

HOTEL INDUSTRY - LUXURY HOTELS

MARKET OVERVIEW

■ France's tourism industry

- World's leading tourist destination: 79.5 million foreign tourists in 2011
- Ranked third in receipts (US\$53.8 billion) after the United States and Spain ⁽¹⁾

■ France's hotel sector

- More than 175,000 salaried employees ⁽²⁾
- Annual sales of €17.4 billion in 2008 (more than 20% of tourist industry sales ⁽³⁾)
- More than 17,000 classified hotels in 2012 with more than 614,600 rooms ⁽⁴⁾
- An estimated 9,000 unclassified hotels ⁽⁵⁾
- Large concentration in the Paris region
 - 73.2% occupancy rate
 - Classified hotels accounted for more than one-third of overnight stays in France in 2010, far ahead of the Provence-Alpes-Côte d'Azur (10.8%) and Rhône-Alpes (8.9%) regions ⁽⁶⁾
- 3.4% increase in overnight stays by French visitors versus 2010
- 2.3% increase in overnight stays by foreign visitors versus 2010 ⁽⁷⁾

PLAYERS

- Three categories: independents, chains and voluntary associations of independents
- Once the majority, independents now account for only 48% of hotels
- Accor owns a number of chains (Ibis, Mercure, Novotel, etc.) and largely dominates the market with more than 20% of hotel rooms in mainland France
- The U.S.-owned Groupe du Louvre, with its brands Campanile, Première Classe and Kyriad, is second, with nearly 9% of hotel rooms in France ⁽⁸⁾

(1) UNWTO Tourism Highlights (June 2012)

(2) Latest data available from INSEE, source: XERFI 2011

(3) XERFI 2010

(4) INSEE, 2012

(5) XERFI, 2011. There is no official classification for unclassified hotels (those not accredited).

(6) XERFI 2011

(7) KPMG, January 2012

(8) XERFI 2011

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- Overnight stays grew 12.2% from 2009 to 2010 ⁽⁹⁾
- The “Palace” classification, introduced by the French State Secretary for Tourism, is now held by eight 5-star hotels

PROFESSIONAL ORGANIZATIONS

- The French Hotel Industry Association (UMIH) is the main professional organization representing hotel industry interests
<http://www.umih.fr/>

■ Other professional organizations

- SYNHORCAT (French Association of Hoteliers, Restaurateurs, Café Owners and Caterers) has a presence mainly in the luxury hotel and hotel chain sectors
<http://www.synhorcat.com/>
- CPIH (French Confederation of Independent Hotel Professionals)
<http://cpih-france.com/>
- FAGHIT (French Independent General Federation of the Tourist Hotel Industry)
<http://www.fagih.fr>

⁽⁹⁾ XEPA 2011