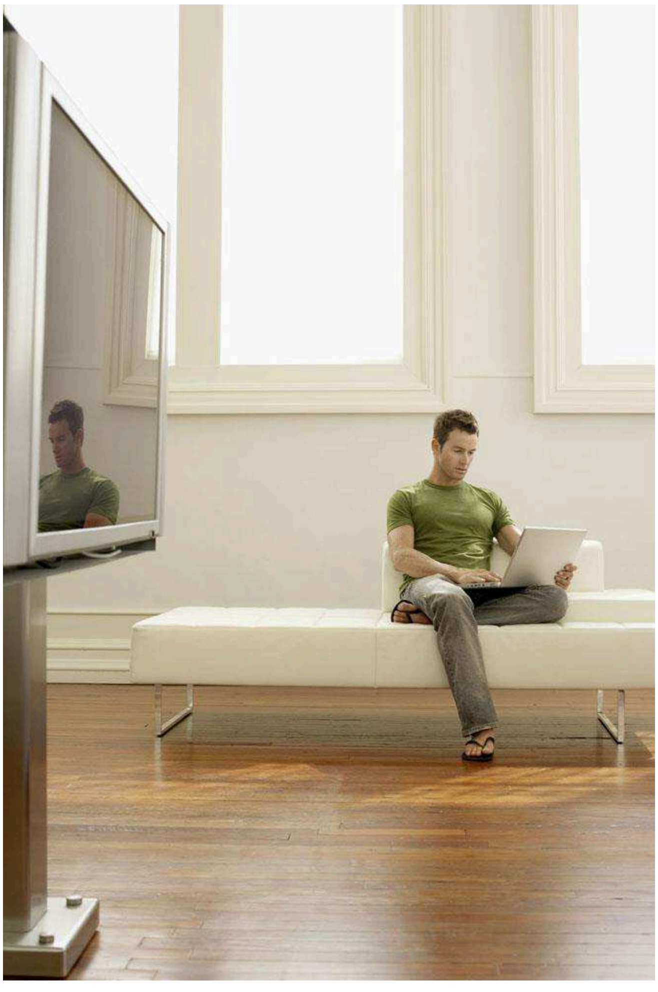
In Extenso
tourisme, culture & hôtellerie

French Hotel Industry Performance

June 2015



Membre de Deloitte.

Our Tourism, Culture and Hospitality News

Consulting, Valuation, Transactions

Annual study: The French Urban Residence Market

The 9th edition of In Extenso TCH's annual study on French urban residences offers a comprehensive analysis of the market:

- Profile of supply and evolutions over five years
- Breakdown of supply in France
- Key players in the market, brand characteristics
- General trading levels + focus on main markets

STUDY AVAILABLE FROM 15 JUNE 2015, PRICED 800 € EXC. VAT
For further information and ordering, please contact:
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Recent references

Client	Description
Owner	Repositioning analysis for a 4* hotel near Saint-Tropez
Etablissement public national du musée de la Marine	Prospective study of the public and positioning of the Musée de la Marine, Paris
Haute-Normandie region	Study to analyse the opportunity for the development of a cultural and tourism project
Buyer	Business Plan review for an upscale hotel project, Paris 14

CONSULTING AND VALUATION
PHILIPPE GAUGUIER, ASSOCIATE MRICS
OLIVIER PETIT, ASSOCIATE

CULTURE AND TOURISME
DOMINIQUE LECEA, DIRECTOR
ANNE RAVARD, DEPUTY DIRECTOR

Transaxio Hôtel sales instructions

Scope	Description
Freehold, Hauts de Seine	Portfolio of three indepently-operated hotels (3 and 4*, total capacity of c. 120 rooms)
Freehold, Lot et Garonne	5* boutique hotel (around 10 rooms) with resetaurant, outdoor pool and meeting room
Freehold, Nord	2* branded hotel-restaurant (around 45 rooms) with bar and meeting room

TRANSAXIO HÔTEL
GUY BOULO, DIRECTOR

Articles

New generations attracted to the durable nature of the family business
Christophe Saubiez, Audit Associate, Deloitte Family

Travel Consumer 2015
Alistair Pritchard, UK Lead Partner, Deloitte

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June kicks off the summer season

Further to a lacklustre month of May with destinations posting conflicting results, June seemed to herald a recovery throughout France. Depending on the category and zone, this recovery amplified the positive results or helped make up for the negative performances recorded since the start of the year. The good weather and the announced beginning of economic recovery doubtless favoured this, although June 2015 is being compared to June 2014 which was particularly quiet given the lack of major events.

With the exception of the Super-budget category – relatively stable (or slightly down) compared with last year given that occupancy drops were offset by higher average rates – all categories and the majority of destinations recorded good results in June.

Paris, in particular, perked up after a rather worrying month of May, helped by a significant increase in average rates (+2,4% to +7,1%, depending on the category), finishing the first semester generally on a positive note. The Midscale category is the only segment to recording a drop in RevPAR (-1,4%), given declining occupancy (despite being in the black in June).

Regional French hotels also posted good performances; excellent in some cases - particularly for upscale categories. Lyon, Bordeaux, the Atlantic coast and the Côte d'Azur, for instance, all showcased this trend.

Comparing June 2015 with June 2014 should be undertaken with some caution. However, such a comparison does confirm how important it is that a destination remain dynamic, notably in terms of programming festive or professional events to support the local hotel industry.

But let's not be too negative – June 2015 could mark the start of a real recovery. Most destinations finished the first semester in the black and the feedback from tourism professionals for the month of July looks to be positive.

Données mensuelles

juin	Gd. luxe	Haut gam.	Milieu gam.	Eco.	Super-éco.
TO 2015	79,8%	82,1%	80,0%	79,8%	71,3%
Var. /n-1	***1,6%***	***1,4%***	***3,5%***	***3,5%***	***-2,9%***
RMC 2015	481 €	218 €	113 €	72 €	42 €
Var. /n-1	***0,1%***	***3,3%***	***1,9%***	***1,6%***	***2,9%***
RevPAR 2015	383 €	179 €	91 €	57 €	30 €
Var. /n-1	***1,7%***	***4,7%***	***5,5%***	***5,2%***	***-0,1%***

Données cumulées

Jan. à juin	Gd. luxe	Haut gam.	Milieu gam.	Eco.	Super-éco.
TO 2015	60,0%	65,3%	63,1%	65,4%	62,1%
Var. /n-1	***-1,9%***	***2,1%***	***1,2%***	***1,7%***	***-1,9%***
RMC 2015	400 €	180 €	101 €	65 €	40 €
Var. /n-1	***-2,7%***	***0,7%***	***0,7%***	***-0,3%***	***1,5%***
RevPAR 2015	240 €	118 €	64 €	42 €	25 €
Var. /n-1	***-4,5%***	***2,8%***	***1,9%***	***1,4%***	***-0,4%***

Définitions

TO = Taux d'Occupation

RMC = Recette Moyenne par Chambre louée

RevPAR = Revenu moyen par chambre disponible

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