

In Extenso

tourisme, culture & hôtellerie

French Hotel Industry Performance

June 2015



Membre de **Deloitte**.

Our Tourism, Culture and Hospitality News

Consulting, Valuation, Transactions

In Extenso
tourisme, culture & hôtellerie

Le marché français des résidences de tourisme urbaines
2015 - 9^{ème} édition



Membre de **Deloitte**

Annual study: The French Urban Residence Market

The 9th edition of In Extenso TCH's annual study on French urban residences offers a comprehensive analysis of the market:

- Profile of supply and evolutions over five years
- Breakdown of supply in France
- Key players in the market, brand characteristics
- General trading levels + focus on main markets

STUDY AVAILABLE FROM 15 JUNE 2015, PRICED 800 € EXC. VAT

For further information and ordering, please contact:
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Recent references

Client	Description
Owner	Repositioning analysis for a 4* hotel near Saint-Tropez
Etablissement public national du musée de la Marine	Prospective study of the public and positioning of the Musée de la Marine, Paris
Haute-Normandie region	Study to analyse the opportunity for the development of a cultural and tourism project
Buyer	Business Plan review for an upscale hotel project, Paris 14

CONSULTING AND VALUATION

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CULTURE AND TOURISME

[DOMINIQUE LECEA](#), DIRECTOR

[ANNE RAVARD](#), DEPUTY DIRECTOR

Transaxio Hôtel sales instructions

Scope	Description
Freehold, Hauts de Seine	Portfolio of three independently-operated hotels (3 and 4*, total capacity of c. 120 rooms)
Freehold, Lot et Garonne	5* boutique hotel (around 10 rooms) with restaurant, outdoor pool and meeting room
Freehold, Nord	2* branded hotel-restaurant (around 45 rooms) with bar and meeting room

TRANSAXIO HÔTEL

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Articles

[New generations attracted to the durable nature of the family business](#)

Christophe Saubiez, Audit Associate, Deloitte Family

[Travel Consumer 2015](#)

Alistair Pritchard, UK Lead Partner, Deloitte

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June kicks off the summer season

Further to a lacklustre month of May with destinations posting conflicting results, June seemed to herald a recovery throughout France. Depending on the category and zone, this recovery amplified the positive results or helped make up for the negative performances recorded since the start of the year. The good weather and the announced beginning of economic recovery doubtless favoured this, although June 2015 is being compared to June 2014 which was particularly quiet given the lack of major events.

With the exception of the Super-budget category – relatively stable (or slightly down) compared with last year given that occupancy drops were offset by higher average rates – all categories and the majority of destinations recorded good results in June.

Paris, in particular, perked up after a rather worrying month of May, helped by a significant increase in average rates (+2,4% to +7,1%, depending on the category), finishing the first semester generally on a positive note. The Midscale category is the only segment to recording a drop in RevPAR (-1,4%), given declining occupancy (despite being in the black in June).

Regional French hotels also posted good performances; excellent in some cases - particularly for upscale categories. Lyon, Bordeaux, the Atlantic coast and the Côte d'Azur, for instance, all showcased this trend.

Comparing June 2015 with June 2014 should be undertaken with some caution. However, such a comparison does confirm how important it is that a destination remain dynamic, notably in terms of programming festive or professional events to support the local hotel industry.

But let's not be too negative – June 2015 could mark the start of a real recovery. Most destinations finished the first semester in the black and the feedback from tourism professionals for the month of July looks to be positive.

Données mensuelles

juin	Gd. luxe	Haut gam.	Milieu gam.	Eco.	Super-éco.
TO 2015	79,8%	82,1%	80,0%	79,8%	71,3%
Var. /n-1	1,6%	1,4%	3,5%	3,5%	-2,9%
RMC 2015	481 €	218 €	113 €	72 €	42 €
Var. /n-1	0,1%	3,3%	1,9%	1,6%	2,9%
RevPAR 2015	383 €	179 €	91 €	57 €	30 €
Var. /n-1	1,7%	4,7%	5,5%	5,2%	-0,1%

Données cumulées

Jan. à juin	Gd. luxe	Haut gam.	Milieu gam.	Eco.	Super-éco.
TO 2015	60,0%	65,3%	63,1%	65,4%	62,1%
Var. /n-1	-1,9%	2,1%	1,2%	1,7%	-1,9%
RMC 2015	400 €	180 €	101 €	65 €	40 €
Var. /n-1	-2,7%	0,7%	0,7%	-0,3%	1,5%
RevPAR 2015	240 €	118 €	64 €	42 €	25 €
Var. /n-1	-4,5%	2,8%	1,9%	1,4%	-0,4%

Définitions

TO = Taux d'Occupation

RMC = Recette Moyenne par Chambre louée

RevPAR = Revenu moyen par chambre disponible

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Performances Paris

June 2015



Paris-City

Monthly performance

June	OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
Paris - Luxury	91,8%	-0,1%	626 €	6,7%	575 €	6,5%
Paris - Boutique Hotels	90,6%	-1,4%	334 €	1,7%	303 €	0,3%
Paris - Upscale	90,6%	-0,1%	264 €	5,2%	239 €	5,1%
Paris - Luxury & Upscale	90,9%	-0,2%	349 €	7,1%	317 €	6,9%
Paris - Superior midscale	92,0%	1,1%	194 €	0,9%	178 €	2,1%
Paris - Standard midscale	90,1%	0,3%	144 €	3,4%	130 €	3,8%
Paris - Midscale	90,9%	0,6%	164 €	2,4%	149 €	3,0%
Paris - Budget	92,6%	2,2%	110 €	3,4%	102 €	5,6%

Year To Date performance

Jan. to June	OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
Paris - Luxury	74,8%	-4,9%	490 €	5,8%	367 €	0,6%
Paris - Boutique Hotels	76,5%	-2,3%	259 €	-3,0%	198 €	-5,2%
Paris - Upscale	76,3%	-0,1%	203 €	2,7%	155 €	2,6%
Paris - Haut de gamme & Gd luxe	76,0%	-1,3%	267 €	3,6%	203 €	2,3%
Paris - Superior midscale	80,4%	-2,2%	159 €	0,6%	128 €	-1,6%
Paris - Standard midscale	76,8%	-4,2%	118 €	2,9%	90 €	-1,4%
Paris - Midscale	78,2%	-3,4%	134 €	2,0%	105 €	-1,4%
Paris - Budget	81,3%	-2,2%	91 €	2,4%	74 €	0,1%

Paris suburbs (excluding Paris) – Luxury and upscale

Monthly performance

June	OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
Paris	90,9%	-0,2%	349 €	7,1%	317 €	6,9%
La Défense	86,1%	-0,9%	193 €	-4,9%	166 €	-5,7%
Roissy CdG	87,2%	1,5%	131 €	4,2%	115 €	5,8%
IDF (exc.Paris and poles)	89,3%	1,2%	260 €	0,5%	232 €	1,7%

Year To Date performance

Jan. to June	OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
Paris	76,0%	-1,3%	267 €	3,6%	203 €	2,3%
La Défense	72,0%	2,5%	161 €	-6,2%	116 €	-3,9%
Roissy CdG	73,9%	3,1%	112 €	3,0%	83 €	6,2%
IDF (exc.Paris and poles)	77,0%	3,0%	231 €	-0,8%	178 €	2,1%

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Performance Regions

June 2015



Regions

Regions (excl. French Riviera)

Monthly performance

June	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2015	71,4%	74,3%	75,0%	75,1%	69,1%
Var. /n-1	4,1%	5,2%	5,6%	4,0%	-3,2%
ADR 2015	293 €	150 €	96 €	67 €	40 €
Var. /n-1	6,4%	2,8%	1,6%	1,2%	2,6%
RevPAR 2015	209 €	111 €	72 €	50 €	28 €
Var. /n-1	10,8%	8,2%	7,3%	5,2%	-0,7%

Year To Date performance

Jan. to June	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2015	53,4%	56,9%	57,7%	60,0%	59,8%
Var. /n-1	1,1%	6,2%	2,7%	1,7%	-2,2%
ADR 2015	250 €	135 €	89 €	63 €	39 €
Var. /n-1	4,2%	1,9%	1,0%	-0,4%	1,7%
RevPAR 2015	134 €	77 €	52 €	37 €	23 €
Var. /n-1	5,3%	8,2%	3,7%	1,3%	-0,6%

French Riviera

Monthly performance

June	Luxury	Upscale *	Midscale	Budget	Super Budget
OR 2015	76,7%	79,0%	84,4%	n.d.	78,4%
Var. /n-1	-0,2%	0,1%	0,6%	-	0,0%
ADR 2015	497 €	197 €	119 €	n.d.	49 €
Var. /n-1	6,8%	-0,1%	0,0%	-	0,7%
RevPAR 2015	381 €	156 €	100 €	n.d.	39 €
Var. /n-1	6,5%	0,0%	0,5%	-	0,6%

Year To Date performance

Jan. to June	Luxury	Upscale *	Midscale	Budget	Super Budget
OR 2015	53,7%	58,0%	63,0%	n.d.	60,8%
Var. /n-1	0,9%	9,4%	5,1%	-	-0,9%
ADR 2015	413 €	167 €	103 €	n.d.	47 €
Var. /n-1	2,1%	0,5%	-0,1%	-	2,5%
RevPAR 2015	221 €	97 €	65 €	n.d.	28 €
Var. /n-1	3,0%	9,9%	5,0%	-	1,6%

* Upscale : = sample groups upscale boutique hotels and standard four star hotels

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Performances Suburbs

June 2015



Paris suburbs (excluding Paris)

Midscale market	Monthly performance								
	June	departments						Average suburbs	
		77	78	91	92	93	94		95
	OR 2015	76,0%	80,6%	84,5%	84,9%	85,9%	88,5%	84,2%	84,3%
	Var. /n-1	-3,3%	4,9%	6,4%	-1,1%	0,4%	1,5%	-1,1%	1,2%
	ADR 2015	109 €	112 €	97 €	131 €	105 €	98 €	110 €	113 €
	Var. /n-1	-2,3%	4,7%	0,6%	1,6%	19,9%	-1,6%	0,1%	2,0%
	RevPAR 2015	83 €	90 €	82 €	111 €	90 €	86 €	93 €	95 €
	Var. /n-1	-5,5%	9,8%	7,1%	0,5%	20,4%	-0,1%	-0,9%	3,2%
Midscale market	Year To Date performance								
	Jan. to June	departments						Average suburbs	
		77	78	91	92	93	94		95
	OR 2015	52,9%	67,5%	65,6%	67,4%	71,5%	74,7%	67,6%	67,6%
	Var. /n-1	-5,2%	9,0%	7,3%	-3,5%	15,1%	0,7%	-2,0%	1,7%
	ADR 2015	106 €	101 €	92 €	112 €	79 €	85 €	100 €	99 €
	Var. /n-1	0,9%	0,9%	-0,6%	0,0%	-3,2%	-3,2%	1,3%	-0,6%
	RevPAR 2015	56 €	68 €	60 €	75 €	56 €	63 €	67 €	67 €
	Var. /n-1	-4,4%	10,0%	6,7%	-3,6%	11,5%	-2,5%	-0,8%	1,0%
Budget market	Monthly performance								
	June	departments						Average suburbs	
		77	78	91	92	93	94		95
	OR 2015	90,2%	80,1%	76,3%	83,7%	86,0%	86,9%	87,2%	85,8%
	Var. /n-1	5,3%	-0,7%	0,3%	1,6%	3,8%	6,0%	2,5%	3,1%
	ADR 2015	64 €	91 €	70 €	90 €	72 €	72 €	63 €	72 €
	Var. /n-1	-1,9%	6,3%	-1,8%	1,4%	3,5%	-5,2%	1,2%	0,8%
	RevPAR 2015	57 €	73 €	53 €	75 €	62 €	62 €	55 €	62 €
	Var. /n-1	3,3%	5,6%	-1,5%	3,1%	7,4%	0,5%	3,8%	3,9%
Budget market	Year To Date performance								
	Jan. to June	departments						Average suburbs	
		77	78	91	92	93	94		95
	OR 2015	75,4%	69,1%	65,6%	68,7%	71,0%	73,9%	75,5%	72,4%
	Var. /n-1	6,0%	-0,4%	3,8%	-3,5%	2,9%	2,8%	4,1%	2,4%
	ADR 2015	60 €	82 €	62 €	77 €	61 €	65 €	56 €	64 €
	Var. /n-1	-1,4%	4,2%	-4,5%	-1,1%	0,9%	-4,3%	1,5%	-0,5%
	RevPAR 2015	45 €	57 €	41 €	53 €	43 €	48 €	42 €	46 €
	Var. /n-1	4,5%	3,8%	-0,8%	-4,6%	3,8%	-1,6%	5,6%	2,0%
Super Budget market	Monthly performance								
	June	departments						IDF (hors Paris)	
		77	78	91	92	93	94		95
	OR 2015	75,4%	79,7%	77,5%	n.d.	83,4%	84,0%	83,0%	80,7%
	Var. /n-1	-7,7%	-1,0%	-1,7%	-	-5,8%	-0,9%	-5,6%	-4,1%
	ADR 2015	47 €	45 €	41 €	n.d.	50 €	46 €	51 €	48 €
	Var. /n-1	5,8%	3,7%	3,9%	-	3,7%	0,6%	6,5%	4,1%
	RevPAR 2015	35 €	36 €	32 €	n.d.	42 €	38 €	42 €	38 €
	Var. /n-1	-2,3%	2,6%	2,1%	-	-2,3%	-0,3%	0,5%	-0,2%
Super Budget market	Year To Date performance								
	Jan. to June	departments						IDF (hors Paris)	
		77	78	91	92	93	94		95
	OR 2015	70,4%	71,3%	70,5%	n.d.	72,1%	74,6%	73,7%	72,1%
	Var. /n-1	-3,3%	-0,7%	2,5%	-	-5,5%	-1,2%	-3,5%	-2,5%
	ADR 2015	43 €	44 €	39 €	n.d.	47 €	44 €	47 €	45 €
	Var. /n-1	2,7%	2,0%	0,3%	-	3,2%	-1,2%	4,5%	1,8%
	RevPAR 2015	30 €	31 €	28 €	n.d.	34 €	33 €	35 €	32 €
	Var. /n-1	-0,7%	1,3%	2,9%	-	-2,4%	-2,4%	0,9%	-0,7%

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Performances North-East

June 2015



North-east & Cities

Luxury Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
North-east	68,1%	2,0%	142 €	3,5%	97 €	5,6%	52,6%	3,4%	134 €	4,2%	71 €	7,8%
Dijon	77,3%	9,7%	138 €	-1,4%	107 €	8,2%	57,1%	11,9%	124 €	-2,4%	71 €	9,3%
Lille	60,8%	-7,1%	137 €	1,4%	83 €	-5,8%	54,3%	-2,1%	132 €	4,7%	71 €	2,5%
Metz	insufficient supply						insufficient supply					
Nancy	insufficient supply						insufficient supply					
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	73,6%	3,8%	118 €	5,8%	87 €	9,9%	58,4%	-0,9%	118 €	3,4%	69 €	2,5%

Midscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
North-east	71,3%	3,9%	91 €	2,2%	65 €	6,2%	55,2%	2,8%	89 €	2,1%	49 €	5,0%
Dijon	74,3%	1,4%	90 €	-1,6%	67 €	-0,2%	56,0%	0,9%	84 €	-1,0%	47 €	-0,1%
Lille	71,3%	-4,5%	95 €	1,4%	68 €	-3,2%	60,9%	-1,1%	92 €	3,6%	56 €	2,5%
Metz	in progress						in progress					
Nancy	84,2%	28,0%	97 €	14,9%	82 €	47,1%	61,6%	10,2%	86 €	7,9%	53 €	18,9%
Reims	79,6%	1,8%	111 €	7,2%	88 €	9,2%	59,0%	-0,2%	103 €	3,2%	61 €	3,0%
Strasbourg	72,3%	1,9%	101 €	1,6%	73 €	3,5%	58,1%	-4,9%	98 €	1,2%	57 €	-3,8%

Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
North-east	77,3%	3,5%	64 €	0,2%	49 €	3,7%	63,5%	2,0%	60 €	-1,0%	38 €	1,0%
Dijon	84,8%	3,0%	65 €	-2,3%	55 €	0,6%	69,2%	-1,6%	61 €	-1,6%	42 €	-3,2%
Lille	76,4%	0,7%	79 €	5,6%	61 €	6,4%	68,2%	3,2%	72 €	1,4%	49 €	4,6%
Metz	81,2%	19,5%	61 €	-10,8%	49 €	6,5%	64,0%	11,2%	59 €	-7,2%	38 €	3,2%
Nancy	84,2%	14,8%	73 €	7,4%	62 €	23,3%	68,8%	4,0%	63 €	-0,6%	44 €	3,5%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	78,6%	4,2%	67 €	0,4%	53 €	4,6%	66,2%	-2,7%	64 €	-1,2%	42 €	-3,8%

Super Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
North-east	68,2%	-3,8%	39 €	3,0%	26 €	-0,9%	59,6%	-2,3%	38 €	2,3%	22 €	0,0%
Dijon	76,5%	-3,4%	39 €	4,1%	30 €	0,6%	63,1%	-4,5%	38 €	1,4%	24 €	-3,1%
Lille	68,7%	-3,5%	41 €	2,4%	28 €	-1,2%	61,3%	-3,2%	40 €	2,0%	25 €	-1,3%
Metz	67,5%	-12,9%	38 €	3,7%	26 €	-9,7%	61,9%	-7,5%	38 €	3,6%	23 €	-4,2%
Nancy	69,8%	-4,1%	39 €	2,4%	28 €	-1,8%	60,2%	3,8%	39 €	2,7%	23 €	6,6%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	67,9%	3,0%	41 €	4,7%	28 €	7,9%	59,3%	-6,4%	41 €	2,8%	24 €	-3,8%

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

June 2015



North-West & Cities

Luxury Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
North-West	70,3%	1,7%	207 €	2,2%	146 €	4,0%	53,2%	-4,8%	197 €	1,1%	105 €	-3,8%
Amiens			insufficient supply						insufficient supply			
Angers			insufficient supply						insufficient supply			
Le Havre			insufficient supply						insufficient supply			
Niort			insufficient supply						insufficient supply			
Nantes			insufficient supply						insufficient supply			
Rennes			insufficient supply						insufficient supply			
Rouen			insufficient supply						insufficient supply			

Midscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
North-West	77,5%	5,5%	94 €	-0,9%	73 €	4,6%	57,7%	4,5%	89 €	0,7%	51 €	5,2%
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	71,2%	-11,0%	90 €	-2,6%	64 €	-13,3%	60,9%	-1,2%	86 €	-0,8%	52 €	-2,1%
Nantes	80,5%	7,6%	97 €	1,3%	78 €	9,0%	61,9%	5,9%	91 €	1,6%	56 €	7,6%
Niort	78,6%	10,9%	79 €	-2,8%	62 €	7,8%	51,5%	-5,2%	81 €	-2,5%	42 €	-7,6%
Rennes	69,8%	5,5%	96 €	7,2%	67 €	13,0%	54,9%	-2,8%	93 €	5,3%	51 €	2,4%
Rouen	79,9%	9,6%	98 €	-2,2%	78 €	7,2%	60,4%	2,5%	92 €	0,6%	56 €	3,1%

Niort : in development, sample subject to change

Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
North-West	73,5%	2,2%	68 €	0,4%	50 €	2,6%	56,4%	0,6%	64 €	-0,4%	36 €	0,3%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	71,3%	-3,4%	67 €	0,6%	48 €	-2,8%	59,7%	0,3%	65 €	-2,4%	39 €	-2,0%
Le Havre	60,3%	-8,0%	58 €	-1,7%	35 €	-9,5%	48,4%	-9,9%	57 €	-0,7%	28 €	-10,6%
Nantes	75,9%	6,1%	72 €	1,8%	55 €	7,9%	59,3%	3,3%	66 €	-0,1%	39 €	3,2%
Niort	72,8%	2,8%	58 €	-5,9%	42 €	-3,2%	50,7%	-7,2%	59 €	-4,4%	30 €	-11,3%
Rennes	76,1%	0,3%	69 €	4,7%	53 €	5,1%	63,8%	0,9%	67 €	0,5%	43 €	1,4%
Rouen	77,4%	6,9%	65 €	-1,3%	51 €	5,5%	59,2%	0,3%	62 €	-0,1%	37 €	0,3%

Niort : in development, sample subject to change

Super Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
North-West	69,8%	-2,3%	41 €	1,1%	28 €	-1,2%	59,2%	-0,5%	39 €	0,7%	23 €	0,2%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	72,1%	-5,5%	41 €	1,7%	30 €	-3,9%	57,2%	-5,8%	41 €	1,7%	23 €	-4,2%
Le Havre	61,8%	-15,6%	38 €	-2,7%	24 €	-17,9%	59,2%	-14,5%	38 €	-3,1%	23 €	-17,1%
Nantes	81,7%	8,6%	45 €	2,7%	37 €	11,6%	67,8%	5,7%	43 €	0,3%	29 €	6,1%
Niort	67,7%	5,4%	36 €	12,3%	24 €	18,4%	61,1%	4,3%	33 €	1,6%	20 €	5,9%
Rennes	68,7%	-2,3%	41 €	1,9%	28 €	-0,4%	60,2%	1,0%	40 €	0,0%	24 €	1,1%
Rouen	68,6%	-2,8%	43 €	-1,5%	30 €	-4,2%	61,6%	5,5%	44 €	-0,1%	27 €	5,3%

Niort : in development, sample subject to change

Departments in the North-Western set :

Calvados; Côtes; Eure; Eure-et-Loir; Finistère; Ille-et-Vilaine; Indre; Indre-et-Loire; Loir-et-Cher; Loire-Atlantique; Maine-et-Loire; Manche; Mayenne; Morbihan; Orne; Sarthe; Seine-Maritime; Deux-Sèvres; Somme; Vendée; Vienne

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Performances South-East

June 2015



South-East (excl. French Riviera) & Cities

	Monthly performance						Year To Date performance					
Luxury Upscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
South-East	82,7%	9,7%	181 €	5,7%	150 €	15,9%	60,6%	8,6%	154 €	3,4%	93 €	12,3%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	88,3%	2,9%	163 €	2,0%	144 €	5,0%	53,9%	-2,9%	141 €	4,0%	76 €	1,1%
Grenoble	insufficient supply						insufficient supply					
Lyon	81,9%	9,1%	153 €	15,4%	126 €	26,0%	68,6%	9,5%	138 €	11,8%	95 €	22,4%
Marseille	79,1%	-0,4%	169 €	-1,9%	133 €	-2,3%	60,1%	-2,3%	140 €	-3,2%	84 €	-5,4%
Montpellier	78,8%	5,7%	146 €	2,2%	115 €	8,0%	60,4%	9,4%	136 €	-2,8%	82 €	6,3%
St Etienne	insufficient supply						insufficient supply					
Midscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
South-East	76,2%	4,9%	95 €	-1,0%	72 €	3,9%	59,3%	0,7%	88 €	-1,1%	52 €	-0,5%
Aix en Provence	85,7%	4,8%	85 €	-1,4%	73 €	3,4%	59,9%	4,5%	80 €	-4,2%	48 €	0,1%
Avignon	94,5%	8,1%	106 €	0,1%	100 €	8,2%	67,6%	5,1%	91 €	-0,8%	61 €	4,2%
Grenoble	66,3%	22,6%	97 €	-4,1%	64 €	17,6%	52,4%	2,1%	95 €	-4,2%	50 €	-2,2%
Lyon	74,5%	6,8%	105 €	6,7%	78 €	14,0%	61,6%	5,6%	98 €	3,3%	60 €	9,0%
Marseille	79,6%	-0,2%	102 €	-6,3%	81 €	-6,5%	64,9%	-3,0%	92 €	-3,0%	60 €	-5,9%
Montpellier	74,8%	5,6%	92 €	0,0%	69 €	5,7%	61,1%	2,6%	85 €	0,0%	52 €	2,7%
St Etienne	in progress						in progress					
Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
South-East	75,9%	5,1%	69 €	1,7%	52 €	6,8%	60,1%	1,0%	65 €	0,3%	39 €	1,3%
Aix en Provence	84,7%	1,3%	71 €	-1,7%	60 €	-0,4%	58,2%	-5,4%	64 €	0,2%	37 €	-5,2%
Avignon	83,0%	8,4%	72 €	2,7%	60 €	11,3%	57,6%	0,9%	63 €	-1,1%	36 €	-0,2%
Grenoble	62,5%	2,4%	63 €	-0,3%	39 €	2,1%	53,5%	-1,7%	60 €	-1,8%	32 €	-3,5%
Lyon	75,5%	1,9%	84 €	12,9%	63 €	15,1%	66,4%	4,8%	76 €	9,1%	50 €	14,4%
Marseille	82,5%	1,3%	73 €	-1,1%	60 €	0,2%	64,7%	0,7%	67 €	-1,7%	43 €	-1,0%
Montpellier	83,8%	8,1%	74 €	4,0%	62 €	12,4%	68,4%	0,2%	70 €	-0,6%	48 €	-0,3%
St Etienne	in progress						in progress					
Super Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
South-East	67,2%	-4,8%	40 €	2,0%	27 €	-2,9%	59,3%	-3,1%	39 €	1,9%	23 €	-1,2%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	68,0%	-10,5%	35 €	-1,5%	24 €	-11,8%	59,8%	-8,0%	34 €	-2,4%	20 €	-10,2%
Grenoble	57,6%	-8,8%	38 €	-1,4%	22 €	-10,1%	56,0%	1,9%	37 €	-3,9%	21 €	-2,0%
Lyon	68,8%	-0,1%	42 €	3,6%	29 €	3,4%	64,7%	0,1%	41 €	3,9%	27 €	4,0%
Marseille	74,8%	-2,2%	42 €	-0,4%	31 €	-2,6%	65,1%	-0,6%	41 €	-1,2%	26 €	-1,8%
Montpellier	68,2%	-11,6%	39 €	3,3%	26 €	-8,7%	61,0%	-7,4%	36 €	1,2%	22 €	-6,4%
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 South West

June 2015



South-West & Cities

	Monthly performance						Year To Date performance					
Luxury Upscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
South-West	74,3%	5,3%	244 €	8,2%	181 €	13,9%	55,4%	6,4%	192 €	0,1%	106 €	6,5%
Bayonne-Anglet-Biarritz	72,9%	-1,4%	282 €	5,0%	205 €	3,5%	48,6%	-1,2%	232 €	2,0%	112 €	0,8%
Bordeaux	70,9%	11,8%	287 €	26,9%	203 €	41,9%	50,0%	10,1%	218 €	9,8%	109 €	20,8%
Pau	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Toulouse	81,1%	16,0%	127 €	-0,8%	103 €	15,0%	70,5%	15,5%	120 €	-6,1%	84 €	8,4%
<i>Bayonne-Anglet-Biarritz : in development, sample subject to change</i>												
Midscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
South-West	75,3%	7,9%	101 €	8,9%	76 €	17,5%	57,6%	3,4%	90 €	3,2%	52 €	6,8%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Bordeaux	86,8%	14,1%	118 €	22,8%	102 €	40,1%	64,0%	6,5%	95 €	8,4%	61 €	15,5%
Pau	66,2%	4,0%	78 €	-4,2%	52 €	-0,3%	52,7%	-4,5%	78 €	-1,4%	41 €	-5,9%
Toulouse	75,9%	11,7%	101 €	-1,4%	77 €	10,1%	59,7%	4,2%	97 €	-2,3%	58 €	1,8%
<i>Bayonne-Anglet-Biarritz : in development, sample subject to change</i>												
Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
South-West	71,5%	5,4%	68 €	4,4%	49 €	10,0%	58,6%	3,8%	62 €	0,0%	36 €	3,8%
Bayonne-Anglet-Biarritz	72,6%	3,0%	62 €	-1,0%	45 €	2,0%	53,9%	4,9%	54 €	-6,1%	29 €	-1,4%
Bordeaux	82,0%	11,3%	83 €	20,8%	68 €	34,5%	66,0%	8,0%	68 €	5,3%	45 €	13,7%
Pau	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Toulouse	73,2%	4,3%	70 €	0,2%	51 €	4,5%	62,6%	0,0%	65 €	-0,3%	41 €	-0,3%
<i>Bayonne-Anglet-Biarritz : in development, sample subject to change</i>												
Super Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
South-West	73,8%	0,7%	43 €	6,7%	32 €	7,4%	62,8%	-1,8%	39 €	2,6%	25 €	0,7%
Bayonne-Anglet-Biarritz	n.d.	-	-	-	-	-	n.d.	-	n.d.	-	-	-
Bordeaux	80,2%	5,4%	45 €	20,6%	36 €	27,1%	66,3%	-1,6%	39 €	5,3%	26 €	3,6%
Pau	57,5%	-0,9%	33 €	-1,5%	19 €	-2,4%	51,4%	-3,0%	33 €	-0,8%	17 €	-3,8%
Toulouse	79,6%	0,9%	41 €	5,3%	33 €	6,3%	70,5%	-0,1%	39 €	1,8%	27 €	1,8%
<i>Bayonne-Anglet-Biarritz : in development, sample subject to change</i>												

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 French Riviera

June 2015



French Riviera

June	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
French Riviera - Luxury	76,7%	-0,2%	497 €	6,8%	381 €	6,5%	53,7%	0,9%	413 €	2,1%	221 €	3,0%
French Riviera - Boutique Hotels**	79,6%	-3,5%	167 €	-1,1%	133 €	-4,5%	67,6%	1,5%	142 €	-1,0%	96 €	0,5%
French Riviera - Upscale	78,9%	0,5%	200 €	-0,1%	158 €	0,4%	57,2%	10,4%	170 €	0,4%	97 €	10,8%
Average Upscale & Luxury	78,2%	0,0%	295 €	3,4%	230 €	3,4%	56,5%	6,5%	246 €	0,0%	139 €	6,5%
Average Midscale	84,4%	0,6%	119 €	0,0%	100 €	0,5%	63,0%	5,1%	103 €	-0,1%	65 €	5,0%
Average Budget	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Average Super-Budget	78,4%	0,0%	49 €	0,7%	39 €	0,6%	60,8%	-0,9%	47 €	2,5%	28 €	1,6%

French Riviera Cities

June	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
Cannes - Luxury	73,8%	-1,6%	477 €	6,7%	352 €	5,0%	51,3%	1,0%	430 €	2,3%	221 €	3,2%
Cannes - Boutique Hotels	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Cannes - Upscale	68,9%	-4,2%	206 €	9,1%	142 €	4,6%	48,7%	10,6%	182 €	0,6%	89 €	11,3%
Cannes - Upscale & Luxury	71,3%	-2,9%	351 €	8,1%	250 €	4,9%	50,1%	4,9%	320 €	1,3%	160 €	6,2%
Cannes - Midscale	75,5%	1,0%	115 €	1,8%	86 €	2,8%	53,2%	2,4%	108 €	-0,2%	58 €	2,2%

June	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
Nice - Upscale & Luxury	89,9%	4,2%	230 €	-3,0%	206 €	1,1%	64,5%	8,6%	181 €	-0,2%	117 €	8,4%
Nice - Midscale	89,3%	1,1%	123 €	-1,0%	110 €	0,0%	67,3%	5,5%	102 €	0,1%	69 €	5,6%

June	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
Monaco - Luxury	78,3%	17,7%	555 €	17,9%	434 €	38,8%	63,4%	16,3%	462 €	6,0%	293 €	23,3%
Monaco - Upscale	83,6%	5,0%	261 €	2,3%	218 €	7,4%	63,8%	8,2%	252 €	1,5%	161 €	9,8%
Monaco - Upscale & Luxury	82,1%	8,3%	338 €	9,3%	278 €	18,3%	63,7%	10,4%	310 €	4,1%	197 €	14,9%

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

** Boutique Hotels: sample excludes Luxury hotels

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Performances Coast

June 2015



Normandy – Nord-Pas-de-Calais coast

Normandy – Nord-Pas-de-Calais coast	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
Average Upscale & Luxury	60,6%	2,9%	213 €	0,4%	129 €	3,3%	49,3%	13,2%	201 €	2,5%	99 €	16,0%
Average Midscale	74,4%	2,8%	102 €	-4,1%	76 €	-1,4%	61,7%	4,9%	97 €	-1,4%	60 €	3,4%
Average Budget	72,0%	4,1%	65 €	-2,9%	46 €	1,1%	57,6%	1,4%	63 €	-1,4%	36 €	0,0%
Average Super-Budget	70,2%	-0,9%	40 €	-0,5%	28 €	-1,4%	58,6%	1,3%	39 €	1,4%	23 €	2,7%

Coast: benchmark based on hotel supply in coastal communes, as defined by INSEE
Benchmark under development and likely to evolve

Brittany – Pays-de-la-Loire coast

Brittany – Pays-de-la-Loire coast	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
Average Upscale & Luxury	70,7%	6,0%	212 €	2,2%	150 €	8,3%	51,4%	-7,8%	208 €	2,0%	107 €	-6,0%
Average Midscale	74,2%	7,7%	100 €	0,7%	74 €	8,5%	57,3%	7,7%	98 €	0,8%	56 €	8,6%
Average Budget	72,9%	9,4%	65 €	0,8%	47 €	10,3%	52,1%	4,9%	61 €	0,4%	32 €	5,3%
Average Super-Budget	67,6%	1,5%	43 €	1,9%	29 €	3,3%	55,1%	2,4%	42 €	2,2%	23 €	4,7%

Coast: benchmark based on hotel supply in coastal communes, as defined by INSEE
Benchmark under development and likely to evolve

Charente-Maritime – Aquitaine coast

Charente-Maritime – Aquitaine coast	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
Average Upscale & Luxury	74,2%	-0,4%	270 €	4,0%	200 €	3,6%	49,3%	-0,7%	226 €	1,8%	111 €	1,1%
Average Midscale	76,7%	3,5%	103 €	3,2%	79 €	6,9%	56,2%	11,0%	97 €	0,6%	54 €	11,7%
Average Budget	73,0%	3,4%	65 €	0,3%	48 €	3,7%	49,3%	5,7%	56 €	-5,2%	28 €	0,2%
Average Super-Budget	73,9%	5,0%	49 €	-6,0%	36 €	-1,3%	56,6%	-2,3%	46 €	0,3%	26 €	-2,0%

Coast: benchmark based on hotel supply in coastal communes, as defined by INSEE
Benchmark under development and likely to evolve

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Performances Main cities in Regions

June 2015



Main cities in Regions – Luxury upscale and midscale

Luxury Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
Avignon	88,3%	2,9%	163 €	2,0%	144 €	5,0%	53,9%	-2,9%	141 €	4,0%	76 €	1,1%
Bayonne-Anglet-Biarritz	72,9%	-1,4%	282 €	5,0%	205 €	3,5%	48,6%	-1,2%	232 €	2,0%	112 €	0,8%
Bordeaux	70,9%	11,8%	287 €	26,9%	203 €	41,9%	50,0%	10,1%	218 €	9,8%	109 €	20,8%
Cannes	71,3%	-2,9%	351 €	8,1%	250 €	4,9%	50,1%	4,9%	320 €	1,3%	160 €	6,2%
Dijon	77,3%	9,7%	138 €	-1,4%	107 €	8,2%	57,1%	11,9%	124 €	-2,4%	71 €	9,3%
Lille	60,8%	-7,1%	137 €	1,4%	83 €	-5,8%	54,3%	-2,1%	132 €	4,7%	71 €	2,5%
Lyon	81,9%	9,1%	153 €	15,4%	126 €	26,0%	68,6%	9,5%	138 €	11,8%	95 €	22,4%
Marseille	79,1%	-0,4%	169 €	-1,9%	133 €	-2,3%	60,1%	-2,3%	140 €	-3,2%	84 €	-5,4%
Monaco	82,1%	8,3%	338 €	9,3%	278 €	18,3%	63,7%	10,4%	310 €	4,1%	197 €	14,9%
Montpellier	78,8%	5,7%	146 €	2,2%	115 €	8,0%	60,4%	9,4%	136 €	-2,8%	82 €	6,3%
Nice	89,9%	4,2%	230 €	-3,0%	206 €	1,1%	64,5%	8,6%	181 €	-0,2%	117 €	8,4%
Strasbourg	73,6%	3,8%	118 €	5,8%	87 €	9,9%	58,4%	-0,9%	118 €	3,4%	69 €	2,5%
Toulouse	81,1%	16,0%	127 €	-0,8%	103 €	15,0%	70,5%	15,5%	120 €	-6,1%	84 €	8,4%
<i>Bayonne-Anglet-Biarritz : in development, sample subject to change</i>												
Midscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
Aix en Provence	85,7%	4,8%	85 €	-1,4%	73 €	3,4%	59,9%	4,5%	80 €	-4,2%	48 €	0,1%
Avignon	94,5%	8,1%	106 €	0,1%	100 €	8,2%	67,6%	5,1%	91 €	-0,8%	61 €	4,2%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Bordeaux	86,8%	14,1%	118 €	22,8%	102 €	40,1%	64,0%	6,5%	95 €	8,4%	61 €	15,5%
Cannes	75,5%	1,0%	115 €	1,8%	86 €	2,8%	53,2%	2,4%	108 €	-0,2%	58 €	2,2%
Dijon	74,3%	1,4%	90 €	-1,6%	67 €	-0,2%	56,0%	0,9%	84 €	-1,0%	47 €	-0,1%
Grenoble	66,3%	22,6%	97 €	-4,1%	64 €	17,6%	52,4%	2,1%	95 €	-4,2%	50 €	-2,2%
Le Havre	71,2%	-11,0%	90 €	-2,6%	64 €	-13,3%	60,9%	-1,2%	86 €	-0,8%	52 €	-2,1%
Lille	71,3%	-4,5%	95 €	1,4%	68 €	-3,2%	60,9%	-1,1%	92 €	3,6%	56 €	2,5%
Lyon	74,5%	6,8%	105 €	6,7%	78 €	14,0%	61,6%	5,6%	98 €	3,3%	60 €	9,0%
Marseille	79,6%	-0,2%	102 €	-6,3%	81 €	-6,5%	64,9%	-3,0%	92 €	-3,0%	60 €	-5,9%
Montpellier	74,8%	5,6%	92 €	0,0%	69 €	5,7%	61,1%	2,6%	85 €	0,0%	52 €	2,7%
Nancy	84,2%	28,0%	97 €	14,9%	82 €	47,1%	61,6%	10,2%	86 €	7,9%	53 €	18,9%
Nantes	80,5%	7,6%	97 €	1,3%	78 €	9,0%	61,9%	5,9%	91 €	1,6%	56 €	7,6%
Niort	78,6%	10,9%	79 €	-2,8%	62 €	7,8%	51,5%	-5,2%	81 €	-2,5%	42 €	-7,6%
Nice	89,3%	1,1%	123 €	-1,0%	110 €	0,0%	67,3%	5,5%	102 €	0,1%	69 €	5,6%
Pau	66,2%	4,0%	78 €	-4,2%	52 €	-0,3%	52,7%	-4,5%	78 €	-1,4%	41 €	-5,9%
Reims	79,6%	1,8%	111 €	7,2%	88 €	9,2%	59,0%	-0,2%	103 €	3,2%	61 €	3,0%
Rennes	69,8%	5,5%	96 €	7,2%	67 €	13,0%	54,9%	-2,8%	93 €	5,3%	51 €	2,4%
Rouen	79,9%	9,6%	98 €	-2,2%	78 €	7,2%	60,4%	2,5%	92 €	0,6%	56 €	3,1%
Strasbourg	72,3%	1,9%	101 €	1,6%	73 €	3,5%	58,1%	-4,9%	98 €	1,2%	57 €	-3,8%
Toulouse	75,9%	11,7%	101 €	-1,4%	77 €	10,1%	59,7%	4,2%	97 €	-2,3%	58 €	1,8%
<i>Bayonne-Anglet-Biarritz : in development, sample subject to change</i>												

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Performances Main cities in Regions

June 2015



Main cities in regions – Budget and Super Budget

Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
Aix en Provence	84,7%	1,3%	71 €	-1,7%	60 €	-0,4%	58,2%	-5,4%	64 €	0,2%	37 €	-5,2%
Angers	71,3%	-3,4%	67 €	0,6%	48 €	-2,8%	59,7%	0,3%	65 €	-2,4%	39 €	-2,0%
Avignon	83,0%	8,4%	72 €	2,7%	60 €	11,3%	57,6%	0,9%	63 €	-1,1%	36 €	-0,2%
Bayonne-Anglet-Biarritz	72,6%	3,0%	62 €	-1,0%	45 €	2,0%	53,9%	4,9%	54 €	-6,1%	29 €	-1,4%
Bordeaux	82,0%	11,3%	83 €	20,8%	68 €	34,5%	66,0%	8,0%	68 €	5,3%	45 €	13,7%
Dijon	84,8%	3,0%	65 €	-2,3%	55 €	0,6%	69,2%	-1,6%	61 €	-1,6%	42 €	-3,2%
Grenoble	62,5%	2,4%	63 €	-0,3%	39 €	2,1%	53,5%	-1,7%	60 €	-1,8%	32 €	-3,5%
Le Havre	60,3%	-8,0%	58 €	-1,7%	35 €	-9,5%	48,4%	-9,9%	57 €	-0,7%	28 €	-10,6%
Lille	76,4%	0,7%	79 €	5,6%	61 €	6,4%	68,2%	3,2%	72 €	1,4%	49 €	4,6%
Lyon	75,5%	1,9%	84 €	12,9%	63 €	15,1%	66,4%	4,8%	76 €	9,1%	50 €	14,4%
Marseille	82,5%	1,3%	73 €	-1,1%	60 €	0,2%	64,7%	0,7%	67 €	-1,7%	43 €	-1,0%
Metz	81,2%	19,5%	61 €	-10,8%	49 €	6,5%	64,0%	11,2%	59 €	-7,2%	38 €	3,2%
Montpellier	83,8%	8,1%	74 €	4,0%	62 €	12,4%	68,4%	0,2%	70 €	-0,6%	48 €	-0,3%
Nancy	84,2%	14,8%	73 €	7,4%	62 €	23,3%	68,8%	4,0%	63 €	-0,6%	44 €	3,5%
Nantes	75,9%	6,1%	72 €	1,8%	55 €	7,9%	59,3%	3,3%	66 €	-0,1%	39 €	3,2%
Niort	72,8%	2,8%	58 €	-5,9%	42 €	-3,2%	50,7%	-7,2%	59 €	-4,4%	30 €	-11,3%
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	76,1%	0,3%	69 €	4,7%	53 €	5,1%	63,8%	0,9%	67 €	0,5%	43 €	1,4%
Rouen	77,4%	6,9%	65 €	-1,3%	51 €	5,5%	59,2%	0,3%	62 €	-0,1%	37 €	0,3%
Strasbourg	78,6%	4,2%	67 €	0,4%	53 €	4,6%	66,2%	-2,7%	64 €	-1,2%	42 €	-3,8%
Toulouse	73,2%	4,3%	70 €	0,2%	51 €	4,5%	62,6%	0,0%	65 €	-0,3%	41 €	-0,3%

Bayonne-Anglet-Biarritz : in development, sample subject to change

Super Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1	2015	Var /n-1
Angers	72,1%	-5,5%	41 €	1,7%	30 €	-3,9%	57,2%	-5,8%	41 €	1,7%	23 €	-4,2%
Avignon	68,0%	-10,5%	35 €	-1,5%	24 €	-11,8%	59,8%	-8,0%	34 €	-2,4%	20 €	-10,2%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Bordeaux	80,2%	5,4%	45 €	20,6%	36 €	27,1%	66,3%	-1,6%	39 €	5,3%	26 €	3,6%
Dijon	76,5%	-3,4%	39 €	4,1%	30 €	0,6%	63,1%	-4,5%	38 €	1,4%	24 €	-3,1%
Grenoble	57,6%	-8,8%	38 €	-1,4%	22 €	-10,1%	56,0%	1,9%	37 €	-3,9%	21 €	-2,0%
Le Havre	61,8%	-15,6%	38 €	-2,7%	24 €	-17,9%	59,2%	-14,5%	38 €	-3,1%	23 €	-17,1%
Lille	68,7%	-3,5%	41 €	2,4%	28 €	-1,2%	61,3%	-3,2%	40 €	2,0%	25 €	-1,3%
Lyon	68,8%	-0,1%	42 €	3,6%	29 €	3,4%	64,7%	0,1%	41 €	3,9%	27 €	4,0%
Marseille	74,8%	-2,2%	42 €	-0,4%	31 €	-2,6%	65,1%	-0,6%	41 €	-1,2%	26 €	-1,8%
Metz	67,5%	-12,9%	38 €	3,7%	26 €	-9,7%	61,9%	-7,5%	38 €	3,6%	23 €	-4,2%
Montpellier	68,2%	-11,6%	39 €	3,3%	26 €	-8,7%	61,0%	-7,4%	36 €	1,2%	22 €	-6,4%
Nancy	69,8%	-4,1%	39 €	2,4%	28 €	-1,8%	60,2%	3,8%	39 €	2,7%	23 €	6,6%
Nantes	81,7%	8,6%	45 €	2,7%	37 €	11,6%	67,8%	5,7%	43 €	0,3%	29 €	6,1%
Niort	67,7%	5,4%	36 €	12,3%	24 €	18,4%	61,1%	4,3%	33 €	1,6%	20 €	5,9%
Pau	57,5%	-0,9%	33 €	-1,5%	19 €	-2,4%	51,4%	-3,0%	33 €	-0,8%	17 €	-3,8%
Rennes	68,7%	-2,3%	41 €	1,9%	28 €	-0,4%	60,2%	1,0%	40 €	0,0%	24 €	1,1%
Rouen	68,6%	-2,8%	43 €	-1,5%	30 €	-4,2%	61,6%	5,5%	44 €	-0,1%	27 €	5,3%
Strasbourg	67,9%	3,0%	41 €	4,7%	28 €	7,9%	59,3%	-6,4%	41 €	2,8%	24 €	-3,8%
Toulouse	79,6%	0,9%	41 €	5,3%	33 €	6,3%	70,5%	-0,1%	39 €	1,8%	27 €	1,8%

Bayonne-Anglet-Biarritz : in development, sample subject to change

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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

Categories

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.

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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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