

**A 'giant leap' for the hotel industry in Paris, while outside Paris, the situation proves more difficult**

There is a very contrasting situation between the hotels in Paris and those in other parts of the country. The hotel industry in Paris storms ahead, with a marked improvement in performances, for upscale as well as midscale hotels. In contrast, the regional hotel industry only saw slight increases in RevPAR levels, and even decreases for the upscale hotels.

November was a good month for the **Parisian hotel industry**. The performances of both upper and mid-scale hotels drastically improved. The increase in RevPAR ranges from +10.8% for 2 star hotels, to +21.8% for 3 star superior hotels. As for 4 star hotels, they saw a RevPAR increase of +18.1%.

The improvement in RevPAR levels is mostly due to a rise in occupancy rates. All categories, except 3 star superior and 2 star hotels, registered a two digit increase in occupancy rates for the month of November. As has often been the case over recent years it is the 'Palaces' and the 'Deluxe' hotels that saw the best improvement in OR: +15.5%. For the rest of the hotel categories, the rise in OR was between +10% and +12% in relation to results for November 2004.

The rise in RevPAR is not however exclusively due to a rise in occupancy rates, since a rise in **average daily room rates (ADR)** was seen across the board. In comparison to occupancy rates, it is not the 'Palaces' and 'Deluxe' hotels which saw the largest growth, but this time it is the 3 star superior hotels, who posted an ADR rise of +13.1%.

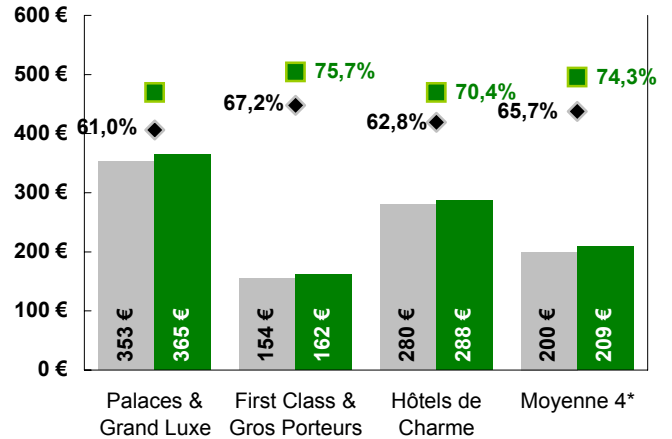
**Outside of Paris**, November proved a less successful month. Although the **RevPAR** of 2 and 3 star hotels did increase, it was only a slight improvement, of +5.4% and +2.3% respectively. Furthermore, the RevPAR of upscale hotels fell by -3.7%.

These performances are far from the rapid growth rates recorded in Paris. Unlike the parisian market, the regional market did not benefit from large increases in demand; the occupancy rate increase ranged from +2.1% for 4 star hotels, to +3% for 2 star hotels, and there were even some decreases recorded; -0,5% for 3 star hotels.

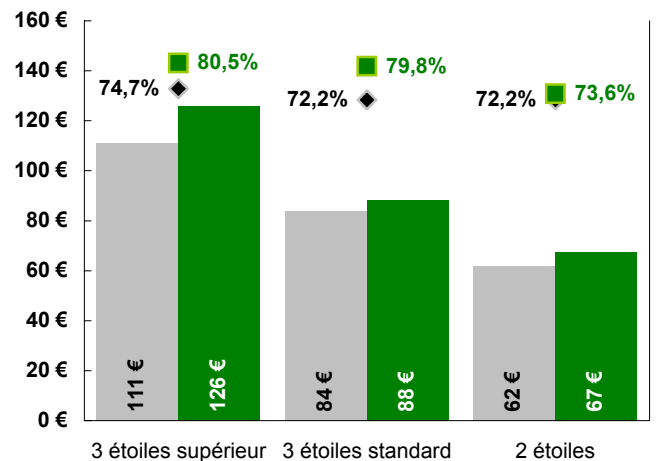
**Average Daily Rate** levels were insufficient to compensate for the lack of custom. 2 star hotels saw an ADR increase of +2.3% and the 3 star market, a rise of +2.8%, while upscale hotels saw their rates decrease by - 5.7%.

**Monthly Indicators**

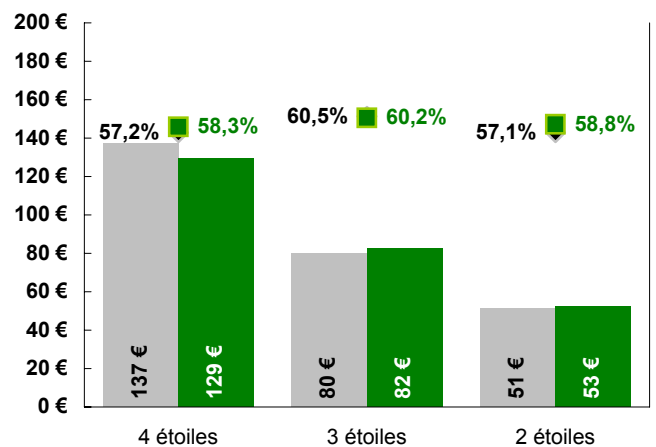
**Upscale hotels in Paris**



**Midscale hotels in Paris**



**Regional hotel industry**



**ADR 2004**      **OR 2004**  
 **ADR 2005**      **OR 2005**

ADR = Average Daily (Room) Rate  
OR = Occupancy Rate

**Upscale hotel industry in Paris**

NOVEMBER	Palaces and Deluxe	First class and large capacity	Boutique Hotels	4* Standard
OR 2004	61,0%	67,2%	62,8%	65,7%
OR 2005	70,4%	75,7%	70,4%	74,3%
Var.	<b>+15,5%</b>	<b>+12,6%</b>	<b>+12,1%</b>	<b>+13,2%</b>
ADR 2004	353 €	154 €	280 €	200 €
ADR 2005	365 €	162 €	288 €	209 €
Var.	<b>+3,5%</b>	<b>+4,9%</b>	<b>+2,7%</b>	<b>+4,4%</b>
RevPAR 2004	215 €	104 €	176 €	131 €
RevPAR 2005	257 €	123 €	202 €	155 €
Var.	<b>+19,5%</b>	<b>+18,1%</b>	<b>+15,2%</b>	<b>+18,1%</b>

NOVEMBER YTD	Palaces and Deluxe	First class and large capacity	Boutique Hotels	4* Standard
OR 2004	68,2%	67,7%	64,1%	67,7%
OR 2005	70,2%	70,3%	66,0%	70,1%
Var.	<b>+2,8%</b>	<b>+3,8%</b>	<b>+2,9%</b>	<b>+3,6%</b>
ADR 2004	420 €	163 €	301 €	226 €
ADR 2005	428 €	161 €	303 €	225 €
Var.	<b>+1,8%</b>	<b>-1,3%</b>	<b>+0,7%</b>	<b>-0,3%</b>
RevPAR 2004	287 €	111 €	193 €	153 €
RevPAR 2005	300 €	113 €	200 €	158 €
Var.	<b>+4,7%</b>	<b>+2,4%</b>	<b>+3,6%</b>	<b>+3,3%</b>

**Mid-scale hotels in Paris**

NOVEMBER	3 star superior	3 star standard	2 star
OR 2004	74,7%	72,2%	72,2%
OR 2005	80,5%	79,8%	73,6%
Var.	<b>+7,7%</b>	<b>+10,4%</b>	<b>+1,9%</b>
ADR 2004	111 €	84 €	62 €
ADR 2005	126 €	88 €	67 €
Var.	<b>+13,1%</b>	<b>+5,4%</b>	<b>+8,7%</b>
RevPAR 2004	83 €	61 €	45 €
RevPAR 2005	101 €	71 €	50 €
Var.	<b>+21,8%</b>	<b>+16,4%</b>	<b>+10,8%</b>

NOVEMBER YTD	3 star superior	3 star standard	2 star
OR 2004	73,6%	73,6%	77,1%
OR 2005	76,2%	76,3%	78,1%
Var.	<b>+3,5%</b>	<b>+3,7%</b>	<b>+1,4%</b>
ADR 2004	116 €	86 €	62 €
ADR 2005	118 €	86 €	63 €
Var.	<b>+1,8%</b>	<b>+0,5%</b>	<b>+1,3%</b>
RevPAR 2004	85 €	63 €	48 €
RevPAR 2005	90 €	66 €	49 €
Var.	<b>+5,3%</b>	<b>+4,2%</b>	<b>+2,7%</b>

*N.B:* OR = Occupancy Rate RevPAR = Revenue per available room  
 ADR = Average Daily Rate (room revenues only)  
 ADR and RevPAR are expressed in Euros, excluding VAT  
 The samples used are stable from one year to the next.

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**Regional Hotel Industry**

NOVEMBER	4 star	3 star	2 star
OR 2004	57,2%	60,5%	57,1%
OR 2005	58,3%	60,2%	58,8%
Var.	+2,1%	-0,5%	+3,0%
ADR 2004	137 €	80 €	51 €
ADR 2005	129 €	82 €	53 €
Var.	-5,7%	+2,8%	+2,3%
RevPAR 2004	78 €	48 €	29 €
RevPAR 2005	76 €	50 €	31 €
Var.	-3,7%	+2,3%	+5,4%

NOVEMBER YTD	4 star	3 star	2 star
OR 2004	57,3%	62,4%	64,4%
OR 2005	58,2%	61,7%	64,0%
Var.	+1,6%	-1,2%	-0,6%
ADR 2004	138 €	80 €	51 €
ADR 2005	142 €	84 €	53 €
Var.	+2,6%	+5,4%	+2,8%
RevPAR 2004	79 €	50 €	33 €
RevPAR 2005	83 €	52 €	34 €
Var.	+4,2%	+4,2%	+2,1%

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ADR = Average Daily Rate (room revenues only)

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