

# 196+ roundtable

196+ roundtable  
italy+

italy, malta,  
san marino, vatican city

live  
(08.02.2022)  
Radisson Collection  
Hotel Palazzo Touring  
Club Milan

22  
participants

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## NOTES

1) calculated as per PKF sample; includes all  
properties with at least 100 rooms; 2) as per 31  
December 2021; 3) as per the PKF contract  
database; 4) from the viewpoint of hotel groups

## supply

1,150 properties	202,729 rooms <sup>1</sup>
47% branded rooms	74% chain affiliated rooms

### group / brand profile

- › strongest brand: **NH**
- › strongest group: **Marriott**
- › fastest growing brand: **NH Collection**
- › fastest growing group: **Bluserena**
- › strongest regional brand (global presence): **TH**
- › fastest growing regional brand: **Brera**

## key takeaways

- › With over thirty openings in 2022, mid-scale and luxury are the most dominant segments represented.
- › The main Italian cities for the new openings are not only the Big Four - Rome, Venice, Milan, and Florence - but also leisure destinations such as Cortina d'Ampezzo, Apulia, Sicily, Umbria and Tuscany. Alternative attractive cities are Trieste, Genoa, Naples and Bari that have aroused the interest of big international brands like NH Hotel Group, Meliá, Hilton, and Radisson Hotel Group.
- › Compared to the previous year, a general increase between 5% and 10% in hotel real estate values throughout the country is expected. Consequently, an overall increase in hotels and demand is foreseen
- › Based on STR's projections, this year's business on the book is growing compared to last year. This trend is not only seen in well established leisure destinations, but also in cities such as Matera and Turin.

## pipeline

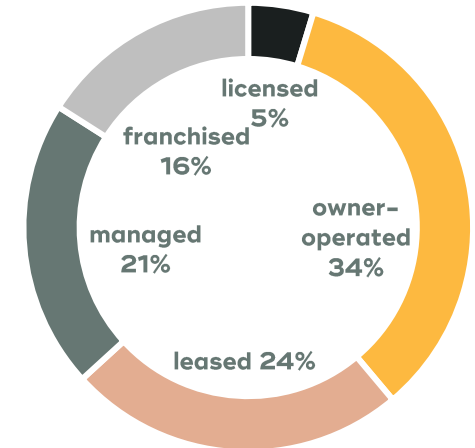
63 properties	14,145 rooms <sup>1,2</sup>
35 hotels under construction	28 planned hotels

### selected openings of 2021

- › Is Serenas Badesi Village, Badesi, **360 rooms**
- › Holiday Inn Express Rome Airport, Fiumicino, **224 rooms**
- › Mama Shelter Rome, Rome, **217 rooms**
- › 25hours Hotel Piazza San Paolino, Florence, **171 rooms**
- › W Rome, Rome, **162 rooms**

## contracts

727 properties	136,208 rooms under contract <sup>2,3,4</sup>
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