



196+ roundtable mediterranean

algeria, libya, tunisia

tunis
(11.04.2023)

14
participants

For enquiries about our research offerings,
please contact **Akshara Walia** at
research@pkfhospitality.com

For enquiries about upcoming events of
the PKF hospitality group, please contact
Yuliya Tomenchuk at events@196plus.com

PKF hospitality group is a member firm of the
PKF International Limited family of legally
independent firms and does not accept any
responsibility or liability for the actions or
inactions of any individual firm or firm.

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

293 properties	79,682 rooms ¹
53% branded rooms	64% chain affiliated rooms

group / brand profile

- › strongest brand: **El Mouradi**
- › strongest group: **El Mouradi**
- › fastest growing brand: **Marriott**
- › fastest growing group: **Marriott**
- › strongest regional brand
(global presence): **El Mouradi**

key takeaways

- › In 2023, the Tunisian tourism market is expected to surpass 2019 levels.
- › Increased demand is mainly driven by the cheap rates due to the devaluation of the Tunisian dinar.
- › Strengths of the market include the close proximity to Europe and a variety of cultural sites (eight UNESCO sites). It could benefit from a stronger focus on cultural tourism to diversify the product offering, as well as showing more responsiveness to market trends.
- › The main weaknesses include the lack of strategic and efficient marketing, positioning and lack of transport infrastructure.
- › Coastal destinations have the highest demand: Tunis, Hammamet, Sousse, Djerba.
- › Real inflation is estimated to be in double digits.
- › Tour Operators have great power over the hotel market and are perceived to not follow a long-term sustainable growth strategy.
- › The hotel market suffers from underfinancing and labour shortage due to low salaries.

pipeline

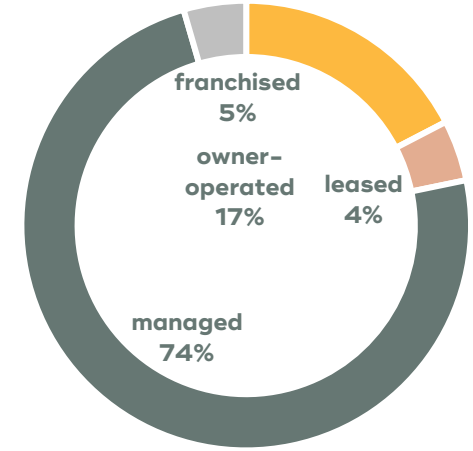
23 properties	5,207 rooms ^{1,2}
20 hotels under construction	3 planned hotels

selected openings of 2022

- › Tunis Marriott Hotel, Tunis,
199 rooms
- › Hotel Royal ASBU Tunis,
Tunis, **142 rooms**

contracts

74 properties	20,465 rooms under contract ^{2,3,4}
-------------------------	---



196+ roundtables around the globe



learn more and find
the 196+ roundtables schedule at

www.196plus.com