

Fabrica and Scenari Immobiliari present “ROME 2030. THE CAPITAL WITHIN THE NEW INTERNATIONAL SCENARIO”

*An outlook about economy and real estate growth in 2030:
Roma as an attractive hub for investors interested in urban regeneration plans, living and hotels*

Roma has a unique historical and architectural heritage, it is a touristic attraction that brought 46.5 million tourist arrivals in 2019, with 1,036 hotels and 51,000 rooms. It has Fiumicino international hub, from which 43.5 million people have transited, it has a plenty of green areas and a low population density, with 162 smq of green areas per inhabitant. In addition, it offers a qualified research and university hub, consisting in 12 universities for 190k students, and an excellence of the health system, with 30 hospitals and 11,500 beds. All these features lead Rome, within European Capital cities, as the fourth for attractiveness and one of the five most relevant urban centers.

These are the main evidences of “Rome 2030. The Capital within the new international scenario”, a report realised by Scenari Immobiliari for Fabrica SGR to analyse the City’s state of health. The survey, based on reliable data and leading opinions, aims at highlighting the opportunities for rebirth that the city is currently showing, in spite of the non-positive perception that hovers in public opinion.

Overall ranking of European capitals

	general Rank	overall Score	demographic Aspects	Mobility and	Environment and	
				infrastructures	quality of life	Tourism
1	London	357,0	100,0	100,0	57,0	100,0
2	Paris	297,2	78,1	84,3	46,8	88,0
3	Madrid	276,3	78,2	69,8	86,8	41,5
4	Rome	211,6	44,2	28,5	86,8	52,1
5	Berlin	210,8	43,2	53,7	67,3	46,6
6	Stockholm	190,7	37,1	30,3	100,0	23,3
7	Lisbon	164,9	35,5	22,1	70,6	36,7
8	Vienna	153,1	26,8	34,8	68,2	23,3
9	Dublin	151,8	29,1	14,0	86,7	22,0
10	Athens	147,3	19,4	28,0	62,2	37,7
11	Brussels	122,0	20,7	19,9	56,4	25,0

“We decided to promote the survey - comments Giovanni Maria Benucci, CEO Fabrica SGR - because we are confident that private entities can and have to play their role, even if governance hasn’t often measured up. There is room in a city like Rome for great opportunities, because it has historical fundamentals of affordability, resilience and extraordinary green areas within the city”.

“The survey shows a split between the actual situation - a city being able to attract and host new companies, tourists and citizens - and an opaque image, based on clichés - adds Alessandro

Caltagirone, deputy chairman Immobiliare Caltagirone -. *It is necessary for everyone to play his role to make Rome known as it is and not as it is said to be*".

"Although Rome has been suffering from a lack of vision and strategic planning - says Mario Breglia, Chairman Scenari Immobiliari - the city has been showing its resilience and its ability to incorporate current changes. Moreover, it has a real estate market that attracts investors: in Roma it takes 20 years to refund a standard real estate investment with the rental income, while Berlin, Paris, Madrid or London have longer duration, often more than 30 years. Rome is expected to be one of the three best real estate performers within european cities. There is still so much to be done, but Rome starts with favourable figures, and it is necessary to analyse them without prejudices nor distortions. Rome is again the city of opportunities!".

Rome attractiveness has a positive influence on real estate market, too. The recent price stability in the city center, together with the decline in the suburbs, leads Rome to have great recovery opportunities in the coming years, potentially among the highest in Europe. The growth forecasts for the next five years, places the capital second to Paris with more than 19.3%, among the cities analyzed, with a potential increase of 15.4% in five years

2026 forecasts - ranking by percentage change in 5 years of average sales prices in central areas, residential sector

City	Average prices	Variation*
	June 2021 Euro/mq	2026/2021 %
1 Paris	13.700	19,3
2 Rome	9.150	15,4
3 Berlin	7.800	14,1
4 Madrid	5.500	12,7
5 London	13.200	11,4
6 Vienna	7.800	10,3
Stockholm	9.800	9,7
8 Brussels	3.800	9,2
9 Lisbona	4.500	8,9
Dublin	6.700	8,2
11 Athens	1.900	5,3

Over 100 investors, one third national and two thirds international, were interviewed to share their opinion on the appeal of Rome, now and in view of 2030.

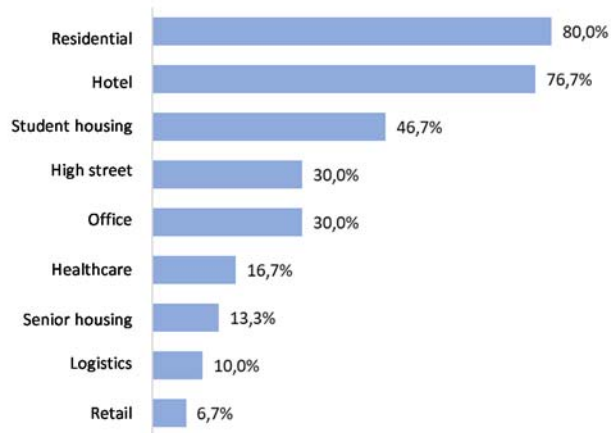
It emerges that the capital represents an interesting opportunity, after a long period of stalemate during which private investors mainly focused on Milan.

Residential and hotel appear to be the preferred asset classes in the coming years in Rome.

As the hotel sector has always been considered key in the Capital, the residential market is regaining appeal differently than in the past. In fact, it is not just a question of building traditional homes and place them on the market, but of thinking about new formats that meet the needs of the national and international market.

The trend towards rental residences, private rented sector, is also present in Rome, a city that attracts young workers and students from central and southern Italy, as well as from abroad.

Which RE asset classes will be privileged in the next few years in Rome? (multiple answers)



It was asked to indicate the most appealing urban areas for real estate investors. The historic city center prevails, followed by the Tiburtina and the Eur area, mainly in the towards the Ostiense neighborhood, but also the axis leading to the airport.

Which urban areas are most able to attract real estate investments? (multiple answers)

