

French Hotel Industry Performances



March 2011

March, a Month of Contrasts

After two encouraging months of improved activity, March was rather inconsistent, with the majority of French hotels experiencing a more tricky situation. The staggering of the school holiday periods in regional France appeared to have strongly impacted hotel performance.

This downward trend should be put in perspective, however, since Paris, the Côte d'Azur and several regional towns escaped the gloom. Avignon and Strasburg, for instance, posted double digit growth in some segments.

In spite of the downturn in March, year-to-date first trimester results are up on last year in the majority of destinations.

French market

Monthly performance

March	5* - 4 *	3 *	2 *
OR 2011	61,3%	62,1%	61,9%
Var. /n-1	0,2%	-2,7%	-6,7%
ADR 2011	214 €	97 €	64 €
Var. /n-1	4,5%	5,3%	1,3%
RevPAR 2011	131 €	60 €	40 €
Var. /n-1	4,7%	2,4%	-5,5%

Year To Date performance

March	5* - 4 *	3 *	2 *
OR 2011	56,3%	57,1%	57,0%
Var. /n-1	2,9%	1,4%	-2,2%
ADR 2011	206 €	96 €	65 €
Var. /n-1	4,0%	4,5%	3,1%
RevPAR 2011	116 €	55 €	37 €
Var. /n-1	7,1%	6,0%	0,8%

Definitions

OR = Occupancy Rate

ADR = Average Daily Rate

RevPAR = Revenue per available room

All hotel categories in Paris saw an increase in activity, with upscale and 3 star hotels posting the best performances (+10% in some instances).

Although Ile-de-France's hotels generally recorded an increase in business, a number of departments did experience a drop. This was the case of Seine-Saint-Denis and Val d'Oise, who after a good start to the year, experienced a more difficult month of March, mainly due to lower occupancy (-20% for Seine-Saint-Denis).

A similar pattern was observed in the rest of France, where the drop in activity was essentially down to lower demand – a phenomenon experienced by the majority of destinations. A number of cities recorded double digit drops. Conversely, ARR increased in all segments and in most large cities, although this growth was not sufficient to offset the drops in occupancy. The 2 star category experienced the most significant declines.

The Côte d'Azur continued to post good results, particularly in the upscale segment (superior 4 star and 5 star hotels). Monaco came out tops, posting RevPAR growth of 24.1% compared to last year (March being particularly difficult in 2010, however).

Leisure destinations appeared to be the most successful in March 2011, taking over from business destinations which are usually favored at the start of the year.

Reproduction or distribution in whole or part without written permission is prohibited and subject to legal action

FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)1 58 37 90 61 OR fdaniel@deloitte.fr)

Deloitte - 185, avenue Charles-de-Gaulle - 92524 Neuilly-sur-Seine Cedex France

Tél : +33 (0)1 58 37 90 37 - Fax : +33 (0)1 55 61 59 16

Performances Paris

March 2011



Paris-City

Monthly performance

March	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris Superior 5* - 4*	76,2%	3,3%	515 €	0,8%	393 €	4,1%
Paris Boutique Hotels	75,4%	2,7%	283 €	5,2%	213 €	8,1%
Paris Standard 5* - 4*	74,8%	2,2%	176 €	6,0%	132 €	8,4%
Paris average - 5* - 4 *	75,1%	2,5%	252 €	4,4%	189 €	7,0%
Paris Superior 3*	86,5%	8,7%	145 €	6,5%	125 €	15,8%
Paris Standard 3*	82,8%	0,2%	101 €	7,6%	83 €	7,8%
Paris - 3*	83,7%	2,4%	112 €	7,1%	94 €	9,6%
Paris - 2*	87,8%	-1,8%	75 €	3,8%	66 €	2,0%

Year To Date performance

March	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris Superior 5* - 4*	66,7%	2,4%	521 €	4,7%	347 €	7,2%
Paris Boutique Hotels	68,2%	3,7%	275 €	3,4%	188 €	7,2%
Paris Standard 5* - 4*	68,0%	2,1%	173 €	5,4%	118 €	7,7%
Paris average - 5* - 4 *	67,7%	2,3%	247 €	5,3%	168 €	7,7%
Paris Superior 3*	77,8%	5,9%	139 €	3,5%	108 €	9,6%
Paris Standard 3*	74,6%	2,2%	98 €	5,1%	73 €	7,4%
Paris - 3*	75,5%	3,2%	110 €	4,7%	83 €	8,0%
Paris - 2*	79,7%	-0,2%	74 €	3,0%	59 €	2,8%

Paris suburbs (excluding Paris)

Monthly performance

March	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris - 5* - 4*	75,1%	2,5%	252 €	4,4%	189 €	7,0%
La Défense - 5* - 4*	n.d.	-	n.d.	-	n.d.	-
Roissy CdG - 5* - 4*	62,3%	-8,1%	97 €	-2,2%	61 €	-10,1%
Paris suburbs* - 5* - 4*	79,3%	2,5%	186 €	7,3%	147 €	10,0%

Year To Date performance

March	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris - 5* - 4*	67,7%	2,3%	247 €	5,3%	168 €	7,7%
La Défense - 5* - 4*	n.d.	-	n.d.	-	n.d.	-
Roissy CdG - 5* - 4*	63,7%	-3,6%	105 €	3,3%	67 €	-0,4%
Paris suburbs* - 5* - 4*	70,5%	4,0%	181 €	3,2%	127 €	7,3%

Reproduction or distribution in whole or part without written permission is prohibited and subject to legal action

FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)1 58 37 90 61 or fdaniel@deloitte.fr)
 Deloitte - 185, avenue Charles-de-Gaulle - 92524 Neuilly-sur-Seine Cedex France
 Tél : +33 (0)1 58 37 90 37 - Fax : +33 (0)1 55 61 59 16

Performance Regions

March 2011



Regions

		<i>Monthly performance</i>				
		<i>March</i>	5* - 4 *	3 *	2 *	
Regions (excl. French Riviera)	OR 2011		50,5%	56,0%	59,1%	
	<i>Var. /n-1</i>		-3,0%	-2,9%	-5,9%	
	ADR 2011		137 €	89 €	65 €	
	<i>Var. /n-1</i>		0,2%	2,6%	1,4%	
	RevPAR 2011		69 €	50 €	38 €	
	<i>Var. /n-1</i>		-2,7%	-0,3%	-4,6%	
	<i>Year To Date performance</i>					
			<i>March</i>	5* - 4 *	3 *	2 *
	OR 2011		48,0%	51,8%	54,4%	
	<i>Var. /n-1</i>		5,1%	2,9%	-1,2%	
ADR 2011		138 €	88 €	65 €		
<i>Var. /n-1</i>		2,7%	2,9%	2,7%		
RevPAR 2011		66 €	46 €	35 €		
<i>Var. /n-1</i>		7,9%	5,9%	1,4%		
		<i>Monthly performance</i>				
		<i>March</i>	5* - 4 *	3 *	2 *	
French Riviera	OR 2011		44,6%	53,2%	n.d.	
	<i>Var. /n-1</i>		1,5%	4,5%	n.d.	
	ADR 2011		196 €	81 €	n.d.	
	<i>Var. /n-1</i>		2,3%	1,6%	n.d.	
	RevPAR 2011		88 €	43 €	n.d.	
	<i>Var. /n-1</i>		3,9%	6,2%	n.d.	
	<i>Year To Date performance</i>					
			<i>March</i>	5* - 4 *	3 *	2 *
	OR 2011		39,3%	47,0%	n.d.	
	<i>Var. /n-1</i>		3,6%	0,3%	n.d.	
ADR 2011		170 €	78 €	n.d.		
<i>Var. /n-1</i>		1,3%	2,2%	n.d.		
RevPAR 2011		67 €	37 €	n.d.		
<i>Var. /n-1</i>		4,9%	2,6%	n.d.		

Reproduction or distribution in whole or part without written permission is prohibited and subject to legal action

FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)1 58 37 90 61 OR fdaniel@deloitte.fr)
 Deloitte - 185, avenue Charles-de-Gaulle - 92524 Neuilly-sur-Seine Cedex France
 Tél : +33 (0)1 58 37 90 37 - Fax : +33 (0)1 55 61 59 16

Performances Suburbs

March 2011



Paris suburbs (excluding Paris)

3 star market	Monthly performance								Average suburbs
	March	departments							
		77	78	91	92	93	94		
OR 2011	75,1%	65,2%	60,5%	65,1%	50,5%	71,8%	63,5%		65,2%
Var. /n-1	-6,3%	1,4%	5,9%	-13,0%	-20,2%	1,5%	-6,7%		-6,5%
ADR 2011	98 €	116 €	99 €	116 €	71 €	84 €	95 €		101 €
Var. /n-1	7,4%	1,4%	5,8%	16,1%	-1,9%	8,6%	3,4%		8,5%
RevPAR 2011	74 €	76 €	60 €	76 €	36 €	60 €	60 €		66 €
Var. /n-1	0,7%	2,8%	12,0%	1,0%	-21,8%	10,2%	-3,6%		1,4%
	Year To Date performance								Average suburbs
March	departments								
OR 2011	71,2%	59,3%	54,7%	57,1%	52,1%	65,5%	62,7%		60,4%
Var. /n-1	0,3%	4,2%	4,6%	-6,6%	-6,4%	-0,6%	-3,6%		-2,1%
ADR 2011	99 €	113 €	98 €	114 €	77 €	83 €	101 €		101 €
Var. /n-1	3,6%	0,2%	3,7%	11,8%	5,1%	10,1%	7,7%		7,1%
RevPAR 2011	70 €	67 €	53 €	65 €	40 €	55 €	63 €		61 €
Var. /n-1	4,0%	4,4%	8,5%	4,5%	-1,6%	9,4%	3,8%		4,8%
2 star market	Monthly performance								Average suburbs
	March	departments							
		77	78	91	92	93	94		
OR 2011	63,9%	67,1%	63,7%	69,2%	67,6%	77,2%	56,8%		65,4%
Var. /n-1	-0,8%	-4,3%	5,4%	1,5%	-7,6%	-4,9%	-18,9%		-6,9%
ADR 2011	59 €	87 €	69 €	74 €	57 €	69 €	57 €		65 €
Var. /n-1	5,2%	3,8%	-1,6%	3,0%	-3,1%	4,4%	-4,7%		0,9%
RevPAR 2011	38 €	58 €	44 €	51 €	39 €	53 €	32 €		42 €
Var. /n-1	4,4%	-0,6%	3,7%	4,5%	-10,5%	-0,7%	-22,7%		-6,0%
	Year To Date performance								IDF (hors Paris)
March	départements								
OR 2011	54,7%	59,7%	60,2%	61,9%	60,9%	70,8%	57,5%		60,0%
Var. /n-1	0,3%	-4,8%	3,3%	1,4%	0,8%	-3,5%	-11,4%		-3,2%
ADR 2011	58 €	86 €	68 €	74 €	60 €	69 €	62 €		66 €
Var. /n-1	2,9%	4,7%	1,5%	3,7%	1,1%	4,1%	8,0%		4,0%
RevPAR 2011	32 €	52 €	41 €	46 €	37 €	49 €	36 €		40 €
Var. /n-1	3,2%	-0,2%	4,9%	5,1%	1,9%	0,4%	-4,3%		0,7%
0/1 star market	Monthly performance								IDF (hors Paris)
	March	departments							
		77	78	91	92	93	94		
OR 2011	62,3%	75,1%	72,1%	n.d.	80,0%	80,0%	69,3%		73,7%
Var. /n-1	-8,4%	-4,0%	5,3%	-	1,5%	-4,1%	-2,0%		-1,5%
ADR 2011	40 €	42 €	39 €	n.d.	41 €	44 €	40 €		42 €
Var. /n-1	7,3%	4,8%	4,2%	-	1,9%	5,4%	-3,3%		3,0%
RevPAR 2011	25 €	32 €	28 €	n.d.	33 €	35 €	27 €		31 €
Var. /n-1	-1,8%	0,6%	9,7%	-	3,4%	1,1%	-5,3%		1,4%
	Year To Date performance								IDF (hors Paris)
March	departments								
OR 2011	57,1%	72,5%	67,1%	n.d.	75,9%	76,8%	71,0%		70,4%
Var. /n-1	-12,5%	0,7%	3,0%	-	5,0%	-3,4%	5,3%		0,3%
ADR 2011	40 €	42 €	39 €	n.d.	41 €	44 €	41 €		42 €
Var. /n-1	8,8%	3,5%	4,9%	-	2,5%	5,1%	0,1%		3,9%
RevPAR 2011	23 €	30 €	26 €	n.d.	31 €	34 €	29 €		30 €
Var. /n-1	-4,9%	4,3%	8,0%	-	7,6%	1,5%	5,4%		4,2%

Reproduction or distribution in whole or part without written permission is prohibited and subject to legal action

FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)1 58 37 90 61 or fdaniel@deloitte.fr)
 Deloitte - 185, avenue Charles-de-Gaulle - 92524 Neuilly-sur-Seine Cedex France
 Tél : +33 (0)1 58 37 90 37 - Fax : +33 (0)1 55 61 59 16

Performances North-East

March 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*	49,7%	2,7%	121 €	-5,2%	60 €	-2,6%	47,1%	10,3%	123 €	-1,6%	58 €	8,6%
Dijon	51,8%	-5,3%	115 €	2,5%	59 €	-2,9%	43,6%	-1,6%	115 €	2,6%	50 €	1,0%
Lille	54,5%	-3,0%	115 €	-8,6%	63 €	-11,4%	52,5%	8,6%	118 €	-0,5%	62 €	8,1%
Metz	insufficient supply						insufficient supply					
Nancy	insufficient supply						insufficient supply					
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	54,3%	4,2%	116 €	-3,0%	63 €	1,1%	51,0%	10,9%	117 €	-3,0%	60 €	7,6%
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*	52,7%	-3,5%	89 €	3,1%	47 €	-0,6%	47,4%	0,8%	88 €	3,0%	41 €	3,8%
Dijon	53,8%	-7,9%	83 €	5,7%	45 €	-2,7%	47,8%	-6,0%	81 €	2,1%	39 €	-4,1%
Lille	67,4%	-2,3%	92 €	-2,9%	62 €	-5,1%	63,9%	3,6%	92 €	2,8%	58 €	6,5%
Metz	in progress						in progress					
Nancy	51,1%	-8,0%	84 €	2,7%	43 €	-5,5%	47,9%	-0,8%	83 €	4,3%	40 €	3,5%
Reims	59,0%	-1,3%	92 €	2,8%	54 €	1,4%	49,8%	-1,0%	88 €	0,4%	44 €	-0,6%
Strasbourg	57,8%	-0,9%	90 €	5,5%	52 €	4,6%	52,3%	2,3%	91 €	3,5%	48 €	5,8%
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*	60,2%	-3,9%	63 €	0,7%	38 €	-3,2%	54,1%	0,5%	63 €	2,4%	34 €	2,9%
Dijon	59,2%	-16,9%	63 €	4,5%	37 €	-13,1%	53,9%	-12,2%	62 €	4,2%	33 €	-8,6%
Lille	72,4%	3,7%	73 €	-1,4%	53 €	2,2%	66,7%	6,9%	74 €	2,7%	49 €	9,8%
Metz	59,2%	1,2%	68 €	-2,0%	40 €	-0,8%	54,5%	3,3%	68 €	3,5%	37 €	6,9%
Nancy	54,4%	-16,2%	59 €	1,2%	32 €	-15,2%	49,0%	-9,2%	59 €	2,2%	29 €	-7,2%
Reims	62,6%	-7,6%	63 €	1,8%	39 €	-5,9%	52,2%	-1,4%	63 €	2,1%	33 €	0,7%
Strasbourg	63,6%	-1,2%	65 €	0,6%	41 €	-0,6%	56,1%	4,1%	65 €	-0,2%	36 €	4,0%
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	65,6%	-1,0%	39 €	4,0%	26 €	2,9%	60,1%	1,7%	39 €	3,1%	23 €	4,8%
Dijon	75,8%	-1,3%	39 €	3,6%	30 €	2,2%	69,9%	4,5%	39 €	5,8%	27 €	10,6%
Lille	69,7%	-2,1%	38 €	2,7%	26 €	0,6%	65,7%	-0,9%	38 €	2,3%	25 €	1,3%
Metz	70,4%	6,7%	37 €	3,4%	26 €	10,3%	67,7%	14,8%	37 €	1,3%	25 €	16,2%
Nancy	64,8%	-6,5%	37 €	4,8%	24 €	-2,0%	58,3%	-2,5%	38 €	5,5%	22 €	2,8%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	61,0%	13,8%	38 €	6,6%	23 €	21,3%	54,2%	19,8%	38 €	6,9%	21 €	28,2%

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

Reproduction or distribution in whole or part without written permission is prohibited and subject to legal action

FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)1 58 37 90 61 or fdaniel@deloitte.fr)

Deloitte - 185, avenue Charles-de-Gaulle - 92524 Neuilly-sur-Seine Cedex France

Tél : +33 (0)1 58 37 90 37 - Fax : +33 (0)1 55 61 59 16

Performances North-West

March 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*	52,9%	-7,1%	163 €	2,7%	86 €	-4,6%	53,4%	3,1%	163 €	4,1%	87 €	7,3%
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*	53,3%	0,9%	84 €	1,7%	45 €	2,6%	50,5%	8,7%	83 €	0,5%	42 €	9,3%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	54,9%	6,8%	92 €	0,1%	51 €	6,9%	57,4%	20,1%	96 €	-5,9%	55 €	13,1%
Le Havre	56,8%	-5,7%	90 €	3,5%	51 €	-2,4%	50,3%	-9,0%	90 €	3,9%	45 €	-5,4%
Nantes	59,3%	-10,0%	90 €	2,0%	53 €	-8,2%	59,0%	2,4%	88 €	1,7%	52 €	4,1%
Rennes	61,0%	-9,3%	99 €	5,3%	60 €	-4,5%	58,3%	2,5%	91 €	4,6%	53 €	7,2%
Rouen	52,0%	-12,3%	95 €	3,1%	49 €	-9,6%	48,7%	-0,3%	94 €	3,5%	46 €	3,2%
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*	57,5%	-7,9%	64 €	2,0%	37 €	-6,0%	53,0%	-2,3%	64 €	2,1%	34 €	-0,2%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	58,0%	-4,8%	68 €	3,7%	40 €	-1,3%	55,0%	0,3%	71 €	2,5%	39 €	2,8%
Le Havre	51,8%	-3,7%	58 €	-0,7%	30 €	-4,4%	50,5%	0,7%	57 €	-1,4%	29 €	-0,7%
Nantes	66,2%	-7,9%	68 €	0,2%	45 €	-7,7%	62,1%	-1,3%	68 €	2,7%	42 €	1,3%
Rennes	62,7%	-13,7%	70 €	2,0%	44 €	-12,0%	60,2%	-4,7%	68 €	3,2%	41 €	-1,6%
Rouen	60,4%	-7,8%	62 €	4,4%	37 €	-3,8%	53,9%	-1,1%	62 €	7,2%	34 €	6,0%
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	65,4%	-2,9%	40 €	2,8%	26 €	-0,2%	59,9%	1,2%	39 €	1,9%	24 €	3,1%
Amiens	75,1%	3,4%	40 €	0,5%	30 €	3,9%	69,3%	4,8%	40 €	0,4%	28 €	5,3%
Angers	70,6%	0,2%	37 €	2,4%	26 €	2,7%	66,9%	4,0%	37 €	0,7%	24 €	4,7%
Le Havre	72,2%	7,5%	39 €	10,5%	28 €	18,7%	68,8%	20,2%	39 €	7,5%	27 €	29,2%
Nantes	69,8%	-7,2%	42 €	2,2%	29 €	-5,2%	65,8%	-1,2%	42 €	1,6%	27 €	0,4%
Rennes	62,2%	-8,6%	38 €	1,1%	24 €	-7,6%	56,3%	-3,5%	38 €	0,6%	21 €	-2,9%
Rouen	65,4%	-13,2%	40 €	6,7%	26 €	-7,4%	61,7%	-8,0%	40 €	5,3%	25 €	-3,1%

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

Reproduction or distribution in whole or part without written permission is prohibited and subject to legal action

FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)1 58 37 90 61 or fdaniel@deloitte.fr)
 Deloitte - 185, avenue Charles-de-Gaulle - 92524 Neuilly-sur-Seine Cedex France
 Tél : +33 (0)1 58 37 90 37 - Fax : +33 (0)1 55 61 59 16

Performances South-East

March 2011



South-East (excl. French Riviera) & 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
South-East - 5* - 4*	53,2%	-3,9%	129 €	0,1%	69 €	-3,7%	49,7%	3,6%	132 €	3,5%	66 €	7,2%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	49,5%	38,2%	109 €	-9,6%	54 €	25,0%	40,5%	28,1%	106 €	-5,0%	43 €	21,7%
Grenoble	insufficient supply						insufficient supply					
Lyon	61,9%	-2,8%	123 €	2,2%	76 €	-0,7%	63,3%	11,6%	128 €	10,9%	81 €	23,8%
Marseille	47,5%	-10,0%	122 €	-4,2%	58 €	-13,7%	45,2%	0,2%	126 €	-4,1%	57 €	-3,9%
Montpellier	58,2%	-21,5%	131 €	-3,5%	76 €	-24,2%	52,8%	-10,2%	130 €	-1,8%	69 €	-11,9%
St Etienne	insufficient supply						insufficient supply					
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
South-East - 3*	61,2%	-5,0%	91 €	3,3%	56 €	-1,8%	57,4%	2,1%	91 €	4,0%	52 €	6,1%
Aix en Provence	57,4%	-11,8%	88 €	4,8%	51 €	-7,6%	52,1%	-9,4%	88 €	4,6%	46 €	-5,2%
Avignon	56,5%	4,0%	78 €	4,6%	44 €	8,7%	47,3%	9,3%	79 €	1,6%	37 €	11,0%
Grenoble	62,4%	-6,0%	108 €	7,8%	67 €	1,3%	59,4%	-0,9%	105 €	5,8%	62 €	4,9%
Lyon	62,5%	-9,7%	103 €	3,5%	65 €	-6,6%	64,0%	6,6%	106 €	9,2%	68 €	16,4%
Marseille	64,7%	-2,5%	95 €	0,1%	61 €	-2,4%	58,9%	-0,4%	94 €	-0,4%	55 €	-0,8%
Montpellier	62,4%	-8,9%	92 €	-3,6%	57 €	-12,2%	59,4%	2,7%	94 €	1,6%	56 €	4,4%
St Etienne	in progress						in progress					
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
South-East - 2*	60,8%	-9,1%	66 €	1,2%	40 €	-8,0%	58,0%	-2,5%	66 €	3,5%	38 €	0,9%
Aix en Provence	57,4%	-5,8%	69 €	2,8%	40 €	-3,2%	50,7%	-6,6%	69 €	0,8%	35 €	-5,8%
Avignon	54,0%	3,3%	54 €	1,8%	29 €	5,1%	49,0%	12,8%	54 €	-1,8%	26 €	10,7%
Grenoble	69,1%	-8,2%	67 €	2,1%	46 €	-6,3%	65,5%	-5,6%	68 €	3,9%	44 €	-2,0%
Lyon	67,6%	-13,8%	74 €	1,1%	50 €	-12,8%	68,2%	-0,7%	75 €	7,4%	51 €	6,6%
Marseille	62,5%	-8,6%	72 €	1,7%	45 €	-7,1%	56,4%	-5,7%	70 €	-0,5%	40 €	-6,2%
Montpellier	65,9%	-14,0%	66 €	4,0%	44 €	-10,6%	64,3%	-5,6%	67 €	5,8%	43 €	-0,2%
St Etienne	in progress						in progress					
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
South-East - 0/1 star	63,1%	-2,9%	40 €	1,3%	25 €	-1,7%	59,2%	0,8%	40 €	1,1%	24 €	1,9%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	63,0%	-0,6%	35 €	2,0%	22 €	1,3%	58,9%	-1,5%	35 €	1,4%	21 €	-0,1%
Grenoble	77,9%	-1,6%	41 €	0,4%	32 €	-1,1%	75,2%	-0,4%	41 €	-0,6%	31 €	-1,1%
Lyon	75,3%	-1,5%	39 €	-0,7%	29 €	-2,1%	73,1%	7,6%	40 €	0,4%	29 €	8,0%
Marseille	69,3%	-4,1%	40 €	-2,3%	28 €	-6,4%	65,8%	1,4%	40 €	-2,5%	26 €	-1,1%
Montpellier	70,5%	4,9%	37 €	-0,1%	26 €	4,8%	68,5%	12,8%	37 €	-0,1%	26 €	12,6%
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

Reproduction or distribution in whole or part without written permission is prohibited and subject to legal action

FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)1 58 37 90 61 or fdaniel@deloitte.fr)
 Deloitte - 185, avenue Charles-de-Gaulle - 92524 Neuilly-sur-Seine Cedex France
 Tél : +33 (0)1 58 37 90 37 - Fax : +33 (0)1 55 61 59 16

Performances French Riviera

March 2011



French Riviera

March	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*	46,0%	15,2%	286 €	-3,6%	132 €	11,1%	38,7%	10,7%	243 €	-2,2%	94 €	8,3%
Boutique Hotel	52,7%	4,5%	106 €	-8,0%	56 €	-3,9%	44,3%	8,8%	100 €	-5,4%	44 €	3,0%
Standard 5* - 4*	42,8%	-6,4%	152 €	3,9%	65 €	-2,7%	39,0%	-0,7%	137 €	1,9%	53 €	1,2%
Average 5/4 star	44,6%	1,5%	196 €	2,3%	88 €	3,9%	39,3%	3,6%	170 €	1,3%	67 €	4,9%
Average 3 star	53,2%	4,5%	81 €	1,6%	43 €	6,2%	47,0%	0,3%	78 €	2,2%	37 €	2,6%

French Riviera Cities

March	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*	41,0%	10,3%	336 €	-5,3%	138 €	4,5%	35,8%	7,3%	250 €	-4,0%	90 €	3,1%
Cannes Boutique Hotels	40,9%	11,2%	148 €	-5,2%	61 €	5,4%	35,6%	10,9%	127 €	-9,4%	45 €	0,5%
Cannes Standard 5* - 4*	31,8%	-7,6%	173 €	3,8%	55 €	-4,1%	29,9%	4,4%	141 €	0,8%	42 €	5,3%
Cannes - 5* - 4*	36,7%	2,4%	260 €	-0,1%	95 €	2,3%	33,1%	6,7%	199 €	-1,2%	66 €	5,4%
Cannes - 3*	36,6%	-5,1%	108 €	9,2%	40 €	3,6%	34,8%	-0,7%	88 €	5,8%	31 €	5,1%

March	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*	51,9%	-7,0%	139 €	-1,7%	72 €	-8,6%	46,0%	-0,2%	126 €	-0,8%	58 €	-1,0%
Nice - 3*	60,4%	8,1%	78 €	-1,2%	47 €	6,7%	52,6%	0,7%	77 €	1,5%	41 €	2,2%

March	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*	51,1%	43,5%	267 €	-5,9%	136 €	35,0%	38,9%	27,6%	282 €	-5,2%	110 €	21,0%
Monaco Standard 5* - 4*	49,3%	6,8%	164 €	8,0%	81 €	15,3%	43,4%	3,5%	158 €	2,4%	69 €	5,9%
Monaco - 5* - 4*	50,0%	19,6%	205 €	3,8%	103 €	24,1%	41,7%	11,6%	203 €	0,6%	84 €	12,3%

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

Reproduction or distribution in whole or part without written permission is prohibited and subject to legal action

FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)1 58 37 90 61 OR fdaniel@deloitte.fr)
 Deloitte - 185, avenue Charles-de-Gaulle - 92524 Neuilly-sur-Seine Cedex France
 Tél : +33 (0)1 58 37 90 37 - Fax : +33 (0)1 55 61 59 16

Performances South West

March 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*	45,2%	-5,3%	158 €	6,1%	72 €	0,5%	43,2%	2,7%	157 €	6,4%	68 €	9,3%
Bordeaux	34,3%	-8,9%	172 €	5,0%	59 €	-4,4%	30,2%	-2,7%	168 €	6,2%	51 €	3,3%
Toulouse	59,9%	3,5%	121 €	-4,4%	73 €	-1,1%	59,6%	10,9%	122 €	-0,8%	73 €	10,0%
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*	55,4%	0,2%	88 €	1,1%	49 €	1,3%	50,6%	4,3%	88 €	3,1%	45 €	7,6%
Bordeaux	55,2%	-6,4%	83 €	3,5%	46 €	-3,2%	49,1%	-2,2%	81 €	1,8%	40 €	-0,5%
Toulouse	61,8%	-3,2%	97 €	-1,0%	60 €	-4,1%	59,5%	6,7%	97 €	0,4%	58 €	7,2%
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*	55,9%	-1,0%	66 €	2,8%	37 €	1,7%	49,9%	-1,1%	66 €	3,0%	33 €	1,9%
Bordeaux	64,2%	-0,4%	69 €	2,4%	44 €	2,0%	55,5%	-4,7%	69 €	3,0%	38 €	-1,8%
Toulouse	59,5%	-0,8%	72 €	0,7%	43 €	-0,1%	55,9%	4,3%	72 €	0,9%	40 €	5,3%
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	63,8%	-0,5%	38 €	0,6%	24 €	0,1%	57,6%	0,4%	38 €	0,6%	22 €	1,0%
Bordeaux	66,4%	2,1%	36 €	-0,3%	24 €	1,8%	61,3%	1,9%	36 €	-1,0%	22 €	0,9%
Toulouse	76,0%	1,8%	38 €	-4,3%	29 €	-2,6%	68,9%	5,2%	39 €	-2,3%	27 €	2,9%

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

Reproduction or distribution in whole or part without written permission is prohibited and subject to legal action

FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)1 58 37 90 61 OR fdaniel@deloitte.fr)
 Deloitte - 185, avenue Charles-de-Gaulle - 92524 Neuilly-sur-Seine Cedex France
 Tél : +33 (0)1 58 37 90 37 - Fax : +33 (0)1 55 61 59 16

Performances Main cities in Regions

March 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	49,5%	38,2%	109 €	-9,6%	54 €	25,0%	40,5%	28,1%	106 €	-5,0%	43 €	21,7%
Bordeaux	34,3%	-8,9%	172 €	5,0%	59 €	-4,4%	30,2%	-2,7%	168 €	6,2%	51 €	3,3%
Cannes	36,7%	2,4%	260 €	-0,1%	95 €	2,3%	33,1%	6,7%	199 €	-1,2%	66 €	5,4%
Lille	54,5%	-3,0%	115 €	-8,6%	63 €	-11,4%	52,5%	8,6%	118 €	-0,5%	62 €	8,1%
Lyon	61,9%	-2,8%	123 €	2,2%	76 €	-0,7%	63,3%	11,6%	128 €	10,9%	81 €	23,8%
Marseille	47,5%	-10,0%	122 €	-4,2%	58 €	-13,7%	45,2%	0,2%	126 €	-4,1%	57 €	-3,9%
Monaco	50,0%	19,6%	205 €	3,8%	103 €	24,1%	41,7%	11,6%	203 €	0,6%	84 €	12,3%
Montpellier	58,2%	-2,1,5%	131 €	-3,5%	76 €	-24,2%	52,8%	-10,2%	130 €	-1,8%	69 €	-11,9%
Nice	51,9%	-7,0%	139 €	-1,7%	72 €	-8,6%	46,0%	-0,2%	126 €	-0,8%	58 €	-1,0%
Strasbourg	54,3%	4,2%	116 €	-3,0%	63 €	1,1%	51,0%	10,9%	117 €	-3,0%	60 €	7,6%
Toulouse	59,9%	3,5%	121 €	-4,4%	73 €	-1,1%	59,6%	10,9%	122 €	-0,8%	73 €	10,0%

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	57,4%	-11,8%	88 €	4,8%	51 €	-7,6%	52,1%	-9,4%	88 €	4,6%	46 €	-5,2%
Angers	54,9%	6,8%	92 €	0,1%	51 €	6,9%	57,4%	20,1%	96 €	-5,9%	55 €	13,1%
Avignon	56,5%	4,0%	78 €	4,6%	44 €	8,7%	47,3%	9,3%	79 €	1,6%	37 €	11,0%
Bordeaux	55,2%	-6,4%	83 €	3,5%	46 €	-3,2%	49,1%	-2,2%	81 €	1,8%	40 €	-0,5%
Cannes	36,6%	-5,1%	108 €	9,2%	40 €	3,6%	34,8%	-0,7%	88 €	5,8%	31 €	5,1%
Grenoble	62,4%	-6,0%	108 €	7,8%	67 €	1,3%	59,4%	-0,9%	105 €	5,8%	62 €	4,9%
Lille	67,4%	-2,3%	92 €	-2,9%	62 €	-5,1%	63,9%	3,6%	92 €	2,8%	58 €	6,5%
Lyon	62,5%	-9,7%	103 €	3,5%	65 €	-6,6%	64,0%	6,6%	106 €	9,2%	68 €	16,4%
Marseille	64,7%	-2,5%	95 €	0,1%	61 €	-2,4%	58,9%	-0,4%	94 €	-0,4%	55 €	-0,8%
Montpellier	62,4%	-8,9%	92 €	-3,6%	57 €	-12,2%	59,4%	2,7%	94 €	1,6%	56 €	4,4%
Nancy	51,1%	-8,0%	84 €	2,7%	43 €	-5,5%	47,9%	-0,8%	83 €	4,3%	40 €	3,5%
Nantes	59,3%	-10,0%	90 €	2,0%	53 €	-8,2%	59,0%	2,4%	88 €	1,7%	52 €	4,1%
Nice	60,4%	8,1%	78 €	-1,2%	47 €	6,7%	52,6%	0,7%	77 €	1,5%	41 €	2,2%
Reims	59,0%	-1,3%	92 €	2,8%	54 €	1,4%	49,8%	-1,0%	88 €	0,4%	44 €	-0,6%
Rennes	61,0%	-9,3%	99 €	5,3%	60 €	-4,5%	58,3%	2,5%	91 €	4,6%	53 €	7,2%
Rouen	52,0%	-12,3%	95 €	3,1%	49 €	-9,6%	48,7%	-0,3%	94 €	3,5%	46 €	3,2%
Strasbourg	57,8%	-0,9%	90 €	5,5%	52 €	4,6%	52,3%	2,3%	91 €	3,5%	48 €	5,8%
Toulouse	61,8%	-3,2%	97 €	-1,0%	60 €	-4,1%	59,5%	6,7%	97 €	0,4%	58 €	7,2%

Reproduction or distribution in whole or part without written permission is prohibited and subject to legal action

FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)1 58 37 90 61 OR fdaniel@deloitte.fr)
 Deloitte - 185, avenue Charles-de-Gaulle - 92524 Neuilly-sur-Seine Cedex France
 Tél : +33 (0)1 58 37 90 37 - Fax : +33 (0)1 55 61 59 16

Performances Main cities in Regions

March 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	57,4%	-5,8%	69 €	2,8%	40 €	-3,2%	50,7%	-6,6%	69 €	0,8%	35 €	-5,8%
Angers	58,0%	-4,8%	68 €	3,7%	40 €	-1,3%	55,0%	0,3%	71 €	2,5%	39 €	2,8%
Avignon	54,0%	3,3%	54 €	1,8%	29 €	5,1%	49,0%	12,8%	54 €	-1,8%	26 €	10,7%
Bordeaux	64,2%	-0,4%	69 €	2,4%	44 €	2,0%	55,5%	-4,7%	69 €	3,0%	38 €	-1,8%
Grenoble	69,1%	-8,2%	67 €	2,1%	46 €	-6,3%	65,5%	-5,6%	68 €	3,9%	44 €	-2,0%
Lille	72,4%	3,7%	73 €	-1,4%	53 €	2,2%	66,7%	6,9%	74 €	2,7%	49 €	9,8%
Lyon	67,6%	-13,8%	74 €	1,1%	50 €	-12,8%	68,2%	-0,7%	75 €	7,4%	51 €	6,6%
Marseille	62,5%	-8,6%	72 €	1,7%	45 €	-7,1%	56,4%	-5,7%	70 €	-0,5%	40 €	-6,2%
Metz	59,2%	1,2%	68 €	-2,0%	40 €	-0,8%	54,5%	3,3%	68 €	3,5%	37 €	6,9%
Montpellier	65,9%	-14,0%	66 €	4,0%	44 €	-10,6%	64,3%	-5,6%	67 €	5,8%	43 €	-0,2%
Nancy	54,4%	-16,2%	59 €	1,2%	32 €	-15,2%	49,0%	-9,2%	59 €	2,2%	29 €	-7,2%
Nantes	66,2%	-7,9%	68 €	0,2%	45 €	-7,7%	62,1%	-1,3%	68 €	2,7%	42 €	1,3%
Reims	62,6%	-7,6%	63 €	1,8%	39 €	-5,9%	52,2%	-1,4%	63 €	2,1%	33 €	0,7%
Rennes	62,7%	-13,7%	70 €	2,0%	44 €	-12,0%	60,2%	-4,7%	68 €	3,2%	41 €	-1,6%
Rouen	60,4%	-7,8%	62 €	4,4%	37 €	-3,8%	53,9%	-1,1%	62 €	7,2%	34 €	6,0%
Strasbourg	63,6%	-1,2%	65 €	0,6%	41 €	-0,6%	56,1%	4,1%	65 €	-0,2%	36 €	4,0%
Toulouse	59,5%	-0,8%	72 €	0,7%	43 €	-0,1%	55,9%	4,3%	72 €	0,9%	40 €	5,3%

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	75,1%	3,4%	40 €	0,5%	30 €	3,9%	69,3%	4,8%	40 €	0,4%	28 €	5,3%
Angers	70,6%	0,2%	37 €	2,4%	26 €	2,7%	66,9%	4,0%	37 €	0,7%	24 €	4,7%
Avignon	63,0%	-0,6%	35 €	2,0%	22 €	1,3%	58,9%	-1,5%	35 €	1,4%	21 €	-0,1%
Bordeaux	66,4%	2,1%	36 €	-0,3%	24 €	1,8%	61,3%	1,9%	36 €	-1,0%	22 €	0,9%
Grenoble	77,9%	-1,6%	41 €	0,4%	32 €	-1,1%	75,2%	-0,4%	41 €	-0,6%	31 €	-1,1%
Lille	69,7%	-2,1%	38 €	2,7%	26 €	0,6%	65,7%	-0,9%	38 €	2,3%	25 €	1,3%
Lyon	75,3%	-1,5%	39 €	-0,7%	29 €	-2,1%	73,1%	7,6%	40 €	0,4%	29 €	8,0%
Marseille	69,3%	-4,1%	40 €	-2,3%	28 €	-6,4%	65,8%	1,4%	40 €	-2,5%	26 €	-1,1%
Metz	70,4%	6,7%	37 €	3,4%	26 €	10,3%	67,7%	14,8%	37 €	1,3%	25 €	16,2%
Montpellier	70,5%	4,9%	37 €	-0,1%	26 €	4,8%	68,5%	12,8%	37 €	-0,1%	26 €	12,6%
Nancy	64,8%	-6,5%	37 €	4,8%	24 €	-2,0%	58,3%	-2,5%	38 €	5,5%	22 €	2,8%
Nantes	69,8%	-7,2%	42 €	2,2%	29 €	-5,2%	65,8%	-1,2%	42 €	1,6%	27 €	0,4%
Rennes	62,2%	-8,6%	38 €	1,1%	24 €	-7,6%	56,3%	-3,5%	38 €	0,6%	21 €	-2,9%
Rouen	65,4%	-13,2%	40 €	6,7%	26 €	-7,4%	61,7%	-8,0%	40 €	5,3%	25 €	-3,1%
Strasbourg	61,0%	13,8%	38 €	6,6%	23 €	21,3%	54,2%	19,8%	38 €	6,9%	21 €	28,2%
Toulouse	76,0%	1,8%	38 €	-4,3%	29 €	-2,6%	68,9%	5,2%	39 €	-2,3%	27 €	2,9%

Reproduction or distribution in whole or part without written permission is prohibited and subject to legal action

FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)1 58 37 90 61 or fdaniel@deloitte.fr)
 Deloitte - 185, avenue Charles-de-Gaulle - 92524 Neuilly-sur-Seine Cedex France
 Tél : +33 (0)1 58 37 90 37 - Fax : +33 (0)1 55 61 59 16

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

Reproduction or distribution in whole or part without written permission is prohibited and subject to legal action

FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)1 58 37 90 61 OR fdaniel@deloitte.fr)

Deloitte - 185, avenue Charles-de-Gaulle - 92524 Neuilly-sur-Seine Cedex France

Tél : +33 (0)1 58 37 90 37 - Fax : +33 (0)1 55 61 59 16

Informations

Deloitte

About Deloitte in France

Deloitte & Associés is the Deloitte Touche Tohmatsu member firm in France and the professional services are delivered by Deloitte & Associés, its subsidiaries and affiliates. Deloitte calls on diversified expertise to cover the scope of services required by its clients of all sizes from all sectors - major multinationals, local micro-companies and medium-sized enterprises. Our 6,000 professionals and partners embody the vigor and success of the Firm in their commitment to clients and their constant concern for service excellence. Deloitte offers a very comprehensive range of services: audit, consulting and risk services, tax and legal, accounting and corporate finance, in accordance with its multidisciplinary strategy and ethical approach. For more information, visit www.deloitte.fr

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.

Reproduction or distribution in whole or part without written permission is prohibited and subject to legal action

FOR FURTHER INFORMATION, PLEASE CONTACT FLORENT DANIEL (+33 (0)1 58 37 90 61 OR fdaniel@deloitte.fr)
 Deloitte - 185, avenue Charles-de-Gaulle - 92524 Neuilly-sur-Seine Cedex France
 Tél : +33 (0)1 58 37 90 37 - Fax : +33 (0)1 55 61 59 16