

In Extenso

tourisme, hôtellerie et restauration

French Hotel Industry Performances

June 2011



Membre de **Deloitte**.

An upscale month of June

The beginning of summer saw the French hotel industry continuing to post solid growth, with luxury hotels recording the best results. The large-scale events, the Paris Air Show and Vinexpo, rendered June a great month for hotels in Paris and Bordeaux, notably.

The midscale segment posted more moderate – although satisfactory – results. In comparison with June 2010, a number of destinations (including Bordeaux, Cannes and Nancy) stood out, recording double digit RevPAR growth. Overall, the progressive return to an upswing in the hotel cycle can be confirmed by June's good performances.

As usual, budget hotels posted more modest results, although growth was regular.

However, is this growth likely to slow down due to July's unfavourable weather conditions?

French market

Monthly performance

June	5* - 4 *	3 *	2 *
OR 2011	82,2%	80,3%	77,3%
Var. /n-1	4,1%	1,2%	1,3%
ADR 2011	276 €	106 €	68 €
Var. /n-1	12,2%	6,1%	2,2%
RevPAR 2011	227 €	85 €	52 €
Var. /n-1	16,7%	7,3%	3,5%

Year To Date performance

June	5* - 4 *	3 *	2 *
OR 2011	66,0%	65,4%	64,1%
Var. /n-1	4,8%	2,3%	0,0%
ADR 2011	236 €	99 €	65 €
Var. /n-1	6,8%	5,1%	2,8%
RevPAR 2011	156 €	65 €	42 €
Var. /n-1	11,8%	7,5%	2,9%

Definitions

OR = Occupancy Rate

ADR = Average Daily Rate

RevPAR = Revenue per available room

Hotel performances in **Paris** were excellent in June. The combined effect of economic recovery and the hosting of the Paris Air Show in Borget boosted the average room rate (ARR) of upscale and midscale hotels.

Ile-de-France (excluding Paris), also benefited from the Air Show. Thanks to an overflow of hotel guests to the Parisian suburbs, 2 and 3 star hotels in Seine-Saint-Denis and the Val d'Oise saw ARR increase significantly. With the exception of budget hotels in the Yvelines, who recorded a slight decrease, all categories of hotels in Ile-de-France posted encouraging growth.

Hotels in **regional France** posted more moderate revenue growth than those in Ile-de-France, with midscale and budget hotels recording a slower growth rate than last month. Base effects are reducing and current performances are being compared with results that were already encouraging in June 2010.

Hotels in **large cities** confirmed May 2010's solid performances. Taking advantage of the city's attractiveness and Vinexpo, in particular, Bordeaux's hotels posted double digit RevPAR growth in all categories. In the upscale category, Lille and Toulouse were the only cities to fall short. Occupancy on the **Côte d'Azur** continued to rise, driven notably by overseas guests – this was especially the case for hotels in Cannes and Monaco who performed particularly well. Hotels in Nice also posted better results, primarily thanks to higher occupancy.

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Performances Paris

June 2011



Paris-City

Monthly performance

June	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris Superior 5* - 4*	90,6%	2,1%	718 €	15,1%	651 €	17,6%
Paris Boutique Hotels	89,1%	-2,1%	352 €	13,7%	313 €	11,3%
Paris Standard 5* - 4*	89,2%	6,0%	237 €	21,2%	211 €	28,4%
Paris average - 5* - 4 *	89,5%	4,6%	340 €	16,9%	304 €	22,3%
Paris Superior 3*	91,4%	-1,1%	171 €	8,0%	156 €	6,8%
Paris Standard 3*	89,1%	-1,0%	123 €	12,5%	110 €	11,4%
Paris - 3*	89,7%	-1,0%	136 €	10,8%	122 €	9,7%
Paris - 2*	91,5%	-1,1%	89 €	7,6%	82 €	6,3%

Year To Date performance

June	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris Superior 5* - 4*	75,9%	4,7%	574 €	7,3%	435 €	12,4%
Paris Boutique Hotels	77,1%	4,7%	297 €	6,7%	229 €	11,7%
Paris Standard 5* - 4*	76,8%	5,0%	193 €	10,6%	149 €	16,1%
Paris average - 5* - 4 *	76,7%	4,9%	275 €	9,1%	211 €	14,5%
Paris Superior 3*	84,5%	5,7%	151 €	5,9%	128 €	11,9%
Paris Standard 3*	81,3%	2,5%	107 €	7,7%	87 €	10,4%
Paris - 3*	82,2%	3,4%	119 €	7,5%	98 €	11,2%
Paris - 2*	85,0%	0,8%	79 €	4,5%	67 €	5,4%

Paris suburbs (excluding Paris)

Monthly performance

June	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris - 5* - 4*	89,5%	4,6%	340 €	16,9%	304 €	22,3%
La Défense - 5* - 4*	n.d.	-	n.d.	-	n.d.	-
Roissy CdG - 5* - 4*	82,3%	4,6%	123 €	9,4%	101 €	14,4%
Paris suburbs* - 5* - 4*	89,0%	-0,1%	246 €	13,9%	219 €	13,8%

Year To Date performance

June	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris - 5* - 4*	76,7%	4,9%	275 €	9,1%	211 €	14,5%
La Défense - 5* - 4*	n.d.	-	n.d.	-	n.d.	-
Roissy CdG - 5* - 4*	68,8%	0,6%	104 €	1,8%	72 €	2,5%
Paris suburbs* - 5* - 4*	77,5%	3,2%	212 €	6,9%	165 €	10,3%

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Performance Regions

June 2011



Regions

		<i>Monthly performance</i>				
		<i>June</i>	5* - 4 *	3 *	2 *	
Regions (excl. French Riviera)	OR 2011		74,1%	75,4%	74,9%	
	<i>Var. /n-1</i>		1,9%	1,2%	1,6%	
	ADR 2011		171 €	94 €	67 €	
	<i>Var. /n-1</i>		8,2%	3,2%	0,9%	
	RevPAR 2011		127 €	71 €	50 €	
	<i>Var. /n-1</i>		10,2%	4,5%	2,5%	
	<i>Year To Date performance</i>					
			<i>June</i>	5* - 4 *	3 *	2 *
		OR 2011		57,1%	59,8%	61,3%
		<i>Var. /n-1</i>		4,4%	2,7%	0,5%
	ADR 2011		152 €	90 €	65 €	
	<i>Var. /n-1</i>		4,0%	3,1%	2,3%	
	RevPAR 2011		87 €	54 €	40 €	
	<i>Var. /n-1</i>		8,6%	5,9%	2,8%	
		<i>Monthly performance</i>				
		<i>June</i>	5* - 4 *	3 *	2 *	
French Riviera	OR 2011		75,7%	84,7%	n.d.	
	<i>Var. /n-1</i>		4,1%	4,7%	<i>n.d.</i>	
	ADR 2011		258 €	100 €	n.d.	
	<i>Var. /n-1</i>		4,4%	3,5%	<i>n.d.</i>	
	RevPAR 2011		195 €	85 €	n.d.	
	<i>Var. /n-1</i>		8,7%	8,3%	<i>n.d.</i>	
	<i>Year To Date performance</i>					
			<i>June</i>	5* - 4 *	3 *	2 *
		OR 2011		53,4%	61,7%	n.d.
		<i>Var. /n-1</i>		4,8%	2,6%	<i>n.d.</i>
	ADR 2011		239 €	93 €	n.d.	
	<i>Var. /n-1</i>		3,0%	2,1%	<i>n.d.</i>	
	RevPAR 2011		128 €	57 €	n.d.	
	<i>Var. /n-1</i>		8,0%	4,7%	<i>n.d.</i>	

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Performances Suburbs

June 2011



Paris suburbs (excluding Paris)

3 star market	Monthly performance								
	June	departments						Average suburbs	
		77	78	91	92	93	94		95
	OR 2011	82,2%	79,4%	82,6%	84,3%	79,4%	86,9%	85,6%	83,4%
	Var. /n-1	-9,4%	8,8%	3,2%	-1,3%	0,1%	3,9%	5,9%	0,5%
	ADR 2011	140 €	117 €	89 €	117 €	91 €	87 €	110 €	110 €
	Var. /n-1	10,9%	2,8%	-0,6%	9,5%	24,0%	6,2%	8,1%	7,5%
	RevPAR 2011	115 €	93 €	74 €	99 €	72 €	75 €	94 €	92 €
	Var. /n-1	0,5%	11,8%	2,5%	8,1%	24,1%	10,3%	14,5%	8,0%
3 star market	Year To Date performance								
	June	departments						Average suburbs	
		77	78	91	92	93	94		95
	OR 2011	74,6%	65,4%	63,8%	67,4%	62,6%	74,0%	69,5%	68,4%
	Var. /n-1	-3,8%	9,9%	5,8%	-2,7%	-1,1%	1,7%	0,8%	0,2%
	ADR 2011	118 €	110 €	92 €	111 €	76 €	82 €	100 €	102 €
	Var. /n-1	4,9%	0,1%	3,3%	10,4%	8,8%	7,8%	7,4%	6,5%
	RevPAR 2011	88 €	72 €	59 €	75 €	47 €	61 €	70 €	70 €
	Var. /n-1	0,9%	10,1%	9,3%	7,4%	7,6%	9,6%	8,2%	6,8%
2 star market	Monthly performance								
	June	departments						Average suburbs	
		77	78	91	92	93	94		95
	OR 2011	81,0%	73,4%	74,1%	82,3%	87,6%	87,4%	78,8%	81,7%
	Var. /n-1	0,4%	-7,5%	2,4%	2,4%	3,9%	-0,1%	3,8%	1,5%
	ADR 2011	61 €	85 €	66 €	72 €	64 €	66 €	63 €	67 €
	Var. /n-1	7,3%	2,3%	-4,6%	1,0%	5,7%	-0,4%	5,9%	3,6%
	RevPAR 2011	49 €	63 €	49 €	59 €	56 €	58 €	50 €	54 €
	Var. /n-1	7,8%	-5,4%	-2,3%	3,4%	9,8%	-0,5%	9,9%	5,2%
2 star market	Year To Date performance								
	June	départements						IDF (hors Paris)	
		77	78	91	92	93	94		95
	OR 2011	64,8%	63,7%	64,5%	69,4%	71,7%	78,2%	64,8%	68,1%
	Var. /n-1	0,6%	-4,1%	7,4%	2,9%	3,5%	-0,1%	-3,0%	0,5%
	ADR 2011	59 €	86 €	66 €	71 €	59 €	67 €	59 €	64 €
	Var. /n-1	4,2%	4,1%	-1,8%	3,1%	2,0%	3,4%	5,5%	3,4%
	RevPAR 2011	38 €	54 €	43 €	49 €	42 €	53 €	38 €	44 €
	Var. /n-1	4,8%	-0,1%	5,5%	6,1%	5,5%	3,3%	2,4%	3,9%
0/1 star market	Monthly performance								
	June	departments						IDF (hors Paris)	
		77	78	91	92	93	94		95
	OR 2011	77,1%	79,2%	80,7%	n.d.	86,1%	86,1%	84,9%	82,9%
	Var. /n-1	10,3%	-5,7%	5,5%	-	-1,2%	-3,0%	1,7%	1,1%
	ADR 2011	42 €	42 €	39 €	n.d.	43 €	44 €	43 €	43 €
	Var. /n-1	8,9%	3,2%	4,5%	-	3,4%	5,2%	6,7%	4,8%
	RevPAR 2011	32 €	33 €	32 €	n.d.	37 €	38 €	36 €	35 €
	Var. /n-1	20,1%	-2,6%	10,2%	-	2,2%	2,0%	8,5%	6,0%
0/1 star market	Year To Date performance								
	June	departments						IDF (hors Paris)	
		77	78	91	92	93	94		95
	OR 2011	62,5%	74,4%	71,1%	n.d.	79,2%	80,3%	74,7%	74,2%
	Var. /n-1	-6,1%	-0,5%	5,0%	-	2,8%	-2,3%	3,2%	0,9%
	ADR 2011	41 €	42 €	39 €	n.d.	41 €	44 €	41 €	42 €
	Var. /n-1	8,0%	3,6%	4,7%	-	2,4%	4,9%	1,9%	4,0%
	RevPAR 2011	25 €	31 €	28 €	n.d.	33 €	35 €	31 €	31 €
	Var. /n-1	1,4%	3,1%	9,9%	-	5,3%	2,5%	5,2%	4,9%

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Performances North-East

June 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*	73,2%	3,4%	141 €	3,7%	103 €	7,2%	55,9%	7,3%	130 €	0,4%	73 €	7,8%
Dijon	84,4%	11,9%	130 €	2,9%	110 €	15,1%	58,5%	3,6%	123 €	2,0%	72 €	5,7%
Lille	61,4%	-6,8%	121 €	-2,3%	74 €	-9,0%	55,7%	4,9%	117 €	1,0%	65 €	6,0%
Metz	insufficient supply						insufficient supply					
Nancy	insufficient supply						insufficient supply					
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	80,7%	10,3%	132 €	12,2%	106 €	23,7%	60,2%	11,9%	121 €	1,0%	73 €	13,0%

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
North-East - 3*	73,9%	2,1%	90 €	1,2%	67 €	3,3%	56,6%	1,9%	88 €	2,6%	50 €	4,5%
Dijon	80,4%	3,1%	85 €	0,6%	68 €	3,7%	60,1%	-2,8%	82 €	0,9%	49 €	-1,9%
Lille	74,4%	-1,2%	92 €	-2,3%	68 €	-3,5%	65,9%	2,1%	91 €	2,9%	60 €	5,1%
Metz	in progress						in progress					
Nancy	72,8%	8,9%	83 €	3,5%	60 €	12,8%	56,2%	3,8%	82 €	4,9%	46 €	8,9%
Reims	82,5%	1,0%	102 €	2,6%	84 €	3,6%	64,4%	2,8%	94 €	1,9%	61 €	4,7%
Strasbourg	74,3%	-2,3%	99 €	1,7%	74 €	-0,6%	60,9%	0,6%	93 €	2,5%	57 €	3,1%

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
North-East - 2*	75,8%	4,2%	64 €	-1,3%	49 €	2,8%	61,5%	2,0%	63 €	1,6%	39 €	3,6%
Dijon	76,9%	-5,7%	69 €	6,4%	53 €	0,4%	61,1%	-9,7%	64 €	3,6%	39 €	-6,5%
Lille	76,7%	4,0%	75 €	-0,3%	58 €	3,7%	70,6%	7,8%	73 €	2,2%	52 €	10,1%
Metz	78,2%	-3,2%	68 €	1,8%	54 €	-1,4%	64,0%	2,5%	68 €	3,0%	44 €	5,6%
Nancy	69,1%	-1,8%	58 €	-1,3%	40 €	-3,1%	56,5%	-1,9%	59 €	1,4%	33 €	-0,5%
Reims	82,4%	4,2%	65 €	0,5%	54 €	4,7%	65,3%	6,7%	64 €	2,5%	42 €	9,3%
Strasbourg	77,7%	3,3%	67 €	-2,3%	52 €	0,9%	63,9%	2,5%	65 €	0,3%	41 €	2,9%

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
North-East - 0/1 star	74,9%	-1,1%	40 €	3,5%	30 €	2,3%	65,1%	-0,6%	39 €	3,4%	26 €	2,8%
Dijon	83,1%	-3,9%	39 €	4,3%	32 €	0,2%	75,1%	3,0%	39 €	4,3%	29 €	7,5%
Lille	75,2%	2,3%	37 €	1,2%	28 €	3,4%	69,6%	1,7%	38 €	1,9%	26 €	3,7%
Metz	84,9%	13,2%	37 €	2,2%	31 €	15,7%	73,7%	11,2%	37 €	2,0%	27 €	13,5%
Nancy	67,5%	-14,5%	38 €	4,1%	26 €	-11,0%	62,0%	-6,3%	38 €	5,6%	23 €	-1,1%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	69,5%	3,7%	39 €	5,7%	27 €	9,6%	59,6%	8,2%	39 €	6,7%	23 €	15,4%

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

June 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*	77,5%	7,6%	189 €	6,7%	147 €	14,8%	61,7%	3,2%	178 €	5,1%	110 €	8,5%
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*	76,1%	2,1%	96 €	4,7%	73 €	6,9%	59,0%	6,2%	88 €	2,4%	52 €
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	75,0%	2,9%	93 €	-6,4%	70 €	-3,7%	62,0%	16,3%	93 €	-3,2%	58 €	12,6%
Le Havre	73,8%	-3,3%	96 €	8,2%	71 €	4,6%	61,4%	-0,4%	91 €	3,5%	56 €	3,1%
Nantes	74,8%	-1,1%	99 €	9,3%	74 €	8,1%	61,5%	3,4%	92 €	5,2%	56 €	8,8%
Rennes	70,6%	5,7%	89 €	1,6%	63 €	7,3%	61,8%	5,4%	89 €	4,4%	55 €	10,0%
Rouen	76,9%	5,7%	99 €	1,3%	77 €	7,1%	59,3%	6,9%	95 €	2,4%	56 €	9,5%
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*	74,9%	1,4%	67 €	1,7%	50 €	3,1%	60,7%	0,6%	64 €	2,1%	39 €
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	72,5%	6,5%	66 €	-2,7%	48 €	3,6%	59,9%	4,1%	68 €	2,9%	41 €	7,1%
Le Havre	69,4%	14,8%	63 €	2,6%	43 €	17,7%	57,1%	4,6%	59 €	1,0%	34 €	5,6%
Nantes	74,6%	-3,8%	68 €	1,5%	51 €	-2,3%	65,0%	0,0%	68 €	3,2%	44 €	3,3%
Rennes	70,7%	-0,8%	67 €	1,7%	47 €	0,8%	63,5%	-1,1%	67 €	3,5%	42 €	2,4%
Rouen	74,6%	-3,7%	63 €	-1,0%	47 €	-4,6%	61,9%	2,8%	62 €	4,2%	38 €	7,1%
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	76,8%	0,5%	41 €	1,5%	32 €	2,0%	66,4%	1,3%	40 €	1,8%	27 €
Amiens	88,5%	3,9%	43 €	1,1%	38 €	5,0%	75,8%	5,3%	41 €	0,2%	31 €	5,5%
Angers	75,6%	-2,3%	37 €	2,5%	28 €	0,1%	71,1%	4,6%	37 €	0,1%	26 €	4,7%
Le Havre	78,2%	2,3%	38 €	-0,3%	30 €	2,0%	72,7%	10,9%	39 €	4,4%	28 €	15,8%
Nantes	78,1%	0,9%	43 €	3,2%	33 €	4,2%	69,6%	1,1%	42 €	2,3%	29 €	3,3%
Rennes	68,1%	-2,8%	37 €	1,5%	25 €	-1,3%	59,2%	-3,1%	37 €	0,7%	22 €	-2,4%
Rouen	74,1%	-3,9%	40 €	-5,2%	30 €	-8,9%	69,3%	1,4%	40 €	1,8%	28 €	3,3%

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

June 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*	76,3%	0,4%	158 €	3,9%	121 €	4,4%	59,0%	3,5%	142 €	1,8%	84 €	5,4%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	84,9%	8,9%	147 €	4,5%	125 €	13,7%	57,8%	27,6%	126 €	-3,9%	73 €	22,7%
Grenoble	insufficient supply						insufficient supply					
Lyon	73,5%	2,8%	129 €	5,3%	95 €	8,3%	66,4%	9,5%	126 €	6,4%	84 €	16,4%
Marseille	77,2%	3,8%	159 €	1,4%	122 €	5,3%	57,2%	4,1%	137 €	-1,8%	78 €	2,2%
Montpellier	77,5%	-7,1%	153 €	8,1%	119 €	0,4%	60,8%	-10,3%	140 €	2,4%	85 €	-8,2%
St Etienne	insufficient supply						insufficient supply					
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
South-East - 3*	76,7%	0,0%	95 €	3,5%	73 €	3,6%	63,5%	2,0%	92 €	3,7%	58 €	5,7%
Aix en Provence	84,7%	0,7%	90 €	4,2%	76 €	5,0%	63,1%	-5,7%	88 €	5,6%	55 €	-0,4%
Avignon	87,9%	3,3%	94 €	2,3%	82 €	5,7%	62,5%	6,9%	85 €	1,6%	53 €	8,7%
Grenoble	65,0%	-4,7%	107 €	3,9%	69 €	-1,0%	58,8%	1,0%	105 €	5,3%	62 €	6,3%
Lyon	70,8%	-2,6%	103 €	3,0%	73 €	0,4%	65,3%	3,9%	104 €	7,1%	68 €	11,3%
Marseille	82,1%	-0,9%	106 €	0,3%	87 €	-0,6%	66,7%	-0,8%	98 €	1,5%	66 €	0,7%
Montpellier	81,0%	0,5%	98 €	-0,5%	80 €	0,0%	65,9%	0,3%	95 €	1,6%	62 €	1,9%
St Etienne	in progress						in progress					
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
South-East - 2*	75,1%	-0,3%	68 €	1,0%	51 €	0,7%	63,3%	-0,9%	66 €	2,9%	42 €	2,0%
Aix en Provence	81,0%	4,2%	75 €	1,3%	60 €	5,6%	62,1%	-0,7%	70 €	2,1%	44 €	1,4%
Avignon	84,7%	4,9%	66 €	4,0%	56 €	9,1%	61,0%	6,9%	60 €	2,3%	37 €	9,4%
Grenoble	69,4%	-8,2%	69 €	4,1%	48 €	-4,4%	65,6%	-3,9%	68 €	5,1%	44 €	1,0%
Lyon	70,8%	-2,7%	75 €	1,7%	53 €	-1,1%	68,9%	-0,6%	75 €	6,8%	51 €	6,2%
Marseille	77,7%	-3,4%	72 €	-2,1%	56 €	-5,4%	64,7%	-2,3%	71 €	-0,1%	46 €	-2,4%
Montpellier	81,7%	0,8%	71 €	-0,4%	58 €	0,4%	70,2%	-3,9%	68 €	2,3%	48 €	-1,7%
St Etienne	in progress						in progress					
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
South-East - 0/1 star	75,4%	-0,5%	41 €	2,7%	31 €	2,2%	64,5%	-0,9%	40 €	1,4%	26 €	0,5%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	86,5%	-2,0%	35 €	2,0%	30 €	-0,1%	69,4%	-2,4%	35 €	1,2%	24 €	-1,2%
Grenoble	71,8%	-11,8%	41 €	3,4%	30 €	-8,8%	73,6%	-2,2%	41 €	0,4%	30 €	-1,9%
Lyon	72,3%	-0,4%	40 €	2,4%	29 €	2,0%	71,5%	3,8%	40 €	1,4%	28 €	5,3%
Marseille	78,4%	-6,0%	41 €	-1,4%	32 €	-7,3%	70,8%	-2,5%	40 €	-2,9%	28 €	-5,3%
Montpellier	85,8%	1,7%	40 €	2,3%	34 €	4,1%	73,8%	6,0%	39 €	1,0%	28 €	7,1%
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

June 2011



French Riviera

June	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*	74,1%	4,0%	381 €	5,5%	282 €	9,8%	53,0%	9,8%	360 €	2,0%	191 €	12,0%
Boutique Hotel	78,0%	2,2%	186 €	15,5%	145 €	18,1%	59,2%	4,4%	140 €	-0,2%	83 €	4,1%
Standard 5* - 4*	76,4%	4,5%	195 €	1,9%	149 €	6,5%	52,9%	2,0%	180 €	1,3%	95 €	3,4%
Average 5/4 star	75,7%	4,1%	258 €	4,4%	195 €	8,7%	53,4%	4,8%	239 €	3,0%	128 €	8,0%
Average 3 star	84,7%	4,7%	100 €	3,5%	85 €	8,3%	61,7%	2,6%	93 €	2,1%	57 €	4,7%

French Riviera Cities

June	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*	74,4%	3,8%	404 €	8,2%	300 €	12,3%	52,5%	8,7%	394 €	4,4%	207 €	13,5%
Cannes Boutique Hotels	65,0%	-0,8%	174 €	-5,7%	113 €	-6,5%	49,7%	10,0%	154 €	-10,6%	76 €	-1,6%
Cannes Standard 5* - 4*	71,6%	10,8%	175 €	4,8%	125 €	16,2%	45,8%	7,5%	171 €	0,7%	78 €	8,3%
Cannes - 5* - 4*	72,6%	6,6%	290 €	5,6%	211 €	12,6%	49,3%	8,4%	287 €	3,9%	142 €	12,7%
Cannes - 3*	77,8%	3,7%	109 €	14,7%	85 €	18,9%	53,7%	8,1%	110 €	6,9%	59 €	15,5%
Nice - 5* - 4*	85,2%	3,3%	197 €	-1,3%	168 €	1,9%	61,4%	2,1%	163 €	-2,1%	100 €	-0,1%
Nice - 3*	86,3%	2,1%	102 €	-0,4%	88 €	1,7%	66,5%	1,3%	91 €	0,5%	61 €	1,8%
Monaco Superior 5* - 4*	66,9%	9,5%	412 €	2,4%	276 €	12,2%	48,5%	19,6%	388 €	-5,9%	188 €	12,5%
Monaco Standard 5* - 4*	76,4%	-0,7%	249 €	10,1%	191 €	9,3%	54,6%	2,7%	240 €	4,8%	131 €	7,7%
Monaco - 5* - 4*	72,7%	2,8%	309 €	7,6%	224 €	10,6%	52,2%	8,5%	294 €	0,9%	153 €	9,5%

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

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Performances South West

June 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
5/4-star												
South-West - 5* - 4*	70,6%	1,4%	215 €	16,1%	152 €	17,7%	52,4%	3,1%	181 €	10,7%	95 €	14,1%
Bordeaux	69,1%	3,1%	252 €	28,8%	174 €	32,8%	43,9%	0,5%	202 €	14,2%	89 €	14,8%
Toulouse	71,3%	-1,6%	123 €	0,3%	88 €	-1,3%	63,1%	8,3%	122 €	1,2%	77 €	9,6%
3-star												
South-West - 3*	74,7%	1,5%	99 €	5,2%	74 €	6,7%	59,4%	3,2%	91 €	3,6%	54 €	6,9%
Bordeaux	80,6%	7,8%	104 €	16,7%	84 €	25,8%	59,6%	0,8%	86 €	5,6%	52 €	6,4%
Toulouse	70,9%	-4,1%	104 €	1,2%	74 €	-3,0%	64,5%	4,3%	100 €	2,6%	64 €	6,9%
2-star												
South-West - 2*	72,1%	0,2%	71 €	3,6%	51 €	3,8%	57,9%	-0,3%	67 €	3,0%	39 €	2,7%
Bordeaux	81,8%	9,6%	78 €	11,6%	64 €	22,3%	63,1%	-1,3%	71 €	5,3%	45 €	3,9%
Toulouse	69,0%	-2,4%	72 €	-0,2%	50 €	-2,6%	60,1%	2,1%	72 €	2,7%	43 €	4,9%
0/1-star												
South-West - 0/1 star	77,6%	3,2%	41 €	4,1%	32 €	7,4%	65,0%	0,1%	39 €	1,7%	25 €	1,8%
Bordeaux	84,4%	11,9%	40 €	8,4%	34 €	21,2%	67,8%	1,4%	37 €	1,3%	25 €	2,7%
Toulouse	78,2%	-0,8%	39 €	-2,4%	31 €	-3,2%	73,1%	4,4%	39 €	-2,2%	29 €	2,1%

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

June 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	84,9%	8,9%	147 €	4,5%	125 €	13,7%	57,8%	27,6%	126 €	-3,9%	73 €	22,7%
Bordeaux	69,1%	3,1%	252 €	28,8%	174 €	32,8%	43,9%	0,5%	202 €	14,2%	89 €	14,8%
Cannes	72,6%	6,6%	290 €	5,6%	211 €	12,6%	49,3%	8,4%	287 €	3,9%	142 €	12,7%
Lille	61,4%	-6,8%	121 €	-2,3%	74 €	-9,0%	55,7%	4,9%	117 €	1,0%	65 €	6,0%
Lyon	73,5%	2,8%	129 €	5,3%	95 €	8,3%	66,4%	9,5%	126 €	6,4%	84 €	16,4%
Marseille	77,2%	3,8%	159 €	1,4%	122 €	5,3%	57,2%	4,1%	137 €	-1,8%	78 €	2,2%
Monaco	72,7%	2,8%	309 €	7,6%	224 €	10,6%	52,2%	8,5%	294 €	0,9%	153 €	9,5%
Montpellier	77,5%	-7,1%	153 €	8,1%	119 €	0,4%	60,8%	-10,3%	140 €	2,4%	85 €	-8,2%
Nice	85,2%	3,3%	197 €	-1,3%	168 €	1,9%	61,4%	2,1%	163 €	-2,1%	100 €	-0,1%
Strasbourg	80,7%	10,3%	132 €	12,2%	106 €	23,7%	60,2%	11,9%	121 €	1,0%	73 €	13,0%
Toulouse	71,3%	-1,6%	123 €	0,3%	88 €	-1,3%	63,1%	8,3%	122 €	1,2%	77 €	9,6%

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	84,7%	0,7%	90 €	4,2%	76 €	5,0%	63,1%	-5,7%	88 €	5,6%	55 €	-0,4%
Angers	75,0%	2,9%	93 €	-6,4%	70 €	-3,7%	62,0%	16,3%	93 €	-3,2%	58 €	12,6%
Avignon	87,9%	3,3%	94 €	2,3%	82 €	5,7%	62,5%	6,9%	85 €	1,6%	53 €	8,7%
Bordeaux	80,6%	7,8%	104 €	16,7%	84 €	25,8%	59,6%	0,8%	86 €	5,6%	52 €	6,4%
Cannes	77,8%	3,7%	109 €	14,7%	85 €	18,9%	53,7%	8,1%	110 €	6,9%	59 €	15,5%
Grenoble	65,0%	-4,7%	107 €	3,9%	69 €	-1,0%	58,8%	1,0%	105 €	5,3%	62 €	6,3%
Lille	74,4%	-1,2%	92 €	-2,3%	68 €	-3,5%	65,9%	2,1%	91 €	2,9%	60 €	5,1%
Lyon	70,8%	-2,6%	103 €	3,0%	73 €	0,4%	65,3%	3,9%	104 €	7,1%	68 €	11,3%
Marseille	82,1%	-0,9%	106 €	0,3%	87 €	-0,6%	66,7%	-0,8%	98 €	1,5%	66 €	0,7%
Montpellier	81,0%	0,5%	98 €	-0,5%	80 €	0,0%	65,9%	0,3%	95 €	1,6%	62 €	1,9%
Nancy	72,8%	8,9%	83 €	3,5%	60 €	12,8%	56,2%	3,8%	82 €	4,9%	46 €	8,9%
Nantes	74,8%	-1,1%	99 €	9,3%	74 €	8,1%	61,5%	3,4%	92 €	5,2%	56 €	8,8%
Nice	86,3%	2,1%	102 €	-0,4%	88 €	1,7%	66,5%	1,3%	91 €	0,5%	61 €	1,8%
Reims	82,5%	1,0%	102 €	2,6%	84 €	3,6%	64,4%	2,8%	94 €	1,9%	61 €	4,7%
Rennes	70,6%	5,7%	89 €	1,6%	63 €	7,3%	61,8%	5,4%	89 €	4,4%	55 €	10,0%
Rouen	76,9%	5,7%	99 €	1,3%	77 €	7,1%	59,3%	6,9%	95 €	2,4%	56 €	9,5%
Strasbourg	74,3%	-2,3%	99 €	1,7%	74 €	-0,6%	60,9%	0,6%	93 €	2,5%	57 €	3,1%
Toulouse	70,9%	-4,1%	104 €	1,2%	74 €	-3,0%	64,5%	4,3%	100 €	2,6%	64 €	6,9%

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Performances Main cities in Regions

June 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	81,0%	4,2%	75 €	1,3%	60 €	5,6%	62,1%	-0,7%	70 €	2,1%	44 €	1,4%
Angers	72,5%	6,5%	66 €	-2,7%	48 €	3,6%	59,9%	4,1%	68 €	2,9%	41 €	7,1%
Avignon	84,7%	4,9%	66 €	4,0%	56 €	9,1%	61,0%	6,9%	60 €	2,3%	37 €	9,4%
Bordeaux	81,8%	9,6%	78 €	11,6%	64 €	22,3%	63,1%	-1,3%	71 €	5,3%	45 €	3,9%
Grenoble	69,4%	-8,2%	69 €	4,1%	48 €	-4,4%	65,6%	-3,9%	68 €	5,1%	44 €	1,0%
Lille	76,7%	4,0%	75 €	-0,3%	58 €	3,7%	70,6%	7,8%	73 €	2,2%	52 €	10,1%
Lyon	70,8%	-2,7%	75 €	1,7%	53 €	-1,1%	68,9%	-0,6%	75 €	6,8%	51 €	6,2%
Marseille	77,7%	-3,4%	72 €	-2,1%	56 €	-5,4%	64,7%	-2,3%	71 €	-0,1%	46 €	-2,4%
Metz	78,2%	-3,2%	68 €	1,8%	54 €	-1,4%	64,0%	2,5%	68 €	3,0%	44 €	5,6%
Montpellier	81,7%	0,8%	71 €	-0,4%	58 €	0,4%	70,2%	-3,9%	68 €	2,3%	48 €	-1,7%
Nancy	69,1%	-1,8%	58 €	-1,3%	40 €	-3,1%	56,5%	-1,9%	59 €	1,4%	33 €	-0,5%
Nantes	74,6%	-3,8%	68 €	1,5%	51 €	-2,3%	65,0%	0,0%	68 €	3,2%	44 €	3,3%
Reims	82,4%	4,2%	65 €	0,5%	54 €	4,7%	65,3%	6,7%	64 €	2,5%	42 €	9,3%
Rennes	70,7%	-0,8%	67 €	1,7%	47 €	0,8%	63,5%	-1,1%	67 €	3,5%	42 €	2,4%
Rouen	74,6%	-3,7%	63 €	-1,0%	47 €	-4,6%	61,9%	2,8%	62 €	4,2%	38 €	7,1%
Strasbourg	77,7%	3,3%	67 €	-2,3%	52 €	0,9%	63,9%	2,5%	65 €	0,3%	41 €	2,9%
Toulouse	69,0%	-2,4%	72 €	-0,2%	50 €	-2,6%	60,1%	2,1%	72 €	2,7%	43 €	4,9%

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	88,5%	3,9%	43 €	1,1%	38 €	5,0%	75,8%	5,3%	41 €	0,2%	31 €	5,5%
Angers	75,6%	-2,3%	37 €	2,5%	28 €	0,1%	71,1%	4,6%	37 €	0,1%	26 €	4,7%
Avignon	86,5%	-2,0%	35 €	2,0%	30 €	-0,1%	69,4%	-2,4%	35 €	1,2%	24 €	-1,2%
Bordeaux	84,4%	11,9%	40 €	8,4%	34 €	21,2%	67,8%	1,4%	37 €	1,3%	25 €	2,7%
Grenoble	71,8%	-11,8%	41 €	3,4%	30 €	-8,8%	73,6%	-2,2%	41 €	0,4%	30 €	-1,9%
Lille	75,2%	2,3%	37 €	1,2%	28 €	3,4%	69,6%	1,7%	38 €	1,9%	26 €	3,7%
Lyon	72,3%	-0,4%	40 €	2,4%	29 €	2,0%	71,5%	3,8%	40 €	1,4%	28 €	5,3%
Marseille	78,4%	-6,0%	41 €	-1,4%	32 €	-7,3%	70,8%	-2,5%	40 €	-2,9%	28 €	-5,3%
Metz	84,9%	13,2%	37 €	2,2%	31 €	15,7%	73,7%	11,2%	37 €	2,0%	27 €	13,5%
Montpellier	85,8%	1,7%	40 €	2,3%	34 €	4,1%	73,8%	6,0%	39 €	1,0%	28 €	7,1%
Nancy	67,5%	-14,5%	38 €	4,1%	26 €	-11,0%	62,0%	-6,3%	38 €	5,6%	23 €	-1,1%
Nantes	78,1%	0,9%	43 €	3,2%	33 €	4,2%	69,6%	1,1%	42 €	2,3%	29 €	3,3%
Rennes	68,1%	-2,8%	37 €	1,5%	25 €	-1,3%	59,2%	-3,1%	37 €	0,7%	22 €	-2,4%
Rouen	74,1%	-3,9%	40 €	-5,2%	30 €	-8,9%	69,3%	1,4%	40 €	1,8%	28 €	3,3%
Strasbourg	69,5%	3,7%	39 €	5,7%	27 €	9,6%	59,6%	8,2%	39 €	6,7%	23 €	15,4%
Toulouse	78,2%	-0,8%	39 €	-2,4%	31 €	-3,2%	73,1%	4,4%	39 €	-2,2%	29 €	2,1%

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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

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"> Detailed market study Operational recommendations to respond to the requirements of potential clients Determination of the product-service concept Determination of client target the price positioning Revenue estimations (accommodation, food and beverage, other...) Operating forecasts over several years : establishment of expense items to determine the project's profitability (GOP, cash-flows) 	<ul style="list-style-type: none"> A detailed market study Product analysis (strengths, weaknesses, necessary renovations and refurbishments) Forecasts over several years 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). 	<ul style="list-style-type: none"> Dynamic review of existing supply Analysis of the impact of development factors (economy, transportation, tourist markets, etc.) Analysis of supply/demand situation Assessment of development ambitions and objectives Recommendations on strategy 	<ul style="list-style-type: none"> Aligning Human Resources with the strategic goals of the company Mastering operational risks in terms of HR and abiding by the regulations Incorporating the human dimension in all your reorganization and transformation processes Developing an attractive and incentive remuneration policy 	<ul style="list-style-type: none"> Hotel benchmark survey Identification of operators and investors Optimize your information systems Marketing audits Quality control Organizational audits and management support Etc.

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