In Extenso

tourisme, culture & hôtellerie

French Hotel Industry Performance

January 2016

Membre de Deloitte.

Our news

Consulting, Valuations and Transactions

In Extenso
tourisme, culture & hôtellerie

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Recent references

Developer
Business plan review for an urban apart-hotel project (Western Paris)
Paris
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Feasibility study for two hotel projects in Martinique and Guadeloupe
French West Indies
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Investor
Audit / expertise for a hotel in the process of being acquired
Poitou-Charentes
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Sales instruction for a 3 branded hotel, > 50 rooms, meeting rooms, private parking City centre*
Aude
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Owner
Sales instruction for a 3 star hotel, > 35 rooms, bar, breakfast room, parking
Freehold
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Owner
Sales instruction for a 3 hotel, > 60 rooms bar, meeting room*
Freehold
Bouches du Rhône
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Production of a reference framework for the camping market and preliminary analyses of a camping group
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Communauté de communes (51)
Opportunity and feasibility study for an art cluster in the Champagne region
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Articles and publications

2016 tourism and hospitality trends – A new lease of life

The Paris terrorist attacks in June and November doubtless had an impact in 2015, yet other phenomena should also be considered when analysing the year's results: the maturing of new hotel and apart-hotel supply, the repercussions of the school calendar, the political situation in competitor destinations, etc. Given this, the year turned out very differently from one region or hotel category to another, as our 2016 study shows.

Download here: https://www2.deloitte.com/fr/fr/pages/consumer-business/articles/les-tendances-du-tourisme-et-de-l-hotellerie-2016.html

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2016 begins as 2015 ends

Late 2015 was heavily impacted by November's tragic events, and Parisian hoteliers were hopeful that January would signal a return to normality. However, they will have to wait, since 2016 began in the same way as November and December 2015 ended.

Compared to January 2015 – a month marked by the attacks on Charlie Hebdo and Hyper Cacher (Porte de Vincennes), hoteliers were expecting growth in early 2016. However, the effects of November's terrorist attacks continued to affect most of the Ile-de-France region – particularly in Paris itself, where RevPAR dropped between -13% and -16% depending on the category. Unlike January 2015, the decline was exacerbated by a decrease in average rates.

Less exposed, regional hotels recorded a good month in terms of occupancy – particularly the case for Upscale and Luxury hotels. Outside of the Côte d'Azur, this encouraging trend was tarnished by a drop in average rates. Bucking against the general trend, Super-budget hotels better resisted in terms of average rates, but RevPAR suffered due to declining occupancy (a continuation of 2015's trend).

Ultimately, the Luxury segment was the only one to post RevPAR growth in January 2016 - thanks to regional hotels – a small consolation in today's gloomy climate, since the segment accounts for just 2% of hotel room capacity in France.

Note to our readers

Numerous branded and independent hotels joined our benchmark in 2015, and we would like to thank them for the trust they have placed in us. As well as incorporating these new participants, we have recently revised a number of our samples in order to:

- *Integrate recently-opened hotels that have now become established on their respective markets.*
- *Better present Parisian performances by refining the segmentation of supply, so that participants can more easily identify their own market.*

The statistical data presented in this document is evidently still based on constant samples.

For questions concerning our benchmarks or to speak with one of our consultants, please contact Sacha Fournier or Grégory Fortems:

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- *By phone: 01 72 29 68 15*

Monthly performance

January	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	45,5%	52,5%	50,3%	52,0%	50,4%
Var. /n-1	***15,5%***	***-2,4%***	***-2,3%***	***0,8%***	***-2,6%***
ADR 2016	293 €	165 €	100 €	62 €	39 €
Var. /n-1	***-9,3%***	***-2,9%***	***-3,1%***	***-2,1%***	***-0,2%***
RevPAR 2016	133 €	87 €	50 €	32 €	20 €
Var. /n-1	***4,8%***	***-5,2%***	***-5,3%***	***-1,3%***	***-2,8%***

Year To Date performance

Jan. to January	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	45,5%	52,5%	50,3%	52,0%	50,4%
Var. /n-1	***15,5%***	***-2,4%***	***-2,3%***	***0,8%***	***-2,6%***
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Definitions

OR = Occupancy Rate
ADR = Average Daily Rate
RevPAR = Revenue per available room

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