



French Hotel Industry Performances



January 2011

An encouraging start to the year

The new year saw hoteliers hit the ground running. In Paris and throughout France, RevPAR increases in January were substantial, thanks to the combined effects of higher occupancy and average rates.

However, these increases should be put in perspective. On the one hand, and with the exception of Paris and several large regional cities, business activity remained modest, with occupancy not quite hitting the 50% mark in the upscale and midscale segments. On the other hand, economic recovery in January 2010 had not yet begun, with year-on-year hotel performances significantly decreasing, even.

Nevertheless, the news is, on the whole, welcome. Growth is more pronounced in the upscale (4/5*) and 3 star segments, in line with the trend observed during 2010. GDP growth in emerging markets, recovery in the investment market and higher levels of seminar and congress activity are all factors that help sustain occupancy in these hotels.

French market

Monthly performance

January	5* - 4 *	3 *	2 *
OR 2011	54,9%	53,1%	52,2%
Var. /n-1	4,5%	4,0%	0,3%
ADR 2011	207 €	97 €	65 €
Var. /n-1	3,9%	4,7%	4,5%
RevPAR 2011	113 €	52 €	34 €
Var. /n-1	8,5%	8,9%	4,8%

Year To Date performance

January	5* - 4 *	3 *	2 *
OR 2011	54,9%	53,1%	52,2%
Var. /n-1	4,5%	4,0%	0,3%
ADR 2011	207 €	97 €	65 €
Var. /n-1	3,9%	4,7%	4,5%
RevPAR 2011	113 €	52 €	34 €
Var. /n-1	8,5%	8,9%	4,8%

Definitions

OR = Occupancy Rate

ADR = Average Daily Rate

RevPAR = Revenue per available room

January's performances were encouraging and a number of cities stood out from the crowd with spectacular two-digit growth. Hotels in Lille, Lyon, Angers and Metz thus saw rooms revenue increasing in all categories – up to 42% for upscale hotels in Lyon, for instance. Hotels here benefitted from the biennial Sirha trade show that attracted a large number of visitors this year.

However, a number of cities experienced a decline in RevPAR. Hotel performances in Aix-en-Provence, Nantes, Nice and Marseille slumped in most categories, although a number of these cities had benefited in 2010 from the shoots of economic recovery within a somewhat dismal context.

The year got off to a flying start in the majority of destinations and the economic signs are encouraging. However, the French hotel industry could be indirectly impacted by the challenges faced by both the French and European economies: moderate growth in the Euro zone and in France, the heavy debt burden which could affect the domestic economy and the slow reduction of the unemployment rate, for instance. The budget and 2 star sector could be impacted to an even greater extent by these factors.

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Performances Paris

January 2011



Paris-City

Monthly performance

January	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris Superior 5* - 4*	62,3%	-0,2%	509 €	5,0%	317 €	4,8%
Paris Boutique Hotels	67,2%	4,4%	277 €	1,4%	186 €	5,9%
Paris Standard 5* - 4*	68,3%	4,7%	178 €	6,0%	122 €	11,0%
Paris average - 5* - 4 *	67,0%	3,6%	250 €	5,1%	167 €	8,9%
Paris Superior 3*	76,1%	5,1%	141 €	2,9%	107 €	8,1%
Paris Standard 3*	72,5%	6,7%	100 €	4,8%	72 €	11,9%
Paris - 3*	73,4%	6,4%	111 €	4,4%	81 €	11,0%
Paris - 2*	76,0%	4,6%	74 €	2,6%	56 €	7,3%

Year To Date performance

January	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris Superior 5* - 4*	62,3%	-0,2%	509 €	5,0%	317 €	4,8%
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Paris Superior 3*	76,1%	5,1%	141 €	2,9%	107 €	8,1%
Paris Standard 3*	72,5%	6,7%	100 €	4,8%	72 €	11,9%
Paris - 3*	73,4%	6,4%	111 €	4,4%	81 €	11,0%
Paris - 2*	76,0%	4,6%	74 €	2,6%	56 €	7,3%

Paris suburbs (excluding Paris)

Monthly performance

January	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris - 5* - 4*	67,0%	3,6%	250 €	5,1%	167 €	8,9%
La Défense - 5* - 4*	n.d.	-	n.d.	-	n.d.	-
Roissy CdG - 5* - 4*	64,6%	-5,1%	114 €	8,2%	73 €	2,7%
Paris suburbs* - 5* - 4*	65,2%	4,6%	172 €	2,2%	112 €	6,9%

Year To Date performance

January	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris - 5* - 4*	67,0%	3,6%	250 €	5,1%	167 €	8,9%
La Défense - 5* - 4*	n.d.	-	n.d.	-	n.d.	-
Roissy CdG - 5* - 4*	64,6%	-5,1%	114 €	8,2%	73 €	2,7%
Paris suburbs* - 5* - 4*	65,2%	4,6%	172 €	2,2%	112 €	6,9%

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Performance Regions

January 2011



Regions

Regions (excl. French Riviera)	<i>Monthly performance</i>			
	January	5* - 4 *	3 *	2 *
	OR 2011	45,8%	47,1%	49,5%
	Var. /n-1	9,2%	5,6%	1,3%
	ADR 2011	139 €	88 €	65 €
	Var. /n-1	3,9%	3,4%	4,5%
	RevPAR 2011	64 €	41 €	32 €
	Var. /n-1	13,4%	9,2%	5,8%
	<i>Year To Date performance</i>			
	January	5* - 4 *	3 *	2 *
	OR 2011	45,8%	47,1%	49,5%
	Var. /n-1	9,2%	5,6%	1,3%
	ADR 2011	139 €	88 €	65 €
	Var. /n-1	3,9%	3,4%	4,5%
	RevPAR 2011	64 €	41 €	32 €
	Var. /n-1	13,4%	9,2%	5,8%
French Riviera	<i>Monthly performance</i>			
	January	5* - 4 *	3 *	2 *
	OR 2011	38,0%	39,0%	n.d.
	Var. /n-1	8,9%	-3,5%	n.d.
	ADR 2011	162 €	78 €	n.d.
	Var. /n-1	-0,1%	0,2%	n.d.
	RevPAR 2011	61 €	30 €	n.d.
	Var. /n-1	8,8%	-3,3%	n.d.
	<i>Year To Date performance</i>			
	January	5* - 4 *	3 *	2 *
	OR 2011	38,0%	39,0%	n.d.
	Var. /n-1	8,9%	-3,5%	n.d.
	ADR 2011	162 €	78 €	n.d.
	Var. /n-1	-0,1%	0,2%	n.d.
	RevPAR 2011	61 €	30 €	n.d.
	Var. /n-1	8,8%	-3,3%	n.d.

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Performances Suburbs

January 2011



Paris suburbs (excluding Paris)

3 star market

Monthly performance

January	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2011	70,3%	54,9%	53,8%	53,0%	50,8%	68,8%	61,6%	58,5%
Var. /n-1	10,7%	7,5%	2,5%	-0,4%	2,9%	7,9%	-5,0%	2,6%
ADR 2011	94 €	115 €	99 €	114 €	80 €	87 €	105 €	102 €
Var. /n-1	1,7%	0,6%	2,5%	10,4%	5,8%	14,7%	8,3%	7,1%
RevPAR 2011	66 €	63 €	53 €	60 €	41 €	60 €	65 €	60 €
Var. /n-1	12,6%	8,1%	5,0%	10,0%	8,9%	23,8%	2,8%	9,9%

Year To Date performance

January	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2011	70,3%	54,9%	53,8%	53,0%	50,8%	68,8%	61,6%	58,5%
Var. /n-1	10,7%	7,5%	2,5%	-0,4%	2,9%	7,9%	-5,0%	2,6%
ADR 2011	94 €	115 €	99 €	114 €	80 €	87 €	105 €	102 €
Var. /n-1	1,7%	0,6%	2,5%	10,4%	5,8%	14,7%	8,3%	7,1%
RevPAR 2011	66 €	63 €	53 €	60 €	41 €	60 €	65 €	60 €
Var. /n-1	12,6%	8,1%	5,0%	10,0%	8,9%	23,8%	2,8%	9,9%

2 star market

Monthly performance

January	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2011	47,9%	55,6%	58,5%	59,9%	54,2%	69,2%	56,5%	56,3%
Var. /n-1	10,2%	-3,3%	1,3%	3,8%	3,2%	1,8%	-11,5%	-0,7%
ADR 2011	57 €	86 €	68 €	74 €	63 €	69 €	64 €	67 €
Var. /n-1	-0,9%	5,2%	5,9%	4,2%	0,4%	4,3%	9,6%	4,1%
RevPAR 2011	27 €	48 €	40 €	45 €	34 €	48 €	36 €	38 €
Var. /n-1	9,2%	1,7%	7,3%	8,2%	3,6%	6,2%	-3,0%	3,4%

Year To Date performance

January	départements							IDF (hors Paris)
	77	78	91	92	93	94	95	
OR 2011	47,9%	55,6%	58,5%	59,9%	54,2%	69,2%	56,5%	56,3%
Var. /n-1	10,2%	-3,3%	1,3%	3,8%	3,2%	1,8%	-11,5%	-0,7%
ADR 2011	57 €	86 €	68 €	74 €	63 €	69 €	64 €	67 €
Var. /n-1	-0,9%	5,2%	5,9%	4,2%	0,4%	4,3%	9,6%	4,1%
RevPAR 2011	27 €	48 €	40 €	45 €	34 €	48 €	36 €	38 €
Var. /n-1	9,2%	1,7%	7,3%	8,2%	3,6%	6,2%	-3,0%	3,4%

O/1 star market

Monthly performance

January	departments							IDF (hors Paris)
	77	78	91	92	93	94	95	
OR 2011	52,2%	66,9%	63,7%	n.d.	72,2%	73,7%	71,9%	67,3%
Var. /n-1	-12,0%	5,5%	3,4%	-	5,7%	-1,2%	8,2%	2,6%
ADR 2011	40 €	41 €	39 €	n.d.	41 €	43 €	42 €	42 €
Var. /n-1	12,1%	1,4%	4,7%	-	1,0%	5,0%	-1,5%	3,2%
RevPAR 2011	21 €	27 €	25 €	n.d.	30 €	32 €	30 €	28 €
Var. /n-1	-1,3%	6,9%	8,2%	-	6,7%	3,7%	6,6%	5,8%

Year To Date performance

January	departments							IDF (hors Paris)
	77	78	91	92	93	94	95	
OR 2011	52,2%	66,9%	63,7%	n.d.	72,2%	73,7%	71,9%	67,3%
Var. /n-1	-12,0%	5,5%	3,4%	-	5,7%	-1,2%	8,2%	2,6%
ADR 2011	40 €	41 €	39 €	n.d.	41 €	43 €	42 €	42 €
Var. /n-1	12,1%	1,4%	4,7%	-	1,0%	5,0%	-1,5%	3,2%
RevPAR 2011	21 €	27 €	25 €	n.d.	30 €	32 €	30 €	28 €
Var. /n-1	-1,3%	6,9%	8,2%	-	6,7%	3,7%	6,6%	5,8%

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Performances North-East

January 2011



North-east & Cities

	Monthly performance						Year To Date performance					
5/4-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 - 5*- 4*	46,4%	18,6%	129 €	3,9%	60 €	23,2%	46,4%	18,6%	129 €	3,9%	60 €	23,2%
Dijon	35,5%	-2,4%	119 €	3,2%	42 €	0,7%	35,5%	-2,4%	119 €	3,2%	42 €	0,7%
Lille	52,1%	23,3%	126 €	9,4%	66 €	34,9%	52,1%	23,3%	126 €	9,4%	66 €	34,9%
Metz	insufficient supply						insufficient supply					
Nancy	insufficient supply						insufficient supply					
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	51,0%	19,5%	121 €	-4,2%	62 €	14,5%	51,0%	19,5%	121 €	-4,2%	62 €	14,5%
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*	42,4%	5,2%	88 €	3,7%	37 €	9,1%	42,4%	5,2%	88 €	3,7%	37 €	9,1%
Dijon	41,5%	9,8%	78 €	-4,4%	32 €	4,9%	41,5%	9,8%	78 €	-4,4%	32 €	4,9%
Lille	62,0%	14,6%	96 €	9,7%	60 €	25,7%	62,0%	14,6%	96 €	9,7%	60 €	25,7%
Metz	in progress						in progress					
Nancy	43,3%	0,3%	81 €	4,4%	35 €	4,7%	43,3%	0,3%	81 €	4,4%	35 €	4,7%
Reims	42,6%	-0,8%	87 €	0,4%	37 €	-0,4%	42,6%	-0,8%	87 €	0,4%	37 €	-0,4%
Strasbourg	47,7%	1,6%	91 €	1,4%	44 €	3,1%	47,7%	1,6%	91 €	1,4%	44 €	3,1%
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*	48,7%	4,5%	64 €	4,3%	31 €	8,9%	48,7%	4,5%	64 €	4,3%	31 €	8,9%
Dijon	46,7%	-7,0%	61 €	3,8%	29 €	-3,5%	46,7%	-7,0%	61 €	3,8%	29 €	-3,5%
Lille	65,6%	18,4%	75 €	5,9%	49 €	25,3%	65,6%	18,4%	75 €	5,9%	49 €	25,3%
Metz	48,1%	1,4%	69 €	7,7%	33 €	9,2%	48,1%	1,4%	69 €	7,7%	33 €	9,2%
Nancy	46,2%	-1,7%	59 €	2,6%	27 €	0,9%	46,2%	-1,7%	59 €	2,6%	27 €	0,9%
Reims	42,7%	3,8%	65 €	4,6%	28 €	8,6%	42,7%	3,8%	65 €	4,6%	28 €	8,6%
Strasbourg	51,5%	11,6%	64 €	-3,8%	33 €	7,4%	51,5%	11,6%	64 €	-3,8%	33 €	7,4%
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	54,4%	7,3%	39 €	1,8%	21 €	9,2%	54,4%	7,3%	39 €	1,8%	21 €	9,2%
Dijon	62,3%	10,4%	39 €	7,7%	24 €	18,8%	62,3%	10,4%	39 €	7,7%	24 €	18,8%
Lille	62,3%	2,8%	38 €	0,7%	24 €	3,5%	62,3%	2,8%	38 €	0,7%	24 €	3,5%
Metz	59,1%	19,1%	37 €	-1,4%	22 €	17,4%	59,1%	19,1%	37 €	-1,4%	22 €	17,4%
Nancy	53,4%	8,4%	38 €	4,2%	20 €	13,0%	53,4%	8,4%	38 €	4,2%	20 €	13,0%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	47,7%	29,6%	39 €	6,5%	18 €	38,0%	47,7%	29,6%	39 €	6,5%	18 €	38,0%

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 2011



North-West & Cities

Monthly performance							Year To Date performance					
5/4-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 - 5* - 4*	51,2%	16,1%	148 €	0,0%	76 €	16,1%	51,2%	16,1%	148 €	0,0%	76 €	16,1%
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*	46,7%	11,8%	82 €	-1,7%	38 €	10,0%	46,7%	11,8%	82 €	-1,7%	38 €	10,0%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	62,2%	35,6%	96 €	-5,8%	60 €	27,7%	62,2%	35,6%	96 €	-5,8%	60 €	27,7%
Le Havre	41,6%	-22,6%	88 €	2,4%	36 €	-20,8%	41,6%	-22,6%	88 €	2,4%	36 €	-20,8%
Nantes	53,0%	-7,3%	86 €	0,4%	46 €	-6,8%	53,0%	-7,3%	86 €	0,4%	46 €	-6,8%
Rennes	53,5%	8,9%	87 €	4,8%	46 €	14,1%	53,5%	8,9%	87 €	4,8%	46 €	14,1%
Rouen	45,8%	9,0%	93 €	5,1%	43 €	14,5%	45,8%	9,0%	93 €	5,1%	43 €	14,5%
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*	48,3%	-2,2%	63 €	3,0%	31 €	0,7%	48,3%	-2,2%	63 €	3,0%	31 €	0,7%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	53,8%	7,0%	71 €	2,3%	38 €	9,4%	53,8%	7,0%	71 €	2,3%	38 €	9,4%
Le Havre	45,9%	-2,1%	59 €	1,7%	27 €	-0,5%	45,9%	-2,1%	59 €	1,7%	27 €	-0,5%
Nantes	54,7%	-9,4%	67 €	3,2%	37 €	-6,5%	54,7%	-9,4%	67 €	3,2%	37 €	-6,5%
Rennes	55,3%	-6,9%	67 €	4,0%	37 €	-3,2%	55,3%	-6,9%	67 €	4,0%	37 €	-3,2%
Rouen	47,8%	1,8%	63 €	12,6%	30 €	14,7%	47,8%	1,8%	63 €	12,6%	30 €	14,7%
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	53,6%	5,1%	39 €	1,2%	21 €	6,4%	53,6%	5,1%	39 €	1,2%	21 €	6,4%
Amiens	62,8%	6,7%	39 €	0,0%	25 €	6,8%	62,8%	6,7%	39 €	0,0%	25 €	6,8%
Angers	65,7%	11,8%	37 €	-1,9%	24 €	9,6%	65,7%	11,8%	37 €	-1,9%	24 €	9,6%
Le Havre	61,9%	35,0%	39 €	3,6%	24 €	39,9%	61,9%	35,0%	39 €	3,6%	24 €	39,9%
Nantes	60,1%	-3,5%	41 €	1,1%	25 €	-2,5%	60,1%	-3,5%	41 €	1,1%	25 €	-2,5%
Rennes	51,8%	1,8%	37 €	0,2%	19 €	2,0%	51,8%	1,8%	37 €	0,2%	19 €	2,0%
Rouen	58,2%	-5,3%	40 €	3,0%	23 €	-2,5%	58,2%	-5,3%	40 €	3,0%	23 €	-2,5%

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

January 2011



South-East (excl. French Riviera) & Cities

	Monthly performance						Year To Date performance					
5/4-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 - 5* - 4*	46,5%	4,7%	135 €	6,1%	63 €	11,1%	46,5%	4,7%	135 €	6,1%	63 €	11,1%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	36,9%	27,3%	105 €	-4,5%	39 €	21,5%	36,9%	27,3%	105 €	-4,5%	39 €	21,5%
Grenoble	insufficient supply						insufficient supply					
Lyon	63,1%	16,7%	139 €	21,2%	88 €	41,5%	63,1%	16,7%	139 €	21,2%	88 €	41,5%
Marseille	44,5%	-3,0%	130 €	-9,0%	58 €	-11,7%	44,5%	-3,0%	130 €	-9,0%	58 €	-11,7%
Montpellier	46,6%	-1,8%	125 €	1,5%	58 €	-0,3%	46,6%	-1,8%	125 €	1,5%	58 €	-0,3%
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*	52,2%	3,8%	92 €	5,6%	48 €	9,7%	52,2%	3,8%	92 €	5,6%	48 €	9,7%
Aix en Provence	45,8%	-10,2%	87 €	4,4%	40 €	-6,3%	45,8%	-10,2%	87 €	4,4%	40 €	-6,3%
Avignon	38,4%	6,0%	80 €	1,8%	31 €	7,8%	38,4%	6,0%	80 €	1,8%	31 €	7,8%
Grenoble	52,5%	-3,3%	104 €	4,5%	54 €	1,0%	52,5%	-3,3%	104 €	4,5%	54 €	1,0%
Lyon	61,8%	14,6%	114 €	18,9%	71 €	36,2%	61,8%	14,6%	114 €	18,9%	71 €	36,2%
Marseille	52,5%	-3,6%	96 €	-2,6%	50 €	-6,1%	52,5%	-3,6%	96 €	-2,6%	50 €	-6,1%
Montpellier	54,0%	10,6%	97 €	9,8%	52 €	21,4%	54,0%	10,6%	97 €	9,8%	52 €	21,4%
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*	53,9%	1,9%	66 €	5,7%	36 €	7,8%	53,9%	1,9%	66 €	5,7%	36 €	7,8%
Aix en Provence	40,5%	-18,9%	70 €	2,8%	28 €	-16,6%	40,5%	-18,9%	70 €	2,8%	28 €	-16,6%
Avignon	49,2%	21,4%	54 €	-7,4%	26 €	12,5%	49,2%	21,4%	54 €	-7,4%	26 €	12,5%
Grenoble	61,9%	-2,4%	66 €	3,6%	41 €	1,1%	61,9%	-2,4%	66 €	3,6%	41 €	1,1%
Lyon	66,1%	9,8%	78 €	14,4%	51 €	25,6%	66,1%	9,8%	78 €	14,4%	51 €	25,6%
Marseille	51,0%	-6,6%	68 €	-3,3%	35 €	-9,8%	51,0%	-6,6%	68 €	-3,3%	35 €	-9,8%
Montpellier	61,0%	1,5%	66 €	8,1%	40 €	9,7%	61,0%	1,5%	66 €	8,1%	40 €	9,7%
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	54,1%	6,0%	40 €	0,4%	21 €	6,4%	54,1%	6,0%	40 €	0,4%	21 €	6,4%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	55,1%	-4,7%	36 €	0,2%	20 €	-4,5%	55,1%	-4,7%	36 €	0,2%	20 €	-4,5%
Grenoble	71,6%	7,0%	40 €	-2,0%	29 €	4,9%	71,6%	7,0%	40 €	-2,0%	29 €	4,9%
Lyon	69,9%	18,4%	40 €	0,2%	28 €	18,7%	69,9%	18,4%	40 €	0,2%	28 €	18,7%
Marseille	61,2%	4,2%	40 €	-2,9%	24 €	1,2%	61,2%	4,2%	40 €	-2,9%	24 €	1,2%
Montpellier	65,0%	26,6%	37 €	0,2%	24 €	26,9%	65,0%	26,6%	37 €	0,2%	24 €	26,9%
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

January 2011



French Riviera

	Monthly performance						Year To Date performance					
January	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*	36,0%	12,0%	231 €	-4,1%	83 €	7,5%	36,0%	12,0%	231 €	-4,1%	83 €	7,5%
Boutique Hotel	38,5%	16,4%	99 €	-3,0%	38 €	12,8%	38,5%	16,4%	99 €	-3,0%	38 €	12,8%
Standard 5* - 4*	39,1%	7,1%	131 €	-1,0%	51 €	6,0%	39,1%	7,1%	131 €	-1,0%	51 €	6,0%
Average 5/4 star	38,0%	8,9%	162 €	-0,1%	61 €	8,8%	38,0%	8,9%	162 €	-0,1%	61 €	8,8%
Average 3 star	39,0%	-3,5%	78 €	0,2%	30 €	-3,3%	39,0%	-3,5%	78 €	0,2%	30 €	-3,3%

French Riviera Cities

January	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*	35,5%	15,8%	207 €	-7,7%	74 €	6,9%	35,5%	15,8%	207 €	-7,7%	74 €	6,9%
Cannes Boutique Hotels	32,4%	21,7%	111 €	-7,4%	36 €	12,7%	32,4%	21,7%	111 €	-7,4%	36 €	12,7%
Cannes Standard 5* - 4*	33,5%	13,4%	123 €	-9,0%	41 €	3,1%	33,5%	13,4%	123 €	-9,0%	41 €	3,1%
Cannes - 5* - 4*	34,5%	15,5%	169 €	-4,2%	58 €	10,6%	34,5%	15,5%	169 €	-4,2%	58 €	10,6%
Cannes - 3*	29,8%	2,9%	94 €	4,2%	28 €	7,2%	29,8%	2,9%	94 €	4,2%	28 €	7,2%

January	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
Nice - 5* - 4*	42,6%	2,7%	121 €	1,1%	52 €	3,8%	42,6%	2,7%	121 €	1,1%	52 €	3,8%
Nice - 3*	43,7%	-7,4%	76 €	0,3%	33 €	-7,2%	43,7%	-7,4%	76 €	0,3%	33 €	-7,2%

January	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
Monaco Superior 5* - 4*	31,2%	17,0%	341 €	-0,8%	106 €	16,0%	31,2%	17,0%	341 €	-0,8%	106 €	16,0%
Monaco Standard 5* - 4*	44,8%	13,4%	161 €	-1,1%	72 €	12,2%	44,8%	13,4%	161 €	-1,1%	72 €	12,2%
Monaco - 5* - 4*	39,6%	15,2%	215 €	-1,7%	85 €	13,3%	39,6%	15,2%	215 €	-1,7%	85 €	13,3%

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

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Performances South West

January 2011



South-West & Cities

	Monthly performance						Year To Date performance					
5/4-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-West - 5* - 4*	41,6%	4,2%	156 €	2,7%	65 €	7,1%	41,6%	4,2%	156 €	2,7%	65 €	7,1%
Bordeaux	29,9%	6,6%	160 €	3,8%	48 €	10,6%	29,9%	6,6%	160 €	3,8%	48 €	10,6%
Toulouse	58,3%	13,8%	122 €	-1,7%	71 €	11,8%	58,3%	13,8%	122 €	-1,7%	71 €	11,8%
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-West - 3*	46,5%	6,3%	88 €	3,1%	41 €	9,6%	46,5%	6,3%	88 €	3,1%	41 €	9,6%
Bordeaux	47,6%	6,0%	76 €	-3,6%	36 €	2,2%	47,6%	6,0%	76 €	-3,6%	36 €	2,2%
Toulouse	56,1%	7,4%	97 €	-0,9%	54 €	6,5%	56,1%	7,4%	97 €	-0,9%	54 €	6,5%
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
South-West - 2*	44,6%	-0,3%	66 €	4,3%	29 €	4,0%	44,6%	-0,3%	66 €	4,3%	29 €	4,0%
Bordeaux	49,3%	-7,2%	70 €	5,5%	34 €	-2,1%	49,3%	-7,2%	70 €	5,5%	34 €	-2,1%
Toulouse	51,2%	6,4%	72 €	1,2%	37 €	7,7%	51,2%	6,4%	72 €	1,2%	37 €	7,7%
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-West - 0/1 star	51,0%	5,2%	38 €	0,8%	19 €	6,1%	51,0%	5,2%	38 €	0,8%	19 €	6,1%
Bordeaux	56,9%	10,5%	36 €	-1,2%	21 €	9,2%	56,9%	10,5%	36 €	-1,2%	21 €	9,2%
Toulouse	61,9%	6,4%	39 €	-1,3%	24 €	5,1%	61,9%	6,4%	39 €	-1,3%	24 €	5,1%

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

January 2011



Main cities in Regions – 5/4* and 3*

	Monthly performance						Year To Date performance					
5/4-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
Avignon	36,9%	27,3%	105 €	-4,5%	39 €	21,5%	36,9%	27,3%	105 €	-4,5%	39 €	21,5%
Bordeaux	29,9%	6,6%	160 €	3,8%	48 €	10,6%	29,9%	6,6%	160 €	3,8%	48 €	10,6%
Cannes	34,5%	15,5%	169 €	-4,2%	58 €	10,6%	34,5%	15,5%	169 €	-4,2%	58 €	10,6%
Lille	52,1%	23,3%	126 €	9,4%	66 €	34,9%	52,1%	23,3%	126 €	9,4%	66 €	34,9%
Lyon	63,1%	16,7%	139 €	21,2%	88 €	41,5%	63,1%	16,7%	139 €	21,2%	88 €	41,5%
Marseille	44,5%	-3,0%	130 €	-9,0%	58 €	-11,7%	44,5%	-3,0%	130 €	-9,0%	58 €	-11,7%
Monaco	39,6%	15,2%	215 €	-1,7%	85 €	13,3%	39,6%	15,2%	215 €	-1,7%	85 €	13,3%
Montpellier	46,6%	-1,8%	125 €	1,5%	58 €	-0,3%	46,6%	-1,8%	125 €	1,5%	58 €	-0,3%
Nice	42,6%	2,7%	121 €	1,1%	52 €	3,8%	42,6%	2,7%	121 €	1,1%	52 €	3,8%
Strasbourg	51,0%	19,5%	121 €	-4,2%	62 €	14,5%	51,0%	19,5%	121 €	-4,2%	62 €	14,5%
Toulouse	58,3%	13,8%	122 €	-1,7%	71 €	11,8%	58,3%	13,8%	122 €	-1,7%	71 €	11,8%

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
Aix en Provence	45,8%	-10,2%	87 €	4,4%	40 €	-6,3%	45,8%	-10,2%	87 €	4,4%	40 €	-6,3%
Angers	62,2%	35,6%	96 €	-5,8%	60 €	27,7%	62,2%	35,6%	96 €	-5,8%	60 €	27,7%
Avignon	38,4%	6,0%	80 €	1,8%	31 €	7,8%	38,4%	6,0%	80 €	1,8%	31 €	7,8%
Bordeaux	47,6%	6,0%	76 €	-3,6%	36 €	2,2%	47,6%	6,0%	76 €	-3,6%	36 €	2,2%
Cannes	29,8%	2,9%	94 €	4,2%	28 €	7,2%	29,8%	2,9%	94 €	4,2%	28 €	7,2%
Grenoble	52,5%	-3,3%	104 €	4,5%	54 €	1,0%	52,5%	-3,3%	104 €	4,5%	54 €	1,0%
Lille	62,0%	14,6%	96 €	9,7%	60 €	25,7%	62,0%	14,6%	96 €	9,7%	60 €	25,7%
Lyon	61,8%	14,6%	114 €	18,9%	71 €	36,2%	61,8%	14,6%	114 €	18,9%	71 €	36,2%
Marseille	52,5%	-3,6%	96 €	-2,6%	50 €	-6,1%	52,5%	-3,6%	96 €	-2,6%	50 €	-6,1%
Montpellier	54,0%	10,6%	97 €	9,8%	52 €	21,4%	54,0%	10,6%	97 €	9,8%	52 €	21,4%
Nancy	43,3%	0,3%	81 €	4,4%	35 €	4,7%	43,3%	0,3%	81 €	4,4%	35 €	4,7%
Nantes	53,0%	-7,3%	86 €	0,4%	46 €	-6,8%	53,0%	-7,3%	86 €	0,4%	46 €	-6,8%
Nice	43,7%	-7,4%	76 €	0,3%	33 €	-7,2%	43,7%	-7,4%	76 €	0,3%	33 €	-7,2%
Reims	42,6%	-0,8%	87 €	0,4%	37 €	-0,4%	42,6%	-0,8%	87 €	0,4%	37 €	-0,4%
Rennes	53,5%	8,9%	87 €	4,8%	46 €	14,1%	53,5%	8,9%	87 €	4,8%	46 €	14,1%
Rouen	45,8%	9,0%	93 €	5,1%	43 €	14,5%	45,8%	9,0%	93 €	5,1%	43 €	14,5%
Strasbourg	47,7%	1,6%	91 €	1,4%	44 €	3,1%	47,7%	1,6%	91 €	1,4%	44 €	3,1%
Toulouse	56,1%	7,4%	97 €	-0,9%	54 €	6,5%	56,1%	7,4%	97 €	-0,9%	54 €	6,5%

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Performances Main cities in Regions

January 2011



Main cities in regions – 2* and 0/1*

	Monthly performance						Year To Date performance					
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
Aix en Provence	40,5%	-18,9%	70 €	2,8%	28 €	-16,6%	40,5%	-18,9%	70 €	2,8%	28 €	-16,6%
Angers	53,8%	7,0%	71 €	2,3%	38 €	9,4%	53,8%	7,0%	71 €	2,3%	38 €	9,4%
Avignon	49,2%	21,4%	54 €	-7,4%	26 €	12,5%	49,2%	21,4%	54 €	-7,4%	26 €	12,5%
Bordeaux	49,3%	-7,2%	70 €	5,5%	34 €	-2,1%	49,3%	-7,2%	70 €	5,5%	34 €	-2,1%
Grenoble	61,9%	-2,4%	66 €	3,6%	41 €	1,1%	61,9%	-2,4%	66 €	3,6%	41 €	1,1%
Lille	65,6%	18,4%	75 €	5,9%	49 €	25,3%	65,6%	18,4%	75 €	5,9%	49 €	25,3%
Lyon	66,1%	9,8%	78 €	14,4%	51 €	25,6%	66,1%	9,8%	78 €	14,4%	51 €	25,6%
Marseille	51,0%	-6,6%	68 €	-3,3%	35 €	-9,8%	51,0%	-6,6%	68 €	-3,3%	35 €	-9,8%
Metz	48,1%	1,4%	69 €	7,7%	33 €	9,2%	48,1%	1,4%	69 €	7,7%	33 €	9,2%
Montpellier	61,0%	1,5%	66 €	8,1%	40 €	9,7%	61,0%	1,5%	66 €	8,1%	40 €	9,7%
Nancy	46,2%	-1,7%	59 €	2,6%	27 €	0,9%	46,2%	-1,7%	59 €	2,6%	27 €	0,9%
Nantes	54,7%	-9,4%	67 €	3,2%	37 €	-6,5%	54,7%	-9,4%	67 €	3,2%	37 €	-6,5%
Reims	42,7%	3,8%	65 €	4,6%	28 €	8,6%	42,7%	3,8%	65 €	4,6%	28 €	8,6%
Rennes	55,3%	-6,9%	67 €	4,0%	37 €	-3,2%	55,3%	-6,9%	67 €	4,0%	37 €	-3,2%
Rouen	47,8%	1,8%	63 €	12,6%	30 €	14,7%	47,8%	1,8%	63 €	12,6%	30 €	14,7%
Strasbourg	51,5%	11,6%	64 €	-3,8%	33 €	7,4%	51,5%	11,6%	64 €	-3,8%	33 €	7,4%
Toulouse	51,2%	6,4%	72 €	1,2%	37 €	7,7%	51,2%	6,4%	72 €	1,2%	37 €	7,7%

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
Amiens	62,8%	6,7%	39 €	0,0%	25 €	6,8%	62,8%	6,7%	39 €	0,0%	25 €	6,8%
Angers	65,7%	11,8%	37 €	-1,9%	24 €	9,6%	65,7%	11,8%	37 €	-1,9%	24 €	9,6%
Avignon	55,1%	-4,7%	36 €	0,2%	20 €	-4,5%	55,1%	-4,7%	36 €	0,2%	20 €	-4,5%
Bordeaux	56,9%	10,5%	36 €	-1,2%	21 €	9,2%	56,9%	10,5%	36 €	-1,2%	21 €	9,2%
Grenoble	71,6%	7,0%	40 €	-2,0%	29 €	4,9%	71,6%	7,0%	40 €	-2,0%	29 €	4,9%
Lille	62,3%	2,8%	38 €	0,7%	24 €	3,5%	62,3%	2,8%	38 €	0,7%	24 €	3,5%
Lyon	69,9%	18,4%	40 €	0,2%	28 €	18,7%	69,9%	18,4%	40 €	0,2%	28 €	18,7%
Marseille	61,2%	4,2%	40 €	-2,9%	24 €	1,2%	61,2%	4,2%	40 €	-2,9%	24 €	1,2%
Metz	59,1%	19,1%	37 €	-1,4%	22 €	17,4%	59,1%	19,1%	37 €	-1,4%	22 €	17,4%
Montpellier	65,0%	26,6%	37 €	0,2%	24 €	26,9%	65,0%	26,6%	37 €	0,2%	24 €	26,9%
Nancy	53,4%	8,4%	38 €	4,2%	20 €	13,0%	53,4%	8,4%	38 €	4,2%	20 €	13,0%
Nantes	60,1%	-3,5%	41 €	1,1%	25 €	-2,5%	60,1%	-3,5%	41 €	1,1%	25 €	-2,5%
Rennes	51,8%	1,8%	37 €	0,2%	19 €	2,0%	51,8%	1,8%	37 €	0,2%	19 €	2,0%
Rouen	58,2%	-5,3%	40 €	3,0%	23 €	-2,5%	58,2%	-5,3%	40 €	3,0%	23 €	-2,5%
Strasbourg	47,7%	29,6%	39 €	6,5%	18 €	38,0%	47,7%	29,6%	39 €	6,5%	18 €	38,0%
Toulouse	61,9%	6,4%	39 €	-1,3%	24 €	5,1%	61,9%	6,4%	39 €	-1,3%	24 €	5,1%

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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, Hospitality & Leisure Desk

Deloitte is one of the leading advisors in Tourism, Hospitality and leisure 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
- 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)	- 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).	- 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	- 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	- 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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