Discover PUGLIA

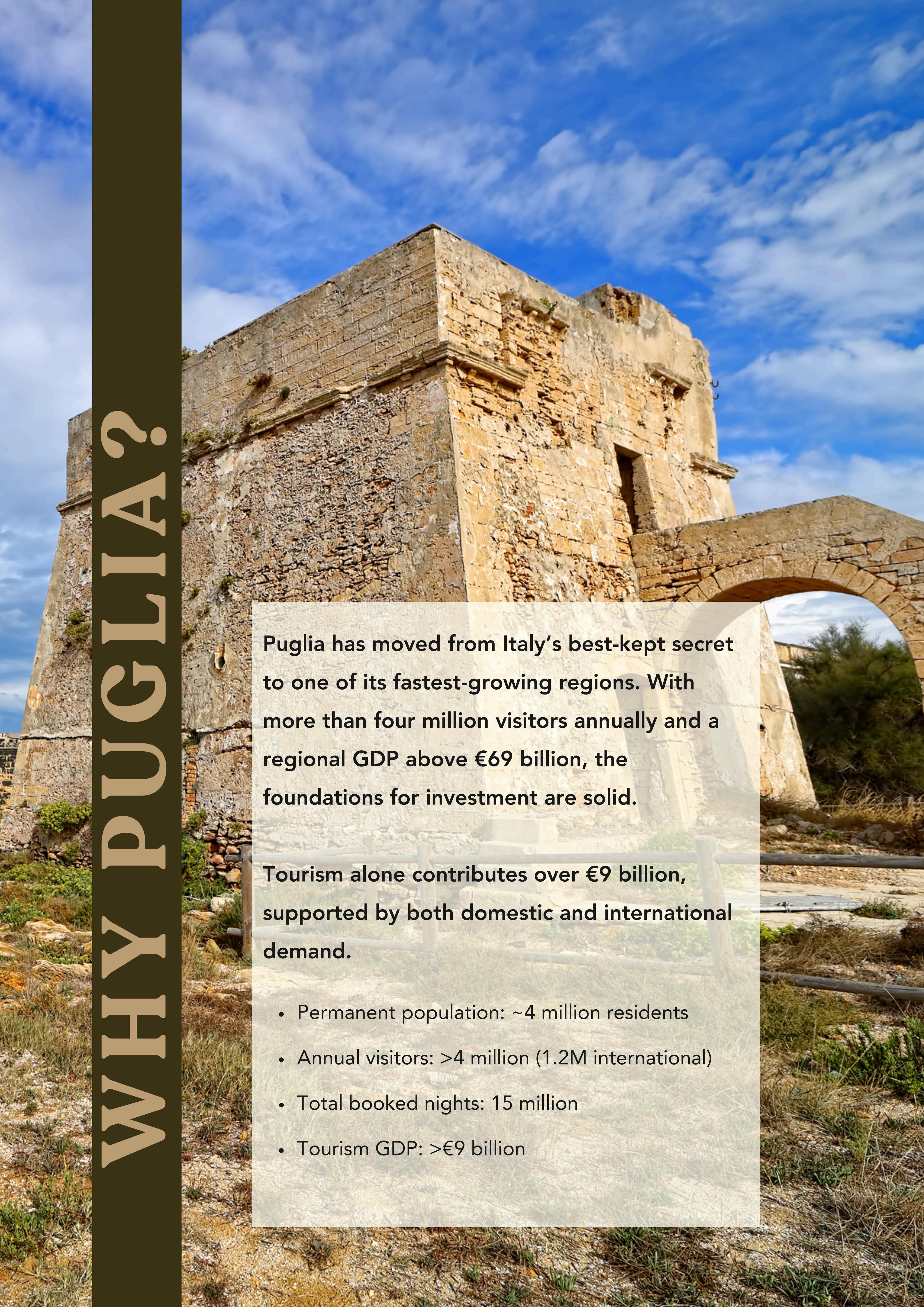
Where Italian Living Meets Investment Opportunity

Discover
PUGLIA

Puglia now welcomes more than four million visitors each year, with tourism adding over €9 billion to the regional economy. International arrivals rose 70% in the five years leading up to 2020, and recovery was swift—by 2022, the region had already returned to pre-pandemic levels. Growth has continued since, with more foreign guests and longer stays than before.

This momentum shows up clearly in the rental market. Occupancy during the summer season averages above 75%, and nightly rates hover around €270. Higher-end stays have seen even stronger performance, with some properties generating €1,000 per night and year-over-year revenue gains of 25%. Importantly, Puglia remains free of global hotel chains, leaving the market in the hands of independent owners.

Accessibility adds another layer of strength. Two international airports, high-speed rail connections, and well-developed road and port networks keep the region connected to Italy and abroad. Together, these factors make Puglia a rare mix of cultural appeal, dependable demand, and room for investors to step in.



WHY PUGLIA?

Puglia has moved from Italy's best-kept secret to one of its fastest-growing regions. With more than four million visitors annually and a regional GDP above €69 billion, the foundations for investment are solid.

Tourism alone contributes over €9 billion, supported by both domestic and international demand.

- Permanent population: ~4 million residents
- Annual visitors: >4 million (1.2M international)
- Total booked nights: 15 million
- Tourism GDP: >€9 billion

Strong fundamentals and a visitor economy worth billions

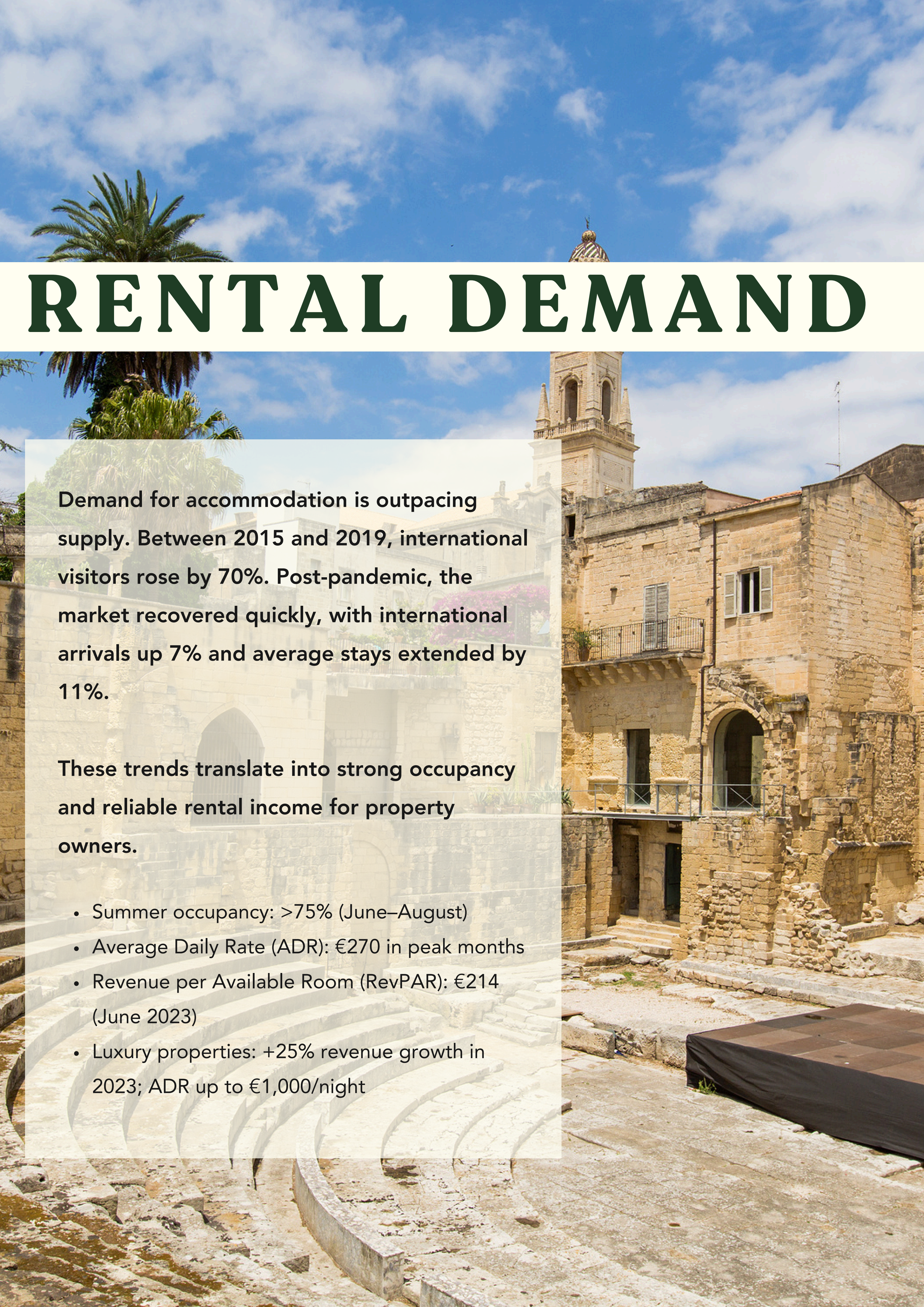
Puglia is no longer just a travel secret; it’s an economic force in Southern Italy. With nearly four million residents and a regional GDP above €69 billion, the local economy provides a stable foundation for investment. Tourism is a cornerstone, contributing over €9 billion annually and driving steady growth across the region.

Unlike some destinations that rely heavily on international visitors, Puglia’s appeal is balanced. Italians account for roughly two-thirds of annual arrivals, ensuring resilience even when global travel slows. At the same time, international tourism has surged, rising by 70% in the five years before the pandemic. Today, over 1.2 million foreign visitors come each year, many drawn by the region’s beaches, culture, and slower pace of life.

The result is a market where demand is diverse, year-round, and growing. With 15 million booked nights annually, rental properties benefit from consistent occupancy and a broad base of travelers—from families and couples to adventurers and digital nomads.

At a Glance

- Permanent population: ~4 million
- Regional GDP: €69B+
- Annual visitors: 4M+ (2.7M Italian, 1.2M international)
- Booked nights: 15M+ annually
- Tourism GDP: €9B+



RENTAL DEMAND

Demand for accommodation is outpacing supply. Between 2015 and 2019, international visitors rose by 70%. Post-pandemic, the market recovered quickly, with international arrivals up 7% and average stays extended by 11%.

These trends translate into strong occupancy and reliable rental income for property owners.

- Summer occupancy: >75% (June–August)
- Average Daily Rate (ADR): €270 in peak months
- Revenue per Available Room (RevPAR): €214 (June 2023)
- Luxury properties: +25% revenue growth in 2023; ADR up to €1,000/night

High occupancy, rising stays, and dependable income potential

Tourism in Puglia has shown remarkable resilience and growth. Between 2015 and 2019, international arrivals surged by 70%, and the recovery after 2020 was faster than most European destinations. By 2022, visitor numbers were already back to pre-pandemic levels—and they've continued to climb. Today, guests are not only returning in greater numbers, but they're also staying longer, with the average length of stay up 11% compared to before 2020.

This demand translates directly into strong rental performance. During the peak summer months, occupancy exceeds 75%, while nightly rates average €270—over 60% higher than comparable Spanish destinations. Revenue per available room (RevPAR) in June 2023 stood at €214, placing Italy ahead of France, Greece, Portugal, and Spain. At the high end of the market, luxury properties have grown revenue by 25% in a single year, with top-tier stays commanding rates of €1,000 per night.

For second-home owners, this means consistent bookings, resilient pricing, and a clear opportunity to generate income even when they aren't in residence.

At a Glance

- +70% international arrivals (2015–2019)
- International visitors +7% vs. pre-2020
- Average stay length +11% vs. pre-2020
- Summer occupancy >75%
- ADR (June/July): €270
- RevPAR (June 2023): €214
- Luxury ADRs: up to €1,000 per night

LOW COMPETITION HIGH POTENTIAL

Unlike other Italian destinations, Puglia is not dominated by international hotel chains. Independent owners and local operators shape the market, especially in the luxury segment, which accounts for 45% of available accommodation. This leaves a wide opening for new entrants who can meet the growing demand.

- No global chain presence in Puglia
- 45% of supply in the four-star or luxury segment
- Strong performance across independent operators
- Clear gap for well-positioned rental homes

A market led by independents, not global hotel chains

Puglia's accommodation market looks very different from other well-known Italian regions. While places like Tuscany or the Amalfi Coast are saturated with global hotel chains, Puglia has none. Instead, the market is led by independent operators, boutique properties, and family-run stays. This creates an environment where new entrants can stand out rather than compete with established brands.

The demand for higher-quality stays is already visible. Nearly half of the region's available accommodations are rated four stars or above, yet visitor growth continues to outpace supply. With strong demand across both domestic and international travelers, and a clear gap in branded options, independent owners and investors are well-positioned to capture value.

For second-home buyers, this means an unusual opportunity: entering a market where demand is proven, pricing is strong, and competition from large players is virtually nonexistent.

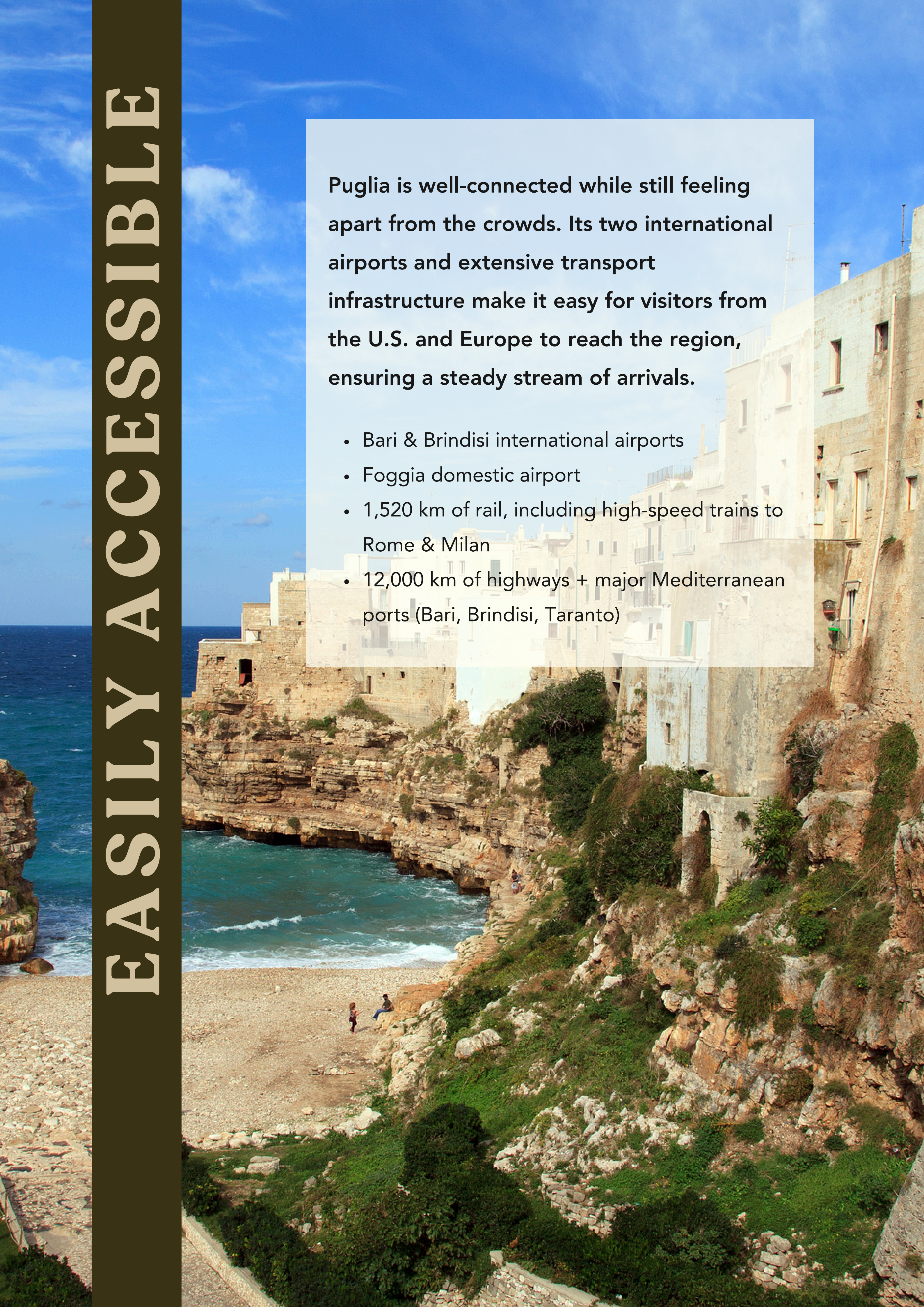
At a Glance

- No presence from global hotel chains
- 45% of available accommodation rated four stars or above
- Market shaped by independent and boutique operators
- Strong demand continuing to outpace supply

EASILY ACCESSIBLE

Puglia is well-connected while still feeling apart from the crowds. Its two international airports and extensive transport infrastructure make it easy for visitors from the U.S. and Europe to reach the region, ensuring a steady stream of arrivals.

- Bari & Brindisi international airports
- Foggia domestic airport
- 1,520 km of rail, including high-speed trains to Rome & Milan
- 12,000 km of highways + major Mediterranean ports (Bari, Brindisi, Taranto)



Easy to reach by air, rail, road, and sea

One of Puglia's strengths is how easy it is for visitors to get here—and how many different ways they can do it. The region has two international airports, in Bari and Brindisi, which connect directly to major European hubs and provide simple onward links for U.S. travelers. A domestic airport in Foggia further supports regional access.

Beyond air travel, Puglia benefits from strong transport infrastructure. More than 1,500 kilometers of railway, including high-speed trains, link the region to Rome and Milan. Over 12,000 kilometers of highways make driving straightforward, while ports in Bari, Brindisi, and Taranto connect Puglia to the wider Mediterranean.

This level of accessibility ensures a steady flow of arrivals from both within Italy and abroad. For property owners, it means rental demand is supported not just by the region's beauty and culture, but also by the ease with which guests can reach it.

At a Glance

- Bari & Brindisi: international airports
- Foggia: domestic airport
- 1,520 km of railway, with high-speed links to Rome & Milan
- 12,000 km of highways
- Major ports: Bari, Brindisi, Taranto

WHY NOW?

Tourism in Puglia has not only rebounded but is exceeding pre-2020 levels. With travel interest in Italy surging globally, Puglia stands out for its combination of affordability, authenticity, and strong returns. For investors, the conditions align: rising demand, premium pricing, and limited competition.

- International visitors +7% vs. pre-2020
- Average length of stay +11% vs. pre-2020
- Google searches for “Italy tour packages” up 300%
- “Cheapest time to travel to Italy” up 200% (indicating year-round interest)

Growth is strong and demand is still accelerating

Tourism in Puglia is not only strong—it's accelerating. Visitor numbers returned to pre-2020 levels as early as 2022, well ahead of many other regions. Since then, international arrivals have grown another 7%, while the average length of stay has increased by 11%. These trends show that Puglia is not a passing trend but a market with durable, long-term growth.

Travel interest in Italy is also surging more broadly. Searches for Italian trips have climbed sharply, and Puglia has benefited from that momentum as travelers look beyond the country's more crowded destinations. The region's reputation for authenticity and slower pace gives it staying power, while rising infrastructure and service investments support ongoing growth.

For investors, this means conditions are aligning: strong and diversified demand, proven resilience, and room for independent owners to capture market share. Puglia offers both the lifestyle value of a second home in Italy and the security of a market that continues to grow.

At a Glance

- International visitors +7% vs. pre-2020
- Average length of stay +11% vs. pre-2020
- Tourism back to pre-pandemic levels by 2022
- Rising global travel interest in Italy benefiting the region

About Us
CLUB PUGLIA

Seven years ago we moved to Puglia, drawn first by its landscapes and pace of life. What we found was more than a beautiful place to live—it was a region full of character, resilience, and opportunities waiting to be explored.

Over time, we've come to know its towns and coastlines, its people and traditions, and the quieter details that don't show up in guidebooks. Living here has given us a front-row view of how Puglia has grown, and how much potential it still holds.

Our earlier careers—in law and international business—taught us to look closely at the details and think carefully about long-term decisions. But what really shapes our perspective today is experience: building a life here, understanding the rhythms of the region, and seeing its future with both clarity and conviction.