

In Extenso

tourisme, culture & hôtellerie

French Hotel Industry Performance

January 2016



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Business plan review for an urban apart-hotel project (Western Paris)

Paris

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Aude

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Owner

Sales instruction for a 3 star hotel, > 35 rooms, bar, breakfast room, parking

Freehold
Hauts de Seine

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Owner

Sales instruction for a 3 hotel, > 60 rooms bar, meeting room*

Freehold
Bouches du Rhône

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Contacts

CONSULTING AND VALUATION

[PHILIPPE GAUGUIER](#), ASSOCIATE MRICS

[OLIVIER PETIT](#), ASSOCIATE

TRANSAXIO HÔTEL :

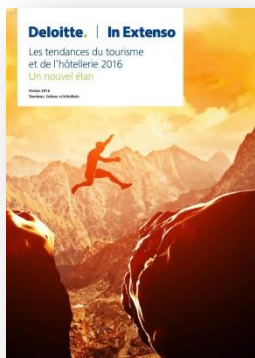
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[DOMINIQUE LECEA](#), DIRECTOR

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Articles and publications



2016 tourism and hospitality trends – A new lease of life

The Paris terrorist attacks in June and November doubtless had an impact in 2015, yet other phenomena should also be considered when analysing the year's results: the maturing of new hotel and apart-hotel supply, the repercussions of the school calendar, the political situation in competitor destinations, etc. Given this, the year turned out very differently from one region or hotel category to another, as our 2016 study shows.

Download here: <https://www2.deloitte.com/fr/fr/pages/consumer-business/articles/les-tendances-du-tourisme-et-de-l-hotellerie-2016.html>

See all our news on www.inextenso-tch.com and www.transaxio.fr

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FOR FURTHER INFORMATION, PLEASE CONTACT SACHA FOURNIER (sacha.fournier@inextenso.fr)

In Extenso Tourism, Culture & Hospitality - 7 rue Ernest Renan - 92136 Issy Les Moulineaux - France

2016 begins as 2015 ends

Late 2015 was heavily impacted by November's tragic events, and Parisian hoteliers were hopeful that January would signal a return to normality. However, they will have to wait, since 2016 began in the same way as November and December 2015 ended.

Compared to January 2015 – a month marked by the attacks on Charlie Hebdo and Hyper Cacher (Porte de Vincennes), hoteliers were expecting growth in early 2016. However, the effects of November's terrorist attacks continued to affect most of the Ile-de-France region – particularly in Paris itself, where RevPAR dropped between -13% and -16% depending on the category. Unlike January 2015, the decline was exacerbated by a decrease in average rates.

Less exposed, regional hotels recorded a good month in terms of occupancy – particularly the case for Upscale and Luxury hotels. Outside of the Côte d'Azur, this encouraging trend was tarnished by a drop in average rates. Bucking against the general trend, Super-budget hotels better resisted in terms of average rates, but RevPAR suffered due to declining occupancy (a continuation of 2015's trend).

Ultimately, the Luxury segment was the only one to post RevPAR growth in January 2016 - thanks to regional hotels – a small consolation in today's gloomy climate, since the segment accounts for just 2% of hotel room capacity in France.

Note to our readers

Numerous branded and independent hotels joined our benchmark in 2015, and we would like to thank them for the trust they have placed in us. As well as incorporating these new participants, we have recently revised a number of our samples in order to:

- Integrate recently-opened hotels that have now become established on their respective markets.
- Better present Parisian performances by refining the segmentation of supply, so that participants can more easily identify their own market.

The statistical data presented in this document is evidently still based on constant samples.

For questions concerning our benchmarks or to speak with one of our consultants, please contact Sacha Fournier or Grégory Fortems:

- By mail: sacha.fournier@inextenso.fr or gregory.fortems@inextenso.fr
- By phone: 01 72 29 68 15

Monthly performance

January	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	45,5%	52,5%	50,3%	52,0%	50,4%
Var. /n-1	15,5%	-2,4%	-2,3%	0,8%	-2,6%
ADR 2016	293 €	165 €	100 €	62 €	39 €
Var. /n-1	-9,3%	-2,9%	-3,1%	-2,1%	-0,2%
RevPAR 2016	133 €	87 €	50 €	32 €	20 €
Var. /n-1	4,8%	-5,2%	-5,3%	-1,3%	-2,8%

Year To Date performance

Jan. to January	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	45,5%	52,5%	50,3%	52,0%	50,4%
Var. /n-1	15,5%	-2,4%	-2,3%	0,8%	-2,6%
ADR 2016	293 €	165 €	100 €	62 €	39 €
Var. /n-1	-9,3%	-2,9%	-3,1%	-2,1%	-0,2%
RevPAR 2016	133 €	87 €	50 €	32 €	20 €
Var. /n-1	4,8%	-5,2%	-5,3%	-1,3%	-2,8%

Definitions

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

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 In Extenso Tourism, Culture & Hospitality - 7 rue Ernest Renan - 92136 Issy Les Moulineaux - France

Performances Paris

January 2016



Paris-City

Monthly performance

January	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Luxury & Palace	51,4%	-10,9%	563 €	-5,9%	289 €	-16,1%
Upscale	59,3%	-14,9%	206 €	0,3%	122 €	-14,6%
Upscale Boutique hotels	58,8%	-10,1%	237 €	-6,2%	139 €	-15,7%
Standard Upscale hotels	59,4%	-16,0%	198 €	1,9%	117 €	-14,4%
Midscale	63,3%	-9,2%	125 €	-6,0%	79 €	-14,7%
Midscale Boutique hotels	63,9%	-7,7%	137 €	-7,7%	88 €	-14,8%
Standard Midscale hotels	62,8%	-10,3%	116 €	-4,7%	73 €	-14,5%
Budget	62,8%	-10,2%	79 €	-2,7%	49 €	-12,7%

Year To Date performance

Jan. to January	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Luxury & Palace	51,4%	-10,9%	563 €	-5,9%	289 €	-16,1%
Upscale	59,3%	-14,9%	206 €	0,3%	122 €	-14,6%
Upscale Boutique hotels	58,8%	-10,1%	237 €	-6,2%	139 €	-15,7%
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Midscale Boutique hotels	63,9%	-7,7%	137 €	-7,7%	88 €	-14,8%
Standard Midscale hotels	62,8%	-10,3%	116 €	-4,7%	73 €	-14,5%
Budget	62,8%	-10,2%	79 €	-2,7%	49 €	-12,7%

Paris suburbs (excluding Paris) – Luxury and Upscale

Monthly performance

January	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Paris	59,3%	-14,9%	206 €	0,3%	122 €	-14,6%
La Défense	54,2%	-20,9%	151 €	0,9%	82 €	-20,2%
Roissy CdG	64,1%	-14,1%	133 €	6,4%	86 €	-8,7%
Other areas	67,0%	5,3%	139 €	-5,9%	93 €	-0,9%

Year To Date performance

Jan. to January	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Paris	59,3%	-14,9%	206 €	0,3%	122 €	-14,6%
La Défense	54,2%	-20,9%	151 €	0,9%	82 €	-20,2%
Roissy CdG	64,1%	-14,1%	133 €	6,4%	86 €	-8,7%
Other areas	67,0%	5,3%	139 €	-5,9%	93 €	-0,9%

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Performance Regions

January 2016



Regions

Regions (excl. French Riviera)

Monthly performance

January	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	43,2%	48,8%	46,2%	49,5%	47,6%
Var. /n-1	15,0%	3,1%	2,4%	3,5%	-2,3%
ADR 2016	208 €	125 €	87 €	60 €	38 €
Var. /n-1	-9,0%	-2,3%	-0,4%	-3,1%	0,2%
RevPAR 2016	90 €	61 €	40 €	30 €	18 €
Var. /n-1	4,7%	0,7%	2,0%	0,3%	-2,2%

Year To Date performance

Jan. to January	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	43,2%	48,8%	46,2%	49,5%	47,6%
Var. /n-1	15,0%	3,1%	2,4%	3,5%	-2,3%
ADR 2016	208 €	125 €	87 €	60 €	38 €
Var. /n-1	-9,0%	-2,3%	-0,4%	-3,1%	0,2%
RevPAR 2016	90 €	61 €	40 €	30 €	18 €
Var. /n-1	4,7%	0,7%	2,0%	0,3%	-2,2%

French Riviera

Monthly performance

January	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	39,9%	40,4%	38,6%	40,1%	39,5%
Var. /n-1	30,8%	9,8%	4,7%	4,7%	-9,0%
ADR 2016	153 €	111 €	81 €	57 €	45 €
Var. /n-1	-2,9%	-0,4%	2,4%	-1,0%	1,6%
RevPAR 2016	61 €	45 €	31 €	23 €	18 €
Var. /n-1	27,0%	9,4%	7,3%	3,7%	-7,6%

Year To Date performance

Jan. to January	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	39,9%	40,4%	38,6%	40,1%	39,5%
Var. /n-1	30,8%	9,8%	4,7%	4,7%	-9,0%
ADR 2016	153 €	111 €	81 €	57 €	45 €
Var. /n-1	-2,9%	-0,4%	2,4%	-1,0%	1,6%
RevPAR 2016	61 €	45 €	31 €	23 €	18 €
Var. /n-1	27,0%	9,4%	7,3%	3,7%	-7,6%

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In Extenso Tourism, Culture & Hospitality - 7 rue Ernest Renan - 92136 Issy Les Moulineaux - France

Performances Suburbs

January 2016



Paris suburbs (excluding Paris)

Midscale market

Monthly performance								
January	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	38,1%	51,2%	59,4%	49,1%	45,8%	51,3%	61,5%	51,8%
Var. /n-1	-13,9%	-7,2%	2,0%	-11,1%	-11,5%	-12,9%	-3,3%	-8,1%
ADR 2016	93 €	105 €	99 €	119 €	93 €	97 €	99 €	104 €
Var. /n-1	-1,5%	4,8%	0,1%	1,0%	8,8%	-1,4%	0,0%	1,2%
RevPAR 2016	35 €	54 €	59 €	59 €	43 €	50 €	61 €	54 €
Var. /n-1	-15,2%	-2,7%	2,1%	-10,2%	-3,8%	-14,2%	-3,2%	-6,9%

Year To Date performance								
Jan. to January	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	38,1%	51,2%	59,4%	49,1%	45,8%	51,3%	61,5%	51,8%
Var. /n-1	-13,9%	-7,2%	2,0%	-11,1%	-11,5%	-12,9%	-3,3%	-8,1%
ADR 2016	93 €	105 €	99 €	119 €	93 €	97 €	99 €	104 €
Var. /n-1	-1,5%	4,8%	0,1%	1,0%	8,8%	-1,4%	0,0%	1,2%
RevPAR 2016	35 €	54 €	59 €	59 €	43 €	50 €	61 €	54 €
Var. /n-1	-15,2%	-2,7%	2,1%	-10,2%	-3,8%	-14,2%	-3,2%	-6,9%

Budget market

Monthly performance								
January	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	53,2%	55,8%	52,4%	55,6%	44,4%	59,9%	59,3%	53,3%
Var. /n-1	1,4%	-3,6%	-7,5%	-5,5%	-6,2%	-6,9%	-0,6%	-4,3%
ADR 2016	52 €	84 €	69 €	79 €	63 €	66 €	62 €	67 €
Var. /n-1	-6,0%	4,9%	7,7%	3,1%	2,0%	8,3%	-0,2%	2,2%
RevPAR 2016	28 €	47 €	36 €	44 €	28 €	39 €	37 €	36 €
Var. /n-1	-4,7%	1,1%	-0,4%	-2,6%	-4,3%	0,8%	-0,8%	-2,1%

Year To Date performance								
Jan. to January	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	53,2%	55,8%	52,4%	55,6%	44,4%	59,9%	59,3%	53,3%
Var. /n-1	1,4%	-3,6%	-7,5%	-5,5%	-6,2%	-6,9%	-0,6%	-4,3%
ADR 2016	52 €	84 €	69 €	79 €	63 €	66 €	62 €	67 €
Var. /n-1	-6,0%	4,9%	7,7%	3,1%	2,0%	8,3%	-0,2%	2,2%
RevPAR 2016	28 €	47 €	36 €	44 €	28 €	39 €	37 €	36 €
Var. /n-1	-4,7%	1,1%	-0,4%	-2,6%	-4,3%	0,8%	-0,8%	-2,1%

Super Budget market

Monthly performance								
January	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	51,1%	64,6%	61,5%	63,4%	56,9%	61,3%	68,7%	60,4%
Var. /n-1	-16,1%	1,6%	-2,9%	1,1%	-3,8%	-1,9%	-5,8%	-4,7%
ADR 2016	39 €	43 €	40 €	52 €	46 €	46 €	46 €	44 €
Var. /n-1	0,6%	0,5%	-0,2%	-3,3%	-2,1%	-1,7%	-1,5%	-0,6%
RevPAR 2016	20 €	28 €	25 €	33 €	26 €	28 €	32 €	27 €
Var. /n-1	-15,6%	2,1%	-3,1%	-2,3%	-5,9%	-3,6%	-7,2%	-5,3%

Year To Date performance								
Jan. to January	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	51,1%	64,6%	61,5%	63,4%	56,9%	61,3%	68,7%	60,4%
Var. /n-1	-16,1%	1,6%	-2,9%	1,1%	-3,8%	-1,9%	-5,8%	-4,7%
ADR 2016	39 €	43 €	40 €	52 €	46 €	46 €	46 €	44 €
Var. /n-1	0,6%	0,5%	-0,2%	-3,3%	-2,1%	-1,7%	-1,5%	-0,6%
RevPAR 2016	20 €	28 €	25 €	33 €	26 €	28 €	32 €	27 €
Var. /n-1	-15,6%	2,1%	-3,1%	-2,3%	-5,9%	-3,6%	-7,2%	-5,3%

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Performances North-East

January 2016



North-east & Cities

Luxury & Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
North-east	46,4%	1,0%	129 €	1,0%	60 €	2,0%	46,4%	1,0%	129 €	1,0%	60 €	2,0%
Dijon	36,6%	-2,4%	115 €	2,3%	42 €	-0,2%	36,6%	-2,4%	115 €	2,3%	42 €	-0,2%
Lille	60,8%	12,9%	139 €	-2,0%	84 €	10,7%	60,8%	12,9%	139 €	-2,0%	84 €	10,7%
Metz	insufficient supply						insufficient supply					
Nancy	insufficient supply						insufficient supply					
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	48,5%	-17,8%	118 €	0,3%	57 €	-17,6%	48,5%	-17,8%	118 €	0,3%	57 €	-17,6%

Midscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
North-east	44,1%	3,8%	89 €	1,2%	39 €	5,1%	44,1%	3,8%	89 €	1,2%	39 €	5,1%
Dijon	35,6%	-7,3%	91 €	6,7%	32 €	-1,1%	35,6%	-7,3%	91 €	6,7%	32 €	-1,1%
Lille	59,7%	5,1%	100 €	2,5%	60 €	7,7%	59,7%	5,1%	100 €	2,5%	60 €	7,7%
Metz	in progress						in progress					
Nancy	51,4%	1,3%	89 €	3,9%	46 €	5,2%	51,4%	1,3%	89 €	3,9%	46 €	5,2%
Reims	48,1%	17,9%	100 €	1,7%	48 €	20,0%	48,1%	17,9%	100 €	1,7%	48 €	20,0%
Strasbourg	46,0%	-7,4%	94 €	-2,4%	43 €	-9,6%	46,0%	-7,4%	94 €	-2,4%	43 €	-9,6%

Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
North-east	54,5%	7,5%	59 €	-1,6%	32 €	5,8%	54,5%	7,5%	59 €	-1,6%	32 €	5,8%
Dijon	47,6%	-0,9%	56 €	-5,8%	27 €	-6,7%	47,6%	-0,9%	56 €	-5,8%	27 €	-6,7%
Lille	62,0%	4,0%	74 €	0,5%	46 €	4,5%	62,0%	4,0%	74 €	0,5%	46 €	4,5%
Metz	45,3%	-1,7%	61 €	2,8%	27 €	1,0%	45,3%	-1,7%	61 €	2,8%	27 €	1,0%
Nancy	61,8%	5,3%	62 €	5,1%	39 €	10,7%	61,8%	5,3%	62 €	5,1%	39 €	10,7%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	49,6%	-5,9%	61 €	-5,3%	30 €	-10,9%	49,6%	-5,9%	61 €	-5,3%	30 €	-10,9%

Super Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
North-east	48,9%	-0,2%	38 €	1,1%	18 €	1,0%	48,9%	-0,2%	38 €	1,1%	18 €	1,0%
Dijon	47,0%	-5,8%	37 €	-1,7%	17 €	-7,4%	47,0%	-5,8%	37 €	-1,7%	17 €	-7,4%
Lille	59,6%	0,1%	43 €	-0,2%	25 €	-0,2%	59,6%	0,1%	43 €	-0,2%	25 €	-0,2%
Metz	49,5%	-8,8%	38 €	1,9%	19 €	-7,1%	49,5%	-8,8%	38 €	1,9%	19 €	-7,1%
Nancy	43,8%	-15,5%	38 €	1,9%	17 €	-13,9%	43,8%	-15,5%	38 €	1,9%	17 €	-13,9%
Reims	35,4%	-7,1%	43 €	6,6%	15 €	-1,0%	35,4%	-7,1%	43 €	6,6%	15 €	-1,0%
Strasbourg	44,2%	-12,8%	40 €	-0,4%	18 €	-13,1%	44,2%	-12,8%	40 €	-0,4%	18 €	-13,1%

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

January 2016



North-West & Cities

	Monthly performance						Year To Date performance					
Luxury & Upscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
North-West	44,9%	34,2%	170 €	4,0%	76 €	39,6%	44,9%	34,2%	170 €	4,0%	76 €	39,6%
Amiens			insufficient supply				insufficient supply					
Angers			insufficient supply				insufficient supply					
Le Havre			insufficient supply				insufficient supply					
Nantes			insufficient supply				insufficient supply					
Niort			insufficient supply				insufficient supply					
Rennes			insufficient supply				insufficient supply					
Rouen			insufficient supply				insufficient supply					
Midscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
North-West	46,7%	3,4%	85 €	0,6%	40 €	4,1%	46,7%	3,4%	85 €	0,6%	40 €	4,1%
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	42,9%	-12,9%	90 €	0,5%	39 €	-12,5%	42,9%	-12,9%	90 €	0,5%	39 €	-12,5%
Nantes	53,9%	-0,4%	88 €	1,7%	47 €	1,3%	53,9%	-0,4%	88 €	1,7%	47 €	1,3%
Niort	42,4%	-0,8%	80 €	-4,1%	34 €	-4,9%	42,4%	-0,8%	80 €	-4,1%	34 €	-4,9%
Rennes	51,2%	5,1%	92 €	-1,6%	47 €	3,4%	51,2%	5,1%	92 €	-1,6%	47 €	3,4%
Rouen	47,3%	-10,8%	95 €	4,5%	45 €	-6,8%	47,3%	-10,8%	95 €	4,5%	45 €	-6,8%
Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
North-West	45,7%	5,0%	62 €	-0,6%	29 €	4,4%	45,7%	5,0%	62 €	-0,6%	29 €	4,4%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	51,8%	-3,6%	70 €	0,0%	36 €	-3,7%	51,8%	-3,6%	70 €	0,0%	36 €	-3,7%
Le Havre	36,4%	-4,8%	56 €	-1,1%	20 €	-5,9%	36,4%	-4,8%	56 €	-1,1%	20 €	-5,9%
Nantes	52,7%	3,2%	66 €	-1,5%	35 €	1,6%	52,7%	3,2%	66 €	-1,5%	35 €	1,6%
Niort	41,6%	-2,8%	60 €	0,7%	25 €	-2,1%	41,6%	-2,8%	60 €	0,7%	25 €	-2,1%
Rennes	62,9%	11,6%	64 €	-1,7%	40 €	9,7%	62,9%	11,6%	64 €	-1,7%	40 €	9,7%
Rouen	50,2%	4,2%	64 €	2,1%	32 €	6,4%	50,2%	4,2%	64 €	2,1%	32 €	6,4%
Super Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
North-West	45,7%	-2,1%	38 €	1,8%	17 €	-0,4%	45,7%	-2,1%	38 €	1,8%	17 €	-0,4%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	51,3%	3,7%	42 €	-2,9%	22 €	0,7%	51,3%	3,7%	42 €	-2,9%	22 €	0,7%
Le Havre	46,5%	-3,3%	37 €	1,5%	17 €	-1,9%	46,5%	-3,3%	37 €	1,5%	17 €	-1,9%
Nantes	57,6%	-1,6%	44 €	2,1%	25 €	0,4%	57,6%	-1,6%	44 €	2,1%	25 €	0,4%
Niort	49,7%	4,4%	35 €	-6,6%	18 €	-2,5%	49,7%	4,4%	35 €	-6,6%	18 €	-2,5%
Rennes	55,0%	3,7%	40 €	0,3%	22 €	4,1%	55,0%	3,7%	40 €	0,3%	22 €	4,1%
Rouen	56,8%	4,1%	42 €	1,2%	24 €	5,3%	56,8%	4,1%	42 €	1,2%	24 €	5,3%

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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FOR FURTHER INFORMATION, PLEASE CONTACT SACHA FOURNIER (sacha.fournier@inextenso.fr)

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Performances South-East

January 2016



South-East (excl. French Riviera) & Cities

Luxury & Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
South-East	51,4%	7,0%	125 €	-6,4%	64 €	0,2%	51,4%	7,0%	125 €	-6,4%	64 €	0,2%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	36,3%	6,1%	105 €	10,0%	38 €	16,8%	36,3%	6,1%	105 €	10,0%	38 €	16,8%
Grenoble	insufficient supply						insufficient supply					
Lyon	58,9%	-0,1%	138 €	-14,3%	81 €	-14,4%	58,9%	-0,1%	138 €	-14,3%	81 €	-14,4%
Marseille	49,9%	19,6%	117 €	-5,2%	58 €	13,4%	49,9%	19,6%	117 €	-5,2%	58 €	13,4%
Montpellier	45,1%	-10,7%	122 €	-3,4%	55 €	-13,8%	45,1%	-10,7%	122 €	-3,4%	55 €	-13,8%
St Etienne	insufficient supply						insufficient supply					
Midscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
	South-East	46,7%	-2,8%	87 €	-2,6%	40 €	-5,4%	46,7%	-2,8%	87 €	-2,6%	40 €
Aix en Provence	43,7%	9,4%	77 €	-3,5%	34 €	5,6%	43,7%	9,4%	77 €	-3,5%	34 €	5,6%
Avignon	42,4%	5,4%	87 €	2,3%	37 €	7,8%	42,4%	5,4%	87 €	2,3%	37 €	7,8%
Grenoble	48,6%	5,4%	92 €	-1,9%	45 €	3,4%	48,6%	5,4%	92 €	-1,9%	45 €	3,4%
Lyon	53,9%	-11,4%	97 €	-13,8%	53 €	-23,6%	53,9%	-11,4%	97 €	-13,8%	53 €	-23,6%
Marseille	48,5%	0,2%	90 €	-0,4%	44 €	-0,1%	48,5%	0,2%	90 €	-0,4%	44 €	-0,1%
Montpellier	49,5%	-9,1%	84 €	-2,4%	42 €	-11,3%	49,5%	-9,1%	84 €	-2,4%	42 €	-11,3%
St Etienne	43,6%	-1,3%	86 €	2,2%	37 €	0,9%	43,6%	-1,3%	86 €	2,2%	37 €	0,9%
Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
	South-East	49,4%	2,5%	61 €	-8,0%	30 €	-5,7%	49,4%	2,5%	61 €	-8,0%	30 €
Aix en Provence	41,7%	-1,1%	60 €	4,3%	25 €	3,2%	41,7%	-1,1%	60 €	4,3%	25 €	3,2%
Avignon	40,5%	-1,9%	60 €	-1,7%	24 €	-3,5%	40,5%	-1,9%	60 €	-1,7%	24 €	-3,5%
Grenoble	47,0%	-1,8%	59 €	-4,1%	28 €	-5,8%	47,0%	-1,8%	59 €	-4,1%	28 €	-5,8%
Lyon	58,5%	-3,0%	73 €	-14,5%	43 €	-17,0%	58,5%	-3,0%	73 €	-14,5%	43 €	-17,0%
Marseille	48,3%	4,2%	59 €	-5,3%	28 €	-1,2%	48,3%	4,2%	59 €	-5,3%	28 €	-1,2%
Montpellier	54,0%	-6,8%	63 €	-8,2%	34 €	-14,4%	54,0%	-6,8%	63 €	-8,2%	34 €	-14,4%
St Etienne	47,2%	2,5%	67 €	-3,7%	32 €	-1,3%	47,2%	2,5%	67 €	-3,7%	32 €	-1,3%
Super Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
	South-East	47,2%	-4,5%	38 €	-2,4%	18 €	-6,8%	47,2%	-4,5%	38 €	-2,4%	18 €
Aix en Provence	49,0%	13,9%	38 €	0,2%	19 €	14,1%	49,0%	13,9%	38 €	0,2%	19 €	14,1%
Avignon	47,1%	1,0%	34 €	0,9%	16 €	1,9%	47,1%	1,0%	34 €	0,9%	16 €	1,9%
Grenoble	43,1%	-16,9%	38 €	2,1%	16 €	-15,2%	43,1%	-16,9%	38 €	2,1%	16 €	-15,2%
Lyon	55,3%	-16,7%	42 €	-9,1%	23 €	-24,3%	55,3%	-16,7%	42 €	-9,1%	23 €	-24,3%
Marseille	49,4%	6,2%	43 €	-0,6%	21 €	5,6%	49,4%	6,2%	43 €	-0,6%	21 €	5,6%
Montpellier	45,1%	-19,1%	35 €	-1,7%	16 €	-20,4%	45,1%	-19,1%	35 €	-1,7%	16 €	-20,4%
St Etienne	57,8%	5,2%	40 €	-1,7%	23 €	3,4%	57,8%	5,2%	40 €	-1,7%	23 €	3,4%

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 SACHA FOURNIER (sacha.fournier@inextenso.fr)

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Performances South West

January 2016



South-West & Cities

Luxury & Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
South-West	43,6%	3,9%	158 €	-0,7%	69 €	3,2%	43,6%	3,9%	158 €	-0,7%	69 €	3,2%
Bayonne-Anglet-Biarritz	38,5%	0,6%	183 €	2,1%	70 €	2,7%	38,5%	0,6%	183 €	2,1%	70 €	2,7%
Bordeaux	42,1%	12,6%	185 €	7,1%	78 €	20,7%	42,1%	12,6%	185 €	7,1%	78 €	20,7%
Pau	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Toulouse	62,9%	6,8%	121 €	0,6%	76 €	7,4%	62,9%	6,8%	121 €	0,6%	76 €	7,4%
Midscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
	South-West	46,8%	8,1%	86 €	0,2%	40 €	8,4%	46,8%	8,1%	86 €	0,2%	40 €
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Bordeaux	47,9%	0,2%	88 €	3,2%	42 €	3,5%	47,9%	0,2%	88 €	3,2%	42 €	3,5%
Pau	44,7%	1,6%	75 €	-3,0%	34 €	-1,5%	44,7%	1,6%	75 €	-3,0%	34 €	-1,5%
Toulouse	51,8%	6,6%	95 €	-2,4%	49 €	4,1%	51,8%	6,6%	95 €	-2,4%	49 €	4,1%
Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
	South-West	46,8%	-3,9%	59 €	1,1%	28 €	-2,8%	46,8%	-3,9%	59 €	1,1%	28 €
Bayonne-Anglet-Biarritz	39,8%	-6,1%	53 €	9,4%	21 €	2,7%	39,8%	-6,1%	53 €	9,4%	21 €	2,7%
Bordeaux	51,8%	1,9%	65 €	0,9%	34 €	2,8%	51,8%	1,9%	65 €	0,9%	34 €	2,8%
Pau	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Toulouse	53,8%	2,1%	68 €	1,3%	37 €	3,4%	53,8%	2,1%	68 €	1,3%	37 €	3,4%
Super Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
	South-West	48,5%	-5,6%	38 €	2,0%	18 €	-3,7%	48,5%	-5,6%	38 €	2,0%	18 €
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Bordeaux	51,2%	-3,0%	39 €	0,0%	20 €	-2,9%	51,2%	-3,0%	39 €	0,0%	20 €	-2,9%
Pau	41,6%	-2,2%	34 €	5,4%	14 €	3,0%	41,6%	-2,2%	34 €	5,4%	14 €	3,0%
Toulouse	59,1%	-2,5%	40 €	2,4%	24 €	-0,2%	59,1%	-2,5%	40 €	2,4%	24 €	-0,2%

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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FOR FURTHER INFORMATION, PLEASE CONTACT SACHA FOURNIER (sacha.fournier@inextenso.fr)

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Performances French Riviera

January 2016



French Riviera

January	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
French Riviera - Luxury	39,9%	30,8%	153 €	-2,9%	61 €	27,0%	39,9%	30,8%	153 €	-2,9%	61 €	27,0%
French Riviera - Boutique Hotels	40,3%	4,8%	100 €	1,5%	40 €	6,3%	40,3%	4,8%	100 €	1,5%	40 €	6,3%
French Riviera - Upscale	40,4%	10,4%	112 €	-0,6%	45 €	9,7%	40,4%	10,4%	112 €	-0,6%	45 €	9,7%
Average Upscale & Luxury	40,2%	18,0%	128 €	-0,5%	52 €	17,4%	40,2%	18,0%	128 €	-0,5%	52 €	17,4%
Average Midscale	38,6%	4,7%	81 €	2,4%	31 €	7,3%	38,6%	4,7%	81 €	2,4%	31 €	7,3%
Average Budget	40,1%	4,7%	57 €	-1,0%	23 €	3,7%	40,1%	4,7%	57 €	-1,0%	23 €	3,7%
Average Super-Budget	39,5%	-9,0%	45 €	1,6%	18 €	-7,6%	39,5%	-9,0%	45 €	1,6%	18 €	-7,6%

French Riviera Cities

January	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Cannes - Luxury	36,8%	45,7%	142 €	-3,0%	52 €	41,2%	36,8%	45,7%	142 €	-3,0%	52 €	41,2%
Cannes - Boutique Hotels	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Cannes - Upscale	36,0%	-3,0%	105 €	1,8%	38 €	-1,2%	36,0%	-3,0%	105 €	1,8%	38 €	-1,2%
Cannes - Upscale & Luxury	36,6%	24,6%	130 €	2,2%	48 €	27,4%	36,6%	24,6%	130 €	2,2%	48 €	27,4%
Cannes - Midscale	29,0%	6,4%	82 €	5,3%	24 €	12,0%	29,0%	6,4%	82 €	5,3%	24 €	12,0%
Cannes - Budget	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Cannes - Super Budget	41,3%	-4,2%	43 €	0,3%	18 €	-4,0%	41,3%	-4,2%	43 €	0,3%	18 €	-4,0%

January	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
	Nice - Upscale & Luxury	45,4%	17,5%	124 €	-1,0%	56 €	16,3%	45,4%	17,5%	124 €	-1,0%	56 €
Nice - Midscale	40,0%	1,3%	82 €	3,2%	33 €	4,6%	40,0%	1,3%	82 €	3,2%	33 €	4,6%

January	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
	Monaco - Luxury	48,1%	-7,2%	302 €	-0,4%	145 €	-7,5%	48,1%	-7,2%	302 €	-0,4%	145 €
Monaco - Upscale	56,4%	4,5%	157 €	2,0%	89 €	6,6%	56,4%	4,5%	157 €	2,0%	89 €	6,6%
Monaco - Upscale & Luxury	54,3%	1,7%	190 €	-1,7%	103 €	-0,1%	54,3%	1,7%	190 €	-1,7%	103 €	-0,1%

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Performances Coast

January 2016



Normandy – Nord-Pas-de-Calais coast

Normandy – Nord-Pas-de-Calais coast	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Average Upscale & Luxury	39,1%	-0,9%	138 €	-0,3%	54 €	-1,2%	39,1%	-0,9%	138 €	-0,3%	54 €	-1,2%
Average Midscale	41,4%	-2,9%	87 €	-0,8%	36 €	-3,7%	41,4%	-2,9%	87 €	-0,8%	36 €	-3,7%
Average Budget	56,5%	30,9%	56 €	-8,5%	32 €	19,9%	56,5%	30,9%	56 €	-8,5%	32 €	19,9%
Average Super-Budget	48,4%	21,7%	37 €	5,2%	18 €	28,1%	48,4%	21,7%	37 €	5,2%	18 €	28,1%

Brittany – Pays-de-la-Loire coast

Brittany – Pays-de-la-Loire coast	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Average Upscale & Luxury	45,3%	62,1%	160 €	-10,3%	72 €	45,4%	45,3%	62,1%	160 €	-10,3%	72 €	45,4%
Average Midscale	42,1%	0,4%	85 €	2,0%	36 €	2,3%	42,1%	0,4%	85 €	2,0%	36 €	2,3%
Average Budget	40,0%	18,8%	59 €	6,4%	24 €	26,3%	40,0%	18,8%	59 €	6,4%	24 €	26,3%
Average Super-Budget	41,9%	8,1%	39 €	1,6%	17 €	9,8%	41,9%	8,1%	39 €	1,6%	17 €	9,8%

Charente-Maritime – Aquitaine coast

Charente-Maritime – Aquitaine coast	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Average Upscale & Luxury	38,5%	0,6%	183 €	2,1%	70 €	2,7%	38,5%	0,6%	183 €	2,1%	70 €	2,7%
Average Midscale	42,9%	21,6%	85 €	-0,2%	37 €	21,3%	42,9%	21,6%	85 €	-0,2%	37 €	21,3%
Average Budget	27,2%	-5,5%	51 €	10,2%	14 €	4,1%	27,2%	-5,5%	51 €	10,2%	14 €	4,1%
Average Super-Budget	40,2%	2,7%	40 €	3,3%	16 €	6,1%	40,2%	2,7%	40 €	3,3%	16 €	6,1%

Coastal areas samples under continuous development and likely to evolve

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FOR FURTHER INFORMATION, PLEASE CONTACT SACHA FOURNIER (sacha.fournier@inextenso.fr)

In Extenso Tourism, Culture & Hospitality - 7 rue Ernest Renan - 92136 Issy Les Moulineaux - France

Performances Main cities in Regions

January 2016



Main cities in Regions – Luxury upscale and midscale

Luxury & Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Avignon	36,3%	6,1%	105 €	10,0%	38 €	16,8%	36,3%	6,1%	105 €	10,0%	38 €	16,8%
Bayonne-Anglet-Biarritz	38,5%	0,6%	183 €	2,1%	70 €	2,7%	38,5%	0,6%	183 €	2,1%	70 €	2,7%
Bordeaux	42,1%	12,6%	185 €	7,1%	78 €	20,7%	42,1%	12,6%	185 €	7,1%	78 €	20,7%
Cannes	36,6%	24,6%	130 €	2,2%	48 €	27,4%	36,6%	24,6%	130 €	2,2%	48 €	27,4%
Dijon	36,6%	-2,4%	115 €	2,3%	42 €	-0,2%	36,6%	-2,4%	115 €	2,3%	42 €	-0,2%
Lille	60,8%	12,9%	139 €	-2,0%	84 €	10,7%	60,8%	12,9%	139 €	-2,0%	84 €	10,7%
Lyon	58,9%	-0,1%	138 €	-14,3%	81 €	-14,4%	58,9%	-0,1%	138 €	-14,3%	81 €	-14,4%
Marseille	49,9%	19,6%	117 €	-5,2%	58 €	13,4%	49,9%	19,6%	117 €	-5,2%	58 €	13,4%
Monaco	54,3%	1,7%	190 €	-1,7%	103 €	-0,1%	54,3%	1,7%	190 €	-1,7%	103 €	-0,1%
Montpellier	45,1%	-10,7%	122 €	-3,4%	55 €	-13,8%	45,1%	-10,7%	122 €	-3,4%	55 €	-13,8%
Nice	45,4%	17,5%	124 €	-1,0%	56 €	16,3%	45,4%	17,5%	124 €	-1,0%	56 €	16,3%
Strasbourg	48,5%	-17,8%	118 €	0,3%	57 €	-17,6%	48,5%	-17,8%	118 €	0,3%	57 €	-17,6%
Toulouse	62,9%	6,8%	121 €	0,6%	76 €	7,4%	62,9%	6,8%	121 €	0,6%	76 €	7,4%

Midscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Aix en Provence	43,7%	9,4%	77 €	-3,5%	34 €	5,6%	43,7%	9,4%	77 €	-3,5%	34 €	5,6%
Avignon	42,4%	5,4%	87 €	2,3%	37 €	7,8%	42,4%	5,4%	87 €	2,3%	37 €	7,8%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Bordeaux	47,9%	0,2%	88 €	3,2%	42 €	3,5%	47,9%	0,2%	88 €	3,2%	42 €	3,5%
Cannes	29,0%	6,4%	82 €	5,3%	24 €	12,0%	29,0%	6,4%	82 €	5,3%	24 €	12,0%
Dijon	35,6%	-7,3%	91 €	6,7%	32 €	-1,1%	35,6%	-7,3%	91 €	6,7%	32 €	-1,1%
Grenoble	48,6%	5,4%	92 €	-1,9%	45 €	3,4%	48,6%	5,4%	92 €	-1,9%	45 €	3,4%
Le Havre	42,9%	-12,9%	90 €	0,5%	39 €	-12,5%	42,9%	-12,9%	90 €	0,5%	39 €	-12,5%
Lille	59,7%	5,1%	100 €	2,5%	60 €	7,7%	59,7%	5,1%	100 €	2,5%	60 €	7,7%
Lyon	53,9%	-11,4%	97 €	-13,8%	53 €	-23,6%	53,9%	-11,4%	97 €	-13,8%	53 €	-23,6%
Marseille	48,5%	0,2%	90 €	-0,4%	44 €	-0,1%	48,5%	0,2%	90 €	-0,4%	44 €	-0,1%
Montpellier	49,5%	-9,1%	84 €	-2,4%	42 €	-11,3%	49,5%	-9,1%	84 €	-2,4%	42 €	-11,3%
Nancy	51,4%	1,3%	89 €	3,9%	46 €	5,2%	51,4%	1,3%	89 €	3,9%	46 €	5,2%
Nantes	53,9%	-0,4%	88 €	1,7%	47 €	1,3%	53,9%	-0,4%	88 €	1,7%	47 €	1,3%
Niort	42,4%	-0,8%	80 €	-4,1%	34 €	-4,9%	42,4%	-0,8%	80 €	-4,1%	34 €	-4,9%
Nice	40,0%	1,3%	82 €	3,2%	33 €	4,6%	40,0%	1,3%	82 €	3,2%	33 €	4,6%
Pau	44,7%	1,6%	75 €	-3,0%	34 €	-1,5%	44,7%	1,6%	75 €	-3,0%	34 €	-1,5%
Reims	48,1%	17,9%	100 €	1,7%	48 €	20,0%	48,1%	17,9%	100 €	1,7%	48 €	20,0%
Rennes	51,2%	5,1%	92 €	-1,6%	47 €	3,4%	51,2%	5,1%	92 €	-1,6%	47 €	3,4%
Rouen	47,3%	-10,8%	95 €	4,5%	45 €	-6,8%	47,3%	-10,8%	95 €	4,5%	45 €	-6,8%
Saint Etienne	43,6%	-1,3%	86 €	2,2%	37 €	0,9%	43,6%	-1,3%	86 €	2,2%	37 €	0,9%
Strasbourg	46,0%	-7,4%	94 €	-2,4%	43 €	-9,6%	46,0%	-7,4%	94 €	-2,4%	43 €	-9,6%
Toulouse	51,8%	6,6%	95 €	-2,4%	49 €	4,1%	51,8%	6,6%	95 €	-2,4%	49 €	4,1%

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FOR FURTHER INFORMATION, PLEASE CONTACT SACHA FOURNIER (sacha.fournier@inextenso.fr)

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Performances Main cities in Regions

January 2016



Main cities in regions – Budget and Super Budget

Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1
Aix en Provence	41,7%	-1,1%	60 €	4,3%	25 €	3,2%	41,7%	-1,1%	60 €	4,3%	25 €	3,2%
Angers	51,8%	-3,6%	70 €	0,0%	36 €	-3,7%	51,8%	-3,6%	70 €	0,0%	36 €	-3,7%
Avignon	40,5%	-1,9%	60 €	-1,7%	24 €	-3,5%	40,5%	-1,9%	60 €	-1,7%	24 €	-3,5%
Bayonne-Anglet-Biarritz	39,8%	-6,1%	53 €	9,4%	21 €	2,7%	39,8%	-6,1%	53 €	9,4%	21 €	2,7%
Bordeaux	51,8%	1,9%	65 €	0,9%	34 €	2,8%	51,8%	1,9%	65 €	0,9%	34 €	2,8%
Dijon	47,6%	-0,9%	56 €	-5,8%	27 €	-6,7%	47,6%	-0,9%	56 €	-5,8%	27 €	-6,7%
Grenoble	47,0%	-1,8%	59 €	-4,1%	28 €	-5,8%	47,0%	-1,8%	59 €	-4,1%	28 €	-5,8%
Le Havre	36,4%	-4,8%	56 €	-1,1%	20 €	-5,9%	36,4%	-4,8%	56 €	-1,1%	20 €	-5,9%
Lille	62,0%	4,0%	74 €	0,5%	46 €	4,5%	62,0%	4,0%	74 €	0,5%	46 €	4,5%
Lyon	58,5%	-3,0%	73 €	-14,5%	43 €	-17,0%	58,5%	-3,0%	73 €	-14,5%	43 €	-17,0%
Marseille	48,3%	4,2%	59 €	-5,3%	28 €	-1,2%	48,3%	4,2%	59 €	-5,3%	28 €	-1,2%
Metz	45,3%	-1,7%	61 €	2,8%	27 €	1,0%	45,3%	-1,7%	61 €	2,8%	27 €	1,0%
Montpellier	54,0%	-6,8%	63 €	-8,2%	34 €	-14,4%	54,0%	-6,8%	63 €	-8,2%	34 €	-14,4%
Nancy	61,8%	5,3%	62 €	5,1%	39 €	10,7%	61,8%	5,3%	62 €	5,1%	39 €	10,7%
Nantes	52,7%	3,2%	66 €	-1,5%	35 €	1,6%	52,7%	3,2%	66 €	-1,5%	35 €	1,6%
Niort	41,6%	-2,8%	60 €	0,7%	25 €	-2,1%	41,6%	-2,8%	60 €	0,7%	25 €	-2,1%
Pau	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Rennes	62,9%	11,6%	64 €	-1,7%	40 €	9,7%	62,9%	11,6%	64 €	-1,7%	40 €	9,7%
Rouen	50,2%	4,2%	64 €	2,1%	32 €	6,4%	50,2%	4,2%	64 €	2,1%	32 €	6,4%
Saint Etienne	47,2%	2,5%	67 €	-3,7%	32 €	-1,3%	47,2%	2,5%	67 €	-3,7%	32 €	-1,3%
Strasbourg	49,6%	-5,9%	61 €	-5,3%	30 €	-10,9%	49,6%	-5,9%	61 €	-5,3%	30 €	-10,9%
Toulouse	53,8%	2,1%	68 €	1,3%	37 €	3,4%	53,8%	2,1%	68 €	1,3%	37 €	3,4%

Super Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1
	Angers	51,3%	3,7%	42 €	-2,9%	22 €	0,7%	51,3%	3,7%	42 €	-2,9%	22 €
Avignon	47,1%	1,0%	34 €	0,9%	16 €	1,9%	47,1%	1,0%	34 €	0,9%	16 €	1,9%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Bordeaux	51,2%	-3,0%	39 €	0,0%	20 €	-2,9%	51,2%	-3,0%	39 €	0,0%	20 €	-2,9%
Cannes	41,3%	-4,2%	43 €	0,3%	18 €	-4,0%	41,3%	-4,2%	43 €	0,3%	18 €	-4,0%
Dijon	47,0%	-5,8%	37 €	-1,7%	17 €	-7,4%	47,0%	-5,8%	37 €	-1,7%	17 €	-7,4%
Grenoble	43,1%	-16,9%	38 €	2,1%	16 €	-15,2%	43,1%	-16,9%	38 €	2,1%	16 €	-15,2%
Le Havre	46,5%	-3,3%	37 €	1,5%	17 €	-1,9%	46,5%	-3,3%	37 €	1,5%	17 €	-1,9%
Lille	59,6%	0,1%	43 €	-0,2%	25 €	-0,2%	59,6%	0,1%	43 €	-0,2%	25 €	-0,2%
Lyon	55,3%	-16,7%	42 €	-9,1%	23 €	-24,3%	55,3%	-16,7%	42 €	-9,1%	23 €	-24,3%
Marseille	49,4%	6,2%	43 €	-0,6%	21 €	5,6%	49,4%	6,2%	43 €	-0,6%	21 €	5,6%
Metz	49,5%	-8,8%	38 €	1,9%	19 €	-7,1%	49,5%	-8,8%	38 €	1,9%	19 €	-7,1%
Montpellier	45,1%	-19,1%	35 €	-1,7%	16 €	-20,4%	45,1%	-19,1%	35 €	-1,7%	16 €	-20,4%
Nancy	43,8%	-15,5%	38 €	1,9%	17 €	-13,9%	43,8%	-15,5%	38 €	1,9%	17 €	-13,9%
Nantes	57,6%	-1,6%	44 €	2,1%	25 €	0,4%	57,6%	-1,6%	44 €	2,1%	25 €	0,4%
Niort	49,7%	4,4%	35 €	-6,6%	18 €	-2,5%	49,7%	4,4%	35 €	-6,6%	18 €	-2,5%
Pau	41,6%	-2,2%	34 €	5,4%	14 €	3,0%	41,6%	-2,2%	34 €	5,4%	14 €	3,0%
Rennes	55,0%	3,7%	40 €	0,3%	22 €	4,1%	55,0%	3,7%	40 €	0,3%	22 €	4,1%
Rouen	56,8%	4,1%	42 €	1,2%	24 €	5,3%	56,8%	4,1%	42 €	1,2%	24 €	5,3%
Saint Etienne	57,8%	5,2%	40 €	-1,7%	23 €	3,4%	57,8%	5,2%	40 €	-1,7%	23 €	3,4%
Strasbourg	44,2%	-12,8%	40 €	-0,4%	18 €	-13,1%	44,2%	-12,8%	40 €	-0,4%	18 €	-13,1%
Toulouse	59,1%	-2,5%	40 €	2,4%	24 €	-0,2%	59,1%	-2,5%	40 €	2,4%	24 €	-0,2%

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FOR FURTHER INFORMATION, PLEASE CONTACT SACHA FOURNIER (sacha.fournier@inextenso.fr)

In Extenso Tourism, Culture & Hospitality - 7 rue Ernest Renan - 92136 Issy Les Moulineaux - France

Information

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.

General segmentation

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.

Segmentation of Parisian hotels

Luxury and Palace hotels: Classified 5 star, a third of whom carry the Palace distinction, Luxury hotels offer minimum rates of 450 to 500 € inc. VAT (flexible rates, excluding promotional offers). These establishments tend to be located in the 1st, 8th and 16th districts of Paris. Characterised by a high proportion of suites, they propose exceptional product and service quality.

Upscale hotels: Mostly classified 4 star, Upscale hotels represent just under 20% of Parisian supply. Upscale hotels propose rates (flexible) starting at 280 to 300 € inc. VAT, depending on location. They can be divided into two groups:

- **Boutique hotels:** As with their Midscale counterparts, Boutique hotels offer a limited rooms capacity (around 60 rooms on average) and differentiate themselves through their individual design. Operated independently or under a non-standardised brand name, they offer a higher level of comfort and service and larger guest rooms than Midscale Boutique hotels.

- **Standard hotels:** Mostly operated by international chains, standard Upscale hotels have a high capacity in common (over 200 rooms, on average). They offer a full range of services (F&B, meeting rooms or conference centre, wellness / spa, etc.).

Midscale hotels: Classified 3 or 4 star, Midscale hotels represent almost 40% of Parisian hotel room capacity. Rooms rates do not tend to surpass 250 to 280 € exc. VAT (flexible rates, excluding promotional offers), depending on location. Midscale hotels can be divided into two subgroups:

- **Boutique hotels:** primarily small, independent hotels (around 40 rooms, on average) offering an individual product and design, which can compensate for the more limited size of guest rooms.

- **Standard hotels:** Operated by brands or independently-run, these hotels tend to be larger (80 rooms, on average) and offer a wider range of services and facilities (F&B, meeting rooms). Rooms are often standardised.

Budget hotels: Predominantly 3 star, Budget hotels represent a third of Parisian hotel room capacity. Whether branded or operated independently, these hotels generally offer fewer services, and rates that do not tend to exceed 130 to 150 € inc. VAT (flexible rates, excluding special offers).

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FOR FURTHER INFORMATION, PLEASE CONTACT SACHA FOURNIER (sacha.fournier@inextenso.fr)

In Extenso Tourism, Culture & Hospitality - 7 rue Ernest Renan - 92136 Issy Les Moulineaux - France

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Tourism, Culture & Hospitality Desk

In Extenso is one of the leading advisors in Tourism, Culture & Hospitality 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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In Extenso Tourism, Culture & Hospitality - 7 rue Ernest Renan - 92136 Issy Les Moulineaux - France