

2017

HOTELS & CHAINS

ITALY

Full Edition

HOSPITALITY STATISTICS COMPENDIUM

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Foreword

Dear Reader,

Thank you for choosing the new *Full Edition* of the Hotels & Chains Report 2017!

We have prepared the Full Edition to support hospitality developers, owners and chains in their in-depth understanding of the Italian current hospitality landscape.

We are frequently asked to provide information on “*who is who*” in the hotel business and to generate snapshots on top or second tier destinations, for which we try, every time, to be the most precise and quick possible.

But with this report we disclose the core of the Hotels & Chains census database *all at once*, in the effort to provide analysts with the most accurate data on cities, chains, trends, drivers, pipeline and business models, through a comprehensive and updated compendium.

We have included over 130 pages of completely new statistics which were not reported in the Executive Edition.

This Full Edition can be surfed by chain ranking, by cities ranking or scale rankings and it is enriched, for the first time, by the opinion of 11 chains development experts with relevant experience in Italy, providing their personal point of view on hotel development drivers for the next 3 years.

There is no other source of business intelligence data on hotel development in Italy which can offer such a detailed and accurate picture of hospitality in Italy as the Full Edition does.

Thank you again!

The Horwath HTL Italy Team

Copyrights and Methodology

This document has been edited by Horwath HTL and it is intended to provide hospitality business intelligence data on Italy.

It has been printed on April 2017, based on the Horwath HTL Hotel Chains Census 2016.

Since hotel chains data are updated as of December 2016, minor changes in chains portfolio may have occurred in the first 3 months of 2017, of which we cannot report.

As a consequence, we cannot be considered responsible for data inaccuracy deriving from incorrect information based on the time of the edition of this Report.

This report does not provide financial information, nor it is intended to provide investment guidelines or display investment opportunities for any of the mentioned hotel chains or brands.

We do not provide any valuation on the presented hotel chains or brands.

In addition, we have not been paid or sponsored by any of the mentioned hotel chains or brands to be included or listed in this Report. The listing is generated according to the Census methodology, which is here summarized:

- A chain is any organization operating 5 or more hotels in the world (of which, at least 1 is in Italy), by owning, managing, leasing or franchising properties.
- *Light brands* and the so called “*voluntary affiliation networks*” are not considered into the count.
- International chains are those with headquarter outside Italy; domestic chains are those with headquarter in Italy, including those that also have operations abroad.
- Investigation is based on voluntary cooperation of participating hotel chains and desk research covering several sources such as official websites, international and domestic chains directories, previous studies.
- As for the census, scales are based on the official classification of the hotels (Italian stars system) and do not represent the target positioning of the brand itself. See the box on the bottom right of this page.
- Double counting of hotels managed by second tier operators and franchised by a chain has been avoided. Therefore, aggregated data is net of double-counting.
- When the case, figures including double counting of properties are reported as “IDC”
- For the scope of this report, Pipeline hotels are counted separately and do not sum up into the census. Pipeline and re-branded hotels are counted together. Pipeline do not include the count of independent hotels

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All data on hotel chains as of December 31st, 2016.

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We have tried our best to correctly report information and data on hotel chains and have directly contacted hotel chains responsible persons prior to distribution for data check, in order to improve accuracy.

Nevertheless, omissions and minor errors may occur as methodologically accepted for any census.

Stars to Scale conversion

The 2016 Census uses the following “Stars”-to-“Scale” conversion:

- 1 Star = Absent
- 2 Stars = Economy
- 3 Stars = Midscale
- 3S Stars = Midscale
- 4 Stars = Upscale
- 4S Stars = Upscale
- 5 Stars = Upper Upscale & Lux
- 5L Stars = Upper Upscale & Lux