

# In Extenso

tourisme, hôtellerie et restauration

## French Hotel Industry Performances

September



Membre de **Deloitte**.

# Growth continues in September

After a sunny summer, growth continued in September, with the return of business guests. In regional France, upscale hotels (4 and 5 star) played their game well with a rise in rooms revenue of over +8%. Other categories also saw RevPAR progress, although to a lesser extent.

In Paris, growth was the result of an increase in average rates, only, with the 3 star category even posting slightly lower occupancy. However, results remain satisfactory.

## French market

### Monthly performance

September	5* - 4 *	3 *	2 *
OR 2011	82,1%	79,5%	75,2%
Var. /n-1	2,7%	0,3%	-1,2%
ADR 2011	255 €	107 €	69 €
Var. /n-1	4,7%	2,9%	2,6%
RevPAR 2011	210 €	85 €	52 €
Var. /n-1	7,6%	3,2%	1,3%

### Year To Date performance

September	5* - 4 *	3 *	2 *
OR 2011	70,3%	68,6%	66,1%
Var. /n-1	4,4%	2,4%	0,5%
ADR 2011	246 €	98 €	65 €
Var. /n-1	6,0%	4,5%	2,5%
RevPAR 2011	173 €	67 €	43 €
Var. /n-1	10,6%	7,1%	3,0%

## Definitions

OR = Occupancy Rate

ADR = Average Daily Rate

RevPAR = Revenue per available room

In regional France, September was characterized by better RevPAR performances – the higher the hotel category, the better the performance. Two star hotels posted a +1.3% growth in RevPAR, whilst 3 and 4 star hotels recorded an increase of +3.8% and +8.6%, respectively.

The trend was the same in many large cities, with the majority posting double-digit RevPAR growth in the luxury segment. Cannes recorded the highest RevPAR increases – up +29% in standard 4 star hotels and over +45% in superior 4 star properties. Such encouraging results can be primarily explained by the town hosting the International TFWA World Exhibition (Tax Free) in September this year, rather than in October, as was the case last year. Monaco also recorded strong RevPAR growth – up +38% in its most luxurious properties, for instance, thanks to the recovery in demand.

In Paris, rooms revenue in all categories grew by +4%, on average. Although occupancy rates remained relatively stable in the upscale segment, 3 star hotels recorded a slight drop.

Unfortunately, not all destinations experienced growth, and September's trend was mostly downward in towns such as Lille, Strasburg, Grenoble, Le Havre and Rouen. Looking forward, November is likely to be difficult for hotels in Paris and throughout the rest of France, given the number of bank holidays which will undoubtedly impact the business market.

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# Performances Paris

## September 2011



### Paris-City

#### Monthly performance

September	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris Superior 5* - 4*	90,0%	1,5%	625 €	2,7%	562 €	4,3%
Paris Boutique Hotels	90,7%	-0,5%	334 €	4,5%	303 €	4,0%
Paris Standard 5* - 4*	88,9%	0,6%	225 €	3,7%	200 €	4,3%
<b>Paris average - 5* - 4 *</b>	<b>89,2%</b>	<b>0,7%</b>	<b>311 €</b>	<b>3,4%</b>	<b>278 €</b>	<b>4,1%</b>
Paris Superior 3*	93,6%	0,8%	180 €	6,5%	168 €	7,4%
Paris Standard 3*	89,5%	-3,0%	129 €	5,4%	115 €	2,2%
<b>Paris - 3*</b>	<b>90,6%</b>	<b>-2,0%</b>	<b>143 €</b>	<b>6,2%</b>	<b>130 €</b>	<b>4,1%</b>
<b>Paris - 2*</b>	<b>92,7%</b>	<b>-0,4%</b>	<b>90 €</b>	<b>4,2%</b>	<b>84 €</b>	<b>3,7%</b>

#### Year To Date performance

September	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris Superior 5* - 4*	78,3%	3,8%	584 €	5,2%	457 €	9,1%
Paris Boutique Hotels	78,4%	3,3%	299 €	6,0%	235 €	9,5%
Paris Standard 5* - 4*	78,3%	4,1%	195 €	10,7%	153 €	15,3%
<b>Paris average - 5* - 4 *</b>	<b>78,3%</b>	<b>4,0%</b>	<b>279 €</b>	<b>8,1%</b>	<b>219 €</b>	<b>12,4%</b>
Paris Superior 3*	85,8%	5,0%	152 €	6,7%	130 €	12,0%
Paris Standard 3*	82,2%	1,7%	107 €	7,8%	88 €	9,7%
<b>Paris - 3*</b>	<b>83,2%</b>	<b>2,6%</b>	<b>119 €</b>	<b>7,8%</b>	<b>99 €</b>	<b>10,6%</b>
<b>Paris - 2*</b>	<b>85,8%</b>	<b>1,4%</b>	<b>79 €</b>	<b>4,4%</b>	<b>68 €</b>	<b>5,9%</b>

### Paris suburbs (excluding Paris)

#### Monthly performance

September	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris - 5* - 4*	89,2%	0,7%	311 €	3,4%	278 €	4,1%
La Défense - 5* - 4*	n.d.	-	n.d.	-	n.d.	-
Roissy CdG - 5* - 4*	80,6%	-3,5%	118 €	-6,2%	95 €	-9,5%
Paris suburbs* - 5* - 4*	86,7%	-2,1%	210 €	4,7%	182 €	2,6%

#### Year To Date performance

September	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris - 5* - 4*	78,3%	4,0%	279 €	8,1%	219 €	12,4%
La Défense - 5* - 4*	n.d.	-	n.d.	-	n.d.	-
Roissy CdG - 5* - 4*	71,1%	2,8%	104 €	2,2%	74 €	5,1%
Paris suburbs* - 5* - 4*	79,4%	2,0%	224 €	5,1%	177 €	7,2%

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# Performance Regions

## September 2011



### Regions

		<i>Monthly performance</i>				
		<i>September</i>	<b>5* - 4 *</b>	<b>3 *</b>	<b>2 *</b>	
Regions (excl. French Riviera)	<b>OR 2011</b>		75,5%	75,2%	72,8%	
	<i>Var. /n-1</i>		<b>3,5%</b>	<b>2,5%</b>	<b>-1,1%</b>	
	<b>ADR 2011</b>		166 €	92 €	68 €	
	<i>Var. /n-1</i>		<b>4,9%</b>	<b>1,3%</b>	<b>2,4%</b>	
	<b>RevPAR 2011</b>		125 €	70 €	49 €	
	<i>Var. /n-1</i>		<b>8,6%</b>	<b>3,8%</b>	<b>1,3%</b>	
	<i>Year To Date performance</i>					
			<i>September</i>	<b>5* - 4 *</b>	<b>3 *</b>	<b>2 *</b>
	<b>OR 2011</b>			61,5%	63,2%	63,5%
	<i>Var. /n-1</i>			<b>4,0%</b>	<b>2,5%</b>	<b>0,6%</b>
<b>ADR 2011</b>			160 €	90 €	65 €	
<i>Var. /n-1</i>			<b>3,3%</b>	<b>2,3%</b>	<b>1,9%</b>	
<b>RevPAR 2011</b>			98 €	57 €	41 €	
<i>Var. /n-1</i>			<b>7,4%</b>	<b>4,8%</b>	<b>2,6%</b>	
		<i>Monthly performance</i>				
		<i>September</i>	<b>5* - 4 *</b>	<b>3 *</b>	<b>2 *</b>	
French Riviera	<b>OR 2011</b>		76,2%	85,7%	n.d.	
	<i>Var. /n-1</i>		<b>10,0%</b>	<b>4,5%</b>	<b>n.d.</b>	
	<b>ADR 2011</b>		244 €	102 €	n.d.	
	<i>Var. /n-1</i>		<b>11,1%</b>	<b>5,8%</b>	<b>n.d.</b>	
	<b>RevPAR 2011</b>		186 €	87 €	n.d.	
	<i>Var. /n-1</i>		<b>22,2%</b>	<b>10,5%</b>	<b>n.d.</b>	
	<i>Year To Date performance</i>					
			<i>September</i>	<b>5* - 4 *</b>	<b>3 *</b>	<b>2 *</b>
	<b>OR 2011</b>			62,7%	71,1%	n.d.
	<i>Var. /n-1</i>			<b>5,5%</b>	<b>3,3%</b>	<b>n.d.</b>
<b>ADR 2011</b>			268 €	99 €	n.d.	
<i>Var. /n-1</i>			<b>3,5%</b>	<b>4,1%</b>	<b>n.d.</b>	
<b>RevPAR 2011</b>			168 €	70 €	n.d.	
<i>Var. /n-1</i>			<b>9,2%</b>	<b>7,5%</b>	<b>n.d.</b>	

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# Performances Suburbs

## September 2011



### Paris suburbs (excluding Paris)

3 star market	Monthly performance								Average suburbs
	September	departments							
		77	78	91	92	93	94		
OR 2011	83,6%	73,5%	72,2%	83,1%	74,6%	83,9%	83,2%	80,2%	
Var. /n-1	-5,6%	1,0%	-5,7%	-2,4%	-8,4%	1,0%	-4,8%	-3,6%	
ADR 2011	117 €	116 €	97 €	119 €	86 €	86 €	111 €	109 €	
Var. /n-1	4,7%	1,6%	7,9%	1,2%	0,0%	2,7%	2,7%	3,0%	
RevPAR 2011	98 €	85 €	70 €	99 €	64 €	72 €	92 €	87 €	
Var. /n-1	-1,2%	2,7%	1,7%	-1,2%	-8,4%	3,7%	-2,2%	-0,8%	
Year To Date performance								Average suburbs	
September	departments								
	77	78	91	92	93	94	95		
OR 2011	77,7%	67,4%	65,7%	70,9%	64,3%	76,2%	71,6%	71,0%	
Var. /n-1	-3,1%	10,3%	6,7%	-0,6%	-1,3%	2,4%	2,0%	1,4%	
ADR 2011	131 €	103 €	88 €	104 €	74 €	79 €	98 €	101 €	
Var. /n-1	5,2%	0,0%	2,7%	8,0%	7,5%	7,0%	6,3%	5,4%	
RevPAR 2011	101 €	69 €	58 €	74 €	47 €	60 €	70 €	71 €	
Var. /n-1	1,9%	10,3%	9,6%	7,4%	6,1%	9,5%	8,4%	6,8%	
2 star market	Monthly performance								Average suburbs
	September	departments							
		77	78	91	92	93	94		
OR 2011	77,2%	70,3%	65,6%	78,8%	82,5%	79,3%	76,5%	77,4%	
Var. /n-1	4,9%	-6,1%	-6,3%	-2,1%	-1,6%	-8,9%	-1,6%	-1,8%	
ADR 2011	58 €	88 €	68 €	72 €	62 €	69 €	70 €	68 €	
Var. /n-1	-0,4%	6,3%	1,1%	3,3%	-2,3%	4,9%	4,4%	1,8%	
RevPAR 2011	45 €	62 €	45 €	57 €	51 €	55 €	54 €	52 €	
Var. /n-1	4,5%	-0,2%	-5,2%	1,1%	-3,9%	-4,4%	2,7%	-0,1%	
Year To Date performance								IDF (hors Paris)	
September	départements								
	77	78	91	92	93	94	95		
OR 2011	67,6%	63,0%	59,7%	69,9%	73,4%	77,7%	65,0%	68,6%	
Var. /n-1	2,7%	-2,6%	3,6%	3,4%	4,0%	0,1%	-1,4%	1,4%	
ADR 2011	60 €	83 €	66 €	67 €	57 €	64 €	58 €	62 €	
Var. /n-1	2,6%	4,2%	-1,4%	3,1%	0,7%	3,7%	5,6%	2,9%	
RevPAR 2011	41 €	52 €	39 €	47 €	41 €	49 €	38 €	43 €	
Var. /n-1	5,4%	1,4%	2,1%	6,6%	4,7%	3,8%	4,1%	4,4%	
0/1 star market	Monthly performance								IDF (hors Paris)
	September	departments							
		77	78	91	92	93	94		
OR 2011	68,0%	77,5%	76,4%	n.d.	89,0%	78,8%	84,7%	80,4%	
Var. /n-1	4,2%	0,8%	4,5%	-	3,2%	-5,4%	0,5%	1,6%	
ADR 2011	41 €	42 €	39 €	n.d.	43 €	44 €	44 €	43 €	
Var. /n-1	4,1%	4,0%	2,9%	-	3,3%	4,4%	2,5%	3,7%	
RevPAR 2011	28 €	33 €	30 €	n.d.	39 €	35 €	37 €	35 €	
Var. /n-1	8,5%	4,8%	7,5%	-	6,6%	-1,3%	3,0%	5,4%	
Year To Date performance								IDF (hors Paris)	
September	departments								
	77	78	91	92	93	94	95		
OR 2011	65,8%	73,2%	69,2%	n.d.	78,3%	77,6%	75,0%	73,8%	
Var. /n-1	-1,8%	1,2%	5,2%	-	3,4%	-2,6%	2,3%	1,7%	
ADR 2011	41 €	42 €	39 €	n.d.	41 €	44 €	41 €	42 €	
Var. /n-1	5,9%	3,1%	4,2%	-	2,2%	5,0%	2,2%	3,6%	
RevPAR 2011	27 €	30 €	27 €	n.d.	32 €	34 €	31 €	31 €	
Var. /n-1	4,0%	4,4%	9,7%	-	5,7%	2,3%	4,6%	5,3%	

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# Performances North-East

## September 2011



### North-east & Cities

5/4-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
North-East - 5* - 4*	74,6%	1,0%	138 €	-1,9%	103 €	-0,9%	59,1%	5,7%	129 €	-0,5%	76 €	5,1%
Dijon	82,1%	4,8%	129 €	4,6%	106 €	9,6%	64,9%	6,5%	124 €	2,1%	80 €	8,7%
Lille	68,2%	-0,9%	125 €	-0,3%	85 €	-1,2%	54,1%	3,6%	115 €	0,7%	62 €	4,3%
Metz	insufficient supply						insufficient supply					
Nancy	insufficient supply						insufficient supply					
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	79,7%	-0,5%	131 €	-4,9%	104 €	-5,3%	62,9%	8,6%	116 €	-1,1%	73 €	7,4%
<b>3-star</b>												
3-star	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
North-East - 3*	72,9%	-0,6%	91 €	0,6%	66 €	0,0%	59,9%	1,9%	87 €	1,7%	52 €	3,6%
Dijon	72,2%	-6,1%	87 €	3,6%	63 €	-2,6%	64,4%	-2,0%	84 €	1,8%	54 €	-0,3%
Lille	75,0%	-2,5%	98 €	2,0%	73 €	-0,5%	64,3%	1,3%	88 €	2,6%	57 €	4,0%
Metz	in progress						in progress					
Nancy	70,1%	4,1%	85 €	3,9%	59 €	8,2%	58,5%	5,5%	80 €	4,4%	47 €	10,2%
Reims	83,3%	-1,0%	100 €	4,5%	84 €	3,5%	67,3%	1,8%	94 €	2,4%	63 €	4,3%
Strasbourg	76,6%	-2,2%	101 €	-3,5%	78 €	-5,7%	64,5%	1,5%	90 €	0,9%	58 €	2,4%
<b>2-star</b>												
2-star	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
North-East - 2*	74,3%	0,0%	66 €	0,2%	49 €	0,2%	63,4%	2,5%	63 €	0,7%	40 €	3,2%
Dijon	80,4%	5,7%	66 €	2,6%	53 €	8,4%	65,1%	-4,9%	64 €	2,8%	42 €	-2,2%
Lille	77,7%	-1,9%	80 €	3,5%	62 €	1,5%	66,3%	7,1%	72 €	1,4%	48 €	8,7%
Metz	78,6%	-4,2%	68 €	1,5%	54 €	-2,8%	65,9%	1,2%	67 €	2,8%	44 €	4,0%
Nancy	68,3%	5,2%	60 €	-1,7%	41 €	3,4%	55,7%	1,0%	58 €	0,3%	32 €	1,3%
Reims	82,1%	6,7%	65 €	-1,8%	54 €	4,7%	68,4%	8,1%	64 €	1,1%	43 €	9,3%
Strasbourg	79,9%	-0,7%	71 €	3,5%	57 €	2,7%	65,4%	3,3%	63 €	0,3%	41 €	3,6%
<b>0/1-star</b>												
0/1-star	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
North-East - 0/1 star	72,9%	-2,9%	40 €	3,6%	29 €	0,6%	67,6%	-0,3%	40 €	3,3%	27 €	3,0%
Dijon	80,9%	0,0%	39 €	3,4%	31 €	3,3%	77,4%	2,6%	39 €	3,8%	30 €	6,5%
Lille	75,2%	-1,8%	39 €	2,9%	29 €	1,0%	67,8%	1,7%	38 €	1,8%	26 €	3,5%
Metz	79,2%	5,2%	38 €	4,2%	30 €	9,6%	76,0%	9,7%	37 €	2,5%	28 €	12,5%
Nancy	72,0%	3,7%	38 €	3,9%	27 €	7,8%	62,1%	-4,5%	38 €	5,4%	24 €	0,6%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	76,6%	-5,4%	39 €	3,3%	30 €	-2,4%	62,5%	5,8%	39 €	5,4%	24 €	11,6%

#### 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 2011



### North-West & Cities

5/4-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
North-West - 5* - 4*	71,4%	1,1%	181 €	2,8%	130 €	4,0%	65,9%	1,9%	187 €	3,2%	124 €	5,1%
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			
3-star	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
	North-West - 3*	71,7%	1,0%	90 €	-1,1%	65 €	-0,2%	62,2%	3,9%	90 €	1,2%	56 €
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	70,3%	-1,1%	85 €	-0,6%	60 €	-1,7%	63,1%	-1,6%	88 €	2,7%	56 €	1,1%
Nantes	65,5%	-5,1%	93 €	-4,2%	61 €	-9,1%	59,1%	1,7%	89 €	4,1%	53 €	5,9%
Rennes	66,8%	-1,8%	103 €	0,6%	69 €	-1,2%	60,7%	3,1%	88 €	3,8%	53 €	7,0%
Rouen	72,6%	-5,7%	97 €	0,3%	70 €	-5,4%	61,5%	1,3%	93 €	1,2%	57 €	2,6%
2-star	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
	North-West - 2*	69,6%	-3,0%	68 €	3,2%	47 €	0,1%	61,8%	-0,4%	65 €	2,0%	40 €
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	62,4%	-9,3%	68 €	2,4%	42 €	-7,1%	58,3%	1,7%	66 €	2,7%	38 €	4,4%
Le Havre	57,6%	-19,5%	63 €	5,3%	36 €	-15,2%	56,6%	-2,8%	60 €	1,6%	34 €	-1,3%
Nantes	65,6%	-1,8%	71 €	5,6%	47 €	3,7%	61,1%	-1,0%	67 €	3,3%	41 €	2,3%
Rennes	73,4%	3,5%	72 €	4,0%	53 €	7,6%	63,4%	1,2%	65 €	3,2%	41 €	4,5%
Rouen	68,9%	-5,1%	64 €	3,3%	44 €	-2,0%	61,5%	-0,8%	62 €	2,7%	38 €	1,9%
0/1-star	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
	North-West - 0/1 star	72,6%	-1,6%	41 €	2,8%	30 €	1,1%	68,8%	1,0%	41 €	2,1%	28 €
Amiens	84,8%	6,2%	41 €	0,3%	35 €	6,5%	77,2%	7,1%	41 €	0,2%	32 €	7,3%
Angers	74,4%	1,4%	37 €	2,3%	28 €	3,8%	70,9%	4,1%	37 €	0,6%	26 €	4,8%
Le Havre	76,0%	1,3%	39 €	6,8%	30 €	8,1%	75,4%	7,1%	39 €	4,6%	30 €	12,0%
Nantes	70,5%	-3,6%	43 €	3,2%	30 €	-0,6%	68,0%	-0,6%	42 €	2,8%	29 €	2,2%
Rennes	67,7%	0,1%	40 €	0,6%	27 €	0,7%	59,4%	-1,8%	39 €	1,1%	23 €	-0,7%
Rouen	73,0%	2,7%	40 €	0,2%	29 €	2,9%	69,1%	1,4%	40 €	1,3%	28 €	2,7%

#### 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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# Performances South-East September 2011



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

5/4-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
South-East - 5* - 4*	78,1%	4,7%	161 €	7,6%	126 €	12,7%	63,9%	3,1%	152 €	3,1%	97 €	6,3%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	85,4%	6,7%	149 €	4,5%	127 €	11,5%	67,6%	16,9%	143 €	-3,0%	97 €	13,4%
Grenoble	insufficient supply						insufficient supply					
Lyon	75,6%	0,0%	140 €	10,8%	106 €	10,8%	65,1%	7,7%	125 €	7,0%	81 €	15,2%
Marseille	78,2%	7,7%	155 €	7,6%	121 €	15,9%	62,6%	3,7%	139 €	1,5%	87 €	5,2%
Montpellier	89,1%	9,9%	161 €	8,8%	143 €	19,5%	69,8%	-4,3%	148 €	4,9%	103 €	0,4%
St Etienne	insufficient supply						insufficient supply					
3-star	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
	South-East - 3*	77,7%	5,1%	94 €	2,6%	73 €	7,9%	66,6%	2,3%	92 €	3,0%	62 €
Aix en Provence	80,7%	6,6%	90 €	3,9%	72 €	10,8%	67,1%	-3,2%	90 €	5,0%	60 €	1,5%
Avignon	86,5%	3,3%	95 €	7,7%	82 €	11,2%	70,4%	3,5%	93 €	3,6%	66 €	7,3%
Grenoble	65,0%	-4,0%	103 €	1,9%	67 €	-2,3%	56,9%	-1,4%	103 €	4,7%	59 €	3,3%
Lyon	75,4%	-0,2%	105 €	5,4%	79 €	5,2%	63,7%	2,6%	101 €	6,4%	64 €	9,2%
Marseille	80,7%	0,6%	105 €	5,8%	85 €	6,4%	69,9%	-0,1%	97 €	1,9%	68 €	1,8%
Montpellier	85,4%	11,6%	102 €	8,1%	87 €	20,6%	71,3%	1,7%	95 €	2,0%	68 €	3,8%
St Etienne	in progress						in progress					
2-star	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
	South-East - 2*	72,8%	-1,2%	68 €	3,3%	50 €	2,0%	65,4%	-0,2%	66 €	2,7%	43 €
Aix en Provence	83,0%	14,5%	74 €	0,7%	62 €	15,3%	67,6%	2,9%	72 €	2,6%	48 €	5,6%
Avignon	80,8%	4,7%	66 €	2,8%	53 €	7,7%	69,0%	5,9%	66 €	2,6%	46 €	8,7%
Grenoble	65,3%	-7,0%	68 €	2,3%	45 €	-4,9%	64,5%	-2,5%	67 €	4,6%	43 €	2,0%
Lyon	71,4%	-7,6%	75 €	5,2%	54 €	-2,8%	64,7%	-1,8%	73 €	5,7%	47 €	3,7%
Marseille	77,3%	4,2%	73 €	1,5%	56 €	5,8%	67,7%	1,2%	69 €	-1,2%	47 €	0,0%
Montpellier	83,2%	0,7%	74 €	8,6%	61 €	9,4%	75,3%	-1,5%	69 €	3,5%	52 €	1,9%
St Etienne	in progress						in progress					
0/1-star	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
	South-East - 0/1 star	72,6%	0,4%	41 €	1,0%	30 €	1,4%	69,1%	-0,6%	42 €	1,7%	29 €
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	82,2%	9,5%	35 €	1,5%	29 €	11,2%	75,4%	-0,1%	37 €	2,6%	28 €	2,5%
Grenoble	76,3%	-4,9%	41 €	0,2%	31 €	-4,6%	74,7%	-2,3%	41 €	0,8%	31 €	-1,5%
Lyon	72,5%	-0,3%	40 €	3,2%	29 €	2,9%	70,8%	2,8%	39 €	1,9%	28 €	4,7%
Marseille	78,1%	-1,3%	41 €	-0,2%	32 €	-1,4%	72,9%	-4,1%	41 €	-2,0%	30 €	-5,9%
Montpellier	80,5%	1,7%	38 €	1,4%	31 €	3,2%	81,2%	6,2%	39 €	2,0%	31 €	8,3%
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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# Performances French Riviera

## September 2011



### French Riviera

September	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Superior 5* - 4*	74,3%	23,7%	351 €	10,5%	261 €	36,8%	61,6%	11,1%	406 €	1,3%	250 €	12,6%
Boutique Hotel	84,3%	6,4%	149 €	-3,0%	126 €	3,3%	68,8%	2,0%	150 €	0,5%	103 €	2,6%
Standard 5* - 4*	76,3%	3,4%	192 €	7,5%	147 €	11,1%	62,6%	2,8%	200 €	2,7%	125 €	5,6%
Average 5/4 star	76,2%	10,0%	244 €	11,1%	186 €	22,2%	62,7%	5,5%	268 €	3,5%	168 €	9,2%
Average 3 star	85,7%	4,5%	102 €	5,8%	87 €	10,5%	71,1%	3,3%	99 €	4,1%	70 €	7,5%

### French Riviera Cities

September	Monthly performance						Year To date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Cannes Superior 5* - 4*	73,1%	26,7%	331 €	14,6%	242 €	45,2%	61,3%	11,4%	426 €	0,6%	261 €	12,1%
Cannes Boutique Hotels	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Cannes Standard 5* - 4*	71,2%	8,9%	164 €	18,4%	117 €	29,0%	57,7%	6,0%	178 €	3,9%	103 €	10,2%
Cannes - 5* - 4*	72,4%	17,3%	248 €	17,9%	179 €	38,3%	59,6%	8,7%	304 €	2,5%	181 €	11,5%
Cannes - 3*	73,2%	13,5%	113 €	24,8%	83 €	41,6%	63,1%	8,5%	108 €	10,4%	68 €	19,8%
Nice - 5* - 4*	88,5%	2,7%	187 €	2,5%	166 €	5,3%	71,4%	3,0%	186 €	1,7%	133 €	4,8%
Nice - 3*	91,6%	1,4%	102 €	2,1%	93 €	3,6%	75,4%	1,8%	99 €	2,5%	74 €	4,3%
Monaco Superior 5* - 4*	68,6%	32,9%	458 €	3,7%	314 €	37,8%	56,1%	17,6%	460 €	-2,1%	258 €	15,1%
Monaco Standard 5* - 4*	73,1%	2,6%	262 €	6,8%	192 €	9,5%	62,4%	2,0%	275 €	3,6%	171 €	5,6%
Monaco - 5* - 4*	71,4%	12,3%	336 €	9,1%	240 €	22,5%	59,9%	7,4%	343 €	2,3%	205 €	9,8%

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

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# Performances South West

## September 2011



### South-West & Cities

	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
<b>5/4-star</b>												
South-West - 5* - 4*	74,4%	5,7%	201 €	8,8%	150 €	15,1%	57,3%	5,1%	200 €	8,0%	114 €	13,5%
Bordeaux	74,6%	15,6%	216 €	9,5%	161 €	26,5%	50,6%	6,0%	201 €	11,5%	102 €	18,2%
Toulouse	76,2%	7,6%	127 €	1,6%	97 €	9,3%	62,8%	9,4%	120 €	1,4%	75 €	10,9%
<b>3-star</b>												
South-West - 3*	78,5%	3,8%	95 €	2,6%	75 €	6,5%	63,5%	3,2%	92 €	2,9%	58 €	6,2%
Bordeaux	77,6%	2,0%	89 €	5,0%	69 €	7,2%	62,2%	2,3%	84 €	4,1%	52 €	6,5%
Toulouse	76,3%	7,5%	105 €	2,6%	80 €	10,3%	64,0%	4,3%	98 €	2,5%	63 €	6,9%
<b>2-star</b>												
South-West - 2*	73,2%	0,0%	70 €	4,0%	51 €	4,0%	61,5%	-0,4%	68 €	2,9%	42 €	2,4%
Bordeaux	77,9%	6,9%	71 €	3,1%	55 €	10,2%	64,5%	0,4%	69 €	3,4%	44 €	3,8%
Toulouse	69,1%	-4,5%	71 €	5,1%	49 €	0,3%	59,7%	2,5%	70 €	2,7%	42 €	5,2%
<b>0/1-star</b>												
South-West - 0/1 star	76,1%	2,9%	40 €	-0,1%	30 €	2,8%	69,4%	1,1%	40 €	1,7%	28 €	2,8%
Bordeaux	76,4%	4,7%	37 €	0,8%	28 €	5,6%	71,0%	1,1%	37 €	1,1%	27 €	2,2%
Toulouse	78,1%	4,8%	40 €	-1,1%	31 €	3,6%	74,1%	5,3%	39 €	-2,1%	29 €	3,1%

#### 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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# Performances Main cities in Regions

## September 2011



### Main cities in Regions – 5/4\* and 3\*

5/4-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Avignon	85,4%	6,7%	149 €	4,5%	127 €	11,5%	67,6%	16,9%	143 €	-3,0%	97 €	13,4%
Bordeaux	74,6%	15,6%	216 €	9,5%	161 €	26,5%	50,6%	6,0%	201 €	11,5%	102 €	18,2%
Cannes	72,4%	17,3%	248 €	17,9%	179 €	38,3%	59,6%	8,7%	304 €	2,5%	181 €	11,5%
Lille	68,2%	-0,9%	125 €	-0,3%	85 €	-1,2%	54,1%	3,6%	115 €	0,7%	62 €	4,3%
Lyon	75,6%	0,0%	140 €	10,8%	106 €	10,8%	65,1%	7,7%	125 €	7,0%	81 €	15,2%
Marseille	78,2%	7,7%	155 €	7,6%	121 €	15,9%	62,6%	3,7%	139 €	1,5%	87 €	5,2%
Monaco	71,4%	12,3%	336 €	9,1%	240 €	22,5%	59,9%	7,4%	343 €	2,3%	205 €	9,8%
Montpellier	89,1%	9,9%	161 €	8,8%	143 €	19,5%	69,8%	-4,3%	148 €	4,9%	103 €	0,4%
Nice	88,5%	2,7%	187 €	2,5%	166 €	5,3%	71,4%	3,0%	186 €	1,7%	133 €	4,8%
Strasbourg	79,7%	-0,5%	131 €	-4,9%	104 €	-5,3%	62,9%	8,6%	116 €	-1,1%	73 €	7,4%
Toulouse	76,2%	7,6%	127 €	1,6%	97 €	9,3%	62,8%	9,4%	120 €	1,4%	75 €	10,9%

  

3-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Aix en Provence	80,7%	6,6%	90 €	3,9%	72 €	10,8%	67,1%	-3,2%	90 €	5,0%	60 €	1,5%
Avignon	86,5%	3,3%	95 €	7,7%	82 €	11,2%	70,4%	3,5%	93 €	3,6%	66 €	7,3%
Bordeaux	77,6%	2,0%	89 €	5,0%	69 €	7,2%	62,2%	2,3%	84 €	4,1%	52 €	6,5%
Cannes	73,2%	13,5%	113 €	24,8%	83 €	41,6%	63,1%	8,5%	108 €	10,4%	68 €	19,8%
Grenoble	65,0%	-4,0%	103 €	1,9%	67 €	-2,3%	56,9%	-1,4%	103 €	4,7%	59 €	3,3%
Lille	75,0%	-2,5%	98 €	2,0%	73 €	-0,5%	64,3%	1,3%	88 €	2,6%	57 €	4,0%
Lyon	75,4%	-0,2%	105 €	5,4%	79 €	5,2%	63,7%	2,6%	101 €	6,4%	64 €	9,2%
Marseille	80,7%	0,6%	105 €	5,8%	85 €	6,4%	69,9%	-0,1%	97 €	1,9%	68 €	1,8%
Montpellier	85,4%	11,6%	102 €	8,1%	87 €	20,6%	71,3%	1,7%	95 €	2,0%	68 €	3,8%
Nancy	70,1%	4,1%	85 €	3,9%	59 €	8,2%	58,5%	5,5%	80 €	4,4%	47 €	10,2%
Nantes	65,5%	-5,1%	93 €	-4,2%	61 €	-9,1%	59,1%	1,7%	89 €	4,1%	53 €	5,9%
Nice	91,6%	1,4%	102 €	2,1%	93 €	3,6%	75,4%	1,8%	99 €	2,5%	74 €	4,3%
Reims	83,3%	-1,0%	100 €	4,5%	84 €	3,5%	67,3%	1,8%	94 €	2,4%	63 €	4,3%
Rennes	66,8%	-1,8%	103 €	0,6%	69 €	-1,2%	60,7%	3,1%	88 €	3,8%	53 €	7,0%
Rouen	72,6%	-5,7%	97 €	0,3%	70 €	-5,4%	61,5%	1,3%	93 €	1,2%	57 €	2,6%
Strasbourg	76,6%	-2,2%	101 €	-3,5%	78 €	-5,7%	64,5%	1,5%	90 €	0,9%	58 €	2,4%
Toulouse	76,3%	7,5%	105 €	2,6%	80 €	10,3%	64,0%	4,3%	98 €	2,5%	63 €	6,9%

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# Performances Main cities in Regions

## September 2011



### Main cities in regions – 2\* and 0/1\*

2-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Aix en Provence	83,0%	14,5%	74 €	0,7%	62 €	15,3%	67,6%	2,9%	72 €	2,6%	48 €	5,6%
Angers	62,4%	-9,3%	68 €	2,4%	42 €	-7,1%	58,3%	1,7%	66 €	2,7%	38 €	4,4%
Avignon	80,8%	4,7%	66 €	2,8%	53 €	7,7%	69,0%	5,9%	66 €	2,6%	46 €	8,7%
Bordeaux	77,9%	6,9%	71 €	3,1%	55 €	10,2%	64,5%	0,4%	69 €	3,4%	44 €	3,8%
Grenoble	65,3%	-7,0%	68 €	2,3%	45 €	-4,9%	64,5%	-2,5%	67 €	4,6%	43 €	2,0%
Lille	77,7%	-1,9%	80 €	3,5%	62 €	1,5%	66,3%	7,1%	72 €	1,4%	48 €	8,7%
Lyon	71,4%	-7,6%	75 €	5,2%	54 €	-2,8%	64,7%	-1,8%	73 €	5,7%	47 €	3,7%
Marseille	77,3%	4,2%	73 €	1,5%	56 €	5,8%	67,7%	1,2%	69 €	-1,2%	47 €	0,0%
Metz	78,6%	-4,2%	68 €	1,5%	54 €	-2,8%	65,9%	1,2%	67 €	2,8%	44 €	4,0%
Montpellier	83,2%	0,7%	74 €	8,6%	61 €	9,4%	75,3%	-1,5%	69 €	3,5%	52 €	1,9%
Nancy	68,3%	5,2%	60 €	-1,7%	41 €	3,4%	55,7%	1,0%	58 €	0,3%	32 €	1,3%
Nantes	65,6%	-1,8%	71 €	5,6%	47 €	3,7%	61,1%	-1,0%	67 €	3,3%	41 €	2,3%
Reims	82,1%	6,7%	65 €	-1,8%	54 €	4,7%	68,4%	8,1%	64 €	1,1%	43 €	9,3%
Rennes	73,4%	3,5%	72 €	4,0%	53 €	7,6%	63,4%	1,2%	65 €	3,2%	41 €	4,5%
Rouen	68,9%	-5,1%	64 €	3,3%	44 €	-2,0%	61,5%	-0,8%	62 €	2,7%	38 €	1,9%
Strasbourg	79,9%	-0,7%	71 €	3,5%	57 €	2,7%	65,4%	3,3%	63 €	0,3%	41 €	3,6%
Toulouse	69,1%	-4,5%	71 €	5,1%	49 €	0,3%	59,7%	2,5%	70 €	2,7%	42 €	5,2%

  

0/1-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Amiens	84,8%	6,2%	41 €	0,3%	35 €	6,5%	77,2%	7,1%	41 €	0,2%	32 €	7,3%
Angers	74,4%	1,4%	37 €	2,3%	28 €	3,8%	70,9%	4,1%	37 €	0,6%	26 €	4,8%
Avignon	82,2%	9,5%	35 €	1,5%	29 €	11,2%	75,4%	-0,1%	37 €	2,6%	28 €	2,5%
Bordeaux	76,4%	4,7%	37 €	0,8%	28 €	5,6%	71,0%	1,1%	37 €	1,1%	27 €	2,2%
Grenoble	76,3%	-4,9%	41 €	0,2%	31 €	-4,6%	74,7%	-2,3%	41 €	0,8%	31 €	-1,5%
Lille	75,2%	-1,8%	39 €	2,9%	29 €	1,0%	67,8%	1,7%	38 €	1,8%	26 €	3,5%
Lyon	72,5%	-0,3%	40 €	3,2%	29 €	2,9%	70,8%	2,8%	39 €	1,9%	28 €	4,7%
Marseille	78,1%	-1,3%	41 €	-0,2%	32 €	-1,4%	72,9%	-4,1%	41 €	-2,0%	30 €	-5,9%
Metz	79,2%	5,2%	38 €	4,2%	30 €	9,6%	76,0%	9,7%	37 €	2,5%	28 €	12,5%
Montpellier	80,5%	1,7%	38 €	1,4%	31 €	3,2%	81,2%	6,2%	39 €	2,0%	31 €	8,3%
Nancy	72,0%	3,7%	38 €	3,9%	27 €	7,8%	62,1%	-4,5%	38 €	5,4%	24 €	0,6%
Nantes	70,5%	-3,6%	43 €	3,2%	30 €	-0,6%	68,0%	-0,6%	42 €	2,8%	29 €	2,2%
Rennes	67,7%	0,1%	40 €	0,6%	27 €	0,7%	59,4%	-1,8%	39 €	1,1%	23 €	-0,7%
Rouen	73,0%	2,7%	40 €	0,2%	29 €	2,9%	69,1%	1,4%	40 €	1,3%	28 €	2,7%
Strasbourg	76,6%	-5,4%	39 €	3,3%	30 €	-2,4%	62,5%	5,8%	39 €	5,4%	24 €	11,6%
Toulouse	78,1%	4,8%	40 €	-1,1%	31 €	3,6%	74,1%	5,3%	39 €	-2,1%	29 €	3,1%

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# 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

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### Tourism, Hotels & Restaurants Desk

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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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