

# In Extenso

tourisme, hôtellerie et restauration

## French Hotel Industry Performances

April



Membre de **Deloitte**.

# April – a mixed bag

After a brief respite in March, hotel performances dropped again in April. Hotel demand appeared under pressure, with overall occupancy rates down for all categories. With the exception of Luxury and Super-budget hotels who posted falling RevPAR, the growth in average room rates compensated for the drop in demand for other categories. That said, a more detailed examination of the data illustrates that the situation is more uncertain than suggested by the figures for France as a whole. Indeed, Paris continued to progress, while throughout the rest of France, it was often MICE activity that set the pace.

Generally speaking, hotel activity in **Paris** progressed, particularly in the Midscale sector. In **Ile-de-France**, the upscale segment in Roissy and the departments of Val d'Oise (95) and Seine-Saint-Denis (93) improved, with double-digit RevPAR growth. The triennial tradeshow, Intermat (16 – 21 April), which attracted over 200 000 visitors to the Paris-Nord Villepinte exhibition centre (including 34.2% overseas visitors), clearly gave a boost to these hotel poles.

Along the **Côte d'Azur**, performances were more mixed. Cannes, for instance, recorded a significant drop in occupancy – down -9.2% for Midscale hotels and -19% for Luxury hotels. At the other end of the scale, Monaco saw demand grow – up +23.6% for Luxury and Upscale hotels compared with April 2011. In addition to its traditional demand, the Principality benefitted from hosting two major events – the Davis Cup and the Poker Tour.

Hotel activity in **regional** France dropped: stagnating average room rates did not compensate for the falling occupancy in all hotel categories. Luxury hotels suffered the most, recording a 12% drop in RevPAR. **Large agglomerations** also followed this trend, with the sharpest declines recorded in Nantes, Rennes, Montpellier and Toulouse, where RevPAR fell by over 10%. However, a few exceptions can be noted – Lille and Avignon, for instance, posted higher rooms revenues in all categories. Moreover, significant increases in rooms revenue were recorded by Le Havre's and Dijon's Budget hotels – up +40% and +18%, respectively.

The difficult economic context continues to weigh heavily on the French hotel sector. In this respect, the month of May could turn out to be even more difficult, given the number of bank holidays which doubtless penalizes business activity. It remains to be seen whether the leisure segment will take over, although the jury is still out.

## Monthly performance

April	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2012	64,0%	68,3%	65,5%	65,8%	67,1%
Var. /n-1	-4,1%	-1,7%	-0,2%	-0,5%	-3,0%
ADR 2012	328 €	170 €	97 €	65 €	40 €
Var. /n-1	1,2%	4,6%	3,9%	3,5%	1,9%
RevPAR 2012	210 €	116 €	64 €	43 €	27 €
Var. /n-1	-2,9%	2,8%	3,7%	3,0%	-1,1%

## Year To Date performance

Jan. to April	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2012	55,7%	58,8%	58,5%	59,0%	62,0%
Var. /n-1	0,3%	-1,0%	-0,7%	-0,3%	-3,0%
ADR 2012	318 €	165 €	96 €	65 €	40 €
Var. /n-1	3,4%	3,7%	1,9%	1,4%	1,9%
RevPAR 2012	177 €	97 €	56 €	39 €	25 €
Var. /n-1	3,7%	2,7%	1,1%	1,1%	-1,1%

### Definitions

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

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# Performances Paris

## April 2012



### Paris-City

#### Monthly performance

April	OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Paris - Luxury	82,2%	-1,6%	462 €	0,6%	380 €	-1,0%
Paris - Boutique Hotels	81,1%	2,4%	281 €	1,7%	228 €	4,1%
Paris - Upscale	83,3%	1,7%	188 €	4,6%	157 €	6,4%
<b>Paris - Luxury &amp; Upscale</b>	<b>82,9%</b>	<b>1,2%</b>	<b>237 €</b>	<b>2,5%</b>	<b>196 €</b>	<b>3,7%</b>
Paris - Superior midscale	88,8%	1,1%	155 €	6,8%	138 €	8,0%
Paris - Standard midscale	86,2%	1,0%	109 €	7,5%	94 €	8,6%
<b>Paris - Midscale</b>	<b>87,0%</b>	<b>1,1%</b>	<b>123 €</b>	<b>7,6%</b>	<b>107 €</b>	<b>8,7%</b>
<b>Paris - Budget</b>	<b>87,5%</b>	<b>-1,4%</b>	<b>86 €</b>	<b>5,9%</b>	<b>75 €</b>	<b>4,4%</b>

#### Year To Date performance

Jan. to April	OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Paris - Luxury	72,4%	1,2%	466 €	4,8%	337 €	6,1%
Paris - Boutique Hotels	69,9%	0,5%	279 €	1,9%	195 €	2,4%
Paris - Upscale	74,5%	3,4%	183 €	4,2%	136 €	7,7%
<b>Paris - Haut de gamme &amp; Gd luxe</b>	<b>73,9%</b>	<b>2,9%</b>	<b>233 €</b>	<b>3,6%</b>	<b>172 €</b>	<b>6,6%</b>
Paris - Superior midscale	80,5%	0,9%	148 €	5,4%	119 €	6,4%
Paris - Standard midscale	77,1%	-0,6%	102 €	3,9%	79 €	3,3%
<b>Paris - Midscale</b>	<b>78,1%</b>	<b>-0,1%</b>	<b>116 €</b>	<b>4,8%</b>	<b>91 €</b>	<b>4,7%</b>
<b>Paris - Budget</b>	<b>81,5%</b>	<b>0,4%</b>	<b>79 €</b>	<b>3,5%</b>	<b>64 €</b>	<b>3,9%</b>

### Paris suburbs (excluding Paris) – Luxury and upscale

#### Monthly performance

April	OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Paris	82,9%	1,2%	237 €	2,5%	196 €	3,7%
La Défense	n.d.	-	n.d.	-	n.d.	-
Roissy CdG	73,1%	11,8%	118 €	18,1%	86 €	32,1%
IDF (hors Paris et pôles)	78,2%	0,4%	266 €	8,8%	208 €	9,3%

#### Year To Date performance

Jan. to April	OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Paris	73,9%	2,9%	233 €	3,6%	172 €	6,6%
La Défense	n.d.	-	n.d.	-	n.d.	-
Roissy CdG	68,2%	3,9%	114 €	2,6%	78 €	6,5%
IDF (hors Paris et pôles)	70,1%	-2,9%	212 €	7,1%	148 €	4,0%

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# Performance Regions

April 2012



## Regions

Regions (excl. French Riviera)

### Monthly performance

April	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2012	52,8%	55,3%	57,7%	60,5%	65,1%
Var. /n-1	-11,0%	-3,7%	-3,0%	-2,7%	-3,9%
ADR 2012	251 €	127 €	88 €	63 €	38 €
Var. /n-1	-1,1%	-1,5%	0,6%	0,8%	1,2%
RevPAR 2012	133 €	70 €	51 €	38 €	25 €
Var. /n-1	-12,0%	-5,1%	-2,4%	-1,9%	-2,7%

### Year To Date performance

Jan. to April	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2012	48,1%	49,2%	52,4%	55,3%	59,8%
Var. /n-1	-2,7%	-2,0%	-2,0%	-1,3%	-3,6%
ADR 2012	216 €	126 €	88 €	64 €	38 €
Var. /n-1	-2,7%	0,1%	0,5%	0,4%	1,6%
RevPAR 2012	104 €	62 €	46 €	36 €	23 €
Var. /n-1	-5,3%	-1,9%	-1,5%	-0,9%	-2,0%

French Riviera

### Monthly performance

April	Luxury	Upscale *	Midscale	Budget	Super Budget
OR 2012	55,7%	56,8%	66,8%	n.d.	n.d.
Var. /n-1	-3,7%	-3,6%	2,2%	-	-
ADR 2012	303 €	163 €	91 €	n.d.	n.d.
Var. /n-1	4,5%	9,5%	4,0%	-	-
RevPAR 2012	169 €	92 €	61 €	n.d.	n.d.
Var. /n-1	0,6%	5,5%	6,2%	-	-

### Year To Date performance

Jan. to April	Luxury	Upscale *	Midscale	Budget	Super Budget
OR 2012	44,3%	42,8%	52,2%	n.d.	n.d.
Var. /n-1	0,8%	-4,6%	0,3%	-	-
ADR 2012	275 €	144 €	83 €	n.d.	n.d.
Var. /n-1	4,1%	4,6%	3,2%	-	-
RevPAR 2012	122 €	61 €	44 €	n.d.	n.d.
Var. /n-1	4,9%	-0,2%	3,5%	-	-

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

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# Performances Suburbs

## April 2012



### Paris suburbs (excluding Paris)

Midscale market	Monthly performance								Average suburbs
	April	departments						95	
		77	78	91	92	93	94		
OR 2012	51,0%	60,9%	60,9%	74,9%	68,5%	81,7%	70,4%	69,3%	
Var. /n-1	4,8%	1,8%	0,6%	9,5%	6,9%	5,7%	5,3%	5,6%	
ADR 2012	102 €	98 €	85 €	96 €	76 €	77 €	109 €	93 €	
Var. /n-1	5,8%	2,5%	2,0%	1,3%	16,6%	2,0%	22,9%	6,4%	
RevPAR 2012	52 €	59 €	52 €	72 €	52 €	63 €	77 €	64 €	
Var. /n-1	10,9%	4,4%	2,5%	10,9%	24,6%	7,8%	29,4%	12,4%	

  

Midscale market	Year To Date performance								Average suburbs
	Jan. to April	departments						95	
		77	78	91	92	93	94		
OR 2012	41,1%	57,7%	57,6%	62,0%	56,2%	73,3%	64,6%	61,1%	
Var. /n-1	2,3%	-1,6%	2,0%	3,5%	2,1%	6,0%	-0,4%	2,1%	
ADR 2012	100 €	107 €	94 €	108 €	78 €	80 €	105 €	99 €	
Var. /n-1	3,7%	1,3%	0,0%	-0,1%	6,3%	-0,9%	5,5%	1,3%	
RevPAR 2012	41 €	62 €	54 €	67 €	44 €	58 €	68 €	61 €	
Var. /n-1	6,1%	-0,3%	2,0%	3,4%	8,5%	5,1%	5,0%	3,4%	

Budget market	Monthly performance								Average suburbs
	April	departments						95	
		77	78	91	92	93	94		
OR 2012	75,8%	63,7%	60,7%	76,8%	80,7%	77,9%	68,9%	73,9%	
Var. /n-1	5,2%	-3,8%	1,0%	4,0%	7,8%	-4,4%	5,8%	4,1%	
ADR 2012	65 €	80 €	61 €	69 €	59 €	65 €	64 €	65 €	
Var. /n-1	3,6%	3,2%	0,2%	4,9%	10,3%	7,3%	27,6%	9,8%	
RevPAR 2012	49 €	51 €	37 €	53 €	48 €	51 €	44 €	48 €	
Var. /n-1	9,0%	-0,7%	1,2%	9,1%	19,0%	2,5%	35,0%	14,2%	

  

Budget market	Year To Date performance								Average suburbs
	Jan. to April	departments						95	
		77	78	91	92	93	94		
OR 2012	63,1%	61,1%	59,4%	65,7%	66,1%	70,6%	59,8%	63,7%	
Var. /n-1	5,9%	-2,9%	-1,3%	-1,1%	3,2%	-4,5%	1,6%	1,2%	
ADR 2012	61 €	84 €	67 €	76 €	61 €	70 €	64 €	67 €	
Var. /n-1	-0,4%	2,2%	1,3%	2,7%	1,3%	4,6%	7,4%	2,6%	
RevPAR 2012	39 €	51 €	40 €	50 €	40 €	49 €	38 €	42 €	
Var. /n-1	5,4%	-0,8%	0,0%	1,6%	4,5%	-0,1%	9,1%	3,9%	

Super Budget market	Monthly performance								IDF (hors Paris)
	April	departments						95	
		77	78	91	92	93	94		
OR 2012	73,0%	69,7%	68,9%	n.d.	86,5%	79,0%	79,7%	76,7%	
Var. /n-1	10,6%	-2,2%	-0,9%	-	6,6%	1,4%	3,5%	3,2%	
ADR 2012	41 €	42 €	40 €	n.d.	43 €	44 €	44 €	43 €	
Var. /n-1	-1,5%	1,8%	2,2%	-	7,1%	2,6%	8,7%	4,1%	
RevPAR 2012	30 €	30 €	27 €	n.d.	38 €	35 €	35 €	33 €	
Var. /n-1	8,9%	-0,5%	1,3%	-	14,2%	4,1%	12,5%	7,4%	

  

Super Budget market	Year To Date performance								IDF (hors Paris)
	Jan. to April	departments						95	
		77	78	91	92	93	94		
OR 2012	65,6%	67,8%	67,6%	n.d.	78,3%	74,2%	76,0%	72,2%	
Var. /n-1	5,9%	-5,3%	-0,8%	-	0,3%	-2,0%	0,3%	0,0%	
ADR 2012	40 €	42 €	40 €	n.d.	43 €	44 €	43 €	43 €	
Var. /n-1	-1,4%	1,9%	2,7%	-	6,0%	2,3%	4,5%	3,1%	
RevPAR 2012	26 €	29 €	27 €	n.d.	34 €	33 €	33 €	31 €	
Var. /n-1	4,4%	-3,4%	1,9%	-	6,3%	0,3%	4,9%	3,1%	

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# Performances North-East

April 2012



## North-east & Cities

	Monthly performance						Year To Date performance					
Luxury Upscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
North-east	55,6%	-4,6%	127 €	-2,4%	71 €	-6,9%	47,6%	-4,7%	125 €	0,0%	59 €	-4,6%
Dijon	62,0%	-2,7%	124 €	-2,2%	77 €	-4,9%	48,3%	-4,0%	122 €	2,6%	59 €	-1,4%
Lille	52,9%	6,9%	110 €	-2,3%	58 €	4,5%	50,7%	3,3%	118 €	-3,0%	60 €	0,2%
Metz	insufficient supply						insufficient supply					
Nancy	insufficient supply						insufficient supply					
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	56,5%	-6,8%	116 €	-3,2%	66 €	-9,8%	48,9%	-8,5%	120 €	1,5%	58 €	-7,1%
Midscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
North-east	56,2%	-2,4%	86 €	0,6%	48 €	-1,8%	48,9%	-2,7%	87 €	-0,1%	43 €	-2,9%
Dijon	61,0%	-3,0%	82 €	-0,5%	50 €	-3,5%	54,8%	6,1%	82 €	0,9%	45 €	7,1%
Lille	63,3%	2,7%	86 €	0,6%	54 €	3,3%	58,2%	-8,0%	90 €	-0,9%	53 €	-8,8%
Metz	in progress						in progress					
Nancy	52,0%	-6,2%	81 €	3,7%	42 €	-2,8%	50,3%	1,1%	82 €	-0,2%	41 €	0,9%
Reims	68,1%	-0,3%	90 €	-1,1%	61 €	-1,4%	54,8%	-2,6%	90 €	-0,2%	49 €	-2,8%
Strasbourg	62,9%	2,9%	90 €	-0,2%	57 €	2,7%	51,6%	0,4%	93 €	0,2%	48 €	0,6%
Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
North-east	62,3%	-1,6%	63 €	2,0%	39 €	0,4%	55,1%	-2,7%	63 €	0,9%	35 €	-1,8%
Dijon	68,7%	13,0%	65 €	4,6%	45 €	18,2%	62,2%	13,5%	64 €	2,4%	40 €	16,1%
Lille	73,0%	2,2%	69 €	0,9%	50 €	3,2%	66,2%	-2,5%	73 €	1,6%	49 €	-1,0%
Metz	65,5%	-4,2%	64 €	-1,7%	42 €	-5,9%	58,3%	-2,1%	67 €	-0,7%	39 €	-2,8%
Nancy	49,9%	-9,6%	62 €	2,5%	31 €	-7,3%	46,7%	-5,3%	64 €	2,0%	30 €	-3,4%
Reims	62,9%	-11,3%	64 €	4,2%	40 €	-7,6%	54,5%	-2,9%	62 €	-0,3%	34 €	-3,2%
Strasbourg	66,6%	-1,9%	61 €	-2,1%	41 €	-3,9%	58,8%	-1,7%	63 €	-1,0%	37 €	-2,6%
Super Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
North-east	63,7%	-3,8%	37 €	1,2%	24 €	-2,7%	58,2%	-5,4%	37 €	1,9%	22 €	-3,6%
Dijon	67,3%	-12,7%	40 €	1,7%	27 €	-11,2%	67,0%	-6,7%	40 €	2,8%	27 €	-4,0%
Lille	73,7%	1,0%	40 €	2,3%	30 €	3,4%	67,1%	-2,3%	41 €	2,0%	27 €	-0,3%
Metz	68,6%	-4,7%	38 €	3,7%	26 €	-1,2%	65,5%	-6,4%	39 €	5,2%	25 €	-1,6%
Nancy	65,1%	8,2%	38 €	-0,8%	25 €	7,3%	64,0%	8,5%	38 €	0,3%	24 €	8,8%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	61,3%	-0,7%	39 €	0,8%	24 €	0,1%	52,7%	-11,9%	39 €	-0,6%	20 €	-12,4%

### Departments in the North-Eastern set :

Aisne; Allier; Ardennes; Aube; Cher; Côte-d'Or; Doubs; Jura; Loiret; Marne; Haute-Marne; Meurthe-et-Moselle; Meuse; Moselle; Nièvre; Nord; Oise; Pas-de-Calais; Bas-Rhin; Haut-Rhin; Haute-Saône; Saône-et-Loire; Vosges; Yonne; Territoire-de-Belfort

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# Performances North-West

April 2012



## North-West & Cities

Luxury Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
North-West	50,3%	-16,8%	195 €	3,9%	98 €	-13,5%	46,4%	-6,2%	173 €	2,3%	80 €	-4,1%
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					
Midscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
North-West	55,5%	-5,9%	90 €	0,7%	50 €	-5,2%	49,8%	-2,8%	85 €	0,4%	43 €	-2,4%
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	60,2%	-11,5%	87 €	0,6%	53 €	-11,0%	58,7%	7,2%	85 €	-3,9%	50 €	3,1%
Nantes	52,6%	-8,9%	85 €	-3,0%	45 €	-11,6%	54,4%	-7,0%	88 €	-0,9%	48 €	-7,8%
Rennes	52,0%	-14,8%	83 €	-0,7%	43 €	-15,4%	53,9%	-8,7%	90 €	0,8%	48 €	-7,9%
Rouen	55,9%	-8,9%	89 €	0,3%	50 €	-8,6%	51,8%	-0,1%	90 €	-2,4%	47 €	-2,6%
Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
North-West	59,9%	-1,9%	63 €	1,8%	38 €	-0,2%	55,2%	0,5%	64 €	1,5%	35 €	2,0%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	57,6%	-2,8%	65 €	1,5%	37 €	-1,3%	58,5%	4,3%	70 €	2,2%	41 €	6,5%
Le Havre	70,0%	32,6%	64 €	5,8%	45 €	40,2%	60,5%	19,6%	62 €	5,3%	37 €	26,0%
Nantes	58,4%	-7,9%	67 €	1,4%	39 €	-6,6%	58,2%	-5,8%	69 €	2,2%	40 €	-3,8%
Rennes	59,9%	-9,4%	64 €	0,8%	38 €	-8,7%	63,4%	1,4%	67 €	1,4%	43 €	2,8%
Rouen	60,1%	-3,8%	61 €	2,4%	36 €	-1,5%	54,1%	-3,2%	61 €	0,2%	33 €	-3,0%
Super Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
North-West	65,5%	-4,2%	38 €	0,6%	25 €	-3,6%	59,2%	-2,2%	38 €	1,2%	23 €	-1,0%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	71,1%	-3,5%	38 €	2,8%	27 €	-0,7%	69,8%	1,7%	38 €	2,9%	26 €	4,7%
Le Havre	74,1%	-0,1%	40 €	2,6%	30 €	2,5%	67,5%	-3,8%	40 €	1,8%	27 €	-2,1%
Nantes	63,5%	-10,7%	42 €	-1,1%	27 €	-11,8%	63,6%	-5,4%	42 €	1,5%	27 €	-4,0%
Rennes	54,4%	-9,0%	40 €	1,4%	22 €	-7,8%	59,6%	0,8%	40 €	1,3%	24 €	2,2%
Rouen	71,8%	-6,0%	41 €	0,2%	29 €	-5,8%	64,2%	-1,8%	41 €	1,4%	26 €	-0,5%

### Departments in the North-Western set :

Calvados; Côtes; Eure; Eure-et-Loir; Finistère; Ile-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

April 2012



## South-East (excl. French Riviera) & Cities

Luxury Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
South-East	59,4%	1,6%	144 €	-3,1%	85 €	-1,6%	51,4%	0,0%	139 €	-0,7%	71 €	-0,8%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	63,5%	-1,4%	131 €	5,2%	83 €	3,8%	45,5%	-2,2%	118 €	5,1%	54 €	2,8%
Grenoble	insufficient supply						insufficient supply					
Lyon	64,0%	1,5%	120 €	0,2%	77 €	1,7%	60,0%	-4,7%	122 €	-4,3%	73 €	-8,8%
Marseille	62,5%	4,9%	120 €	-3,5%	75 €	1,2%	52,5%	7,6%	134 €	7,0%	71 €	15,2%
Montpellier	53,9%	-12,8%	129 €	-9,5%	70 €	-21,0%	49,3%	-10,4%	130 €	-3,1%	64 €	-13,2%
St Etienne	insufficient supply						insufficient supply					
Midscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
	South-East	60,9%	-0,6%	90 €	-0,2%	55 €	-0,8%	57,0%	-1,1%	91 €	-0,1%	52 €
Aix en Provence	63,0%	11,3%	86 €	-1,6%	54 €	9,4%	54,5%	5,8%	89 €	-0,2%	49 €	5,6%
Avignon	74,1%	4,7%	84 €	2,9%	62 €	7,7%	60,6%	13,1%	81 €	0,9%	49 €	14,1%
Grenoble	50,5%	-5,0%	106 €	2,8%	54 €	-2,3%	54,7%	-5,5%	106 €	1,4%	58 €	-4,2%
Lyon	57,6%	-9,5%	94 €	-3,3%	54 €	-12,4%	59,6%	-8,1%	98 €	-5,0%	58 €	-12,6%
Marseille	62,0%	-4,5%	95 €	2,4%	59 €	-2,2%	57,1%	-5,3%	101 €	8,5%	58 €	2,8%
Montpellier	59,0%	-7,3%	88 €	-6,7%	52 €	-13,6%	58,2%	-3,8%	89 €	-4,9%	52 €	-8,6%
St Etienne	in progress						in progress					
Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
	South-East	60,3%	-4,3%	65 €	1,0%	39 €	-3,3%	56,9%	-2,6%	66 €	0,7%	38 €
Aix en Provence	62,9%	-1,0%	68 €	0,5%	43 €	-0,5%	52,8%	-2,0%	70 €	2,5%	37 €	0,4%
Avignon	70,5%	7,4%	61 €	0,4%	43 €	7,9%	55,0%	3,1%	58 €	3,9%	32 €	7,1%
Grenoble	58,8%	-5,2%	64 €	1,6%	37 €	-3,7%	59,0%	-4,9%	65 €	0,3%	38 €	-4,7%
Lyon	60,5%	-12,1%	74 €	2,4%	44 €	-10,0%	62,6%	-7,7%	75 €	-0,6%	47 €	-8,2%
Marseille	66,9%	-1,3%	69 €	-2,0%	46 €	-3,3%	59,4%	-0,9%	72 €	1,6%	43 €	0,7%
Montpellier	67,6%	-6,4%	69 €	4,6%	47 €	-2,1%	64,9%	-1,1%	68 €	3,2%	44 €	2,0%
St Etienne	in progress						in progress					
Super Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
	South-East	64,4%	-5,7%	39 €	1,8%	25 €	-4,0%	60,8%	-4,4%	38 €	1,8%	23 €
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	77,4%	2,3%	36 €	5,9%	28 €	8,3%	64,0%	1,8%	35 €	1,9%	22 €	3,8%
Grenoble	58,5%	-13,1%	41 €	-0,3%	24 €	-13,4%	64,4%	-9,6%	41 €	-1,6%	26 €	-11,0%
Lyon	62,9%	-9,2%	39 €	0,6%	25 €	-8,7%	66,0%	-8,8%	40 €	1,6%	26 €	-7,4%
Marseille	71,3%	3,8%	41 €	1,2%	29 €	5,0%	66,7%	4,6%	41 €	1,9%	28 €	6,6%
Montpellier	68,1%	-15,0%	40 €	6,6%	27 €	-9,4%	67,5%	-7,5%	38 €	4,3%	26 €	-3,6%
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

## April 2012



### French Riviera

April	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
French Riviera - Luxury	55,7%	-3,7%	303 €	4,5%	169 €	0,6%	44,3%	0,8%	275 €	4,1%	122 €	4,9%
French Riviera - Boutique Hotels**	57,4%	-12,8%	140 €	4,2%	80 €	-9,1%	45,1%	-5,8%	126 €	3,7%	57 €	-2,3%
French Riviera - Upscale	56,7%	-2,4%	166 €	10,0%	94 €	7,4%	42,5%	-4,4%	146 €	4,7%	62 €	0,1%
Average Upscale & Luxury	56,4%	-3,7%	213 €	7,3%	120 €	3,3%	43,3%	-2,7%	192 €	6,1%	83 €	3,2%
Average Midscale	66,8%	2,2%	91 €	4,0%	61 €	6,2%	52,2%	0,3%	83 €	3,2%	44 €	3,5%

### French Riviera Cities

April	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Cannes - Luxury	50,2%	-13,0%	264 €	-3,6%	133 €	-16,1%	38,7%	-7,2%	268 €	3,5%	104 €	-4,0%
Cannes - Boutique Hotels	40,5%	-31,0%	158 €	12,8%	64 €	-22,2%	33,5%	-18,5%	158 €	12,9%	53 €	-8,0%
Cannes - Upscale	37,5%	-23,7%	139 €	-0,4%	52 €	-24,0%	31,8%	-9,7%	146 €	4,1%	46 €	-6,0%
Cannes - Upscale & Luxury	43,9%	-18,6%	210 €	0,1%	92 €	-18,5%	35,5%	-8,4%	216 €	6,3%	77 €	-2,7%
Cannes - Midscale	52,7%	-9,2%	95 €	-1,6%	50 €	-10,6%	37,5%	-6,0%	101 €	4,3%	38 €	-2,0%

April	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Nice - Upscale & Luxury	69,3%	-1,8%	162 €	11,0%	112 €	9,1%	51,5%	-2,6%	141 €	5,6%	73 €	2,9%
Nice - Midscale	75,5%	3,7%	92 €	5,5%	69 €	9,4%	58,4%	-0,1%	82 €	3,4%	48 €	3,2%

April	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Monaco - Luxury	60,8%	16,9%	377 €	13,4%	229 €	32,5%	47,7%	12,7%	322 €	7,8%	153 €	21,5%
Monaco - Upscale	70,0%	27,5%	220 €	3,3%	154 €	31,7%	46,4%	0,3%	181 €	4,0%	84 €	4,3%
Monaco - Upscale & Luxury	66,5%	23,6%	275 €	6,4%	183 €	31,6%	46,9%	4,8%	235 €	7,1%	110 €	12,2%

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

\*\* Boutique Hotels: sample excludes Luxury hotels

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# Performances South West

## April 2012



### South-West & Cities

	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
<b>Luxury Upscale</b>												
South-West	48,8%	-8,0%	184 €	-1,1%	90 €	-9,1%	46,4%	2,1%	165 €	-0,7%	76 €	1,4%
Bordeaux	48,2%	2,5%	196 €	-5,1%	95 €	-2,7%	41,8%	21,6%	185 €	2,0%	77 €	24,1%
Toulouse	53,5%	-8,5%	116 €	-3,3%	62 €	-11,5%	56,7%	-4,5%	120 €	-1,7%	68 €	-6,1%
<b>Midscale</b>												
South-West	56,4%	-5,0%	88 €	2,5%	50 €	-2,6%	52,5%	-1,3%	89 €	3,5%	47 €	2,1%
Bordeaux	56,9%	1,3%	85 €	3,2%	48 €	4,6%	51,7%	4,6%	86 €	5,5%	45 €	10,4%
Toulouse	59,5%	-9,8%	95 €	1,0%	57 €	-8,9%	59,2%	-4,9%	98 €	2,6%	58 €	-2,4%
<b>Budget</b>												
South-West	58,8%	-3,4%	62 €	-3,1%	36 €	-6,4%	53,2%	2,0%	63 €	-2,9%	33 €	-1,0%
Bordeaux	58,9%	-2,6%	68 €	1,8%	40 €	-0,8%	58,2%	2,6%	69 €	1,2%	40 €	3,8%
Toulouse	60,5%	-2,6%	60 €	-7,1%	36 €	-9,5%	58,3%	1,9%	65 €	-4,7%	38 €	-2,9%
<b>Super Budget</b>												
South-West	68,9%	-0,9%	39 €	1,1%	27 €	0,2%	62,0%	-1,1%	38 €	1,3%	24 €	0,2%
Bordeaux	69,8%	5,2%	36 €	-0,1%	25 €	5,1%	65,5%	4,8%	36 €	0,1%	24 €	4,9%
Toulouse	70,3%	-8,1%	40 €	1,1%	28 €	-7,1%	67,7%	-4,1%	40 €	2,0%	27 €	-2,2%

#### Departments in the South-Western set :

Ariège; Charente; Charente-Maritime; Corrèze; Creuse; Dordogne; Haute-Garonne; Gers; Gironde; Landes; Lot; Lot-et-Garonne; Pyrénées-Atlantiques; Hautes-Pyrénées; Tarn; Tarn-et-Garonne; Haute-Vienne

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# Performances Main cities in Regions

## April 2012



### Main cities in Regions – Luxury, upscale and midscale

Luxury Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Avignon	63,5%	-1,4%	131 €	5,2%	83 €	3,8%	45,5%	-2,2%	118 €	5,1%	54 €	2,8%
Bordeaux	48,2%	2,5%	196 €	-5,1%	95 €	-2,7%	41,8%	21,6%	185 €	2,0%	77 €	24,1%
Cannes	43,9%	-18,6%	210 €	0,1%	92 €	-18,5%	35,5%	-8,4%	216 €	6,3%	77 €	-2,7%
Dijon	62,0%	-2,7%	124 €	-2,2%	77 €	-4,9%	48,3%	-4,0%	122 €	2,6%	59 €	-1,4%
Lille	52,9%	6,9%	110 €	-2,3%	58 €	4,5%	50,7%	3,3%	118 €	-3,0%	60 €	0,2%
Lyon	64,0%	1,5%	120 €	0,2%	77 €	1,7%	60,0%	-4,7%	122 €	-4,3%	73 €	-8,8%
Marseille	62,5%	4,9%	120 €	-3,5%	75 €	1,2%	52,5%	7,6%	134 €	7,0%	71 €	15,2%
Monaco	66,5%	23,6%	275 €	6,4%	183 €	31,6%	46,9%	4,8%	235 €	7,1%	110 €	12,2%
Montpellier	53,9%	-12,8%	129 €	-9,5%	70 €	-21,0%	49,3%	-10,4%	130 €	-3,1%	64 €	-13,2%
Nice	69,3%	-1,8%	162 €	11,0%	112 €	9,1%	51,5%	-2,6%	141 €	5,6%	73 €	2,9%
Strasbourg	56,5%	-6,8%	116 €	-3,2%	66 €	-9,8%	48,9%	-8,5%	120 €	1,5%	58 €	-7,1%
Toulouse	53,5%	-8,5%	116 €	-3,3%	62 €	-11,5%	56,7%	-4,5%	120 €	-1,7%	68 €	-6,1%

  

Midscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Aix en Provence	63,0%	11,3%	86 €	-1,6%	54 €	9,4%	54,5%	5,8%	89 €	-0,2%	49 €	5,6%
Avignon	74,1%	4,7%	84 €	2,9%	62 €	7,7%	60,6%	13,1%	81 €	0,9%	49 €	14,1%
Bordeaux	56,9%	1,3%	85 €	3,2%	48 €	4,6%	51,7%	4,6%	86 €	5,5%	45 €	10,4%
Cannes	52,7%	-9,2%	95 €	-1,6%	50 €	-10,6%	37,5%	-6,0%	101 €	4,3%	38 €	-2,0%
Dijon	61,0%	-3,0%	82 €	-0,5%	50 €	-3,5%	54,8%	6,1%	82 €	0,9%	45 €	7,1%
Grenoble	50,5%	-5,0%	106 €	2,8%	54 €	-2,3%	54,7%	-5,5%	106 €	1,4%	58 €	-4,2%
Le Havre	60,2%	-11,5%	87 €	0,6%	53 €	-11,0%	58,7%	7,2%	85 €	-3,9%	50 €	3,1%
Lille	63,3%	2,7%	86 €	0,6%	54 €	3,3%	58,2%	-8,0%	90 €	-0,9%	53 €	-8,8%
Lyon	57,6%	-9,5%	94 €	-3,3%	54 €	-12,4%	59,6%	-8,1%	98 €	-5,0%	58 €	-12,6%
Marseille	62,0%	-4,5%	95 €	2,4%	59 €	-2,2%	57,1%	-5,3%	101 €	8,5%	58 €	2,8%
Montpellier	59,0%	-7,3%	88 €	-6,7%	52 €	-13,6%	58,2%	-3,8%	89 €	-4,9%	52 €	-8,6%
Nancy	52,0%	-6,2%	81 €	3,7%	42 €	-2,8%	50,3%	1,1%	82 €	-0,2%	41 €	0,9%
Nantes	52,6%	-8,9%	85 €	-3,0%	45 €	-11,6%	54,4%	-7,0%	88 €	-0,9%	48 €	-7,8%
Nice	75,5%	3,7%	92 €	5,5%	69 €	9,4%	58,4%	-0,1%	82 €	3,4%	48 €	3,2%
Reims	68,1%	-0,3%	90 €	-1,1%	61 €	-1,4%	54,8%	-2,6%	90 €	-0,2%	49 €	-2,8%
Rennes	52,0%	-14,8%	83 €	-0,7%	43 €	-15,4%	53,9%	-8,7%	90 €	0,8%	48 €	-7,9%
Rouen	55,9%	-8,9%	89 €	0,3%	50 €	-8,6%	51,8%	-0,1%	90 €	-2,4%	47 €	-2,6%
Strasbourg	62,9%	2,9%	90 €	-0,2%	57 €	2,7%	51,6%	0,4%	93 €	0,2%	48 €	0,6%
Toulouse	59,5%	-9,8%	95 €	1,0%	57 €	-8,9%	59,2%	-4,9%	98 €	2,6%	58 €	-2,4%

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# Performances Main cities in Regions

## April 2012



### Main cities in regions – Budget and Super Budget

Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Aix en Provence	62,9%	-1,0%	68 €	0,5%	43 €	-0,5%	52,8%	-2,0%	70 €	2,5%	37 €	0,4%
Angers	57,6%	-2,8%	65 €	1,5%	37 €	-1,3%	58,5%	4,3%	70 €	2,2%	41 €	6,5%
Avignon	70,5%	7,4%	61 €	0,4%	43 €	7,9%	55,0%	3,1%	58 €	3,9%	32 €	7,1%
Bordeaux	58,9%	-2,6%	68 €	1,8%	40 €	-0,8%	58,2%	2,6%	69 €	1,2%	40 €	3,8%
Dijon	68,7%	13,0%	65 €	4,6%	45 €	18,2%	62,2%	13,5%	64 €	2,4%	40 €	16,1%
Grenoble	58,8%	-5,2%	64 €	1,6%	37 €	-3,7%	59,0%	-4,9%	65 €	0,3%	38 €	-4,7%
Le Havre	70,0%	32,6%	64 €	5,8%	45 €	40,2%	60,5%	19,6%	62 €	5,3%	37 €	26,0%
Lille	73,0%	2,2%	69 €	0,9%	50 €	3,2%	66,2%	-2,5%	73 €	1,6%	49 €	-1,0%
Lyon	60,5%	-12,1%	74 €	2,4%	44 €	-10,0%	62,6%	-7,7%	75 €	-0,6%	47 €	-8,2%
Marseille	66,9%	-1,3%	69 €	-2,0%	46 €	-3,3%	59,4%	-0,9%	72 €	1,6%	43 €	0,7%
Metz	65,5%	-4,2%	64 €	-1,7%	42 €	-5,9%	58,3%	-2,1%	67 €	-0,7%	39 €	-2,8%
Montpellier	67,6%	-6,4%	69 €	4,6%	47 €	-2,1%	64,9%	-1,1%	68 €	3,2%	44 €	2,0%
Nancy	49,9%	-9,6%	62 €	2,5%	31 €	-7,3%	46,7%	-5,3%	64 €	2,0%	30 €	-3,4%
Nantes	58,4%	-7,9%	67 €	1,4%	39 €	-6,6%	58,2%	-5,8%	69 €	2,2%	40 €	-3,8%
Reims	62,9%	-11,3%	64 €	4,2%	40 €	-7,6%	54,5%	-2,9%	62 €	-0,3%	34 €	-3,2%
Rennes	59,9%	-9,4%	64 €	0,8%	38 €	-8,7%	63,4%	1,4%	67 €	1,4%	43 €	2,8%
Rouen	60,1%	-3,8%	61 €	2,4%	36 €	-1,5%	54,1%	-3,2%	61 €	0,2%	33 €	-3,0%
Strasbourg	66,6%	-1,9%	61 €	-2,1%	41 €	-3,9%	58,8%	-1,7%	63 €	-1,0%	37 €	-2,6%
Toulouse	60,5%	-2,6%	60 €	-7,1%	36 €	-9,5%	58,3%	1,9%	65 €	-4,7%	38 €	-2,9%

  

Super Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Angers	71,1%	-3,5%	38 €	2,8%	27 €	-0,7%	69,8%	1,7%	38 €	2,9%	26 €	4,7%
Avignon	77,4%	2,3%	36 €	5,9%	28 €	8,3%	64,0%	1,8%	35 €	1,9%	22 €	3,8%
Bordeaux	69,8%	5,2%	36 €	-0,1%	25 €	5,1%	65,5%	4,8%	36 €	0,1%	24 €	4,9%
Dijon	67,3%	-12,7%	40 €	1,7%	27 €	-11,2%	67,0%	-6,7%	40 €	2,8%	27 €	-4,0%
Grenoble	58,5%	-13,1%	41 €	-0,3%	24 €	-13,4%	64,4%	-9,6%	41 €	-1,6%	26 €	-11,0%
Le Havre	74,1%	-0,1%	40 €	2,6%	30 €	2,5%	67,5%	-3,8%	40 €	1,8%	27 €	-2,1%
Lille	73,7%	1,0%	40 €	2,3%	30 €	3,4%	67,1%	-2,3%	41 €	2,0%	27 €	-0,3%
Lyon	62,9%	-9,2%	39 €	0,6%	25 €	-8,7%	66,0%	-8,8%	40 €	1,6%	26 €	-7,4%
Marseille	71,3%	3,8%	41 €	1,2%	29 €	5,0%	66,7%	4,6%	41 €	1,9%	28 €	6,6%
Metz	68,6%	-4,7%	38 €	3,7%	26 €	-1,2%	65,5%	-6,4%	39 €	5,2%	25 €	-1,6%
Montpellier	68,1%	-15,0%	40 €	6,6%	27 €	-9,4%	67,5%	-7,5%	38 €	4,3%	26 €	-3,6%
Nancy	65,1%	8,2%	38 €	-0,8%	25 €	7,3%	64,0%	8,5%	38 €	0,3%	24 €	8,8%
Nantes	63,5%	-10,7%	42 €	-1,1%	27 €	-11,8%	63,6%	-5,4%	42 €	1,5%	27 €	-4,0%
Rennes	54,4%	-9,0%	40 €	1,4%	22 €	-7,8%	59,6%	0,8%	40 €	1,3%	24 €	2,2%
Rouen	71,8%	-6,0%	41 €	0,2%	29 €	-5,8%	64,2%	-1,8%	41 €	1,4%	26 €	-0,5%
Strasbourg	61,3%	-0,7%	39 €	0,8%	24 €	0,1%	52,7%	-11,9%	39 €	-0,6%	20 €	-12,4%
Toulouse	70,3%	-8,1%	40 €	1,1%	28 €	-7,1%	67,7%	-4,1%	40 €	2,0%	27 €	-2,2%

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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

## 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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# Informations

## In Extenso – member of Deloitte

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### About In Extenso

A member of Deloitte Touche Tohmatsu, In Extenso is an entity dedicated to small and medium-sized businesses. Almost 3 300 employees in 170 agencies in France serve 70 000 clients, including companies, firms, entrepreneurs, tradesmen and women, self-employed lawyers and doctors, associations and local authorities.

### Tourism, Hotels & Restaurants Desk

In Extenso is one of the leading advisors in Tourism, Hospitality and Restaurant industries worldwide. We provide many consulting services for different stakeholders of the tourism industry :

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

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