

Hotel Ticker

Performance Analysis at selected German cities March 2012

April 2012





March 2012 in comparison to the previous year¹

An actual overview of hotel performances for selected German destinations:

Berlin: Occ 71 % / ADR 90 € / RevPar 64 €

Better RevPar in March (up 7%) due to a 10.7% increase in occupancy. Factors: stronger MICE business in March, as well greater demand due to the ECHO Award presentations (2012 Echo – Occ: +10.4%; ADR -0.8%; RevPar +9.6%). Positive trend at the end of the month with Berlin hosting its Half-Marathon race on 1 April 2012 (23.732 participants). Continued growth in hotel capacities and in the competition have affected the average daily rate (down 2.3% on last year).

Dresden: Occ 54 % / ADR 71 € / RevPar 39 €

Occupancy down 5.9% in March, but a 4.1% increase in ADR and slight decrease in RevPar (down 2.1%). Reasons: Some federal states were affected by the absence of the Carnival holidays, resulting in weaker leisure business. The earlier timing of the break (in February this year) favoured corporate business and boosts the average rates in March.

Dusseldorf: Occ 77 % / ADR 132 € / RevPar 101 €

A 30.3% leap in RevPar due to a boom in occupancy: (Occ up 8.9% and ADR: plus 19.6%). Driving forces: This year's "Wire and Tube" and "METAV" trade shows, which take place every other year. In March 2012, there were five more trade show days than in 2011. Stronger corporate and MICE business in March compared to 2011 due to the timing of this year's Carnival festivities taking place in February. In addition, increased demand this year as a result of the "Prowein" trade fair from 4 - 6 March (OCC: + 3.6%, ADR: +10.1%, RevPar: + 14%, compared with (2011) with positive impact on the city's overall performance.

¹ Temporary figures (daily collected) quoted are comparisons with those for the previous year
Source: Fairmas GmbH/STR Global, details as of 01 April 2012



Frankfurt: Occ 66 % / ADR 113 € / RevPar 75 €

This year's absence of the ISH trade fair (effect on ADR: -10.5%), held only in alternate years, was probably a key factor in the poor RevPar (down 6.3%).

Despite the rescheduling of the ever-growing "Musikmesse" music event from April in 2011 to March in 2012 (21 - 24 March), it was not possible to make up for the lack of the ISH trade show this year. There were more business days in 2011 (five business weeks in 2011 but only four in 2012) with consequent higher price trade in the previous year.

Hamburg: Occ 77 % / ADR 120 € / RevPar 92 €

Strong growth in RevPar (up 17.3%), due in particular to moving the "Aircraft Interiors Expo" event from April to March. Partially stronger MICE business in the hotels. For Hamburg as a whole, the growing leisure business has an added significance.

Cologne/Bonn: Occ 71 % / ADR 116 € / RevPar 82 €

Downward trend in March in all performance areas. RevPar dropped by 3.5% compared to last year, mainly due to falls in ADR (by 3.5%).

Primary reason: Absence of the International Dental Show (IDS) this year. The IDS is held every two years and attracted (approximately 118.000 visitors) as an "A" event, and could not be compensated by the "Eisenwarenmesse" hardware fair and the Anuga FoodTec held in 2012.

Leipzig: Occ 65 % / ADR 81 € / RevPar 53 €

Steadily growing RevPar (+ 2.5%) compared to year. However, decline in occupancy rate in March (down 1.1%). Major reason: the absence of the "Z" (the Subcontracting Fair) and Intec events (held in the city for 4 days in March 2011).

ADR was up 3.6% compared to the year before due to better rates during the Leipzig Book Fair (increase in ADR: +7% 2012/2011).

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Munich: Occ 66 % / ADR 108 € / RevPar 71 €

Despite Carnival week being held earlier this year, decrease in occupancy (down 1.9%) but a 5.0% growth in ADR and RevPar up by 3.0% due to stronger corporate business well as the Champions League football game on 13 March 2012.

Fairmas Hotel Ticker



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Fairmas Gesellschaft für Marktanalysen mbH specializes in market analyses and the development of planning and controlling software for the hotel industry.

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