



196+ roundtable
italy +

italy, malta,
san marino, vatican city

milan
(09.03.2023)

35
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 2022; 3) as per the PKF contract
database; 4) from the viewpoint of hotel groups

supply

1,167 properties	205,272 rooms ¹
48% branded rooms	74% chain affiliated rooms

group / brand profile

- › strongest brand: **NH**
- › strongest group: **Marriott**
- › fastest growing brand: **DoubleTree by Hilton**
- › fastest growing group: **Hilton**
- › strongest regional brand (global presence): **TH**

key takeaways

- › There are currently over 60 major pipeline projects in Italy in 2023 with luxury as the most dominant segment represented.
- › The projects are concentrated in the main Italian cities, however there is significant demand and interest for alternative destinations, in particular in Southern Italy, like Naples, Apulia, Sicily and Sardinia that are catching the eye of the big brands.
- › The principal types of contracts continue to be management and franchise.
- › Industry leaders in Italy agree that there needs to be more resources invested for employee training and digitalisation.
- › There has been much more attention given to sustainability and ESG efforts in both the building and operations. Companies are increasingly focusing attention on social wellbeing and various ESG certifications.
- › The public sector is contributing to tourism development with initiatives like the FRI-Tur (revolving enterprise fund for business support and development investment in tourism).
- › Creativity and versatility are key learnings from Covid as many hotel spaces were reinvented for guests, such as MICE, f&b and other unused spaces.

pipeline

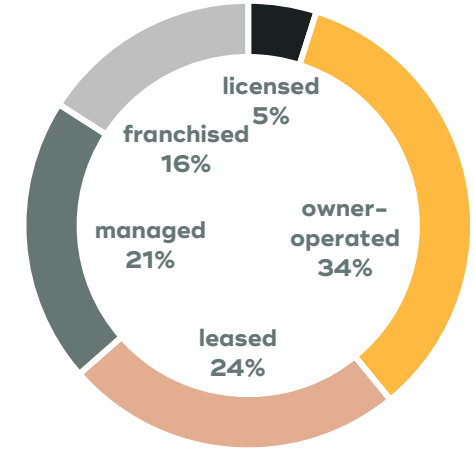
69 properties	14,839 rooms ^{1,2}
39 hotels under construction	30 planned hotels

selected openings of 2022

- › DoubleTree by Hilton Milan Malpensa Solbiate Olona, Solbiate Olona, **246 rooms**
- › NH Collection City Life, Milan, **185 rooms**
- › B&B Hotel Roma Fiumicino Fiera, Fiumicino, **114 rooms**
- › Conrad Chia Laguna Sardinia, Domus De Maria, **107 rooms**
- › Amedia Noventa di Piave, Noventa Di Piave, **106 rooms**

contracts

744 properties	138,647 rooms under contract ^{2,3,4}
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