

# Quantitative & qualitative trends in hospitality investments

Mediterranean region

# Agenda

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Mediterranean outlook: Setting the scene



Top 10 quantitative investment criteria

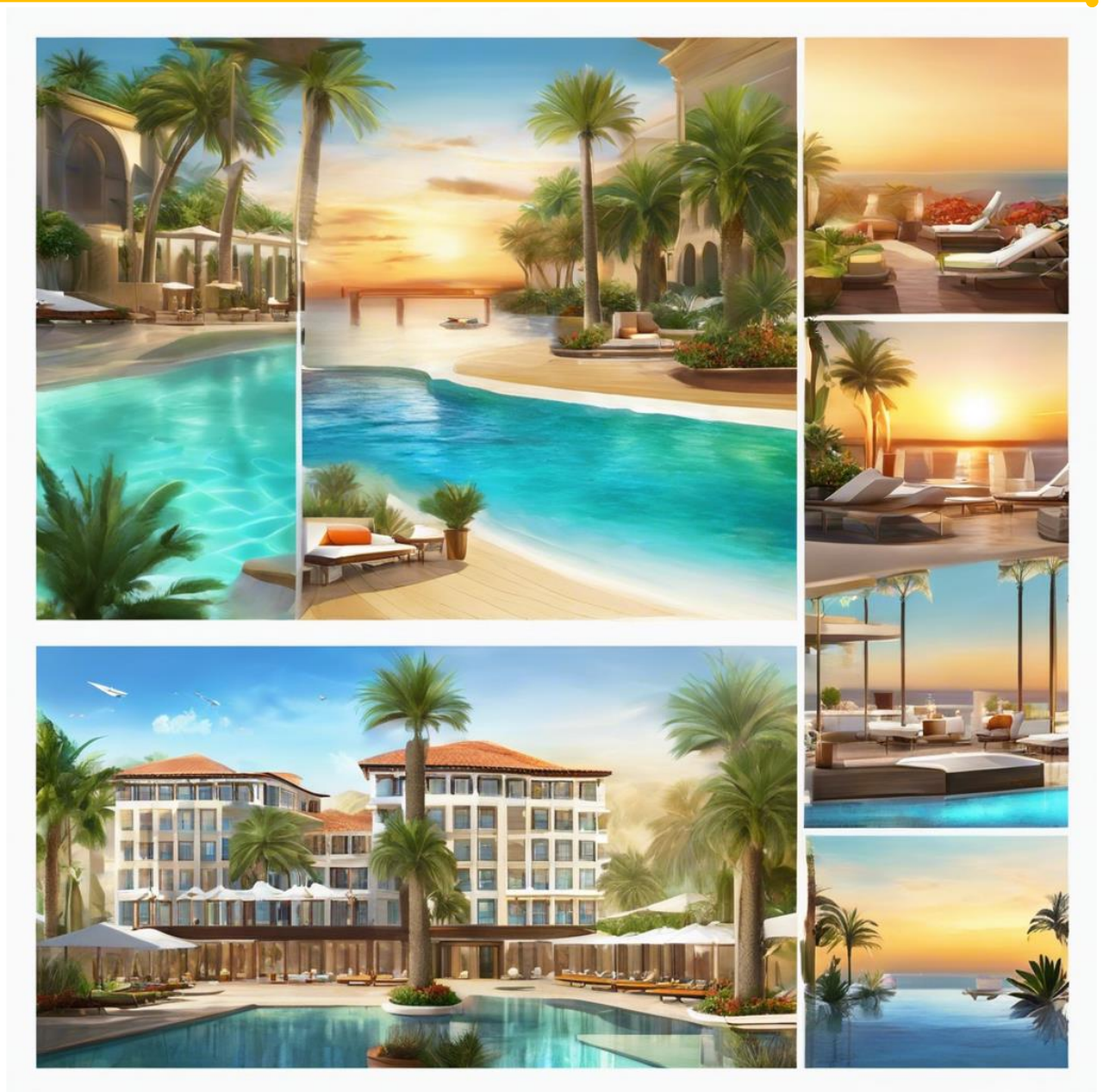


Top 10 qualitative investment criteria



Bold steps forward

# Mediterranean outlook



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## Factors shaping the dynamics of the region

### Robust Tourism Demand

- Stable tourism growth
- Diversified tourism
- Continuous demand

### Real Estate & Development Potential

- Affordable developing markets
- Luxury segment and limited supply

### Demographic Trends & Changing Consumer Preferences

- Ageing population & health tourism
- Growth in wealthy travellers
- Short-term rental market

### Economic Stability & Supportive Policies

- Stable regulatory framework
- Tax incentives

### Infrastructure & Connectivity

- Road – Air – Port connectivity
- Continuous upgrades

### Strategic Geopolitical Positioning

- The centre of the world
- Proximity to major international markets
- Cultural & historical heritage

Hospitality Real Estate  
investors:

Which indicators do they  
value highest?



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## Quantitative Investment Indicators

### Industry Related

- Real Estate price index
- Capitalization rates

### Destination Related

- Tourists arrivals growth rate
- Hotel investment volume
- FDI
- Hotel construction pipeline

### Asset Related

- ADR
- Occ rate
- RevPAR
- Revenue growth & profit margins

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## Qualitative Investment Indicators

### Market Related

- Consumer trends
- Political & economic stability
- Regulatory environment
- Infrastructure & connectivity
- Supply & demand balance

### Asset Related

- Niche segments and experiences
- Brand recognition
- Sustainability practices
- Brand loyalty & repeat customers
- Workforce & talent availability

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# Bold Steps Forward

Do your Housekeeping

Communicate

Negotiate

# About Horwath HTL

At Horwath HTL, our focus is one hundred percent on hospitality, tourism and leisure consulting. Our services cover every aspect of hotel real estate, tourism and leisure development.

Our clients choose us because we have earned a reputation for impartial advice that will often mean the difference between failure and success.

Each project we help is different, so we need all of the experience we have gained over our 100-year history.

We are a global brand with 52 offices in 38 countries, who have successfully carried out over 50,000 assignments for private and public clients.

We are part of the Crowe Global network, a top 10 accounting and financial services network. We are the number one choice for companies and financial institutions looking to invest and develop in the industry.

We are Horwath HTL, the global leader in hospitality, tourism and leisure consulting.

## Regional Contact



Xenophon Petropoulos



[xpetropoulos@horwathhtl.com](mailto:xpetropoulos@horwathhtl.com)



[+30 210 725 6900](tel:+302107256900)

## Athens

25-29 Karneadou Street,  
Kolonaki 10675,  
Athens, Greece

[www.horwathhtl.com](http://www.horwathhtl.com)