



French Hotel Industry Performances



February 2011

Growth is confirmed

The growth observed in January was confirmed in February. Business destinations, particularly in regional France, benefitted from the staggering of winter school holidays, unlike in 2010. In 2011, school holiday periods in regional France fell in February and March, rather than purely in February, as was the case last year. Given this, business guests were more present in February of this year.

Furthermore, although Paris was already recovering in February 2010, hotel performances in regional France were still down. Consequently, regional hotels have more room for improvement than Parisian hotels. Regional hotels (outside the Côte d'Azur) thus posted higher growth than those in the Paris area – up +5% in the 2 star segment and +17% in the upscale category. This was particularly the case for major cities, as witnessed by the double-digit growth recorded in Avignon, Lyon, Toulouse, Nantes, Rennes, Rouen and Metz, for instance.

French market

Monthly performance

February	5* - 4 *	3 *	2 *
OR 2011	52,6%	55,8%	56,9%
Var. /n-1	5,6%	4,4%	1,2%
ADR 2011	195 €	93 €	64 €
Var. /n-1	3,8%	3,4%	4,0%
RevPAR 2011	102 €	52 €	37 €
Var. /n-1	9,6%	7,9%	5,3%

Year To Date performance

February	5* - 4 *	3 *	2 *
OR 2011	53,7%	54,3%	54,4%
Var. /n-1	4,9%	4,0%	0,7%
ADR 2011	201 €	95 €	65 €
Var. /n-1	3,8%	4,1%	4,3%
RevPAR 2011	108 €	52 €	35 €
Var. /n-1	8,9%	8,2%	5,0%

Definitions

OR = Occupancy Rate

ADR = Average Daily Rate

RevPAR = Revenue per available room

In Paris, the performance of 4 star superior hotels was particularly notable, since they recorded the highest growth of all segments. The arrival of two new market entrants did not impact the dynamism of the segment, although it still has a long way to go before repeating 2008's (the 'reference year') performances, given the huge drop recorded in 2009 (-40%).

In Ile-de-France, it was a mixed bag: Seine Saint Denis and Val d'Oise stood the course, although hotels in the Seine et Marne experienced a sharp drop in rooms revenue.

Regional hotels saw solid improvement, with the more upscale hotels recording the highest increases. RevPAR in 4 and 5 star hotels grew by over 17%, compared to last year.

This trend was doubly apparent in major cities, whose growth was even more spectacular: +30% for 4 star hotels in Lyon and 3 star hotels in Nantes, for instance.

However, a number of isolated drops in various towns were recorded. That said, these were rare, did not touch all categories in the same town and tended to be more accidental than representative of a trend.

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Performances Paris

February 2011



Paris-City

Monthly performance

February	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris Superior 5* - 4*	60,7%	4,1%	526 €	10,2%	319 €	14,6%
Paris Boutique Hotels	61,4%	4,4%	263 €	3,2%	162 €	7,7%
Paris Standard 5* - 4*	60,9%	0,3%	163 €	3,6%	99 €	4,0%
Paris average - 5* - 4 *	60,9%	1,3%	240 €	7,1%	146 €	8,5%
Paris Superior 3*	71,2%	4,1%	132 €	0,5%	94 €	4,7%
Paris Standard 3*	70,1%	2,8%	93 €	1,4%	65 €	4,3%
Paris - 3*	70,4%	3,2%	104 €	1,5%	73 €	4,8%
Paris - 2*	75,2%	-2,8%	71 €	2,4%	53 €	-0,5%

Year To Date performance

February	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris Superior 5* - 4*	61,7%	1,8%	524 €	7,3%	323 €	9,3%
Paris Boutique Hotels	64,5%	4,4%	271 €	2,2%	175 €	6,7%
Paris Standard 5* - 4*	64,4%	2,1%	171 €	5,0%	110 €	7,3%
Paris average - 5* - 4 *	63,9%	2,2%	245 €	5,9%	156 €	8,2%
Paris Superior 3*	73,8%	5,2%	136 €	1,9%	101 €	7,2%
Paris Standard 3*	70,5%	3,6%	97 €	3,7%	68 €	7,5%
Paris - 3*	71,4%	4,1%	108 €	3,3%	77 €	7,5%
Paris - 2*	75,6%	0,9%	73 €	2,6%	55 €	3,6%

Paris suburbs (excluding Paris)

Monthly performance

February	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris - 5* - 4*	60,9%	1,3%	240 €	7,1%	146 €	8,5%
La Défense - 5* - 4*	n.d.	-	n.d.	-	n.d.	-
Roissy CdG - 5* - 4*	64,3%	3,7%	104 €	3,2%	67 €	7,0%
Paris suburbs* - 5* - 4*	66,6%	5,2%	183 €	-1,0%	122 €	4,2%

Year To Date performance

February	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris - 5* - 4*	63,9%	2,2%	245 €	5,9%	156 €	8,2%
La Défense - 5* - 4*	n.d.	-	n.d.	-	n.d.	-
Roissy CdG - 5* - 4*	64,5%	-1,1%	109 €	5,8%	70 €	4,6%
Paris suburbs* - 5* - 4*	65,8%	4,9%	177 €	0,6%	117 €	5,6%

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Performance Regions

February 2011



Regions

		<i>Monthly performance</i>				
		<i>February</i>	5* - 4 *	3 *	2 *	
Regions (excl. French Riviera)	OR 2011		47,5%	52,1%	54,6%	
	<i>Var. /n-1</i>		11,7%	7,6%	2,7%	
	ADR 2011		139 €	87 €	64 €	
	<i>Var. /n-1</i>		4,9%	2,6%	2,7%	
	RevPAR 2011		66 €	45 €	35 €	
	<i>Var. /n-1</i>		17,2%	10,5%	5,4%	
	<i>Year To Date performance</i>					
			<i>February</i>	5* - 4 *	3 *	2 *
	OR 2011		46,6%	49,5%	51,9%	
	<i>Var. /n-1</i>		10,4%	6,6%	1,9%	
ADR 2011		139 €	88 €	64 €		
<i>Var. /n-1</i>		4,4%	3,2%	3,6%		
RevPAR 2011		65 €	43 €	33 €		
<i>Var. /n-1</i>		15,2%	10,0%	5,5%		
		<i>Monthly performance</i>				
		<i>February</i>	5* - 4 *	3 *	2 *	
French Riviera	OR 2011		34,6%	48,4%	n.d.	
	<i>Var. /n-1</i>		2,0%	-1,4%	n.d.	
	ADR 2011		136 €	74 €	n.d.	
	<i>Var. /n-1</i>		0,1%	5,0%	n.d.	
	RevPAR 2011		47 €	36 €	n.d.	
	<i>Var. /n-1</i>		2,0%	3,6%	n.d.	
	<i>Year To Date performance</i>					
			<i>February</i>	5* - 4 *	3 *	2 *
	OR 2011		36,4%	43,5%	n.d.	
	<i>Var. /n-1</i>		5,7%	-2,4%	n.d.	
ADR 2011		150 €	76 €	n.d.		
<i>Var. /n-1</i>		0,4%	2,4%	n.d.		
RevPAR 2011		55 €	33 €	n.d.		
<i>Var. /n-1</i>		6,2%	0,0%	n.d.		

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Performances Suburbs

February 2011



Paris suburbs (excluding Paris)

3 star market	Monthly performance								Average suburbs
	February	departments						95	
		77	78	91	92	93	94		
OR 2011	67,6%	57,7%	49,2%	52,7%	55,2%	59,8%	63,0%	57,4%	
Var. /n-1	-2,0%	4,5%	5,4%	-3,8%	8,6%	-5,0%	1,9%	-0,1%	
ADR 2011	105 €	109 €	94 €	110 €	80 €	80 €	102 €	101 €	
Var. /n-1	1,8%	-1,7%	2,4%	7,5%	13,4%	8,1%	12,1%	5,9%	
RevPAR 2011	71 €	63 €	46 €	58 €	44 €	48 €	64 €	58 €	
Var. /n-1	-0,3%	2,7%	7,9%	3,4%	23,2%	2,6%	14,1%	5,7%	
3 star market	Year To Date performance								Average suburbs
	February	departments						95	
		77	78	91	92	93	94		
OR 2011	69,0%	56,2%	51,6%	52,9%	52,9%	62,6%	62,3%	57,9%	
Var. /n-1	4,4%	6,0%	3,8%	-2,0%	2,6%	-1,3%	-1,8%	0,7%	
ADR 2011	99 €	112 €	97 €	112 €	80 €	83 €	104 €	101 €	
Var. /n-1	1,4%	-0,5%	2,4%	9,0%	8,4%	11,0%	9,9%	6,2%	
RevPAR 2011	68 €	63 €	50 €	59 €	42 €	52 €	64 €	59 €	
Var. /n-1	5,8%	5,5%	6,3%	6,8%	11,2%	9,5%	7,9%	6,9%	
2 star market	Monthly performance								Average suburbs
	February	departments						95	
		77	78	91	92	93	94		
OR 2011	52,0%	56,0%	58,4%	55,9%	60,9%	65,8%	59,3%	58,3%	
Var. /n-1	-6,8%	-6,9%	3,2%	-1,6%	10,6%	-6,9%	-1,4%	-1,0%	
ADR 2011	58 €	86 €	66 €	75 €	61 €	69 €	66 €	67 €	
Var. /n-1	3,3%	5,4%	0,7%	4,0%	7,3%	3,3%	22,5%	7,8%	
RevPAR 2011	30 €	48 €	39 €	42 €	37 €	46 €	39 €	39 €	
Var. /n-1	-3,7%	-1,9%	3,9%	2,3%	18,6%	-3,8%	20,8%	6,7%	
2 star market	Year To Date performance								IDF (hors Paris)
	February	départements						95	
		77	78	91	92	93	94		
OR 2011	49,8%	55,8%	58,4%	58,0%	57,3%	67,6%	57,8%	57,2%	
Var. /n-1	1,1%	-5,1%	2,2%	1,3%	6,8%	-2,4%	-6,9%	-0,8%	
ADR 2011	57 €	86 €	67 €	74 €	62 €	69 €	65 €	67 €	
Var. /n-1	1,3%	5,3%	3,4%	4,1%	3,5%	3,8%	15,3%	5,9%	
RevPAR 2011	29 €	48 €	39 €	43 €	36 €	47 €	38 €	38 €	
Var. /n-1	2,3%	0,0%	5,7%	5,4%	10,5%	1,3%	7,3%	5,0%	
0/1 star market	Monthly performance								IDF (hors Paris)
	February	departments						95	
		77	78	91	92	93	94		
OR 2011	56,8%	72,2%	65,2%	n.d.	75,4%	76,7%	71,7%	69,9%	
Var. /n-1	-17,6%	-0,2%	0,1%	-	8,7%	-4,8%	10,8%	0,0%	
ADR 2011	40 €	42 €	39 €	n.d.	41 €	44 €	42 €	43 €	
Var. /n-1	7,2%	4,4%	5,8%	-	5,0%	4,7%	5,8%	5,8%	
RevPAR 2011	23 €	30 €	26 €	n.d.	31 €	34 €	30 €	30 €	
Var. /n-1	-11,6%	4,2%	5,9%	-	14,1%	-0,3%	17,2%	5,7%	
0/1 star market	Year To Date performance								IDF (hors Paris)
	February	departments						95	
		77	78	91	92	93	94		
OR 2011	54,4%	71,1%	64,4%	n.d.	73,7%	75,1%	71,8%	68,7%	
Var. /n-1	-14,8%	3,6%	1,8%	-	7,1%	-3,0%	9,4%	1,4%	
ADR 2011	40 €	42 €	39 €	n.d.	41 €	44 €	42 €	42 €	
Var. /n-1	9,6%	2,8%	5,2%	-	2,9%	4,9%	1,8%	4,4%	
RevPAR 2011	22 €	30 €	25 €	n.d.	30 €	33 €	30 €	29 €	
Var. /n-1	-6,7%	6,5%	7,1%	-	10,2%	1,7%	11,4%	5,9%	

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Performances North-East

February 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*	45,1%	11,7%	119 €	-2,8%	54 €	8,6%	45,8%	15,2%	124 €	0,7%	57 €	16,0%
Dijon	42,3%	2,2%	111 €	3,0%	47 €	5,3%	38,9%	0,5%	115 €	2,8%	45 €	3,3%
Lille	50,7%	9,5%	112 €	0,4%	57 €	9,9%	51,4%	16,5%	120 €	5,4%	62 €	22,7%
Metz	insufficient supply						insufficient supply					
Nancy	insufficient supply						insufficient supply					
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	47,2%	10,2%	114 €	-1,8%	54 €	8,3%	49,2%	15,1%	118 €	-3,0%	58 €	11,7%

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*	47,0%	2,0%	85 €	2,1%	40 €	4,2%	44,6%	3,6%	87 €	2,9%	39 €	6,6%
Dijon	48,2%	-15,8%	80 €	3,3%	39 €	-13,1%	44,7%	-4,8%	79 €	-0,3%	35 €	-5,1%
Lille	62,0%	0,1%	86 €	2,9%	54 €	3,0%	62,0%	7,2%	92 €	6,7%	57 €	14,5%
Metz	in progress						in progress					
Nancy	49,3%	7,5%	83 €	6,8%	41 €	14,8%	46,1%	3,9%	82 €	5,6%	38 €	9,7%
Reims	47,6%	-0,4%	85 €	-3,0%	40 €	-3,4%	44,9%	-0,6%	86 €	-1,3%	39 €	-1,9%
Strasbourg	51,6%	7,8%	93 €	4,2%	48 €	12,3%	49,4%	4,3%	92 €	2,7%	45 €	7,2%

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*	53,3%	2,4%	63 €	2,7%	33 €	5,2%	50,9%	3,4%	63 €	3,5%	32 €	7,0%
Dijon	56,0%	-12,2%	61 €	5,1%	34 €	-7,7%	51,1%	-7,5%	61 €	4,3%	31 €	-3,6%
Lille	61,6%	-0,3%	73 €	4,8%	45 €	4,4%	63,7%	8,9%	74 €	5,4%	47 €	14,9%
Metz	56,3%	7,8%	69 €	6,5%	39 €	14,8%	52,0%	4,6%	69 €	7,1%	36 €	12,0%
Nancy	46,0%	-7,0%	59 €	3,2%	27 €	-4,0%	46,2%	-4,3%	59 €	2,9%	27 €	-1,5%
Reims	51,2%	3,1%	62 €	0,5%	32 €	3,6%	46,7%	3,4%	63 €	2,4%	30 €	6,0%
Strasbourg	52,9%	4,0%	65 €	2,7%	34 €	6,8%	52,2%	7,8%	64 €	-0,7%	34 €	7,1%

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	59,9%	-0,1%	39 €	2,8%	23 €	2,8%	57,0%	3,6%	39 €	2,3%	22 €	6,0%
Dijon	71,9%	6,4%	38 €	7,0%	28 €	13,9%	66,9%	8,3%	39 €	7,4%	26 €	16,3%
Lille	65,1%	-3,2%	38 €	3,4%	25 €	0,0%	63,6%	-0,2%	38 €	2,0%	24 €	1,8%
Metz	74,1%	20,5%	37 €	1,4%	27 €	22,2%	66,3%	19,8%	37 €	0,1%	24 €	19,9%
Nancy	54,9%	-4,9%	37 €	6,0%	21 €	0,8%	52,7%	0,3%	37 €	5,6%	20 €	5,9%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	53,9%	18,9%	38 €	7,7%	21 €	28,1%	50,7%	24,0%	38 €	7,1%	19 €	32,8%

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

February 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*	55,8%	5,2%	174 €	8,5%	97 €	14,1%	53,7%	10,8%	162 €	5,1%	87 €	16,5%
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*	51,6%	16,2%	85 €	1,3%	44 €	17,8%	49,1%	14,0%	83 €	-0,2%	41 €	13,9%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	55,0%	19,6%	100 €	-12,5%	55 €	4,7%	58,8%	28,0%	98 €	-9,3%	57 €	16,2%
Le Havre	52,7%	2,5%	91 €	5,6%	48 €	8,2%	46,9%	-11,0%	89 €	4,2%	42 €	-7,3%
Nantes	65,1%	33,4%	88 €	3,2%	57 €	37,6%	58,8%	10,4%	87 €	1,8%	51 €	12,4%
Rennes	60,5%	12,3%	87 €	5,5%	53 €	18,5%	56,9%	10,7%	87 €	5,2%	49 €	16,4%
Rouen	48,1%	7,6%	94 €	2,8%	45 €	10,6%	46,9%	8,3%	94 €	3,9%	44 €	12,6%
2-star	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
North-West - 2*	53,4%	5,7%	63 €	1,5%	34 €	7,3%	50,7%	1,5%	63 €	2,3%	32 €	3,8%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	54,7%	2,9%	72 €	0,1%	39 €	3,0%	54,2%	4,9%	71 €	1,0%	39 €	6,0%
Le Havre	54,2%	9,1%	54 €	-5,4%	29 €	3,2%	49,8%	3,2%	56 €	-1,9%	28 €	1,2%
Nantes	65,9%	17,8%	69 €	5,5%	45 €	24,3%	60,0%	2,9%	68 €	4,4%	41 €	7,4%
Rennes	62,8%	10,5%	66 €	4,9%	42 €	15,9%	58,9%	1,3%	67 €	4,4%	39 €	5,7%
Rouen	53,6%	7,4%	62 €	6,4%	33 €	14,3%	50,5%	4,4%	62 €	9,4%	32 €	14,2%
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	60,8%	2,8%	39 €	1,6%	24 €	4,4%	57,0%	3,9%	39 €	1,4%	22 €	5,4%
Amiens	70,2%	4,7%	40 €	0,7%	28 €	5,4%	66,3%	5,7%	40 €	0,3%	26 €	6,0%
Angers	64,0%	0,7%	36 €	1,2%	23 €	2,0%	64,9%	6,3%	37 €	-0,4%	24 €	5,9%
Le Havre	72,7%	23,6%	40 €	7,4%	29 €	32,7%	67,0%	28,8%	39 €	5,6%	26 €	36,0%
Nantes	68,0%	9,6%	41 €	1,9%	28 €	11,6%	63,9%	2,7%	41 €	1,4%	26 €	4,2%
Rennes	54,9%	-1,9%	37 €	0,4%	20 €	-1,5%	53,3%	-0,1%	37 €	0,3%	20 €	0,2%
Rouen	61,6%	-4,1%	40 €	6,2%	25 €	1,9%	59,8%	-4,7%	40 €	4,5%	24 €	-0,4%

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

February 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*	49,4%	13,2%	133 €	5,1%	66 €	19,0%	47,9%	8,7%	134 €	5,6%	64 €	14,8%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	34,6%	17,5%	101 €	4,5%	35 €	22,7%	35,8%	22,7%	103 €	-1,3%	37 €	21,2%
Grenoble	insufficient supply						insufficient supply					
Lyon	65,0%	25,5%	122 €	10,8%	79 €	39,0%	64,0%	20,8%	131 €	16,2%	84 €	40,3%
Marseille	43,6%	21,1%	126 €	4,0%	55 €	25,9%	44,1%	7,0%	128 €	-4,3%	56 €	2,4%
Montpellier	53,8%	-1,1%	134 €	-1,9%	72 €	-3,1%	50,0%	-1,5%	130 €	-0,3%	65 €	-1,8%
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*	58,6%	9,7%	90 €	3,2%	52 €	13,2%	55,2%	6,7%	91 €	4,4%	50 €	11,4%
Aix en Provence	53,2%	-5,2%	87 €	4,5%	46 €	-1,0%	49,3%	-7,7%	87 €	4,4%	43 €	-3,7%
Avignon	46,9%	20,7%	77 €	-2,8%	36 €	17,4%	42,4%	13,2%	79 €	-0,6%	33 €	12,5%
Grenoble	63,2%	7,8%	102 €	5,0%	65 €	13,2%	57,8%	2,4%	103 €	4,7%	59 €	7,2%
Lyon	68,1%	20,5%	102 €	6,3%	69 €	28,1%	64,8%	17,4%	108 €	12,6%	70 €	32,2%
Marseille	59,4%	5,8%	92 €	1,6%	54 €	7,5%	55,8%	0,9%	94 €	-0,8%	52 €	0,1%
Montpellier	62,1%	11,0%	93 €	0,8%	57 €	11,9%	57,9%	11,0%	95 €	5,2%	55 €	16,7%
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*	59,3%	1,9%	66 €	4,1%	39 €	6,1%	56,5%	1,8%	66 €	4,9%	37 €	6,8%
Aix en Provence	54,5%	6,5%	67 €	-3,2%	36 €	3,1%	47,2%	-6,7%	68 €	-0,5%	32 €	-7,1%
Avignon	43,4%	18,6%	54 €	-1,0%	23 €	17,5%	46,2%	20,0%	54 €	-4,4%	25 €	14,7%
Grenoble	66,1%	-5,0%	70 €	6,5%	46 €	1,2%	63,8%	-3,9%	68 €	4,9%	43 €	0,8%
Lyon	70,0%	6,6%	74 €	7,4%	52 €	14,5%	68,5%	7,8%	76 €	11,3%	52 €	20,1%
Marseille	55,5%	-1,1%	69 €	-0,4%	39 €	-1,5%	53,1%	-4,0%	69 €	-1,9%	37 €	-5,8%
Montpellier	66,0%	-2,4%	67 €	5,8%	44 €	3,3%	63,4%	-0,4%	67 €	6,9%	42 €	6,5%
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	60,4%	0,5%	40 €	1,4%	24 €	1,9%	57,1%	3,1%	40 €	1,0%	23 €	4,1%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	58,5%	0,9%	35 €	2,1%	21 €	3,1%	56,7%	-2,0%	36 €	1,1%	20 €	-1,0%
Grenoble	76,3%	-6,0%	41 €	-0,4%	32 €	-6,4%	73,8%	0,2%	41 €	-1,2%	30 €	-1,0%
Lyon	74,3%	8,4%	40 €	1,5%	29 €	10,1%	72,0%	13,3%	40 €	0,9%	29 €	14,3%
Marseille	67,1%	5,6%	40 €	-2,2%	27 €	3,2%	64,0%	4,9%	40 €	-2,5%	26 €	2,2%
Montpellier	70,3%	9,6%	37 €	-0,3%	26 €	9,3%	67,5%	17,6%	37 €	-0,1%	25 €	17,5%
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

February 2011



French Riviera

February	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*	32,7%	3,2%	183 €	0,4%	60 €	3,6%	34,5%	8,0%	209 €	-0,9%	72 €	7,0%
Boutique Hotel	44,0%	16,1%	88 €	-5,0%	39 €	10,3%	39,7%	12,3%	95 €	-2,4%	38 €	9,6%
Standard 5* - 4*	34,4%	-1,0%	118 €	1,0%	41 €	0,0%	37,1%	3,9%	126 €	0,0%	47 €	3,9%
Average 5/4 star	34,6%	2,0%	136 €	0,1%	47 €	2,0%	36,4%	5,7%	150 €	0,4%	55 €	6,2%
Average 3 star	48,4%	-1,4%	74 €	5,0%	36 €	3,6%	43,5%	-2,4%	76 €	2,4%	33 €	0,0%

French Riviera Cities

February	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*	29,2%	-6,3%	153 €	3,6%	45 €	-2,9%	32,8%	6,0%	186 €	0,2%	61 €	6,2%
Cannes Boutique Hotels	32,4%	1,5%	110 €	-17,6%	36 €	-16,4%	32,4%	11,0%	111 €	-13,0%	36 €	-3,4%
Cannes Standard 5* - 4*	24,6%	24,3%	98 €	11,9%	24 €	39,0%	29,2%	17,0%	113 €	-3,9%	33 €	12,5%
Cannes - 5* - 4*	27,3%	5,1%	128 €	1,8%	35 €	7,0%	31,2%	11,5%	153 €	-0,7%	48 €	10,8%
Cannes - 3*	38,1%	1,5%	61 €	3,2%	23 €	4,8%	33,7%	2,1%	76 €	4,0%	26 €	6,2%

February	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*	43,0%	7,4%	115 €	1,1%	49 €	8,6%	42,8%	4,9%	118 €	1,0%	50 €	6,0%
Nice - 3*	53,7%	-0,2%	76 €	6,9%	41 €	6,7%	48,5%	-3,8%	77 €	3,2%	37 €	-0,7%

February	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*	33,2%	15,3%	250 €	-8,2%	83 €	5,9%	32,1%	16,1%	296 €	-3,9%	95 €	11,6%
Monaco Standard 5* - 4*	35,4%	-11,7%	144 €	-2,6%	51 €	-14,0%	40,3%	1,4%	154 €	-1,1%	62 €	0,3%
Monaco - 5* - 4*	34,6%	-2,9%	182 €	-2,8%	63 €	-5,6%	37,2%	6,4%	200 €	-1,5%	75 €	4,9%

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

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Performances South West

February 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*	42,7%	12,3%	156 €	11,5%	67 €	25,3%	42,1%	8,1%	156 €	6,7%	66 €	15,4%
Bordeaux	26,1%	-3,8%	174 €	11,9%	45 €	7,7%	28,1%	1,8%	166 €	7,3%	47 €	9,3%
Toulouse	60,9%	17,1%	124 €	4,9%	75 €	22,9%	59,5%	15,3%	123 €	1,4%	73 €	17,0%
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*	49,4%	6,9%	87 €	3,3%	43 €	10,4%	47,9%	6,7%	89 €	4,5%	43 €	11,5%
Bordeaux	44,2%	-5,0%	80 €	0,9%	35 €	-4,2%	46,0%	0,6%	80 €	0,7%	37 €	1,4%
Toulouse	60,9%	19,6%	98 €	3,7%	60 €	24,0%	58,4%	13,1%	98 €	1,3%	57 €	14,6%
2-star	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
South-West - 2*	49,8%	-0,3%	65 €	2,2%	33 €	1,8%	47,0%	-0,4%	66 €	3,2%	31 €	2,8%
Bordeaux	52,8%	-7,4%	69 €	1,3%	36 €	-6,2%	50,9%	-7,3%	69 €	3,4%	35 €	-4,1%
Toulouse	57,2%	9,0%	71 €	0,9%	41 €	10,0%	54,0%	7,6%	71 €	1,0%	39 €	8,8%
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	58,4%	-2,7%	38 €	0,6%	22 €	-2,1%	54,5%	1,0%	38 €	0,7%	21 €	1,8%
Bordeaux	60,4%	-5,6%	37 €	-1,2%	22 €	-6,7%	58,6%	2,0%	36 €	-1,3%	21 €	0,7%
Toulouse	69,0%	8,6%	39 €	-0,7%	27 €	7,8%	65,2%	7,5%	39 €	-1,0%	26 €	6,4%

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

February 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	34,6%	17,5%	101 €	4,5%	35 €	22,7%	35,8%	22,7%	103 €	-1,3%	37 €	21,2%
Bordeaux	26,1%	-3,8%	174 €	11,9%	45 €	7,7%	28,1%	1,8%	166 €	7,3%	47 €	9,3%
Cannes	27,3%	5,1%	128 €	1,8%	35 €	7,0%	31,2%	11,5%	153 €	-0,7%	48 €	10,8%
Lille	50,7%	9,5%	112 €	0,4%	57 €	9,9%	51,4%	16,5%	120 €	5,4%	62 €	22,7%
Lyon	65,0%	25,5%	122 €	10,8%	79 €	39,0%	64,0%	20,8%	131 €	16,2%	84 €	40,3%
Marseille	43,6%	21,1%	126 €	4,0%	55 €	25,9%	44,1%	7,0%	128 €	-4,3%	56 €	2,4%
Monaco	34,6%	-2,9%	182 €	-2,8%	63 €	-5,6%	37,2%	6,4%	200 €	-1,5%	75 €	4,9%
Montpellier	53,8%	-1,1%	134 €	-1,9%	72 €	-3,1%	50,0%	-1,5%	130 €	-0,3%	65 €	-1,8%
Nice	43,0%	7,4%	115 €	1,1%	49 €	8,6%	42,8%	4,9%	118 €	1,0%	50 €	6,0%
Strasbourg	47,2%	10,2%	114 €	-1,8%	54 €	8,3%	49,2%	15,1%	118 €	-3,0%	58 €	11,7%
Toulouse	60,9%	17,1%	124 €	4,9%	75 €	22,9%	59,5%	15,3%	123 €	1,4%	73 €	17,0%

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
Aix en Provence	53,2%	-5,2%	87 €	4,5%	46 €	-1,0%	49,3%	-7,7%	87 €	4,4%	43 €	-3,7%
Angers	55,0%	19,6%	100 €	-12,5%	55 €	4,7%	58,8%	28,0%	98 €	-9,3%	57 €	16,2%
Avignon	46,9%	20,7%	77 €	-2,8%	36 €	17,4%	42,4%	13,2%	79 €	-0,6%	33 €	12,5%
Bordeaux	44,2%	-5,0%	80 €	0,9%	35 €	-4,2%	46,0%	0,6%	80 €	0,7%	37 €	1,4%
Cannes	38,1%	1,5%	61 €	3,2%	23 €	4,8%	33,7%	2,1%	76 €	4,0%	26 €	6,2%
Grenoble	63,2%	7,8%	102 €	5,0%	65 €	13,2%	57,8%	2,4%	103 €	4,7%	59 €	7,2%
Lille	62,0%	0,1%	86 €	2,9%	54 €	3,0%	62,0%	7,2%	92 €	6,7%	57 €	14,5%
Lyon	68,1%	20,5%	102 €	6,3%	69 €	28,1%	64,8%	17,4%	108 €	12,6%	70 €	32,2%
Marseille	59,4%	5,8%	92 €	1,6%	54 €	7,5%	55,8%	0,9%	94 €	-0,8%	52 €	0,1%
Montpellier	62,1%	11,0%	93 €	0,8%	57 €	11,9%	57,9%	11,0%	95 €	5,2%	55 €	16,7%
Nancy	49,3%	7,5%	83 €	6,8%	41 €	14,8%	46,1%	3,9%	82 €	5,6%	38 €	9,7%
Nantes	65,1%	33,4%	88 €	3,2%	57 €	37,6%	58,8%	10,4%	87 €	1,8%	51 €	12,4%
Nice	53,7%	-0,2%	76 €	6,9%	41 €	6,7%	48,5%	-3,8%	77 €	3,2%	37 €	-0,7%
Reims	47,6%	-0,4%	85 €	-3,0%	40 €	-3,4%	44,9%	-0,6%	86 €	-1,3%	39 €	-1,9%
Rennes	60,5%	12,3%	87 €	5,5%	53 €	18,5%	56,9%	10,7%	87 €	5,2%	49 €	16,4%
Rouen	48,1%	7,6%	94 €	2,8%	45 €	10,6%	46,9%	8,3%	94 €	3,9%	44 €	12,6%
Strasbourg	51,6%	7,8%	93 €	4,2%	48 €	12,3%	49,4%	4,3%	92 €	2,7%	45 €	7,2%
Toulouse	60,9%	19,6%	98 €	3,7%	60 €	24,0%	58,4%	13,1%	98 €	1,3%	57 €	14,6%

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Performances Main cities in Regions

February 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	54,5%	6,5%	67 €	-3,2%	36 €	3,1%	47,2%	-6,7%	68 €	-0,5%	32 €	-7,1%
Angers	54,7%	2,9%	72 €	0,1%	39 €	3,0%	54,2%	4,9%	71 €	1,0%	39 €	6,0%
Avignon	43,4%	18,6%	54 €	-1,0%	23 €	17,5%	46,2%	20,0%	54 €	-4,4%	25 €	14,7%
Bordeaux	52,8%	-7,4%	69 €	1,3%	36 €	-6,2%	50,9%	-7,3%	69 €	3,4%	35 €	-4,1%
Grenoble	66,1%	-5,0%	70 €	6,5%	46 €	1,2%	63,8%	-3,9%	68 €	4,9%	43 €	0,8%
Lille	61,6%	-0,3%	73 €	4,8%	45 €	4,4%	63,7%	8,9%	74 €	5,4%	47 €	14,9%
Lyon	70,0%	6,6%	74 €	7,4%	52 €	14,5%	68,5%	7,8%	76 €	11,3%	52 €	20,1%
Marseille	55,5%	-1,1%	69 €	-0,4%	39 €	-1,5%	53,1%	-4,0%	69 €	-1,9%	37 €	-5,8%
Metz	56,3%	7,8%	69 €	6,5%	39 €	14,8%	52,0%	4,6%	69 €	7,1%	36 €	12,0%
Montpellier	66,0%	-2,4%	67 €	5,8%	44 €	3,3%	63,4%	-0,4%	67 €	6,9%	42 €	6,5%
Nancy	46,0%	-7,0%	59 €	3,2%	27 €	-4,0%	46,2%	-4,3%	59 €	2,9%	27 €	-1,5%
Nantes	65,9%	17,8%	69 €	5,5%	45 €	24,3%	60,0%	2,9%	68 €	4,4%	41 €	7,4%
Reims	51,2%	3,1%	62 €	0,5%	32 €	3,6%	46,7%	3,4%	63 €	2,4%	30 €	6,0%
Rennes	62,8%	10,5%	66 €	4,9%	42 €	15,9%	58,9%	1,3%	67 €	4,4%	39 €	5,7%
Rouen	53,6%	7,4%	62 €	6,4%	33 €	14,3%	50,5%	4,4%	62 €	9,4%	32 €	14,2%
Strasbourg	52,9%	4,0%	65 €	2,7%	34 €	6,8%	52,2%	7,8%	64 €	-0,7%	34 €	7,1%
Toulouse	57,2%	9,0%	71 €	0,9%	41 €	10,0%	54,0%	7,6%	71 €	1,0%	39 €	8,8%

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	70,2%	4,7%	40 €	0,7%	28 €	5,4%	66,3%	5,7%	40 €	0,3%	26 €	6,0%
Angers	64,0%	0,7%	36 €	1,2%	23 €	2,0%	64,9%	6,3%	37 €	-0,4%	24 €	5,9%
Avignon	58,5%	0,9%	35 €	2,1%	21 €	3,1%	56,7%	-2,0%	36 €	1,1%	20 €	-1,0%
Bordeaux	60,4%	-5,6%	37 €	-1,2%	22 €	-6,7%	58,6%	2,0%	36 €	-1,3%	21 €	0,7%
Grenoble	76,3%	-6,0%	41 €	-0,4%	32 €	-6,4%	73,8%	0,2%	41 €	-1,2%	30 €	-1,0%
Lille	65,1%	-3,2%	38 €	3,4%	25 €	0,0%	63,6%	-0,2%	38 €	2,0%	24 €	1,8%
Lyon	74,3%	8,4%	40 €	1,5%	29 €	10,1%	72,0%	13,3%	40 €	0,9%	29 €	14,3%
Marseille	67,1%	5,6%	40 €	-2,2%	27 €	3,2%	64,0%	4,9%	40 €	-2,5%	26 €	2,2%
Metz	74,1%	20,5%	37 €	1,4%	27 €	22,2%	66,3%	19,8%	37 €	0,1%	24 €	19,9%
Montpellier	70,3%	9,6%	37 €	-0,3%	26 €	9,3%	67,5%	17,6%	37 €	-0,1%	25 €	17,5%
Nancy	54,9%	-4,9%	37 €	6,0%	21 €	0,8%	52,7%	0,3%	37 €	5,6%	20 €	5,9%
Nantes	68,0%	9,6%	41 €	1,9%	28 €	11,6%	63,9%	2,7%	41 €	1,4%	26 €	4,2%
Rennes	54,9%	-1,9%	37 €	0,4%	20 €	-1,5%	53,3%	-0,1%	37 €	0,3%	20 €	0,2%
Rouen	61,6%	-4,1%	40 €	6,2%	25 €	1,9%	59,8%	-4,7%	40 €	4,5%	24 €	-0,4%
Strasbourg	53,9%	18,9%	38 €	7,7%	21 €	28,1%	50,7%	24,0%	38 €	7,1%	19 €	32,8%
Toulouse	69,0%	8,6%	39 €	-0,7%	27 €	7,8%	65,2%	7,5%	39 €	-1,0%	26 €	6,4%

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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
<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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