



# Annual Autumn Meeting Bled 2025 SLOVENIAN HOTEL ASSOCIATION

Heinz WEHRLE MRICS



# HOTEL CHAINS AND THEIR BRANDS

by Heinz Wehrle, MRICS



# About myself...

## Hospitality

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# About myself

Real Estate



# About myself

Projects Slovenia

## Projects in Slovenia:

Hotelresort Kranjska Gora  
Hotel Mons (Four Points) Ljubljana  
Opera Hotel Ljubljana  
Airporthotel Ljubljana





# Strategic Agenda

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## 01. City vs. Resort

Emerging trends and the blurring lines between urban business and leisure travel.

## 02. Chain Standards

How global giants are defining standards and adapting to lifestyle demands.

## 03. The Digital Guest

Is innovation driven by technology push or guest expectation pull?

## 04. Strategic Directions

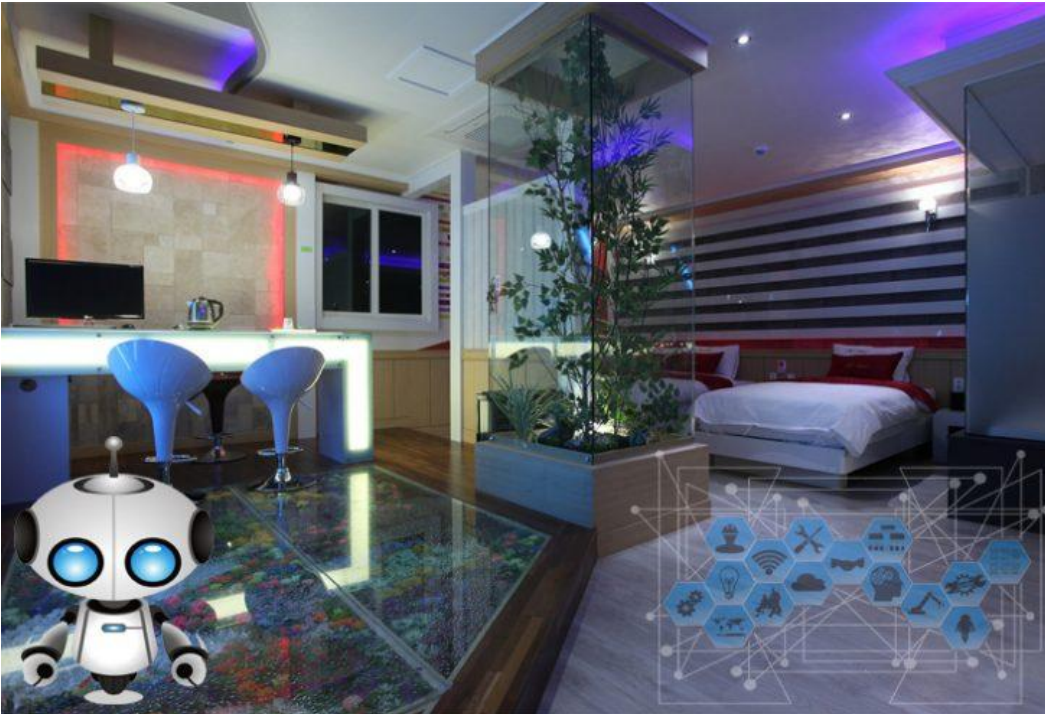
Identifying the three clear pillars: Budget, Selected Service, and Luxury.

# City vs. Resort: Blurring Lines

- ▶ **Bleisure Travel:** City hotels must offer resort-like amenities (spas, leisure) for business travelers extending their stays.
- ▶ **Resort Connectivity:** Resorts are no longer just for disconnecting; high-speed connectivity is now a "utility" for the working nomad.
- ▶ **Design Shift:** Biophilic design is moving from resorts into the concrete jungle.



# Tech vs. Expectations



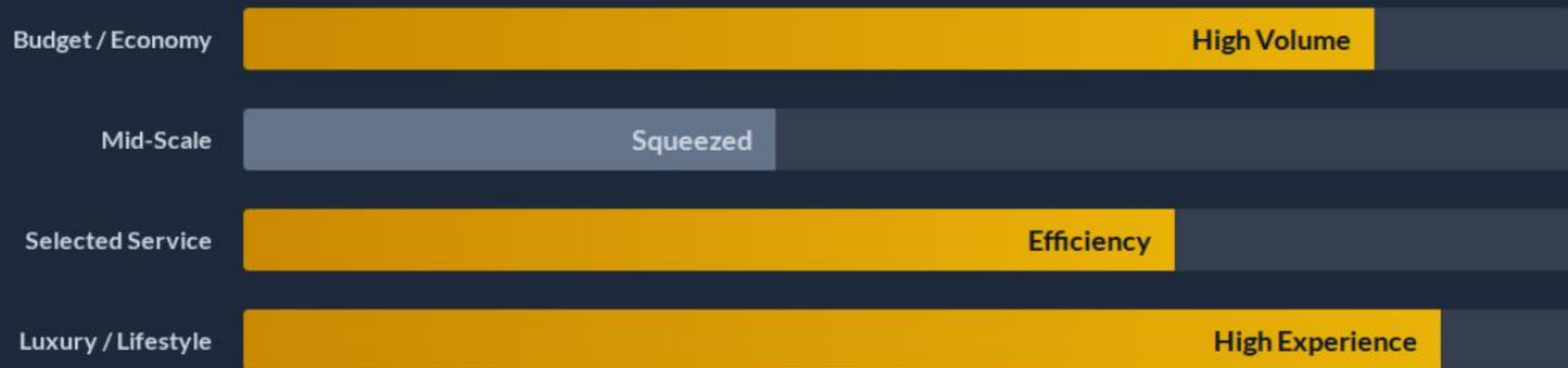
Are we driving technology, or is it driving us? The industry faces a "**High Tech, High Touch**" paradox.

- ▶ **Guest Expectations:** Seamless mobile integration is no longer a "wow" factor; it is a baseline expectation (like hot water).
- ▶ **Operational Efficiency:** Tech is shifting from front-of-house gadgetry to back-of-house optimization (AI in revenue management).
- ▶ **The Human Element:** Technology should remove friction, allowing staff to focus on emotional connection, not administrative tasks.



# Strategic Directions: Market Polarization

The "Middle" is being squeezed. Investment and growth are moving towards the edges of the spectrum.



# The Visual Shift

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From standardized efficiency to curated experiences.  
Whether in Budget or Luxury, the "Cookie Cutter"  
approach is dead.

Today's traveler demands a sense of place, regardless  
of the price point.





# SUMMARY

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*"The future of hospitality lies not in the hardware, but in the personalized software of human interaction supported by invisible technology."*

- Heinz Wehrle, Annual Meeting 2025

THANK YOU VERY MUCH  
QUESTIONS?





# HOTEL OPERATING MODELS

## Management Agreements

- ▶ **Fees:** Base + Incentive Fees
- ▶ **Control:** Operator controls Staff & Ops
- ▶ **Term:** Long term (20+ years)
- ▶ **Key Money:** Often provided by Operator
- ▶ **Risk:** Shared (Performance Tests)

## Franchise Agreements

- ▶ **Fees:** Royalty + Marketing/Res Fees
- ▶ **Control:** Owner/Third-party manages
- ▶ **Term:** Flexible (10-20 years)
- ▶ **Standards:** Strict adherence required
- ▶ **Risk:** Owner bears operational risk

# HOTEL COMPANIES AND BRANDS

Sample Hotel Operating Companies or Hotel Groups

CLASSEMENT 2025 - TOP 12 DES GROUPES HÔTELIERS DANS LE MONDE 2025 RANKINGS - TOP 12 HOTEL GROUPS WORLDWIDE									
RANG RANK#		GROUPES - GROUPS	NAT.	HOTELS		CHAMBRES ROOMS		EV. CH GROWTH	
				2025	2024	2025	2024	+/-	%
1	-	MARRIOTT INTERNATIONAL	USA	9 266	8 692	1 683 204	1 574 486	108 718	6,9%
2	-	JIN JIANG (inc. RADISSON HOTEL GROUP) (1)	CHINE	14 311	13 218	1 439 756	1 336 399	103 357	7,7%
3	-	HILTON WORLDWIDE (2)	USA	8 342	7 438	1 249 814	1 166 828	82 986	7,1%
6	+2	H WORLD GROUP (Ex Huazhu) (3)	CHINE	10 580	8 866	1 017 225	845 573	171 652	20,30%
4	-1	INTERCONTINENTAL HOTEL GROUP (4)	UK	6 599	6 333	977 257	936 677	40 580	4,3%
5	-1	WYNDHAM HOTEL GROUP	USA	9 286	9 178	902 987	871 794	31 193	3,6%
7	-	ACCOR	FRANCE	5 682	5 584	850 285	821 518	28 767	3,5%
8	-	CHOICE HOTELS INTERNATIONAL	USA	7 586	7 527	653 810	632 986	20 824	3,3%
9	+1	OYO (5)	INDE	20 667	17 444	597 873	431 198	166 675	38,70%
10	-1	BTH HOTELS (6)	CHINE	6 910	6 263	518 031	481 503	36 528	7,6%
11	+1	HYATT HOTELS CORP	USA	1 142	1 334	347 301	321 341	25 960	8,1%
12	-1	BEST WESTERN HOTEL GROUP	USA	3 872	3 936	335 405	342 521	-7 116	-2,1%

1) estimation MKG (données Q3) inc. Radisson Hotel Group, hors chambres en simple distribution/affiliation [Hotels & Préférences, Tempting Places]

2) hors timeshares : Hilton Grand Vacations

3) estimation MKG (données Q3) hors hôtels en propriété opérés sous des marques tierces

4) Hors timeshares : Holiday Inn Vacation Club

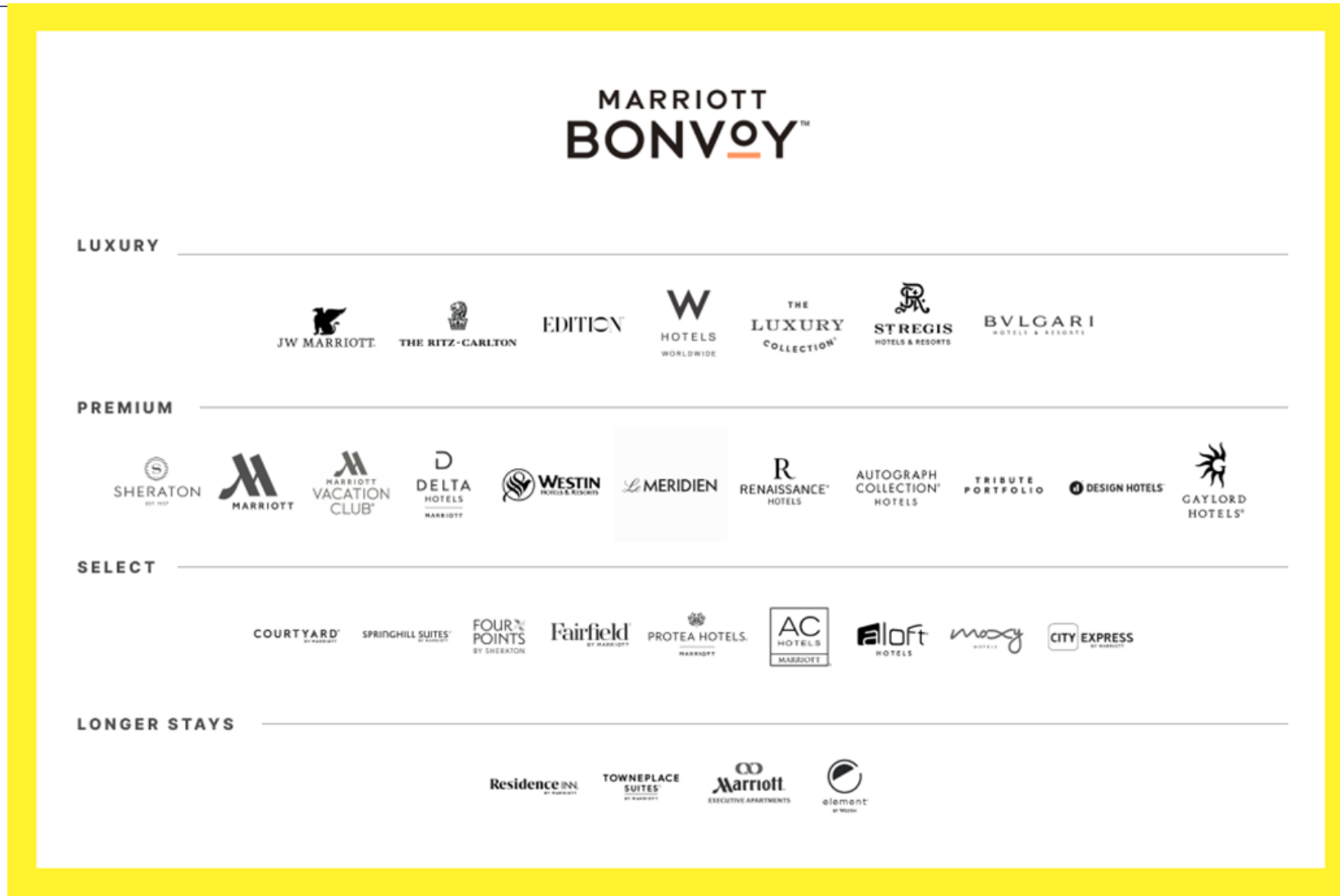
5) inc. G6 Hospitality, estimation MKG pour le parc hôtelier uniquement, hors Oyo vacation homes / ex-@Leisure Group, Belvilla, Ferienwohnungen

6) estimation MKG (données Q3)



# HOTEL COMPANIES AND BRANDS

## Sample of Hotel Brand – MARRIOTT



# HOTEL COMPANIES AND BRANDS

Sample of Hotel Brand – ACCOR

Luxury		Premium		Midscale	Economy
RAFFLES	SLS	mantis	ANGSANA	mantra	BreakFree
ORIENT EXPRESS	SOY	M GALLERY	25h twenty five hours hotels	NOVOTEL	ibis
BANYAN TREE	SOFITEL		HYDE	Mercure	ibis STYLES
DELANO	THE HOUSE OF ORIGINALS	2C	MÖVENPICK	adagio	ibis budget
LEGEND	RIXOS	Art Series	GRAND MERCURE	MAMA SHELTER	JO& JOE
Fairmont	onefinestay	MONDRIAN	PEPPERS	TRIBE	hotelF1
		pullman	THE SEBEL		
		swissôtel			

# HOTEL COMPANIES AND BRANDS

## STR Chain Scale Segments

**Chain Scale Segments:** A categorization of branded hotels based on the actual average room rates. Independent hotels, regardless of their average room rates, are included as a separate category.

The Chain Scale Segments are:

(L)	Luxury Chains
(UU)	Upper Upscale Chains
(U)	Upscale Chains
(UMS)	Upper Midscale Chains
(MS)	Midscale Chains
(E)	Economy Chains
(I*)	Independents
(ES*)	Extended Stay: Hotels focused on attracting guests for extended periods of time. These hotels typically quote weekly/monthly rates.

\*Not segmented by STR; may be at any quality level.



**NB: Under STR classification you must use this terminology for the positioning of hotels**



# HOTEL COMPANIES AND BRANDS

## Hotel Operating Contracts – Negotiating Points

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### Franchise Agreements

- Franchise fees/Royalties
- Other fees: marketing & loyalty programs, reservations, entry fee
- Term / Renewal rights
- FF&E Reserve; funded or not?
- Termination rights
- Sale and transfer rights
- Territorial restriction
- Franchisor key money
- Franchisor inspection rights
- Governing law
- Data transfer rights

### Management Agreements

- Base & Incentive fees/Royalties
- Other fees: marketing & loyalty programs, reservations
- Term (length of contract)/ Renewal rights
- Owner's priority
- Performance test
- FF&E reserve amounts; funded or not?
- Owner approval rights (Budgets, Executive Staff, FF&E and CAPEX procedures)
- Termination rights
- Sale and transfer rights
- Territorial restriction
- Key money
- Accounting/reporting and auditing procedures
- Owner inspection & meeting rights
- Operator guarantees
- Operator key money
- Governing law
- Non-disturbance agreements (Lender)
- Data transfer rights

### Lease Agreements

- Subject to lease / rental contract
- Rental amount (fixed, variable, blended, indexed)
- Term / Renewal rights
- Maintenance and Replacement
- Termination rights
- Sale and transfer rights
- Property insurance, property taxes
- Major structural repairs

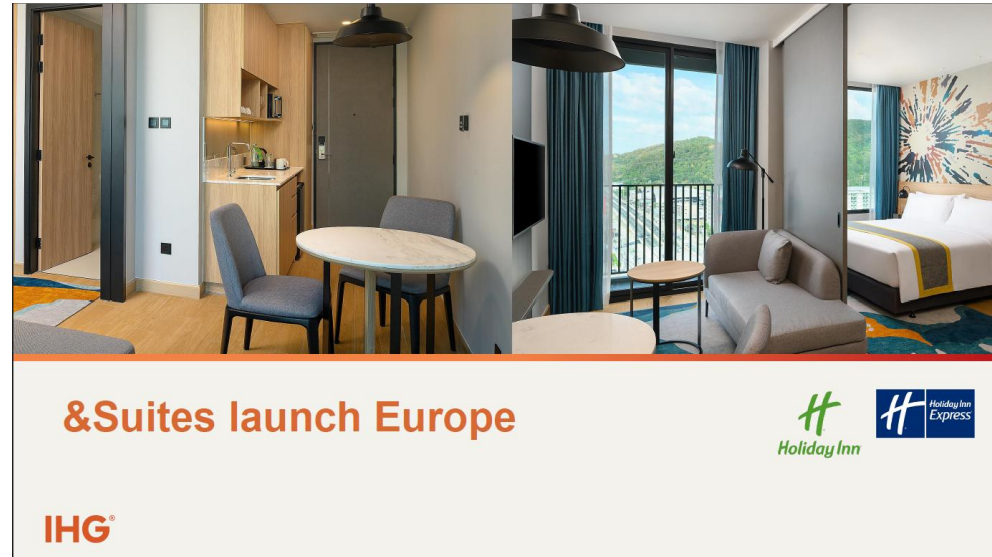
# HOTEL COMPANIES AND BRANDS

## BRAND STANDARDS – sample Holiday Inn

### Hard Brands

- Designed for **new developments**
- Standard Products, Design and Services
- Defined room and floor plans
- Technical Descriptions
- Design and color book
- FF&E / OS&E inventory and delivery book
- Operations Manuals
- Standard Operation Procedures
- Support
  - - Technical Support
  - - Sales and Marketing
  - - HR
  - - Purchasing

Contract a) Franchise b) Management



### Market Shares & Expansion

### Soft Brands

- Designed for **conversions**
- Flexible room and floor plans
- Defined color and design concept
- Basic technical descriptions
- Flexible FF&E / OS&E
- Operations standards and quality system
- Support
  - - Technical Support
  - - Sales and Marketing
  - - HR
  - - Purchasing

Contract a) Management b) Franchise