



## HOTEL INDUSTRY TRENDS REPORT

**Observatory carried out by CDS Groupe  
& MKG Consulting**

2023



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# HIT REPORT BUSINESS DESTINATIONS IN EUROPE

2023 – All Hotels

Cities	Occupancy Rate			ADR (Breakfast included)		
	2023	2022	chge (pt) 2022	2023	2022	chge (%) 2022
Amsterdam	75%	64%	11,3	236	214	10,2%
Athens	68%	61%	7,3	263	241	9,2%
Barcelona	77%	71%	6,6	227	203	12,0%
Berlin	73%	66%	7,7	154	145	6,5%
Brussels	70%	61%	8,8	185	162	14,2%
Budapest	67%	58%	9,1	148	128	15,2%
Cologne	70%	60%	10,7	151	131	15,0%
Düsseldorf	63%	56%	7,0	149	136	9,7%
Frankfurt	60%	53%	7,5	145	144	0,8%
Hanovre	60%	54%	6,2	140	130	7,3%
Istanbul	70%	74%	-4,7	205	134	53,6%
Lisboa	78%	72%	6,5	170	152	11,7%
London	81%	72%	8,7	270	250	7,6%
Madrid	70%	64%	6,3	180	162	10,7%
Munich	68%	59%	8,6	159	157	0,9%
Paris	79%	74%	4,8	271	246	10,4%
Prague	72%	57%	14,9	122	113	8,0%
Vienna	73%	61%	11,6	152	140	8,8%

ADR expressed in euros VAT incl  
Source: MKG\_destination

# HIT REPORT BUSINESS DESTINATIONS IN EUROPE

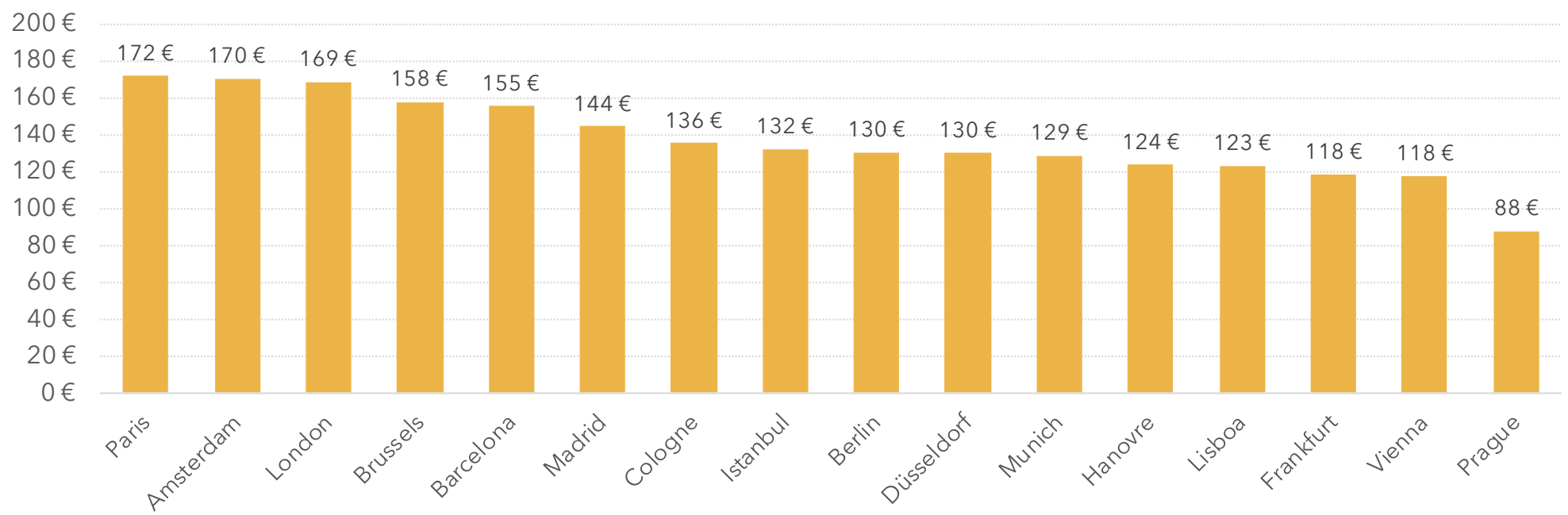
2023 – ADR (Breakfast included) BY CATEGORY

Cities	3*		4*		5*	
	2023	2022	2023	2022	2023	2022
Amsterdam	170	154	232	210	403	362
Athens	n/a	n/a	159	142	312	285
Barcelona	155	134	204	180	379	351
Berlin	130	121	156	149	315	315
Brussels	158	132	195	171	283	268
Budapest	n/a	n/a	136	116	n/a	n/a
Cologne	136	118	162	141	n/a	n/a
Düsseldorf	130	119	152	139	n/a	n/a
Frankfurt	118	115	141	141	218	216
Hanovre	124	119	151	140	n/a	n/a
Istanbul	132	83	165	104	314	208
Lisboa	123	109	153	139	n/a	n/a
London	169	150	268	253	481	473
Madrid	144	126	181	162	348	330
Munich	129	125	161	161	n/a	n/a
Paris	172	153	272	247	669	601
Prague	88	78	127	119	n/a	n/a
Vienna	118	107	152	141	308	284

ADR expressed in euros VAT incl  
Source: MKG\_destination

# HIT REPORT BUSINESS DESTINATIONS IN EUROPE

2023 – ADR (Breakfast included) – 3\* Hotels



# HIT REPORT BUSINESS DESTINATIONS IN EUROPE

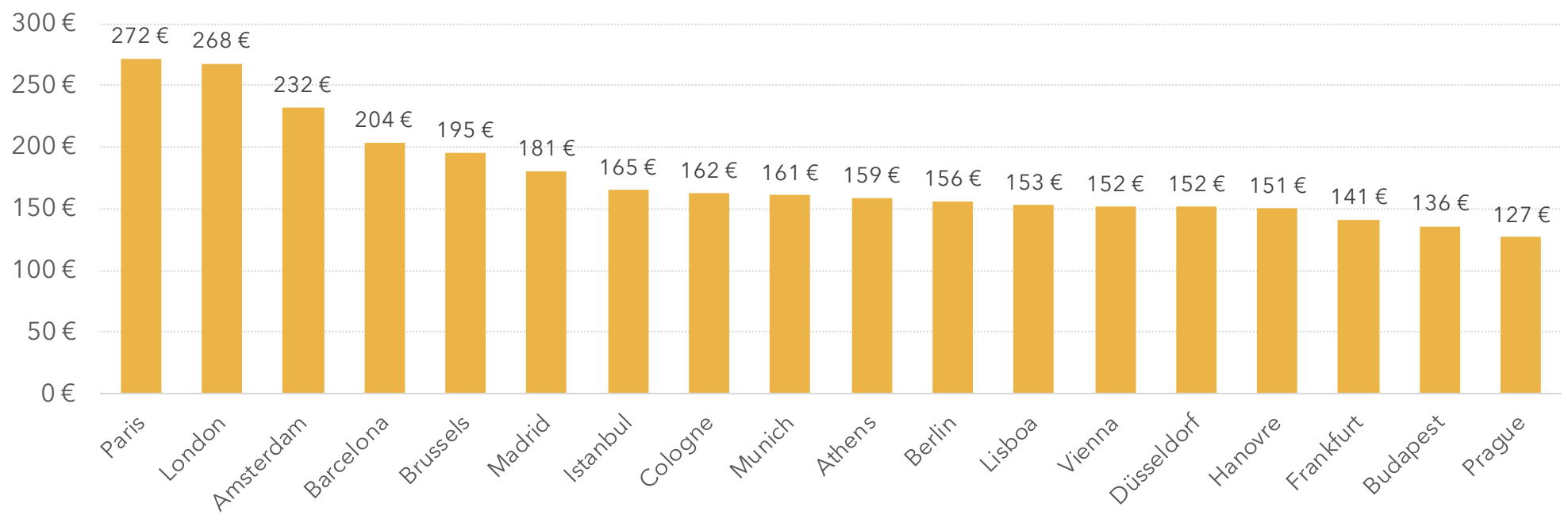
ADR (Breakfast included) – 3\* Hotels

Cities	Occupancy Rate			ADR (Breakfast included)		
	2023	2022	chge (pt) 2022	2023	2022	chge (%) 2022
Amsterdam	81%	68%	13,4	170	154	10,6%
Barcelona	83%	76%	6,5	155	134	15,9%
Berlin	77%	68%	9,1	130	121	8,2%
Brussels	77%	71%	6,6	158	132	19,5%
Cologne	72%	61%	11,1	136	118	14,4%
Düsseldorf	66%	56%	9,4	130	119	9,2%
Frankfurt	61%	54%	7,1	118	115	2,7%
Hanovre	57%	51%	6,4	124	119	4,5%
Istanbul	72%	74%	-1,7	132	83	60,1%
Lisboa	81%	74%	6,6	123	109	12,9%
London	85%	79%	5,3	169	150	12,1%
Madrid	78%	73%	5,9	144	126	15,0%
Munich	69%	62%	7,3	129	125	3,0%
Paris	82%	79%	3,6	172	153	12,3%
Prague	76%	60%	16,3	88	78	12,5%
Vienna	74%	64%	10,5	118	107	10,5%

ADR expressed in euros VAT incl  
Source: MKG\_destination

# HIT REPORT BUSINESS DESTINATIONS IN EUROPE

ADR (Breakfast included) – 4\* Hotels



# HIT REPORT BUSINESS DESTINATIONS IN EUROPE

ADR (Breakfast included) – 4\* Hotels

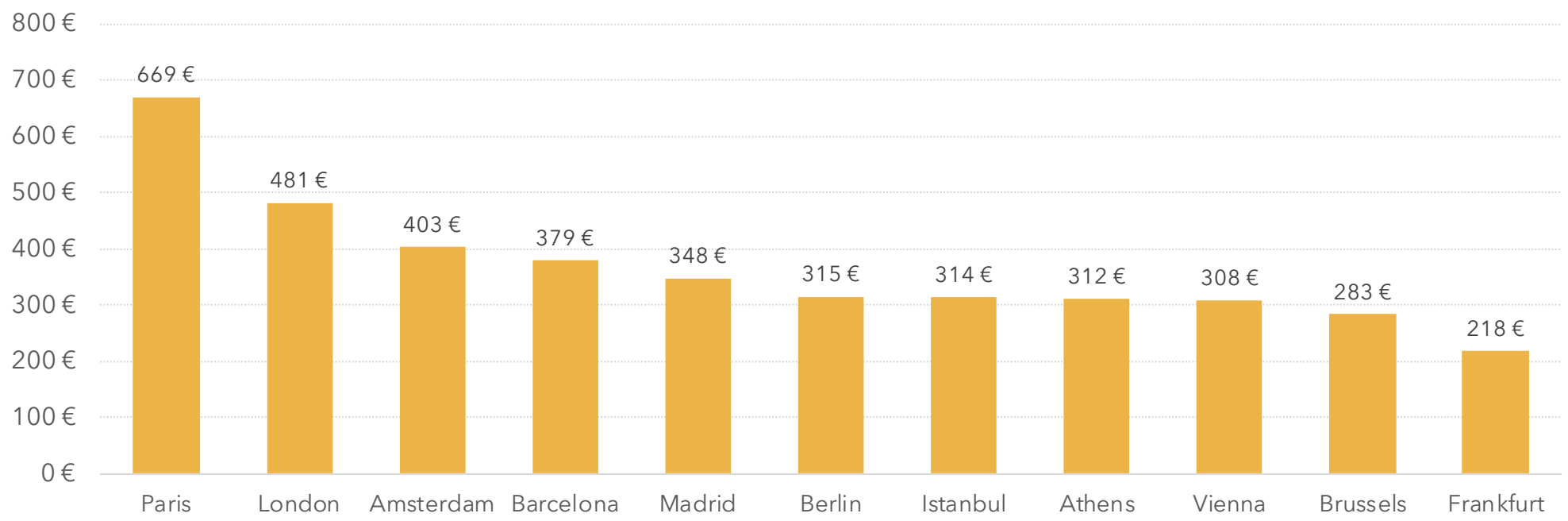
Cities	Occupancy Rate			ADR (Breakfast included)		
	2023	2022	chge (pt) 2022	2023	2022	chge (%) 2022
Amsterdam	74%	62%	11,8	232	210	10,1%
Athens	71%	62%	9,0	159	142	11,8%
Barcelona	76%	71%	5,8	204	180	13,2%
Berlin	74%	66%	8,2	156	149	5,4%
Brussels	67%	58%	9,4	195	171	14,0%
Budapest	66%	56%	9,8	136	116	17,3%
Cologne	70%	59%	11,5	162	141	15,4%
Düsseldorf	64%	57%	7,2	152	139	8,8%
Frankfurt	61%	51%	9,5	141	141	-0,1%
Hanovre	59%	52%	6,9	151	140	7,6%
Istanbul	66%	70%	-4,1	165	104	59,0%
Lisboa	79%	72%	7,0	153	139	9,7%
London	80%	69%	11,1	268	253	5,9%
Madrid	68%	61%	7,9	181	162	11,5%
Munich	67%	58%	9,3	161	161	-0,3%
Paris	79%	73%	6,2	272	247	10,3%
Prague	70%	56%	13,5	127	119	6,2%
Vienna	73%	59%	13,6	152	141	7,8%

ADR expressed in euros VAT incl  
Source: MKG\_destination



# HIT REPORT BUSINESS DESTINATIONS IN EUROPE

ADR (Breakfast included) – 5\* Hotels



# HIT REPORT BUSINESS DESTINATIONS IN EUROPE

ADR (Breakfast included) – 5\* Hotels

Cities	Occupancy Rate			ADR (Breakfast included)		
	2023	2022	chge (pt) 2022	2023	2022	chge (%) 2022
Amsterdam	66%	59%	7,4	403	362	11,3%
Athens	68%	61%	6,6	312	285	9,3%
Barcelona	72%	64%	7,8	379	351	7,8%
Berlin	52%	44%	7,8	315	315	0,1%
Brussels	57%	52%	4,7	283	268	5,5%
Frankfurt	62%	58%	3,7	218	216	1,3%
Istanbul	70%	78%	-7,6	314	208	51,2%
London	76%	67%	8,8	481	473	1,7%
Madrid	59%	57%	2,2	348	330	5,5%
Paris	69%	67%	1,4	669	601	11,4%
Vienna	73%	61%	12,0	308	284	8,4%

ADR expressed in euros VAT incl  
Source: MKG\_destination

# HIT REPORT BUSINESS DESTINATIONS IN FRANCE

ADR (Breakfast included) – All Hotels

Cities	Occupancy Rate			ADR (Breakfast included)		
	2023	2022	chge (pt) 2022	2023	2022	chge (%) 2022
Biarritz	63%	64%	-0,9	147	140	4,6%
Bordeaux	70%	68%	2,9	148	137	8,2%
Cannes	60%	59%	0,4	432	432	0,0%
Clermont-Ferrand	62%	60%	2,7	98	91	7,3%
Dijon	66%	65%	0,5	107	101	5,7%
Lille	68%	66%	2,1	137	126	8,3%
Lyon	71%	68%	3,5	145	127	13,9%
Marseille	71%	70%	0,5	150	139	8,4%
Montpellier	66%	67%	-0,9	114	110	4,1%
Nantes	70%	68%	2,6	127	116	10,0%
Nice	72%	67%	4,9	206	192	7,6%
Poitiers	58%	58%	0,4	93	90	2,9%
Rennes	64%	63%	0,6	113	107	6,0%
Rouen	65%	60%	5,4	109	100	9,5%
Strasbourg	70%	66%	4,6	145	138	5,6%
Tours	62%	59%	3,2	99	93	6,0%

ADR expressed in euros VAT incl  
Source: MKG\_destination

# HIT REPORT BUSINESS DESTINATIONS IN FRANCE

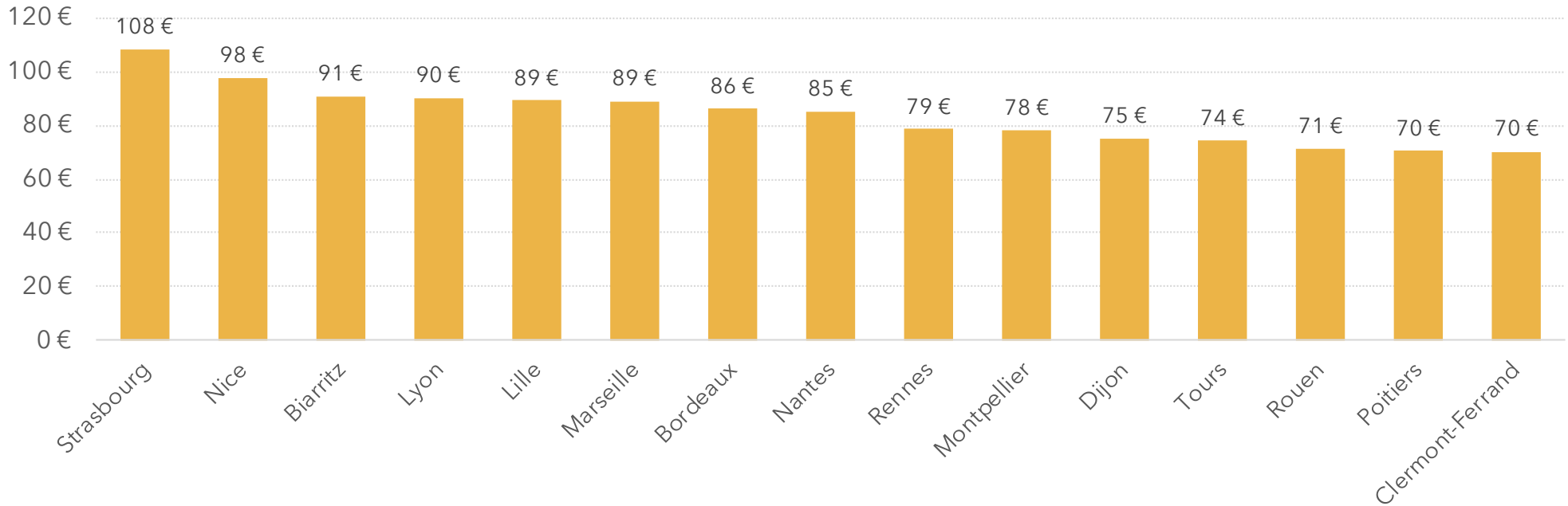
ADR (Breakfast included) BY CATEGORY

Cities	2*		3*		4*	
	2023	2022	2023	2022	2023	2022
Biarritz	91	86	112	103	193	184
Bordeaux	86	78	117	108	164	151
Cannes	n/a	n/a	127	124	284	271
Clermont-Ferrand	70	65	92	87	141	128
Dijon	75	71	102	95	141	137
Lille	89	78	116	104	162	152
Lyon	90	79	n/a	n/a	172	153
Marseille	89	81	111	103	193	178
Montpellier	78	73	107	103	143	136
Nantes	85	74	109	100	156	142
Nice	98	84	127	117	232	217
Poitiers	70	68	91	87	136	135
Rennes	79	73	109	102	146	141
Rouen	71	66	93	86	145	129
Strasbourg	108	95	112	108	164	155
Tours	74	70	95	91	141	136

ADR expressed in euros VAT incl  
Source: MKG\_destination

# HIT REPORT BUSINESS DESTINATIONS IN FRANCE

ADR (Breakfast included) – 2\* Hotels



# HIT REPORT BUSINESS DESTINATIONS IN FRANCE

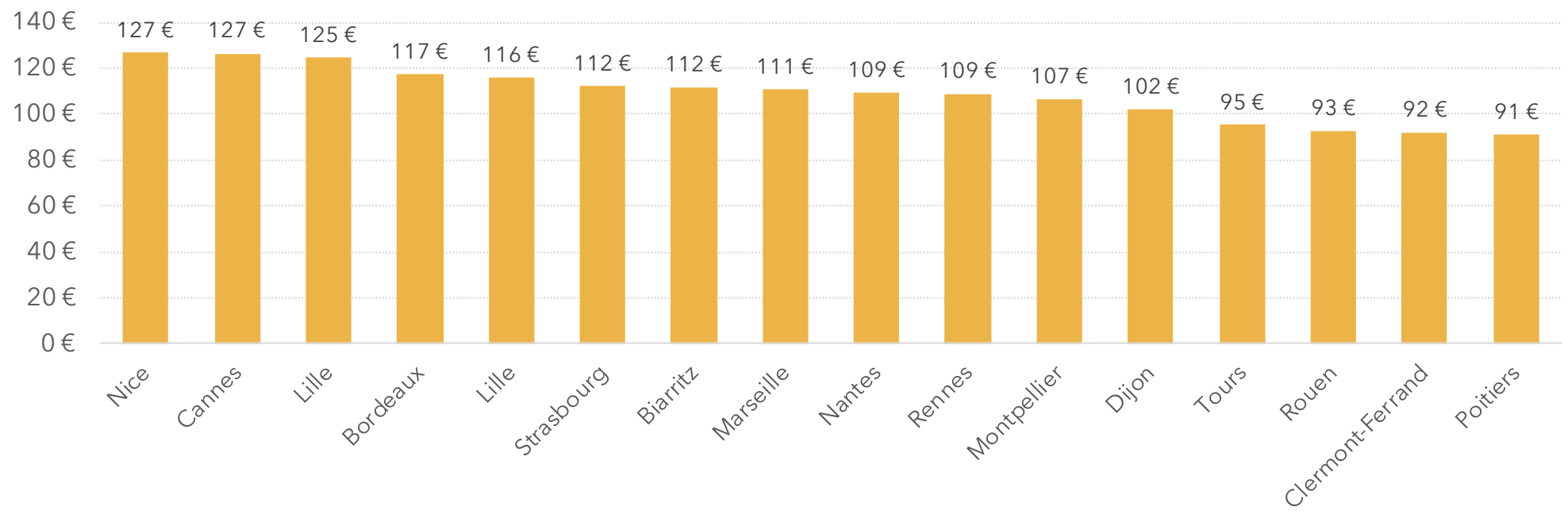
ADR (Breakfast included) – 2\* Hotels

Cities	Occupancy Rate			ADR (Breakfast included)		
	2023	2022	chge (pt) 2022	2023	2022	chge (%) 2022
Biarritz	67%	66%	0,8	91	86	5,1%
Bordeaux	80%	76%	3,6	86	78	10,5%
Clermont-Ferrand	65%	62%	2,8	70	65	7,8%
Dijon	72%	72%	0,0	75	71	6,7%
Lille	66%	64%	1,8	89	78	15,0%
Lyon	71%	69%	1,8	90	79	13,8%
Marseille	76%	75%	0,7	89	81	10,5%
Montpellier	71%	73%	-1,9	78	73	6,6%
Nantes	67%	71%	-3,7	85	74	14,5%
Nice	74%	68%	5,4	98	84	16,1%
Poitiers	59%	56%	2,7	70	68	4,1%
Rennes	68%	68%	-0,4	79	73	7,6%
Rouen	62%	57%	4,8	71	66	7,7%
Strasbourg	77%	78%	-0,4	108	95	13,7%
Tours	65%	65%	0,0	74	70	5,7%

ADR expressed in euros VAT incl  
Source: MKG\_destination

# HIT REPORT BUSINESS DESTINATIONS IN FRANCE

ADR (Breakfast included) – 3\* Hotels



# HIT REPORT BUSINESS DESTINATIONS IN FRANCE

ADR (Breakfast included) – 3\* Hotels

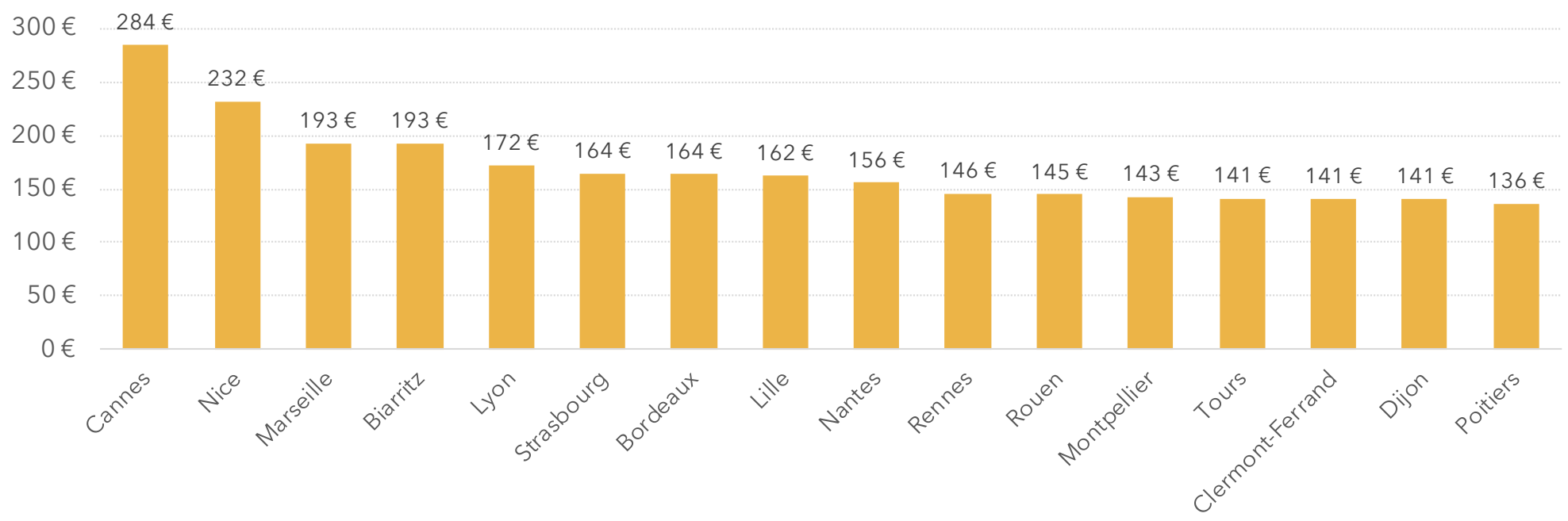
Cities	Occupancy Rate			ADR (Breakfast included)		
	2023	2022	chge (pt) 2022	2023	2022	chge (%) 2022
Biarritz	64%	66%	-2,4	112	103	8,9%
Bordeaux	71%	68%	2,7	117	108	8,6%
Cannes	63%	55%	8,6	127	124	1,9%
Clermont-Ferrand	62%	58%	4,1	92	87	6,1%
Dijon	66%	65%	0,3	102	95	7,6%
Lille	69%	69%	0,0	116	104	11,1%
Lille	70%	66%	3,8	125	109	14,7%
Marseille	71%	71%	0,4	111	103	8,1%
Montpellier	67%	67%	-0,4	107	103	3,5%
Nantes	70%	71%	-0,4	109	100	9,8%
Nice	78%	71%	6,6	127	117	8,2%
Poitiers	56%	56%	-0,6	91	87	4,3%
Rennes	63%	63%	0,2	109	102	6,9%
Rouen	61%	56%	5,0	93	86	7,7%
Strasbourg	73%	66%	7,7	112	108	3,7%
Tours	61%	55%	5,6	95	91	4,9%

ADR expressed in euros VAT incl  
Source: MKG\_destination



# HIT REPORT BUSINESS DESTINATIONS IN FRANCE

ADR (Breakfast included) – 4\* Hotels



# HIT REPORT BUSINESS DESTINATIONS IN FRANCE

ADR (Breakfast included) – 4\* Hotels

Cities	Occupancy Rate			ADR (Breakfast included)		
	2023	2022	chge (pt) 2022	2023	2022	chge (%) 2022
Biarritz	66%	64%	2,0	193	184	4,6%
Bordeaux	67%	64%	3,5	164	151	9,0%
Cannes	58%	57%	1,9	284	271	4,9%
Clermont-Ferrand	61%	61%	0,6	141	128	10,1%
Dijon	66%	63%	3,1	141	137	3,0%
Lille	72%	67%	4,9	162	152	6,5%
Lyon	73%	69%	5,0	172	153	12,7%
Marseille	67%	66%	1,1	193	178	8,1%
Montpellier	63%	64%	-1,0	143	136	4,8%
Nantes	71%	65%	5,9	156	142	9,5%
Nice	69%	64%	5,1	232	217	6,7%
Poitiers	60%	61%	-0,8	136	135	1,1%
Rennes	61%	58%	2,6	146	141	3,9%
Rouen	70%	65%	5,2	145	129	12,0%
Strasbourg	69%	67%	2,8	164	155	6,0%
Tours	67%	62%	5,6	141	136	4,0%

ADR expressed in euros VAT incl  
Source: MKG\_destination

# HIT REPORT BUSINESS DESTINATIONS IN GERMANY

ADR (Breakfast included) – All Hotels

Cities	Occupancy Rate			ADR (Breakfast included)		
	2023	2022	chge (pt) 2022	2023	2022	chge (%) 2022
Berlin	73%	66%	7,7	154	145	6,5%
Cologne	70%	60%	10,7	151	131	15,0%
Düsseldorf	63%	56%	7,0	149	136	9,7%
Frankfurt	60%	53%	7,5	145	144	0,8%
Hamburg	77%	67%	10,0	148	135	9,6%
Hanovre	60%	54%	6,2	140	130	7,3%
Munich	68%	59%	8,6	159	157	0,9%
Stuttgart	61%	52%	8,9	132	124	6,8%

*ADR expressed in euros VAT incl  
Source: MKG\_destination*

# HIT REPORT BUSINESS DESTINATIONS IN EUROPE

## GERMAN MAIN CONFERENCE CITIES

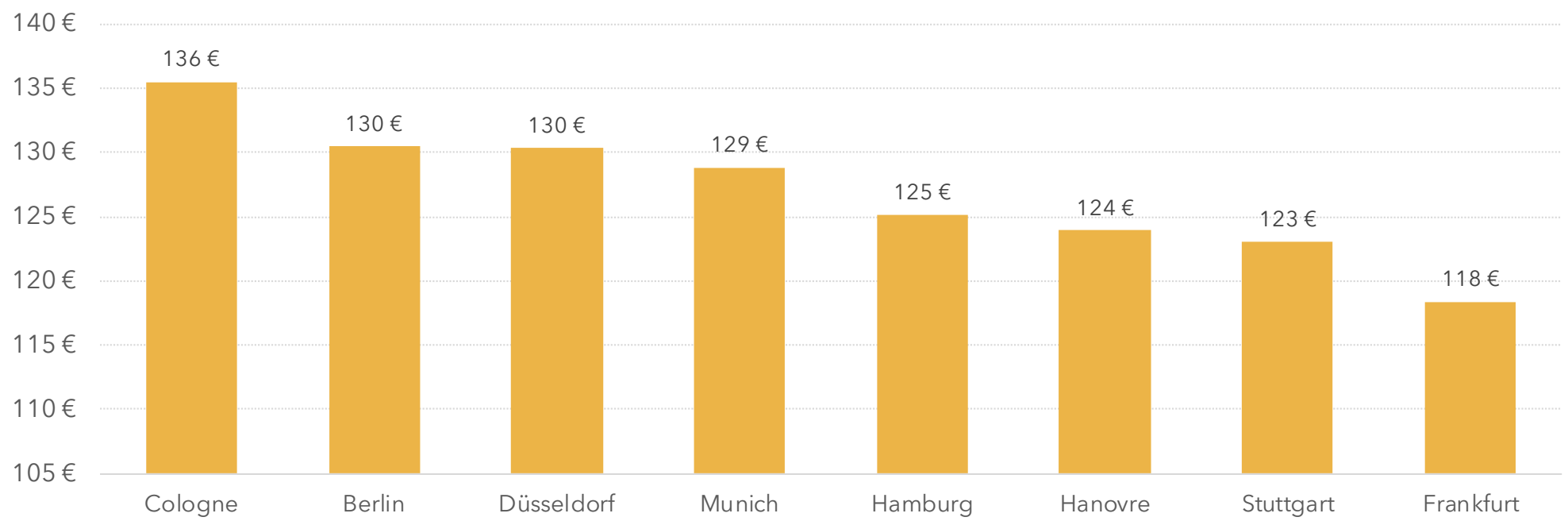
ADR (Breakfast included) BY CATEGORY

Cities	3*		4*	
	2023	2022	2023	2022
Berlin	130	121	156	149
Cologne	136	118	162	141
Düsseldorf	130	119	152	139
Frankfurt	118	115	141	141
Hamburg	125	118	152	138
Hanovre	124	119	151	140
Munich	129	125	161	161
Stuttgart	123	113	148	145

*ADR expressed in euros VAT incl  
Source: MKG\_destination*

# HIT REPORT BUSINESS DESTINATIONS IN GERMANY

ADR (Breakfast included) – 3\* Hotels



# HIT REPORT BUSINESS DESTINATIONS IN GERMANY

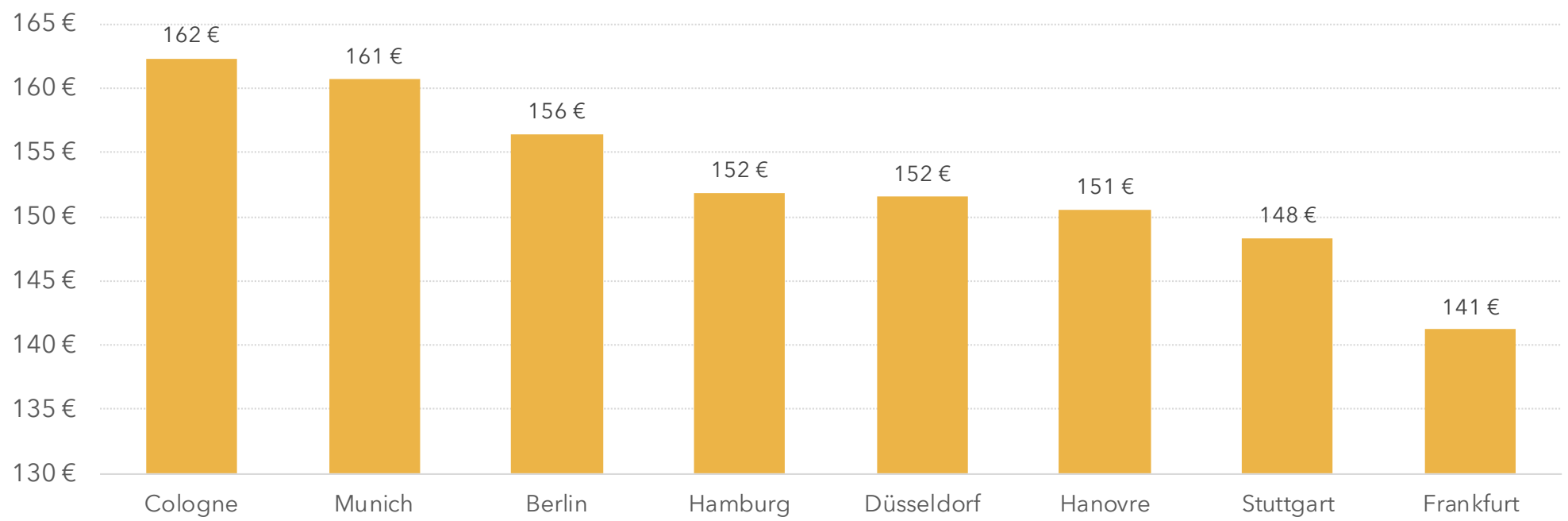
ADR (Breakfast included) – 3\* Hotels

Cities	Occupancy Rate			ADR (Breakfast included)		
	2023	2022	chge (pt) 2022	2023	2022	chge (%) 2022
Berlin	77%	68%	9,1	130	121	8,2%
Cologne	72%	61%	11,1	136	118	14,4%
Düsseldorf	66%	56%	9,4	130	119	9,2%
Frankfurt	61%	54%	7,1	118	115	2,7%
Hamburg	80%	69%	11,1	125	118	5,7%
Hanovre	57%	51%	6,4	124	119	4,5%
Munich	69%	62%	7,3	129	125	3,0%
Stuttgart	61%	53%	8,0	123	113	8,6%

ADR expressed in euros VAT incl  
Source: MKG\_destination

# HIT REPORT BUSINESS DESTINATIONS IN GERMANY

ADR (Breakfast included) – 4\* Hotels



# HIT REPORT BUSINESS DESTINATIONS IN GERMANY

ADR (Breakfast included) – 4\* Hotels

Cities	Occupancy Rate			ADR (Breakfast included)		
	2023	2022	chge (pt) 2022	2023	2022	chge (%) 2022
Berlin	74%	66%	8,2	156	149	5,4%
Cologne	70%	59%	11,5	162	141	15,4%
Düsseldorf	64%	57%	7,2	152	139	8,8%
Frankfurt	61%	51%	9,5	141	141	-0,1%
Hamburg	76%	67%	9,2	152	138	9,7%
Hanovre	59%	52%	6,9	151	140	7,6%
Munich	67%	58%	9,3	161	161	-0,3%
Stuttgart	60%	49%	11,7	148	145	2,5%

ADR expressed in euros VAT incl  
Source: MKG\_destination



# HIT REPORT BUSINESS DESTINATIONS IN ITALY

ADR (Breakfast included) – All Hotels

Cities	Occupancy Rate			ADR (Breakfast included)		
	2023	2022	chge (pt) 2022	2023	2022	chge (%) 2022
Florence	78%	69%	9,5	309	259	19,3%
Genoa	70%	70%	0,4	150	134	11,7%
Milan	76%	68%	8,2	228	200	14,2%
Rome	74%	66%	8,0	252	220	14,5%
Turin	71%	65%	5,8	151	137	10,1%
Venice	66%	58%	8,0	260	248	4,6%

*ADR expressed in euros VAT incl  
Source: MKG\_destination*

# HIT REPORT BUSINESS DESTINATIONS IN ITALY

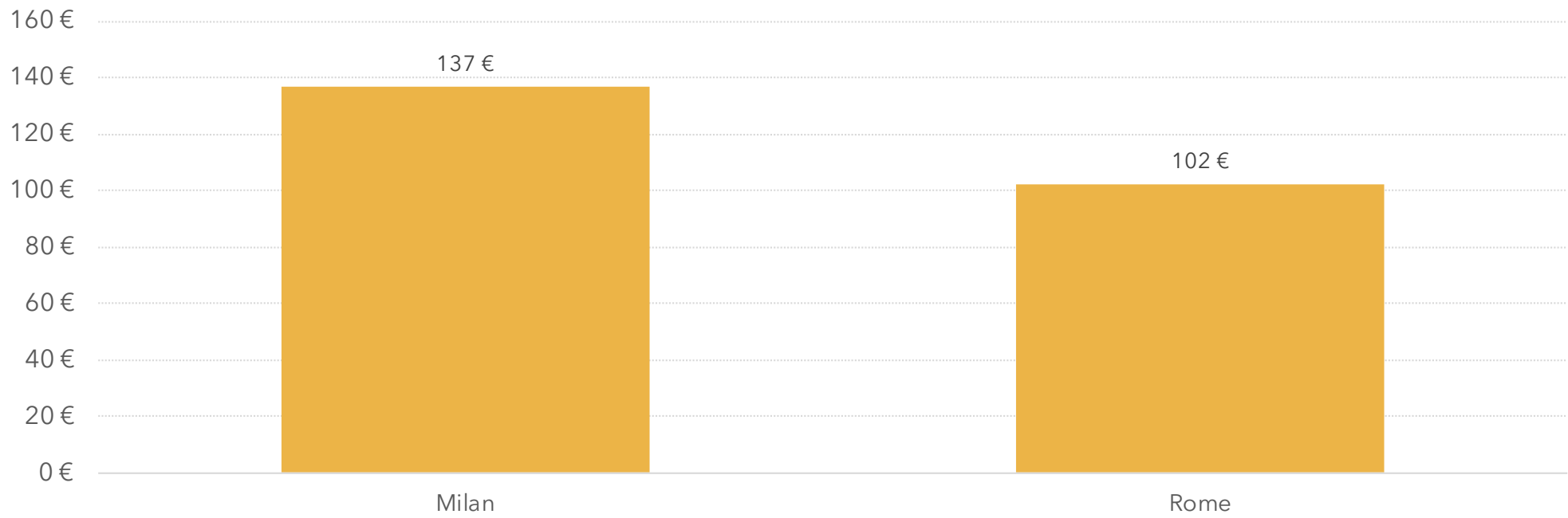
ADR (Breakfast included) BY CATEGORY

Cities	3*		4*		5*	
	2023	2022	2023	2022	2023	2022
Florence	n/a	n/a	220	182	650	567
Genoa	n/a	n/a	143	129	n/a	n/a
Milan	137	112	214	188	401	360
Rome	102	86	183	157	587	501
Turin	n/a	n/a	158	143	n/a	n/a
Venice	n/a	n/a	195	180	n/a	n/a

ADR expressed in euros VAT incl  
Source: MKG\_destination

# HIT REPORT BUSINESS DESTINATIONS IN ITALY

ADR (Breakfast included) – 3\* Hotels



## HIT REPORT BUSINESS DESTINATIONS IN ITALY

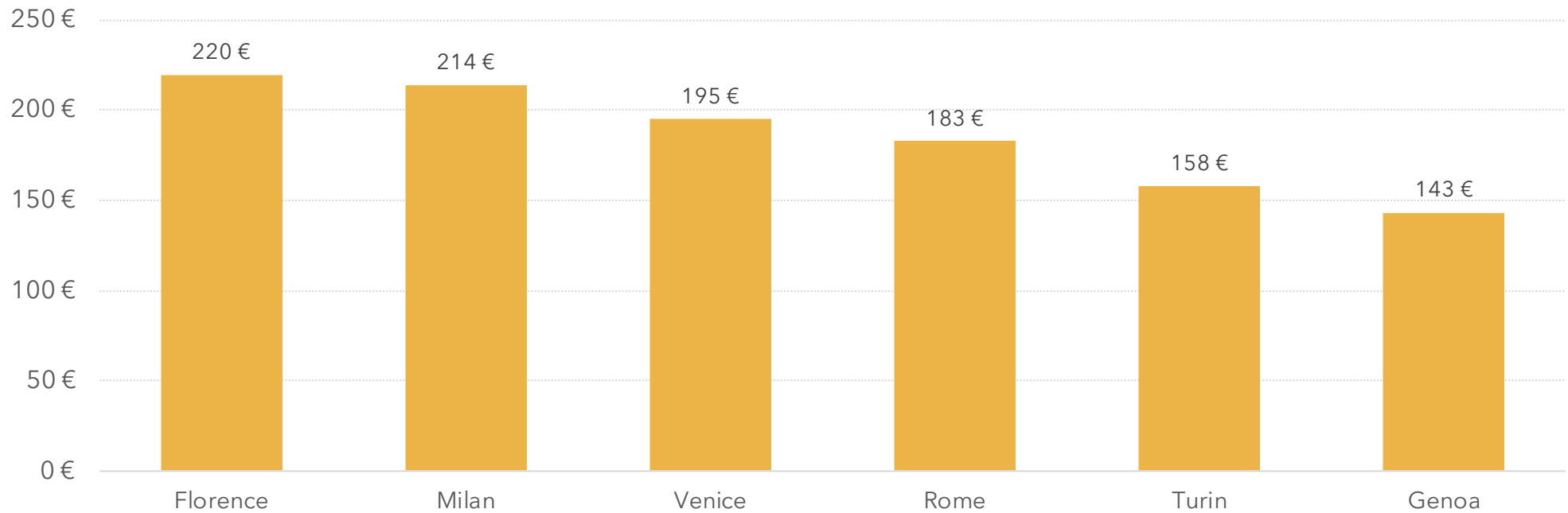
ADR (Breakfast included) – 3\* Hotels

Cities	Occupancy Rate			ADR (Breakfast included)		
	2023	2022	chge (pt) 2022	2023	2022	chge (%) 2022
Milan	84%	76%	7,8	137	112	21,6%
Rome	83%	75%	8,0	102	86	19,6%

*ADR expressed in euros VAT incl  
Source: MKG\_destination*

# HIT REPORT BUSINESS DESTINATIONS IN ITALY

ADR (Breakfast included) – 4\* Hotels



# HIT REPORT BUSINESS DESTINATIONS IN ITALY

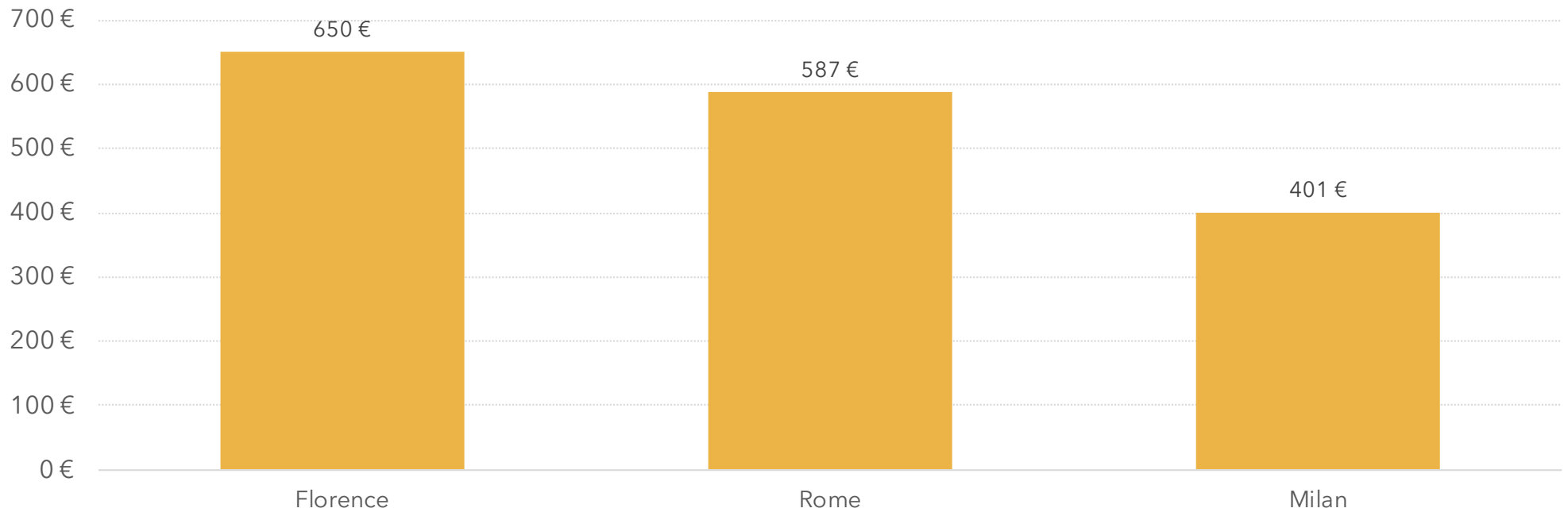
ADR (Breakfast included) – 4\* Hotels

Cities	Occupancy Rate			ADR (Breakfast included)		
	2023	2022	chge (pt) 2022	2023	2022	chge (%) 2022
Florence	81%	70%	11,7	220	182	21,1%
Genoa	67%	67%	-0,2	143	129	11,2%
Milan	75%	66%	8,4	214	188	14,0%
Rome	74%	65%	9,3	183	157	16,6%
Turin	71%	66%	5,9	158	143	10,6%
Venice	65%	59%	6,1	195	180	8,5%

ADR expressed in euros VAT incl  
Source: MKG\_destination

# HIT REPORT BUSINESS DESTINATIONS IN ITALY

ADR (Breakfast included) – 5\* Hotels

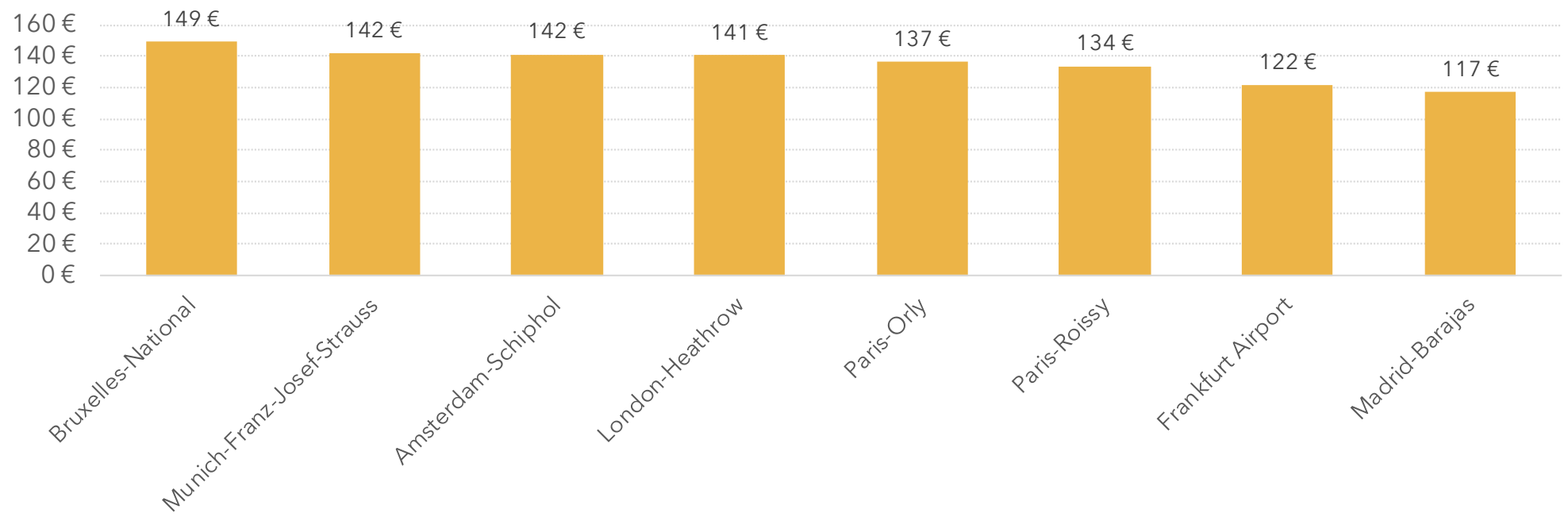


# HIT REPORT BUSINESS DESTINATIONS IN EUROPE

## MAIN EUROPEAN AIRPORTS



ADR (Breakfast included) – All Hotels





# HIT REPORT BUSINESS DESTINATIONS IN EUROPE

## MAIN EUROPEAN AIRPORTS



ADR (Breakfast included) – All Hotels

Airport	Occupancy Rate			ADR (Breakfast included)		
	2023	2022	chge (pt) 2022	2023	2022	chge (%) 2022
Amsterdam-Schiphol	75%	61%	14,3	142	136	4,0%
Bruxelles-National	68%	57%	10,9	149	138	8,1%
Frankfurt Airport	63%	55%	7,6	122	121	0,7%
London-Heathrow	84%	71%	13,2	141	136	3,2%
Madrid-Barajas	72%	68%	4,3	117	104	12,3%
Munich-Franz-Josef- Strauss	68%	62%	5,5	142	137	3,8%
Paris-Orly	69%	66%	3,3	137	120	13,7%
Paris-Roissy	75%	66%	8,9	134	131	2,6%

ADR expressed in euros VAT incl  
Source: MKG\_destination

# GLOSSARY

**Occupancy rate** : Number of sold rooms divided by number of available rooms

**Average daily rate** : Room revenue divided by number of sold rooms (Breakfast included)

**Available rooms** : Capacity x number of days of opening

**Sold rooms** : Capacity x number of days of opening x occupancy rate

**Room revenue** : Room revenue from the sale of guest rooms (excluding other types of revenue such as food and beverage, etc)

# CONVENTIONS

In this review business results by city are presented on a like-for-like basis. Due to the restrictions of some of these samples (the supply itself is restricted) the slightest movement in supply (openings or closings) is likely to generate differences which strongly impact upon results.

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