

In Extenso

Tourisme, Culture & Hôtellerie

French Hotel Industry Performance

January 2017



Consulting, Valuations and Transactions

<p>Developer</p> <p><i>Opportunity study for a hotel project in Rouen</i></p> <p>In Extenso <small>Tourisme, Culture & Hôtellerie</small></p>	<p>Owner</p> <p><i>Valuation of a 4 star hotel in Paris city centre</i></p> <p>In Extenso <small>Tourisme, Culture & Hôtellerie</small></p>	<p>Grand Nancy Metropole</p> <p><i>Study to determine the development potential of hotel supply</i></p> <p>In Extenso <small>Tourisme, Culture & Hôtellerie</small></p>	<p>Developer</p> <p><i>Investor search Upscale hotel project ("BEFA") signed with an operator > 90 rooms Restaurant Meeting rooms</i></p> <p>Var Transaxio <small>Hôtel</small></p>
<p>Owner</p> <p><i>Sales instruction - leasehold 3 star hotel-restaurant, free of brand > 20 rooms Option to purchase the freehold Lyon region</i></p> <p>Transaxio <small>Hôtel</small></p>	<p>Owner</p> <p><i>Sales instruction - leasehold 3* hotel (no restaurant) Free of brand > 40 rooms</i></p> <p>Paris (city centre)</p> <p>Transaxio <small>Hôtel</small></p>	<p>Communauté d'Agglomération Sophia Antipolis</p> <p><i>Assistance with a project to create a Ceramic centre in Vallauris</i></p> <p>In Extenso <small>Tourisme, Culture & Hôtellerie</small></p>	<p>APIX (Senegal)</p> <p><i>Study on the tourism competitiveness of Senegal and the impact of the Ebola threat on the Senegalese economy</i></p> <p>In Extenso <small>Tourisme, Culture & Hôtellerie</small></p>

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Publications



Travel and Hospitality Industry Outlook 2017

An analysis of travel disruptors

Explore the latest travel and hospitality industry trends and find out how four catalysts of change could impact travel in 2017.

Guy Langford, Adam Weissenberg & Gina Pingitore | Deloitte & Touche LLP |

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Jean-Marc Liduena, Associate Monitor Deloitte | February 2017

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Jean-Paul Betbeze, Economic Advisor | Deloitte | February 2017

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| The green shoots of recovery are there

Since the end of 2016, tourist demand has begun to recover in France, with January confirming the trend. Tourist demand was supported by Regional France and Ile-de-France, with encouraging results observed on the Midscale and Upscale markets. Hotels on the Côte d'Azur were the only ones to experience a decline in RevPAR in January.

In January 2017, the French hotel industry generally recorded positive RevPAR growth in all categories – from +4% on the Super-budget market to +10% on the Midscale market. These results were primarily down to Regional France and the Paris region, with the Côte d'Azur being the only destination to post a decline in RevPAR. On a country-wide scale, the Midscale and Upscale markets recorded the most encouraging performances.

After a more positive end to 2016, Parisian hotels saw an increase in occupancy at the beginning of the year. Boutique hotels in the city recorded strong growth in occupancy and Midscale hotels experienced higher RevPAR.

The opposite was true on the Côte d'Azur, although this can be partly attributed to the impact of seasonal trends. Occupancy rates failed to top 40% and declines were visible in all segments. Contrary to Regional France and Ile-de-France, demand dropped in the Côte d'Azur's Luxury hotels in January.

As for Regional France, RevPAR grew to a greater extent in the more upscale categories, generally the result of higher occupancy. Luxury hotels did particularly well, posting +15% RevPAR growth, driven by a +19% rise in occupancy, despite a drop of -3% in average rates.

Monthly performance

January	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	47,0%	56,7%	54,3%	55,4%	51,8%
Var. /n-1	2,9%	7,8%	8,6%	6,1%	3,8%
ADR 2016	287 €	167 €	101 €	63 €	40 €
Var. /n-1	1,3%	1,6%	1,1%	0,2%	-0,1%
RevPAR 201	135 €	95 €	55 €	35 €	21 €
Var. /n-1	4,2%	9,5%	9,8%	6,3%	3,8%

Year To Date performance

Jan. to January	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	47,0%	56,7%	54,3%	55,4%	51,8%
Var. /n-1	2,9%	7,8%	8,6%	6,1%	3,8%
ADR 2016	287 €	167 €	101 €	63 €	40 €
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Definitions

OR = Occupancy Rate

ADR = Average Daily Rate

RevPAR = Revenue per available room

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