hospitality events
for curious minds

196+ roundtable

196+ roundtable mediterranean

Algeria, Tunisia, Libya

Tunis
(23.06.2022)

supply

307 properties	83,079 rooms[1]
53% branded rooms	61% 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
- fastest growing regional brand: AZ

pipeline

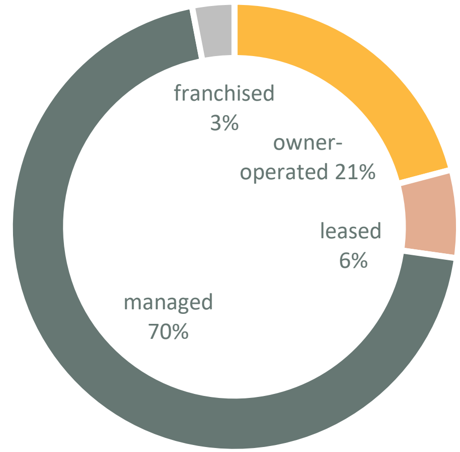
16 properties	3,718 rooms[1,2]
15 hotels under construction	1 planned hotels

selected openings of 2021

- Algiers Marriott Hotel Bab Ezzouar, Algiers, 213 rooms
- AZ Hotel Grand Oran, Oran, 179 rooms
- Residence Inn Algiers Bab Ezzouar, Algiers, 147 rooms
- Novotel Tunis Lac, Tunis, 124 rooms

contracts

68 properties	18,354 rooms under contract[2,3,4]



key takeaways

- Great potential for cultural tourism but clouded by being branded a "beach destination"
- Wrong positioning, Tunisia is not a "cheap" destination
- Lack of hoteliers; most hotels are managed by their real estate owners
- Lack of proper training among the staff
- Lack of government support to the industry, FTH association efforts unheard
- Hotel & tourism network system is disconnected and lacks interest in improving its state
- Airspace restrictions, closed skies and expensive flights (no low cost)
- Outdated entry formalities need revision, lack of infrastructure
- Not all apps can be duplicated in Tunisia market making integration difficult

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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