- **over 60 hostels and low budget private apartments with 15,000+ beds**



Future of the Hotel Industry Berlin



□ Berlin's Inventory in 5 years

- 650 hotels/guest houses
- 110,000 hotel beds
 - ❖ 5-star hotels: 25 - 12.500
 - ⇒ 4-star hotels: 110 - 33.500
 - ⇒ 3-star hotels: 165 - 20.500
 - ⇒ 2-star hotels: 95 - 10.000
- Without Hotel projecte around BBI



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❑ A City with structural Changes

- Futur Market will be dominated by Chaine and Hotel Cooperations
- Less owner driven properties
- A market of privat apartments low Budget offering - 15.000 to 20.000
- Old,small and medium size Hotels which disappear from the market
- Concentration on segments ie 2*- 4*



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❑ Berlin - with the most modern Hotel infrastructure

- Over the last 15 years 80% of the Hotel inventory are new or renovated
- Great mix for Leisure & MICE market
- Currently appx. 7.000 new Hotel rooms are expected within the 3 to 5 years



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□ DEHOGA Berlin Projection in 2005 for 2010 was

- 20 million Overnights and 90.000 Beds
- Now we need 22 million overnights to cover 98.500 Beds by 2010
- estimate overnights for 2009 / 2010 max. 18.5 million



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□ Faimas Benchmark for Berlin first 4 month 2009 vs 2008

- 5* Market occupancy below by 2%
average rate down by 10%
- 3*/ 4* Market occupancy almost in line
with LY
average rate down by 3.5 %



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Opportunities for Berlin

- Image of Berlin / creative / Culture
- With BTM functional Touristic set up
- Service orientated destination
- New Main Airport
- Open to leisure and MICE Market
- Berlin is value for money



Vielen Dank für Ihre Aufmerksamkeit.

