

HTLroundtable
france+

France & Monaco

JO&JOE Paris-Gentilly
(31.10.2019)

15
participants

supply

1,105 properties; 182,427 rooms¹

BRANDED ROOMS

87%

CHAIN AFFILIATED ROOMS

90%

GROUP / BRAND PROFILE

- strongest brand: **Ibis**
- strongest group: **Accor**
- fastest growing brand: **Domitys** (senior citizen residence brand)
- fastest growing group: **Domitys** (senior citizen residence brand)
- strongest regional brand: **Ibis**
- fastest growing regional brand: **Novotel**

pipeline

84 properties; 16,625 rooms^{1,2}

43
HOTELS UNDER CONSTRUCTION

41
PLANNED HOTELS

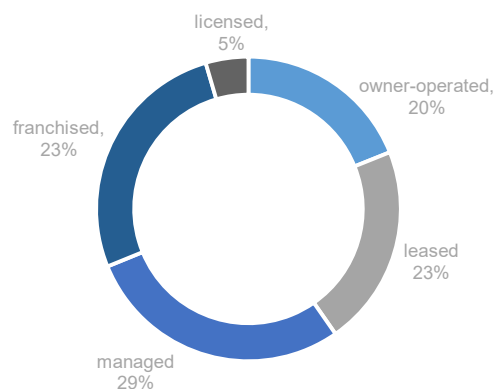


SELECTED OPENINGS of 2018

- Club Med Les Arcs Panorama, Bourg-saint-maurice, **433 rooms**
- Holiday Inn Express Paris - CDG Airport, Roissy-en-france, **305 rooms**
- Motel One Paris Porte Dorée, **255 rooms**
- Mama Shelter Toulouse, **120 rooms**

hotel contracts

346 properties; 64,213 rooms under contract^{2,3,4}



key takeaways

- after nine years of growth for European hotels, demand is softening in 2019
- the ongoing BREXIT discussion has had a negative impact on travel activities according to a survey conducted by STR: roughly 30 % of UK and European travelers, respectively, are delaying making travel plans to the UK or Europe until BREXIT outcome is resolved (according to STR)
- as for France, ADR in 2019 is up by 3,2 % (YTD 9/19) with occupancy stable
- the Antibes/Cannes region, Lyon and Rouen were the only three French markets to achieve double digit revpar growth in 2019 (YTD 9/19)
- with growing supply, especially in Paris, the luxury segment experienced a drop of 3 % in both ADR and OCC (YTD 9/19)
- with growing supply, Paris' performance in 2019 remains flat so far, however, with declining "yellow vest" protests and further growth in demand, the outlook for 2020 is positive

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NOTES:

- 1) calculated as per PKF sample; includes all properties with at least 100 rooms; 2) as per 31 December 2018; 3) as per the PKF contract database 4) from the viewpoint of hotel groups