

# In Extenso

tourisme, hôtellerie et restauration

## French Hotel Industry Performances

September 2012



Membre de **Deloitte**.

# Autumn sends a chill across the hotel industry

September proved disappointing for hotel professionals, with performances down on last year's results. Traditionally a strategic month for the hotel industry, September saw occupancy in most areas and hotel categories drop. The decline was more or less flagrant, depending on the destination, and although a few exceptions were noted, the general underlying trend was present. Admittedly, average rates grew, but with the exception of Paris, increases were not sufficient to curb falling rooms revenue.

September is traditionally a strategic month for hotels in France. With summer over, companies fully resume their business activities, and start booking business trips again. The period is also traditionally characterised by the return of MICE activity, and the accompanying demand for hotel rooms. Finally, the arrival of an Indian summer can further boost activity, if the leisure segment prolongs the summer season. In short, the conjunction of these segments renders September – like June – a busy month... when all goes well!

Irrefutably, September 2012 won't go down in history, as almost all categories and destinations recorded a drop in demand. Occupancy rates in all hotels fell, sparing not even Paris (excluding the Luxury segment). Declines were observed to a greater or lesser extent in other areas – limited to less than 4% in Paris and on the Côte d'Azur, but reaching 7% in regional France. While certain cities, such as Le Havre, Rouen or Nancy, managed to record an increase in occupancy, the general trend was one of falling occupancy rates.

It cannot be denied that today's hoteliers are faced with a genuine scissors effect: on the one hand, the recession is causing companies to limit business travel, putting downward pressure on hotel occupancy. On the other hand, supply is tending to increase, leading to overnights being spread out over a larger number of establishments. Indeed, the growth in the number of hotel rooms in the market has attained or even surpassed 10% over the past two years in certain places. Ultimately, new establishments will undeniably contribute to rendering the destination in question more appealing, yet at present, their arrival just adds to a lifeless market.

Unlike occupancy, average room rates (ARR) are proving resilient, and are progressing in almost all categories, whether in Paris, throughout regional France or on the Côte d'Azur. In general, growth is stronger, the higher up the hotel classification we go – although Luxury hotels on the Côte d'Azur, under pressure from Cannes, are the exception to this rule. That said, for numerous destinations, growth tends to be modest. Consequently, in regional France, increases in average room rates struggled to surpass the +2% mark in September, and in the majority of cases, growth was insufficient to curtail declining rooms revenue. With the exception of Paris, September marked a drop in RevPAR.

## Monthly performance

September	Luxury	Upscale	Midscale	Budget	Super Budget
<b>OR 2012</b>	78,9%	79,1%	76,1%	73,4%	72,6%
<b>Var. /n-1</b>	<b>0,1%</b>	<b>-3,7%</b>	<b>-4,0%</b>	<b>-2,4%</b>	<b>-3,0%</b>
<b>ADR 2012</b>	400 €	202 €	109 €	69 €	41 €
<b>Var. /n-1</b>	<b>3,2%</b>	<b>4,4%</b>	<b>2,7%</b>	<b>0,6%</b>	<b>1,8%</b>
<b>RevPAR 2012</b>	315 €	160 €	83 €	51 €	30 €
<b>Var. /n-1</b>	<b>3,3%</b>	<b>0,6%</b>	<b>-1,4%</b>	<b>-1,8%</b>	<b>-1,3%</b>

## Year To Date performance

Jan. to September	Luxury	Upscale	Midscale	Budget	Super Budget
<b>OR 2012</b>	68,0%	69,0%	66,8%	65,4%	68,2%
<b>Var. /n-1</b>	<b>0,6%</b>	<b>-1,2%</b>	<b>-2,5%</b>	<b>-1,0%</b>	<b>-3,3%</b>
<b>ADR 2012</b>	396 €	185 €	100 €	65 €	41 €
<b>Var. /n-1</b>	<b>2,0%</b>	<b>2,8%</b>	<b>2,3%</b>	<b>0,6%</b>	<b>1,5%</b>
<b>RevPAR 2012</b>	270 €	128 €	67 €	43 €	28 €
<b>Var. /n-1</b>	<b>2,6%</b>	<b>1,6%</b>	<b>-0,3%</b>	<b>-0,4%</b>	<b>-1,9%</b>

### Definitions

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

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FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)2 51 80 18 84 OR florent.daniel@inextenso.fr)  
 In Extenso Tourism, Hotels & Restaurants - 7 rue Ernest Renan - 92136 Issy Les Moulineaux - France  
 Tél : +33 (0)1 72 29 68 12 - Fax : +33 (0)1 72 29 61 24

# Performances Paris

## September 2012



### Paris-City

#### Monthly performance

September	OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Paris - Luxury	91,2%	1,0%	624 €	10,0%	570 €	11,0%
Paris - Boutique Hotels	89,5%	1,2%	345 €	3,5%	309 €	4,7%
Paris - Upscale	85,7%	-3,6%	242 €	6,4%	207 €	2,5%
<b>Paris - Luxury &amp; Upscale</b>	<b>86,8%</b>	<b>-2,6%</b>	<b>311 €</b>	<b>7,6%</b>	<b>270 €</b>	<b>4,8%</b>
Paris - Superior midscale	91,2%	-1,8%	185 €	4,3%	169 €	2,5%
Paris - Standard midscale	86,1%	-4,0%	137 €	6,8%	118 €	2,5%
<b>Paris - Midscale</b>	<b>87,8%</b>	<b>-3,2%</b>	<b>154 €</b>	<b>7,0%</b>	<b>135 €</b>	<b>3,6%</b>
<b>Paris - Budget</b>	<b>90,5%</b>	<b>-2,1%</b>	<b>95 €</b>	<b>5,1%</b>	<b>86 €</b>	<b>2,9%</b>

#### Year To Date performance

Jan. to September	OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Paris - Luxury	80,5%	2,0%	521 €	2,3%	420 €	4,3%
Paris - Boutique Hotels	77,0%	1,0%	301 €	0,9%	232 €	1,9%
Paris - Upscale	78,9%	0,4%	202 €	2,8%	160 €	3,2%
<b>Paris - Haut de gamme &amp; Gd luxe</b>	<b>79,0%</b>	<b>0,7%</b>	<b>260 €</b>	<b>2,6%</b>	<b>205 €</b>	<b>3,3%</b>
Paris - Superior midscale	84,5%	-0,5%	158 €	5,4%	133 €	4,9%
Paris - Standard midscale	80,5%	-2,3%	112 €	5,4%	90 €	3,1%
<b>Paris - Midscale</b>	<b>81,8%</b>	<b>-1,6%</b>	<b>127 €</b>	<b>6,4%</b>	<b>104 €</b>	<b>4,6%</b>
<b>Paris - Budget</b>	<b>84,6%</b>	<b>-0,7%</b>	<b>83 €</b>	<b>4,1%</b>	<b>70 €</b>	<b>3,4%</b>

### Paris suburbs (excluding Paris) – Luxury and upscale

#### Monthly performance

September	OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Paris	86,8%	-2,6%	311 €	7,6%	270 €	4,8%
La Défense	n.d.	-	n.d.	-	n.d.	-
Roissy CdG	80,7%	-1,6%	126 €	-3,0%	101 €	-4,5%
IDF (hors Paris et pôles)	84,5%	-1,4%	222 €	6,3%	188 €	4,8%

#### Year To Date performance

Jan. to September	OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Paris	79,0%	0,7%	260 €	2,6%	205 €	3,3%
La Défense	n.d.	-	n.d.	-	n.d.	-
Roissy CdG	72,7%	0,0%	111 €	-3,2%	81 €	-3,2%
IDF (hors Paris et pôles)	76,9%	-1,4%	239 €	6,3%	183 €	4,9%

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# Performance Regions

## September 2012



### Regions

Regions (excl. French Riviera)	Monthly performance					
	September	Luxury	Upscale	Midscale	Budget	Super Budget
	OR 2012	68,9%	70,5%	71,2%	70,2%	70,7%
	Var. /n-1	-1,8%	-6,8%	-5,4%	-3,0%	-3,0%
	ADR 2012	270 €	144 €	93 €	67 €	39 €
	Var. /n-1	2,3%	0,5%	0,4%	-0,3%	1,5%
	RevPAR 2012	186 €	101 €	66 €	47 €	28 €
	Var. /n-1	0,5%	-6,3%	-5,0%	-3,3%	-1,6%
	Year To Date performance					
	Jan. to September	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2012	58,8%	58,4%	61,0%	61,9%	66,5%	
Var. /n-1	-4,2%	-3,8%	-3,5%	-2,0%	-3,6%	
ADR 2012	272 €	135 €	91 €	65 €	39 €	
Var. /n-1	0,3%	0,8%	0,3%	-0,1%	1,4%	
RevPAR 2012	160 €	79 €	56 €	40 €	26 €	
Var. /n-1	-3,9%	-3,0%	-3,2%	-2,1%	-2,3%	

French Riviera	Monthly performance					
	September	Luxury	Upscale *	Midscale	Budget	Super Budget
	OR 2012	75,6%	75,5%	83,0%	n.d.	n.d.
	Var. /n-1	3,1%	-2,5%	-3,4%	-	-
	ADR 2012	369 €	185 €	106 €	n.d.	n.d.
	Var. /n-1	-3,4%	0,9%	4,2%	-	-
	RevPAR 2012	279 €	140 €	88 €	n.d.	n.d.
	Var. /n-1	-0,5%	-1,6%	0,7%	-	-
	Year To Date performance					
	Jan. to September	Luxury	Upscale *	Midscale	Budget	Super Budget
OR 2012	63,0%	63,1%	70,5%	n.d.	n.d.	
Var. /n-1	2,2%	-0,5%	-1,3%	-	-	
ADR 2012	455 €	201 €	103 €	n.d.	n.d.	
Var. /n-1	4,2%	5,4%	4,5%	-	-	
RevPAR 2012	287 €	127 €	73 €	n.d.	n.d.	
Var. /n-1	6,5%	4,8%	3,1%	-	-	

\* Upscale : = sample groups upscale boutique hotels and standard four star hotels

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# Performances Suburbs

## September 2012



### Paris suburbs (excluding Paris)

Midscale market	Monthly performance							
	September	departments						Average suburbs
		77	78	91	92	93	94	
OR 2012	71,2%	69,1%	72,7%	81,7%	74,0%	84,2%	80,0%	77,5%
Var. /n-1	4,7%	-4,0%	0,9%	-1,8%	-0,8%	-0,9%	-5,2%	-1,9%
ADR 2012	106 €	111 €	92 €	125 €	87 €	88 €	113 €	108 €
Var. /n-1	-2,4%	-0,1%	-5,2%	4,7%	1,1%	-2,3%	0,5%	0,5%
RevPAR 2012	76 €	76 €	67 €	102 €	64 €	74 €	90 €	84 €
Var. /n-1	2,2%	-4,1%	-4,4%	2,7%	0,3%	-3,2%	-4,7%	-1,4%
Midscale market	Year To Date performance							
	Jan. to September	departments						Average suburbs
		77	78	91	92	93	94	
OR 2012	56,7%	63,7%	65,0%	71,3%	64,1%	77,7%	70,3%	68,7%
Var. /n-1	1,5%	-3,9%	-1,1%	0,8%	-0,2%	-1,0%	-3,3%	-1,1%
ADR 2012	103 €	100 €	87 €	106 €	74 €	80 €	99 €	96 €
Var. /n-1	1,5%	0,9%	-0,7%	1,9%	0,1%	-0,2%	0,0%	0,7%
RevPAR 2012	59 €	64 €	57 €	76 €	47 €	62 €	70 €	66 €
Var. /n-1	3,0%	-3,1%	-1,8%	2,8%	-0,1%	-1,2%	-3,3%	-0,4%
Budget market	Monthly performance							
	September	departments						Average suburbs
		77	78	91	92	93	94	
OR 2012	77,8%	67,0%	67,7%	76,8%	82,0%	76,7%	73,6%	76,1%
Var. /n-1	0,0%	-10,1%	3,2%	-4,3%	-0,8%	-1,6%	-2,7%	-2,3%
ADR 2012	64 €	84 €	66 €	82 €	63 €	70 €	73 €	70 €
Var. /n-1	3,2%	-0,7%	-3,5%	5,3%	-3,6%	4,9%	3,1%	1,3%
RevPAR 2012	50 €	56 €	45 €	63 €	52 €	53 €	54 €	54 €
Var. /n-1	3,2%	-10,8%	-0,4%	0,7%	-4,4%	3,2%	0,3%	-1,0%
Budget market	Year To Date performance							
	Jan. to September	departments						Average suburbs
		77	78	91	92	93	94	
OR 2012	71,8%	63,4%	61,6%	71,3%	73,0%	70,2%	64,8%	69,0%
Var. /n-1	3,7%	-4,6%	3,2%	-0,3%	0,5%	-4,6%	1,4%	0,3%
ADR 2012	63 €	80 €	62 €	73 €	56 €	65 €	60 €	64 €
Var. /n-1	0,7%	0,8%	-5,7%	2,9%	-1,6%	3,2%	2,1%	0,8%
RevPAR 2012	45 €	51 €	38 €	52 €	41 €	45 €	39 €	44 €
Var. /n-1	4,4%	-3,9%	-2,7%	2,6%	-1,0%	-1,5%	3,5%	1,1%
Super Budget market	Monthly performance							
	September	departments						IDF (hors Paris)
		77	78	91	92	93	94	
OR 2012	72,4%	74,2%	74,0%	n.d.	87,0%	80,6%	83,6%	79,2%
Var. /n-1	3,9%	-2,9%	-3,6%	-	-2,5%	2,0%	-2,2%	-1,5%
ADR 2012	42 €	42 €	39 €	n.d.	44 €	44 €	48 €	44 €
Var. /n-1	3,3%	0,0%	1,7%	-	2,5%	1,6%	5,4%	2,3%
RevPAR 2012	30 €	31 €	29 €	n.d.	38 €	36 €	40 €	35 €
Var. /n-1	7,3%	-2,9%	-2,0%	-	-0,1%	3,6%	3,1%	0,8%
Super Budget market	Year To Date performance							
	Jan. to September	departments						IDF (hors Paris)
		77	78	91	92	93	94	
OR 2012	69,9%	69,0%	69,0%	n.d.	78,9%	75,2%	76,5%	73,7%
Var. /n-1	6,5%	-4,6%	-1,1%	-	0,4%	-3,0%	-3,1%	-0,9%
ADR 2012	42 €	42 €	39 €	n.d.	43 €	44 €	43 €	43 €
Var. /n-1	1,6%	1,9%	2,1%	-	5,3%	1,3%	3,8%	2,9%
RevPAR 2012	29 €	29 €	27 €	n.d.	34 €	33 €	33 €	32 €
Var. /n-1	8,2%	-2,7%	0,9%	-	5,7%	-1,8%	0,5%	2,0%

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In Extenso Tourism, Hotels & Restaurants - 7 rue Ernest Renan - 92136 Issy Les Moulineaux - France

Tél : +33 (0)1 72 29 68 12 - Fax : +33 (0)1 72 29 61 24

# Performances North-East

## September 2012



### North-east & Cities

Luxury Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
North-east	69,3%	-6,9%	139 €	0,2%	96 €	-6,7%	57,0%	-3,3%	131 €	0,8%	74 €	-2,6%
Dijon	83,4%	1,6%	138 €	7,2%	115 €	8,9%	64,1%	-2,3%	133 €	7,4%	85 €	4,8%
Lille	59,5%	-7,1%	124 €	-8,9%	74 €	-15,4%	50,7%	1,8%	119 €	-2,4%	60 €	-0,7%
Metz	insufficient supply						insufficient supply					
Nancy	insufficient supply						insufficient supply					
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	76,6%	-3,9%	125 €	-4,6%	96 €	-8,3%	60,7%	-3,5%	117 €	0,8%	71 €	-2,8%

  

Midscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
North-east	69,9%	-4,9%	91 €	0,3%	64 €	-4,6%	57,8%	-3,8%	88 €	0,4%	51 €	-3,4%
Dijon	70,7%	-2,1%	89 €	2,5%	63 €	0,4%	65,1%	1,0%	86 €	2,9%	56 €	3,9%
Lille	68,1%	-8,8%	93 €	-6,6%	64 €	-14,8%	59,0%	-7,3%	88 €	-2,2%	52 €	-9,3%
Metz	in progress						in progress					
Nancy	77,2%	10,8%	87 €	1,4%	67 €	12,3%	56,2%	-2,8%	81 €	1,0%	46 €	-1,8%
Reims	73,2%	-12,1%	100 €	-0,7%	73 €	-12,7%	61,8%	-8,2%	93 €	-1,3%	57 €	-9,4%
Strasbourg	75,4%	-1,6%	95 €	-5,1%	72 €	-6,6%	62,3%	2,0%	90 €	-0,5%	56 €	1,4%

  

Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
North-east	73,0%	-2,1%	65 €	-2,2%	47 €	-4,2%	62,6%	-2,0%	63 €	-0,5%	39 €	-2,5%
Dijon	83,6%	3,5%	66 €	-1,9%	55 €	1,6%	71,8%	11,2%	64 €	-1,6%	46 €	9,4%
Lille	69,2%	-10,9%	80 €	-0,5%	55 €	-11,3%	64,9%	-2,1%	73 €	1,7%	48 €	-0,4%
Metz	77,3%	-4,0%	63 €	-7,1%	49 €	-10,8%	64,9%	-4,3%	64 €	-3,1%	42 €	-7,3%
Nancy	69,1%	3,0%	62 €	-2,0%	43 €	1,0%	53,2%	-2,4%	61 €	-0,5%	32 €	-2,8%
Reims	75,2%	-5,4%	68 €	6,6%	51 €	0,8%	58,8%	-11,0%	64 €	2,6%	38 €	-8,7%
Strasbourg	80,1%	0,1%	66 €	-6,0%	53 €	-5,9%	67,6%	1,7%	61 €	-2,9%	41 €	-1,3%

  

Super Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
North-east	69,6%	-2,6%	38 €	0,2%	26 €	-2,4%	64,5%	-4,4%	38 €	1,2%	24 €	-3,2%
Dijon	78,7%	-2,7%	38 €	-1,2%	30 €	-3,9%	74,0%	-4,4%	39 €	1,0%	29 €	-3,5%
Lille	68,1%	-10,6%	42 €	1,4%	28 €	-9,4%	66,1%	-4,5%	40 €	2,0%	27 €	-2,6%
Metz	73,9%	-6,7%	39 €	3,8%	29 €	-3,2%	69,1%	-9,1%	39 €	4,5%	27 €	-5,0%
Nancy	73,6%	1,5%	40 €	3,2%	29 €	4,7%	66,5%	6,6%	38 €	0,7%	26 €	7,3%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	72,5%	-8,7%	40 €	3,0%	29 €	-6,0%	59,8%	-8,4%	39 €	1,4%	23 €	-7,1%

#### Departments in the North-Eastern set :

Aisne; Allier; Ardennes; Aube; Cher; Côte-d'Or; Doubs; Jura; Loiret; Marne; Haute-Marne; Meurthe-et-Moselle; Meuse; Moselle; Nièvre; Nord; Oise; Pas-de-Calais; Bas-Rhin; Haut-Rhin; Haute-Saône; Saône-et-Loire; Vosges; Yonne; Territoire-de-Belfort

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# Performances North-West

## September 2012



### North-West & Cities

	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
<b>Luxury Upscale</b>												
North-West	65,9%	-8,4%	188 €	2,9%	124 €	-5,7%	57,2%	-6,5%	199 €	1,4%	114 €	-5,2%
Amiens			insufficient supply				insufficient supply					
Angers			insufficient supply				insufficient supply					
Le Havre			insufficient supply				insufficient supply					
Nantes			insufficient supply				insufficient supply					
Rennes			insufficient supply				insufficient supply					
Rouen			insufficient supply				insufficient supply					
<b>Midscale</b>												
North-West	68,7%	-4,0%	93 €	3,5%	64 €	-0,7%	59,6%	-3,9%	91 €	-0,1%	54 €	-4,0%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Le Havre	68,2%	4,8%	89 €	5,9%	61 €	10,9%	62,0%	0,9%	87 €	-0,9%	54 €	0,0%
Nantes	63,4%	-3,8%	86 €	-7,5%	54 €	-11,0%	56,2%	-5,6%	86 €	-4,0%	48 €	-9,3%
Rennes	63,5%	-4,9%	111 €	7,7%	71 €	2,3%	55,0%	-9,4%	89 €	1,2%	49 €	-8,3%
Rouen	73,3%	0,9%	96 €	-0,7%	70 €	0,2%	62,6%	1,8%	92 €	-1,3%	58 €	0,4%
<b>Budget</b>												
North-West	67,3%	-2,5%	67 €	1,4%	45 €	-1,1%	59,8%	-2,6%	65 €	1,5%	39 €	-1,1%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	68,0%	9,0%	68 €	0,4%	46 €	9,5%	59,7%	2,5%	67 €	1,7%	40 €	4,2%
Le Havre	66,3%	8,6%	62 €	-1,7%	41 €	6,7%	63,3%	8,9%	64 €	5,6%	40 €	15,0%
Nantes	60,4%	-10,9%	70 €	-1,5%	42 €	-12,2%	57,2%	-6,8%	68 €	1,7%	39 €	-5,2%
Rennes	70,6%	-3,6%	73 €	5,8%	52 €	1,9%	60,7%	-4,5%	66 €	3,9%	40 €	-0,8%
Rouen	70,4%	2,2%	64 €	-0,3%	45 €	1,9%	59,7%	-2,8%	61 €	-0,2%	37 €	-3,1%
<b>Super Budget</b>												
North-West	70,4%	-1,5%	39 €	1,8%	28 €	0,3%	66,3%	-2,3%	40 €	1,6%	26 €	-0,8%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	70,4%	-5,3%	37 €	0,7%	26 €	-4,7%	69,2%	-2,4%	38 €	2,2%	26 €	-0,3%
Le Havre	79,0%	3,8%	39 €	-0,1%	31 €	3,7%	73,7%	-2,2%	40 €	2,3%	30 €	0,0%
Nantes	67,7%	-4,0%	43 €	0,8%	29 €	-3,2%	64,6%	-5,0%	43 €	0,9%	27 €	-4,1%
Rennes	66,3%	-2,0%	42 €	2,8%	28 €	0,8%	58,0%	-2,7%	40 €	1,9%	23 €	-0,8%
Rouen	75,4%	3,3%	41 €	1,2%	31 €	4,4%	67,7%	-2,0%	41 €	1,2%	28 €	-0,9%

#### Departments in the North-Western set :

Calvados; Côtes; Eure; Eure-et-Loir; Finistère; Ille-et-Vilaine; Indre; Indre-et-Loire; Loir-et-Cher; Loire-Atlantique; Maine-et-Loire; Manche; Mayenne; Morbihan; Orne; Sarthe; Seine-Maritime; Deux-Sèvres; Somme; Vendée; Vienne

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FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)2 51 80 18 84 OR florent.daniel@inextenso.fr)

In Extenso Tourism, Hotels & Restaurants - 7 rue Ernest Renan - 92136 Issy Les Moulineaux - France

Tél : +33 (0)1 72 29 68 12 - Fax : +33 (0)1 72 29 61 24

# Performances South-East

## September 2012



### South-East (excl. French Riviera) & Cities

Luxury Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
South-East	72,7%	-6,9%	173 €	1,8%	126 €	-5,2%	61,7%	-3,3%	161 €	0,4%	100 €	-2,9%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	83,4%	-2,3%	153 €	2,4%	127 €	0,0%	67,0%	-0,9%	155 €	8,7%	104 €	7,7%
Grenoble	insufficient supply						insufficient supply					
Lyon	75,2%	-0,6%	138 €	-3,8%	103 €	-4,4%	63,2%	-2,6%	123 €	-3,5%	78 €	-6,0%
Marseille	70,5%	-9,9%	151 €	-2,0%	107 €	-11,7%	61,8%	-1,3%	141 €	1,4%	87 €	0,0%
Montpellier	74,6%	-10,2%	161 €	0,7%	120 €	-9,5%	60,5%	-4,8%	141 €	-3,4%	85 €	-8,1%
St Etienne	insufficient supply						insufficient supply					

  

Midscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
South-East	72,3%	-7,3%	94 €	-1,7%	68 €	-8,9%	64,3%	-3,3%	94 €	0,0%	60 €	-3,4%
Aix en Provence	75,7%	-6,1%	88 €	-2,5%	66 €	-8,4%	68,0%	1,4%	88 €	-1,8%	60 €	-0,4%
Avignon	83,5%	-3,5%	94 €	-0,7%	79 €	-4,3%	74,3%	4,4%	100 €	6,4%	74 €	11,0%
Grenoble	56,6%	-13,0%	104 €	0,8%	59 €	-12,3%	52,4%	-7,8%	103 €	0,3%	54 €	-7,5%
Lyon	69,2%	-8,2%	98 €	-3,6%	68 €	-11,5%	59,6%	-7,1%	95 €	-2,9%	56 €	-9,8%
Marseille	74,1%	-7,7%	101 €	-4,0%	75 €	-11,4%	66,3%	-5,2%	98 €	1,6%	65 €	-3,7%
Montpellier	77,8%	-8,9%	100 €	-2,2%	78 €	-10,9%	69,0%	-3,1%	93 €	-2,5%	64 €	-5,6%
St Etienne	in progress						in progress					

  

Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
South-East	70,4%	-3,2%	68 €	0,1%	48 €	-3,1%	63,3%	-2,7%	67 €	0,2%	42 €	-2,5%
Aix en Provence	70,2%	-15,4%	75 €	1,7%	53 €	-14,0%	67,2%	-0,5%	71 €	-0,7%	48 €	-1,2%
Avignon	77,7%	-4,4%	67 €	1,0%	52 €	-3,5%	68,7%	-1,1%	68 €	2,5%	47 €	1,4%
Grenoble	64,1%	0,3%	65 €	-0,2%	42 €	0,1%	58,7%	-5,7%	63 €	-1,1%	37 €	-6,7%
Lyon	72,9%	-0,5%	75 €	-1,1%	55 €	-1,6%	62,4%	-4,2%	72 €	-1,6%	45 €	-5,7%
Marseille	74,4%	-4,8%	71 €	-3,0%	53 €	-7,7%	66,5%	-3,1%	70 €	-0,7%	46 €	-3,8%
Montpellier	78,0%	-5,9%	76 €	3,2%	59 €	-2,9%	72,4%	-3,5%	71 €	3,1%	52 €	-0,5%
St Etienne	in progress						in progress					

  

Super Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
South-East	70,4%	-4,5%	39 €	1,7%	28 €	-2,9%	67,5%	-5,0%	40 €	1,5%	27 €	-3,6%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	71,8%	-10,5%	36 €	4,2%	26 €	-6,8%	71,9%	-3,9%	37 €	1,9%	26 €	-2,0%
Grenoble	66,9%	-11,3%	40 €	1,2%	27 €	-10,2%	62,4%	-11,9%	40 €	-2,4%	25 €	-13,9%
Lyon	70,0%	-3,4%	41 €	2,7%	28 €	-0,8%	65,9%	-6,9%	40 €	1,5%	26 €	-5,5%
Marseille	73,2%	-9,6%	43 €	2,3%	32 €	-7,4%	71,3%	-1,0%	42 €	1,6%	30 €	0,6%
Montpellier	80,3%	-0,3%	39 €	1,5%	31 €	1,2%	77,6%	-4,4%	40 €	3,7%	31 €	-0,8%
St Etienne	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-

#### Departments in the South-Eastern set :

Ain; Alpes; Hautes-Alpes; Alpes-Maritimes; Ardèche; Aude; Aveyron; Bouches-du-Rhône; Cantal; Drôme; Gard; Hérault; Isère; Loire; Haute-Loire; Lozère; Puy-de-Dôme; Pyrénées-Orientales; Rhône; Savoie; Savoie; Haute-Savoie; Var; Vaucluse

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FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)2 51 80 18 84 OR florent.daniel@inextenso.fr)

In Extenso Tourism, Hotels & Restaurants - 7 rue Ernest Renan - 92136 Issy Les Moulineaux - France

Tél : +33 (0)1 72 29 68 12 - Fax : +33 (0)1 72 29 61 24

# Performances French Riviera

## September 2012



### French Riviera

September	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
French Riviera - Luxury	75,6%	3,1%	369 €	-3,4%	279 €	-0,5%	63,0%	2,2%	455 €	4,2%	287 €	6,5%
French Riviera - Boutique Hotels**	73,0%	-4,8%	159 €	1,7%	116 €	-3,2%	62,1%	-2,9%	164 €	-0,3%	102 €	-3,1%
French Riviera - Upscale	75,8%	-2,3%	188 €	0,8%	143 €	-1,5%	63,2%	-0,2%	205 €	5,9%	130 €	5,7%
Average Upscale & Luxury	75,6%	-0,6%	251 €	-0,6%	189 €	-1,2%	63,1%	0,4%	290 €	5,4%	183 €	5,8%
Average Midscale	83,0%	-3,4%	106 €	4,2%	88 €	0,7%	70,5%	-1,3%	103 €	4,5%	73 €	3,1%

### French Riviera Cities

September	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Cannes - Luxury	72,9%	-0,2%	289 €	-12,8%	211 €	-12,9%	59,6%	-2,7%	438 €	2,9%	261 €	0,1%
Cannes - Boutique Hotels	61,1%	-16,9%	166 €	-3,9%	101 €	-20,1%	53,3%	-8,8%	191 €	3,5%	102 €	-5,5%
Cannes - Upscale	68,2%	-4,4%	150 €	-8,8%	102 €	-12,8%	56,7%	-1,8%	183 €	2,6%	104 €	0,8%
Cannes - Upscale & Luxury	70,2%	-2,9%	222 €	-10,4%	156 €	-13,0%	58,0%	-2,6%	315 €	3,5%	182 €	0,8%
Cannes - Midscale	72,8%	-0,7%	109 €	-3,8%	79 €	-4,4%	57,3%	-8,9%	113 €	4,2%	65 €	-5,0%

September	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Nice - Upscale & Luxury	88,4%	-0,2%	198 €	5,5%	175 €	5,4%	71,4%	0,1%	200 €	7,5%	143 €	7,6%
Nice - Midscale	88,7%	-3,1%	114 €	12,1%	101 €	8,7%	75,7%	-0,3%	104 €	6,7%	79 €	6,4%

September	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Monaco - Luxury	76,7%	11,7%	473 €	3,4%	363 €	15,5%	62,8%	12,0%	485 €	5,3%	304 €	17,9%
Monaco - Upscale	70,5%	-3,6%	273 €	4,4%	193 €	0,7%	63,2%	1,3%	291 €	6,0%	184 €	7,4%
Monaco - Upscale & Luxury	72,9%	2,1%	354 €	5,4%	258 €	7,6%	63,0%	5,2%	365 €	6,4%	230 €	12,0%

\* Monaco set include the following cities : Monaco, Roquebrune and Cap d'Ail

\*\* Boutique Hotels: sample excludes Luxury hotels

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FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)2 51 80 18 84 OR florent.daniel@inextenso.fr)

In Extenso Tourism, Hotels & Restaurants - 7 rue Ernest Renan - 92136 Issy Les Moulineaux - France

Tél : +33 (0)1 72 29 68 12 - Fax : +33 (0)1 72 29 61 24

# Performances South West

## September 2012



### South-West & Cities

	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
<b>Luxury Upscale</b>												
South-West	72,7%	-2,6%	206 €	1,3%	149 €	-1,3%	55,9%	-2,7%	204 €	1,7%	114 €	-1,0%
Bordeaux	78,6%	5,4%	202 €	-6,4%	159 €	-1,4%	54,6%	8,0%	192 €	-4,6%	105 €	3,1%
Toulouse	69,8%	-8,4%	124 €	-1,9%	87 €	-10,1%	58,5%	-6,9%	120 €	-0,1%	70 €	-7,0%
<b>Midscale</b>												
South-West	74,5%	-3,7%	96 €	1,8%	72 €	-1,9%	61,6%	-2,8%	91 €	1,8%	56 €	-1,1%
Bordeaux	77,0%	-0,6%	92 €	1,1%	71 €	0,5%	61,4%	0,4%	85 €	0,0%	52 €	0,4%
Toulouse	72,6%	-4,4%	101 €	-1,8%	73 €	-6,1%	63,0%	-4,6%	97 €	1,8%	61 €	-2,9%
<b>Budget</b>												
South-West	69,5%	-5,0%	69 €	0,5%	48 €	-4,6%	61,5%	0,5%	66 €	-2,3%	41 €	-1,8%
Bordeaux	73,7%	-5,3%	72 €	2,0%	53 €	-3,4%	62,9%	-2,6%	68 €	-0,8%	43 €	-3,3%
Toulouse	62,8%	-9,1%	72 €	6,3%	45 €	-3,3%	59,0%	-0,5%	65 €	-0,8%	39 €	-1,3%
<b>Super Budget</b>												
South-West	74,3%	-3,8%	41 €	2,8%	30 €	-1,1%	69,6%	-2,0%	40 €	1,0%	28 €	-1,0%
Bordeaux	76,7%	0,4%	37 €	0,8%	28 €	1,1%	73,4%	3,3%	37 €	-1,4%	27 €	1,9%
Toulouse	72,3%	-6,7%	41 €	1,9%	29 €	-4,9%	69,3%	-5,7%	40 €	1,7%	28 €	-4,1%

#### Departments in the South-Western set :

Ariège; Charente; Charente-Maritime; Corrèze; Creuse; Dordogne; Haute-Garonne; Gers; Gironde; Landes; Lot; Lot-et-Garonne; Pyrénées-Atlantiques; Hautes-Pyrénées; Tarn; Tarn-et-Garonne; Haute-Vienne

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In Extenso Tourism, Hotels & Restaurants - 7 rue Ernest Renan - 92136 Issy Les Moulineaux - France

Tél : +33 (0)1 72 29 68 12 - Fax : +33 (0)1 72 29 61 24

# Performances Main cities in Regions

## September 2012



### Main cities in Regions – Luxury, upscale and midscale

Luxury Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Avignon	83,4%	-2,3%	153 €	2,4%	127 €	0,0%	67,0%	-0,9%	155 €	8,7%	104 €	7,7%
Bordeaux	78,6%	5,4%	202 €	-6,4%	159 €	-1,4%	54,6%	8,0%	192 €	-4,6%	105 €	3,1%
Cannes	70,2%	-2,9%	222 €	-10,4%	156 €	-13,0%	58,0%	-2,6%	315 €	3,5%	182 €	0,8%
Dijon	83,4%	1,6%	138 €	7,2%	115 €	8,9%	64,1%	-2,3%	133 €	7,4%	85 €	4,8%
Lille	59,5%	-7,1%	124 €	-8,9%	74 €	-15,4%	50,7%	1,8%	119 €	-2,4%	60 €	-0,7%
Lyon	75,2%	-0,6%	138 €	-3,8%	103 €	-4,4%	63,2%	-2,6%	123 €	-3,5%	78 €	-6,0%
Marseille	70,5%	-9,9%	151 €	-2,0%	107 €	-11,7%	61,8%	-1,3%	141 €	1,4%	87 €	0,0%
Monaco	72,9%	2,1%	354 €	5,4%	258 €	7,6%	63,0%	5,2%	365 €	6,4%	230 €	12,0%
Montpellier	74,6%	-10,2%	161 €	0,7%	120 €	-9,5%	60,5%	-4,8%	141 €	-3,4%	85 €	-8,1%
Nice	88,4%	-0,2%	198 €	5,5%	175 €	5,4%	71,4%	0,1%	200 €	7,5%	143 €	7,6%
Strasbourg	76,6%	-3,9%	125 €	-4,6%	96 €	-8,3%	60,7%	-3,5%	117 €	0,8%	71 €	-2,8%
Toulouse	69,8%	-8,4%	124 €	-1,9%	87 €	-10,1%	58,5%	-6,9%	120 €	-0,1%	70 €	-7,0%

  

Midscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Aix en Provence	75,7%	-6,1%	88 €	-2,5%	66 €	-8,4%	68,0%	1,4%	88 €	-1,8%	60 €	-0,4%
Avignon	83,5%	-3,5%	94 €	-0,7%	79 €	-4,3%	74,3%	4,4%	100 €	6,4%	74 €	11,0%
Bordeaux	77,0%	-0,6%	92 €	1,1%	71 €	0,5%	61,4%	0,4%	85 €	0,0%	52 €	0,4%
Cannes	72,8%	-0,7%	109 €	-3,8%	79 €	-4,4%	57,3%	-8,9%	113 €	4,2%	65 €	-5,0%
Dijon	70,7%	-2,1%	89 €	2,5%	63 €	0,4%	65,1%	1,0%	86 €	2,9%	56 €	3,9%
Grenoble	56,6%	-13,0%	104 €	0,8%	59 €	-12,3%	52,4%	-7,8%	103 €	0,3%	54 €	-7,5%
Le Havre	68,2%	4,8%	89 €	5,9%	61 €	10,9%	62,0%	0,9%	87 €	-0,9%	54 €	0,0%
Lille	68,1%	-8,8%	93 €	-6,6%	64 €	-14,8%	59,0%	-7,3%	88 €	-2,2%	52 €	-9,3%
Lyon	69,2%	-8,2%	98 €	-3,6%	68 €	-11,5%	59,6%	-7,1%	95 €	-2,9%	56 €	-9,8%
Marseille	74,1%	-7,7%	101 €	-4,0%	75 €	-11,4%	66,3%	-5,2%	98 €	1,6%	65 €	-3,7%
Montpellier	77,8%	-8,9%	100 €	-2,2%	78 €	-10,9%	69,0%	-3,1%	93 €	-2,5%	64 €	-5,6%
Nancy	77,2%	10,8%	87 €	1,4%	67 €	12,3%	56,2%	-2,8%	81 €	1,0%	46 €	-1,8%
Nantes	63,4%	-3,8%	86 €	-7,5%	54 €	-11,0%	56,2%	-5,6%	86 €	-4,0%	48 €	-9,3%
Nice	88,7%	-3,1%	114 €	12,1%	101 €	8,7%	75,7%	-0,3%	104 €	6,7%	79 €	6,4%
Reims	73,2%	-12,1%	100 €	-0,7%	73 €	-12,7%	61,8%	-8,2%	93 €	-1,3%	57 €	-9,4%
Rennes	63,5%	-4,9%	111 €	7,7%	71 €	2,3%	55,0%	-9,4%	89 €	1,2%	49 €	-8,3%
Rouen	73,3%	0,9%	96 €	-0,7%	70 €	0,2%	62,6%	1,8%	92 €	-1,3%	58 €	0,4%
Strasbourg	75,4%	-1,6%	95 €	-5,1%	72 €	-6,6%	62,3%	2,0%	90 €	-0,5%	56 €	1,4%
Toulouse	72,6%	-4,4%	101 €	-1,8%	73 €	-6,1%	63,0%	-4,6%	97 €	1,8%	61 €	-2,9%

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FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)2 51 80 18 84 OR florent.daniel@inextenso.fr)

In Extenso Tourism, Hotels & Restaurants - 7 rue Ernest Renan - 92136 Issy Les Moulineaux - France

Tél : +33 (0)1 72 29 68 12 - Fax : +33 (0)1 72 29 61 24

# Performances Main cities in Regions

## September 2012



### Main cities in regions – Budget and Super Budget

Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Aix en Provence	70,2%	-15,4%	75 €	1,7%	53 €	-14,0%	67,2%	-0,5%	71 €	-0,7%	48 €	-1,2%
Angers	68,0%	9,0%	68 €	0,4%	46 €	9,5%	59,7%	2,5%	67 €	1,7%	40 €	4,2%
Avignon	77,7%	-4,4%	67 €	1,0%	52 €	-3,5%	68,7%	-1,1%	68 €	2,5%	47 €	1,4%
Bordeaux	73,7%	-5,3%	72 €	2,0%	53 €	-3,4%	62,9%	-2,6%	68 €	-0,8%	43 €	-3,3%
Dijon	83,6%	3,5%	66 €	-1,9%	55 €	1,6%	71,8%	11,2%	64 €	-1,6%	46 €	9,4%
Grenoble	64,1%	0,3%	65 €	-0,2%	42 €	0,1%	58,7%	-5,7%	63 €	-1,1%	37 €	-6,7%
Le Havre	66,3%	8,6%	62 €	-1,7%	41 €	6,7%	63,3%	8,9%	64 €	5,6%	40 €	15,0%
Lille	69,2%	-10,9%	80 €	-0,5%	55 €	-11,3%	64,9%	-2,1%	73 €	1,7%	48 €	-0,4%
Lyon	72,9%	-0,5%	75 €	-1,1%	55 €	-1,6%	62,4%	-4,2%	72 €	-1,6%	45 €	-5,7%
Marseille	74,4%	-4,8%	71 €	-3,0%	53 €	-7,7%	66,5%	-3,1%	70 €	-0,7%	46 €	-3,8%
Metz	77,3%	-4,0%	63 €	-7,1%	49 €	-10,8%	64,9%	-4,3%	64 €	-3,1%	42 €	-7,3%
Montpellier	78,0%	-5,9%	76 €	3,2%	59 €	-2,9%	72,4%	-3,5%	71 €	3,1%	52 €	-0,5%
Nancy	69,1%	3,0%	62 €	-2,0%	43 €	1,0%	53,2%	-2,4%	61 €	-0,5%	32 €	-2,8%
Nantes	60,4%	-10,9%	70 €	-1,5%	42 €	-12,2%	57,2%	-6,8%	68 €	1,7%	39 €	-5,2%
Reims	75,2%	-5,4%	68 €	6,6%	51 €	0,8%	58,8%	-11,0%	64 €	2,6%	38 €	-8,7%
Rennes	70,6%	-3,6%	73 €	5,8%	52 €	1,9%	60,7%	-4,5%	66 €	3,9%	40 €	-0,8%
Rouen	70,4%	2,2%	64 €	-0,3%	45 €	1,9%	59,7%	-2,8%	61 €	-0,2%	37 €	-3,1%
Strasbourg	80,1%	0,1%	66 €	-6,0%	53 €	-5,9%	67,6%	1,7%	61 €	-2,9%	41 €	-1,3%
Toulouse	62,8%	-9,1%	72 €	6,3%	45 €	-3,3%	59,0%	-0,5%	65 €	-0,8%	39 €	-1,3%

  

Super Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Angers	70,4%	-5,3%	37 €	0,7%	26 €	-4,7%	69,2%	-2,4%	38 €	2,2%	26 €	-0,3%
Avignon	71,8%	-10,5%	36 €	4,2%	26 €	-6,8%	71,9%	-3,9%	37 €	1,9%	26 €	-2,0%
Bordeaux	76,7%	0,4%	37 €	0,8%	28 €	1,1%	73,4%	3,3%	37 €	-1,4%	27 €	1,9%
Dijon	78,7%	-2,7%	38 €	-1,2%	30 €	-3,9%	74,0%	-4,4%	39 €	1,0%	29 €	-3,5%
Grenoble	66,9%	-11,3%	40 €	1,2%	27 €	-10,2%	62,4%	-11,9%	40 €	-2,4%	25 €	-13,9%
Le Havre	79,0%	3,8%	39 €	-0,1%	31 €	3,7%	73,7%	-2,2%	40 €	2,3%	30 €	0,0%
Lille	68,1%	-10,6%	42 €	1,4%	28 €	-9,4%	66,1%	-4,5%	40 €	2,0%	27 €	-2,6%
Lyon	70,0%	-3,4%	41 €	2,7%	28 €	-0,8%	65,9%	-6,9%	40 €	1,5%	26 €	-5,5%
Marseille	73,2%	-9,6%	43 €	2,3%	32 €	-7,4%	71,3%	-1,0%	42 €	1,6%	30 €	0,6%
Metz	73,9%	-6,7%	39 €	3,8%	29 €	-3,2%	69,1%	-9,1%	39 €	4,5%	27 €	-5,0%
Montpellier	80,3%	-0,3%	39 €	1,5%	31 €	1,2%	77,6%	-4,4%	40 €	3,7%	31 €	-0,8%
Nancy	73,6%	1,5%	40 €	3,2%	29 €	4,7%	66,5%	6,6%	38 €	0,7%	26 €	7,3%
Nantes	67,7%	-4,0%	43 €	0,8%	29 €	-3,2%	64,6%	-5,0%	43 €	0,9%	27 €	-4,1%
Rennes	66,3%	-2,0%	42 €	2,8%	28 €	0,8%	58,0%	-2,7%	40 €	1,9%	23 €	-0,8%
Rouen	75,4%	3,3%	41 €	1,2%	31 €	4,4%	67,7%	-2,0%	41 €	1,2%	28 €	-0,9%
Strasbourg	72,5%	-8,7%	40 €	3,0%	29 €	-6,0%	59,8%	-8,4%	39 €	1,4%	23 €	-7,1%
Toulouse	72,3%	-6,7%	41 €	1,9%	29 €	-4,9%	69,3%	-5,7%	40 €	1,7%	28 €	-4,1%

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In Extenso Tourism, Hotels & Restaurants - 7 rue Ernest Renan - 92136 Issy Les Moulineaux - France

Tél : +33 (0)1 72 29 68 12 - Fax : +33 (0)1 72 29 61 24

# Informations

## Definitions

**Occupancy Rate (OR)** : Rooms sold divided by rooms available multiplied by 100.

**Rooms Available** : The number of rooms times the number of days in the period.

**Average Daily Rate (ADR)** : Room revenue divided by rooms sold.

**Revenue per Available Room (RevPAR)** : Room revenue divided by rooms available.

ADR and RevPAR are expressed in Euros, excluding VAT

## Categories

**Luxury Hotels**: France's most prestigious hotels that distinguish themselves through their exceptional location, building and design, as well their outstanding product and service quality. Highly reputed, these establishments cater to a particularly discerning clientele.

**Upscale Hotels**: Hotels operating at the higher end of the market and consequently offering a wide range of amenities. These establishments are less prestigious than Luxury Hotels and cater to a wider range of guests.

**Midscale Hotels**: Veritable bridge between higher category and entry-level hotels, Midscale Hotels benefit from a wide range of facilities and amenities, but to a lesser extent than Upscale Hotels.

**Budget Hotels**: Hotels that offer a restricted range of facilities and amenities. Budget hotels primarily target those guests particularly preoccupied by value for money.

**Super Budget Hotels**: Hotels that offer a 'no frills' approach, with a very limited range of services. Price is the key decision-factor for guests.

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In Extenso Tourism, Hotels & Restaurants - 7 rue Ernest Renan - 92136 Issy Les Moulineaux - France

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# Informations

## In Extenso – member of Deloitte

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### About In Extenso

A member of Deloitte Touche Tohmatsu, In Extenso is an entity dedicated to small and medium-sized businesses. Almost 3 300 employees in 170 agencies in France serve 70 000 clients, including companies, firms, entrepreneurs, tradesmen and women, self-employed lawyers and doctors, associations and local authorities.

### Tourism, Hotels & Restaurants Desk

In Extenso is one of the leading advisors in Tourism, Hospitality and Restaurant industries worldwide. We provide many consulting services for different stakeholders of the tourism industry :

Market and feasibility studies	Valuation of hotel and tourist assets	Urban tourism development plans	Human Capital	Others services
<ul style="list-style-type: none"> <li>Detailed market study</li> <li>Operational recommendations to respond to the requirements of potential clients</li> <li>Determination of the product-service concept</li> <li>Determination of client target the price positioning</li> <li>Revenue estimations (accommodation, food and beverage, other...)</li> <li>Operating forecasts over several years : establishment of expense items to determine the project's profitability (GOP, cash-flows)</li> </ul>	<ul style="list-style-type: none"> <li>A detailed market study</li> <li>Product analysis (strengths, weaknesses, necessary renovations and refurbishments)</li> <li>Forecasts over several years</li> <li>The application of the discounted cash-flow method, completed by market references (recent and comparable transactions) and the use of the others methods, specially adapted to each case (multiple of turnover or GOP, approaches linked to the real estate market, etc).</li> </ul>	<ul style="list-style-type: none"> <li>Dynamic review of existing supply</li> <li>Analysis of the impact of development factors (economy, transportation, tourist markets, etc.)</li> <li>Analysis of supply/demand situation</li> <li>Assessment of development ambitions and objectives</li> <li>Recommendations on strategy</li> </ul>	<ul style="list-style-type: none"> <li>Aligning Human Resources with the strategic goals of the company</li> <li>Mastering operational risks in terms of HR and abiding by the regulations</li> <li>Incorporating the human dimension in all your reorganization and transformation processes</li> <li>Developing an attractive and incentive remuneration policy</li> </ul>	<ul style="list-style-type: none"> <li>Hotel benchmark survey</li> <li>Identification of operators and investors</li> <li>Optimize your information systems</li> <li>Marketing audits</li> <li>Quality control</li> <li>Organizational audits and management support</li> <li>Etc.</li> </ul>

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