

# 196+ roundtable

## 196+ roundtable iberian peninsula

andorra, portugal,  
spain, gibraltar

madrid  
(30.03.2023)

30  
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

2,983  
properties

627,753  
rooms<sup>1</sup>

76%  
branded  
rooms

85%  
chain affiliated  
rooms

### group / brand profile

- › strongest brand: **Meliá**
- › strongest group: **Meliá**
- › fastest growing brand: **The Social Hub**
- › fastest growing group: **The Social Hub**
- › strongest regional brand (global presence): **Meliá**
- › fastest growing regional brand: **Riu**

## key takeaways

- › Tourism in Spain is expected to reach 2019 levels this year.
- › High concern about labour costs and employee retention.
- › The Iberian Peninsula remains a very attractive destination for investors, developers and operators.
- › Hotels proved (again) to be a resilient asset class.
- › Serviced Living concepts are growing and increasingly attractive to investors.
- › The shared economy will transform our housing/living customs.
- › ESG is becoming a key factor in the industry and some brands can already measure its economic impact.

## pipeline

166  
properties

36,718  
rooms<sup>1,2</sup>

94  
hotels under  
construction

72  
planned  
hotels

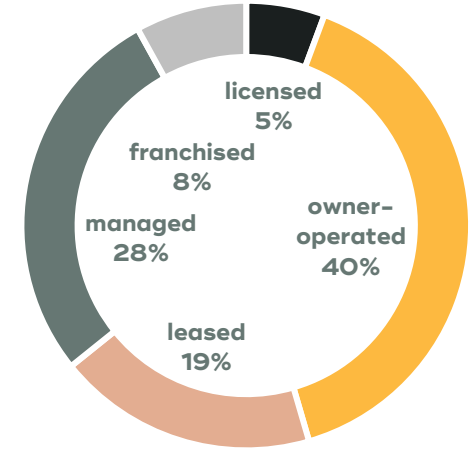
### selected openings of 2022

- › Atzavara Hotel & Spa, Santa Susanna, **465 rooms**
- › Alannia Salou, Salou, **346 rooms**
- › The Social Hub Madrid, Madrid, **300 rooms**
- › Mynd Yaiza, Playa Blanca, **300 rooms**
- › The Social Hub Barcelona Poblenou, Barcelona, **293 rooms**

## contracts

1,425  
properties

323,501  
rooms under  
contract<sup>2,3,4</sup>



## 196+ roundtables around the globe



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