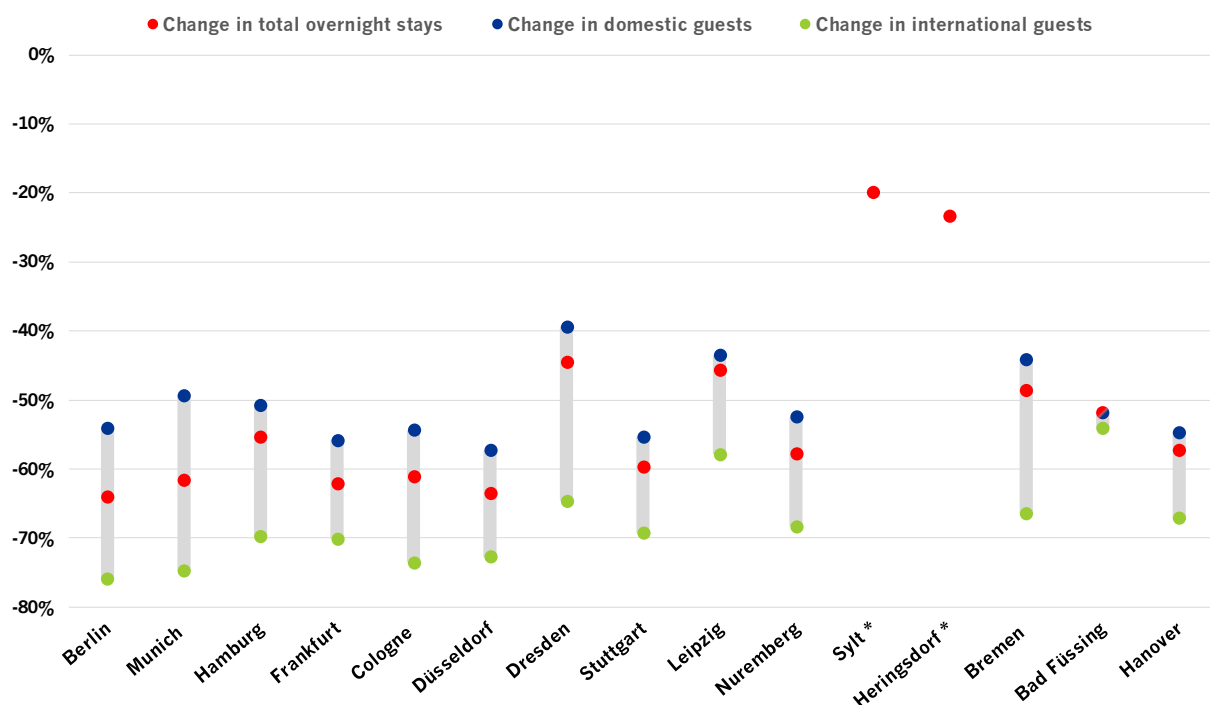


[Lodging market Germany 2020] and the Corona crisis

– Effects on the demand for overnight stays –

The travel restrictions introduced at the beginning of the COVID-19 pandemic led to significant declines in demand for overnight stays in German accommodation establishments (including camping) in 2020. After an all-time high in 2019 with around 191 million arrivals (+3.2 % year-on-year) and 496 million overnight stays (+3.7 % year-on-year), arrivals fell significantly by around 49 % to around 98 million and overnight stays by around 39 % to around 302 million (Source: Destatis).

The 15 destinations with the highest demand recorded the following declines in domestic and foreign overnight stays:



* Data not fully available

Source: Destatis

The extent of the decline in total overnight stays in the individual destinations depends on the proportion of domestic and foreign guests. The travel restrictions with temporary border closures and a quarantine obligation for travellers from risk areas led to a considerable drop in demand, especially among foreign guests. Markets with a high proportion of foreign visitors (over 35 %) such as Berlin, Düsseldorf, Munich, Frankfurt and Cologne therefore were impacted the most, with declines of over 60 % in total demand.

In contrast, cities such as Dresden, Leipzig, Bremen, Hamburg and Hanover, which are traditionally characterised by a high proportion of domestic guests, were able to somewhat reduce the decline in overnight stays. Nevertheless, historical declines between 45 % (Dresden) and 57 % (Hanover) were recorded in these markets. The best performance was recorded by German holiday destinations such as Sylt and Heringsdorf, which recorded declines in demand of "only" 20 % to 23 % due to their high share of domestic guests of over 98 %.

It is also worth to take a closer look at the health resort Bad Füssing: Despite a high proportion of domestic guests (over 97 %) like the North Sea and Baltic Sea destinations, Bad Füssing experienced a decline in total demand of 52 %, similar to the decline in demand experienced by city destinations with a high proportion of domestic guests. The rather high decrease was caused by extensive closures of their thermal baths, which were responsible for around two-thirds of total overnight stays in 2019.

» Total demand Germany

39 % decline in overnight stays in all accommodation establishments

» Top 15 destinations Germany

> 60 % decline in overnight stays in destinations with a high proportion of international guests (> 35 % guest share)

< 23 % decline in overnight stays in holiday destinations due to domestic tourism

Highest decline in total and international demand in Berlin at around 64 % and 76 % respectively

Highest decline in domestic demand in Düsseldorf with around 57 %, lowest decline in Dresden with 39 %

PKF hotelexperts GmbH

Maximilianstrasse 27
80539 Munich

Phone +49 (0)89 / 290 32 –200

E-Mail research@m.pkf.de

Web www.pkfhotelexperts.com

The hotel market reports of PKF hotelexperts provide a quick overview of different hotel markets and segments. Stay up to date and subscribe to the PKF Newsletter on our website.

Subscribe to
PKF Newsletter

Disclaimer: This report and the figures, trends and possible reasons for change contained are based on professional market research. While PKF hotelexperts takes every care in assembling this information, no guarantee of completeness or up-to-dateness is made.

As of April 2021