

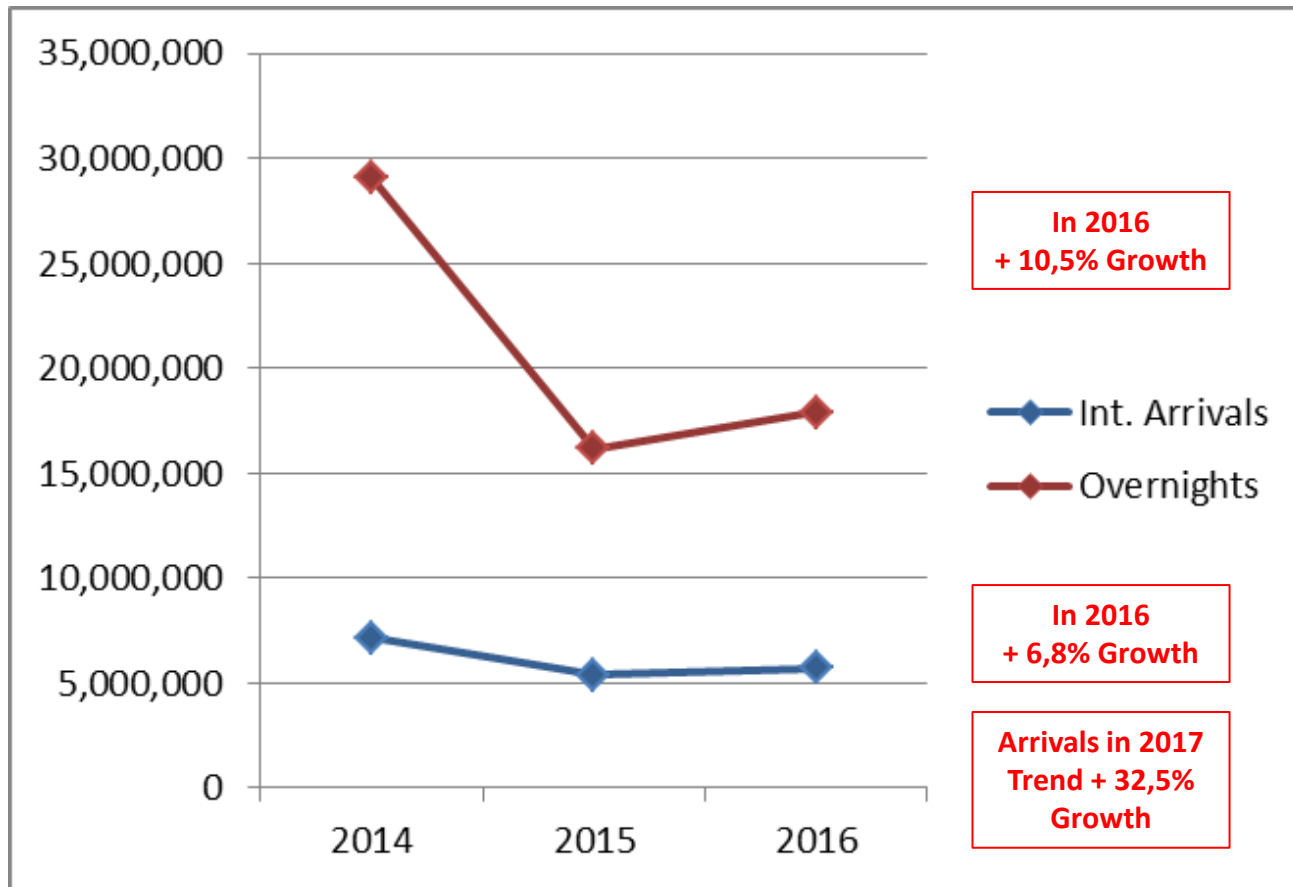


# Sustainable Development & Investment Market Sentiment in Tunisia

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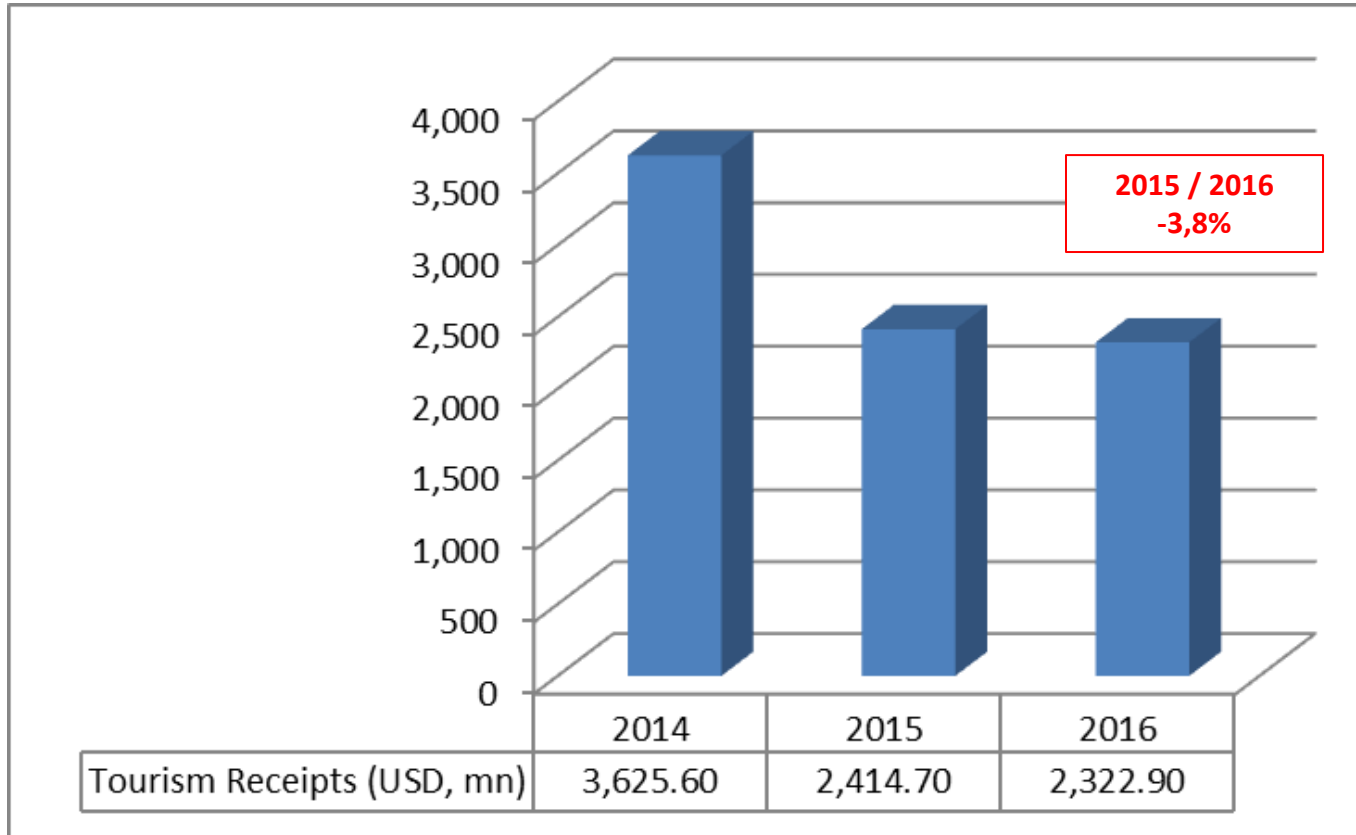
Independent Hotel & Tourism Consultant  
Owner's Representation & Project Mgmt.

# International Tourist Arrivals & Overnights 2014 - 2016



Sources: UNWTO, Ministry of Tourism and Handicrafts, Republic of Tunisia




# International Tourism Receipts 2014 - 2016



Sources: UNWTO, Ministry of Tourism and Handicrafts, Republic of Tunisia

# Hotel Development Pipeline 2015 - 2017

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Development Pipeline	2015	2016	2017	Change % 2015/2017
Hotel projects	12	15	17	42% 
Confirmed keys	2,444	2,976	3,852	58% 
Construction	1,501	1,726	3,204	113% 
Planning	943	1,250	648	-31%
Construction Ratio	61%	58%	83%	35%

Source: W Hospitality (2015 – 2017)

# Selected Hotel Openings / Developments

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**FOUR SEASONS**  
*Hotels and Resorts*

- Four Seasons Hotel Tunis
- Gammarth
- 203 keys (incl. 35 Suites)
- Opening: December 2017
- 5 F&B outlets
- Indoor and outdoor swimming pools
- 11 SPA treatment rooms

# Selected Hotel Openings / Developments

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- Steigenberger Kantaoui Bay
- Sousse
- 365 hotel rooms and suites
- Opening: April 2017
- 5 F&B outlets
- Thalasso & SPA on 5.150 sqm
- 44 treatment rooms



# Selected Hotel Openings / Developments

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- Anantara Tozeur Desert Resort
- City of Tozeur
- 93 rooms and villas
- Opening: 2018
- Restaurant, bar, health club and SPA
- Spacious development on 400,000 sqm
- Owned by Qatari Diar

# Key Findings & Take Away

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- Market indicators are showing an upward trend;
- Crisis in ancient Greece;
- Reconsideration of the way how to approach tourism:
  - Diversification of the tourism offering;
  - Re-positioning of the destination;
  - Adapting the regulative framework;
  - Development of new global markets;
  - Attraction of major international hotel brands;
- The combination of these factors creates a more sustainable foundation for a positive development in the next few years;
- The confidence among tourists, investors and management companies alike, is clearly returning.





Thank you very much  
for your attention!