

supply

1,135 properties; 200,155 rooms¹

BRANDED ROOMS



CHAIN AFFILIATED ROOMS



GROUP / BRAND PROFILE

- strongest brand: **NH**
- strongest group: **Marriott**
- fastest growing brand: **The Student**
- fastest growing group: **The Student**
- strongest regional brand (global presence): **TH Resorts**
- fastest growing regional brand: **Brera**

pipeline

68 properties; 14,851 rooms^{1,2}

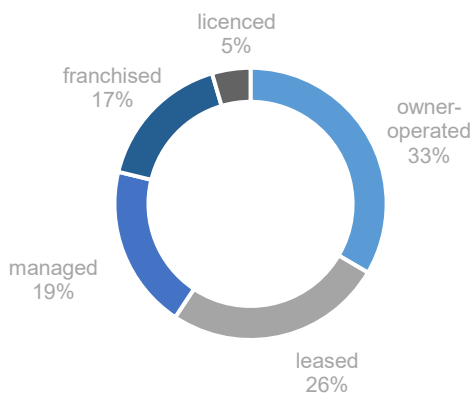


SELECTED OPENINGS of 2020

- The Student Hotel Bologna, Bologna, **361 rooms**
- Smy Sighientu Thalasso & Spa, Capitana, **225 rooms**
- Hyatt Regency Malta, Saint Julian's, **151 rooms**
- Movie Cinecittà Roma, Rome, **117 rooms**
- Mercure St. Julian's Malta, Saint Julian's, **113 rooms**

hotel contracts

650 properties; 123,385 rooms under contract^{2,3,4}



key takeaways

- Alternative destinations represent an attractive market for new openings (e.g. Trieste, Bergamo, Bologna, Cortina D'Ampezzo, etc).
- Hotel investment volume is sitting at about €1 billion in 2020 and it is foreseen to reach about €1.5 billion in 2021.
- According to STR data, the occupancy decreased in 2020 in all Italian cities; the average occupancy for Italy was 26% which represents a 63% decline.
- According to the experts and participants attending:
 - After the pandemic, hotels must rethink about hospitality: hybridisation will be a must and flexibility will be one of the key aspects for hotels.
 - The sector needs more institutional support; Italy is moving in this direction (e.g., Fondo Nazionale del Turismo is spending € 2 billion to requalify iconic and historic buildings).
 - Italy attracts the interest of foreign investors; there are a lot of projects in the pipeline, especially with lifestyle and luxury brands.
 - Hotel assets need to be refurbished and, in some case, rebuilt and costs can vary considerably from one location to another.

participant feedback



HTLroundtables around the globe



learn more and find the HTLroundtables schedule at

www.pkfhotels.com



NOTES:

1) calculated as per PKF sample; includes all properties with at least 100 rooms; 2) as per 31 December 2020; 3) as per the PKF contract database 4) from the viewpoint of hotel groups

For enquiries about our research offerings, please contact Akshara Walla at research@pkfhotels.com
For enquiries about upcoming PKF hotel experts events, please contact Maryana Turchyn at events@pkfhotels.com
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