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tourisme, culture & hôtellerie

French Hotel Industry Performance

March 2016



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Articles and publications



2016 Travel and Hospitality Industry Outlook - Interview with Guy Langford

Fresh off the back of a robust and dynamic 2015, many travel and hospitality (T&HL) companies are heading into 2016 with strong momentum for continued success. But this success is not a given: T&H organizations will need to proactively and effectively respond to a set of evolving challenges around customer and market expectations, data use and integration, recruitment and retention, competitive dynamics, and risk management.

Download the study:



2016 tourism and hospitality trends – A new lease of life

The Paris terrorist attacks in June and November doubtless had an impact in 2015, yet other phenomena should also be considered when analysing the year's results: the maturing of new hotel and apart-hotel supply, the repercussions of the school calendar, the political situation in competitor destinations, etc. Given this, the year turned out very differently from one region or hotel category to another, as our 2016 study shows.

Download the study:



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The first trimester ends on a positive note

No doubt we will have to wait to see what the real trend is, but March's results were generally positive. Regional France, and the Côte d'Azur in particular, showed a good start to the year, with the Luxury segment leading the way. Even though Paris and Ile-de-France were still recording lower performances, the declines are lessening. Note that for the first time in a long time, Super-budget hotels saw simultaneous growth in occupancy and average rates.

It is still too early to start celebrating, since Paris and the Ile-de-France region are not yet back in the black. However, given the very sharp drops recorded since December of last year, posting declines of under 10% in March could almost be construed as hopeful – particularly since March 2015 was a very good month for this zone. Occupancy rates were generally above 70%, with Upscale Boutique Hotels even recording an increase (+1,1%).

Throughout the rest of France, the trend detected in January and February was confirmed in March, with solid growth observed. This was particularly the case for the Luxury segment, whose RevPAR rose by almost 30% in the regions and over 20% on the Côte d'Azur. In these areas, all categories recorded substantial increases in March – again, compared against a good month in 2015.

Further to a long period of decline, the Super-budget category finally managed to lift up its head, posting simultaneous increases in occupancy (+1,6%) and average rates (+0,8%). Whilst the underlying trend has not yet been reversed, this rare encouraging result is still good news!

Note to our readers

Numerous branded and independent hotels joined our benchmark in 2015, and we would like to thank them for the trust they have placed in us. As well as incorporating these new participants, we have recently revised a number of our samples in order to:

- Integrate recently-opened hotels that have now become established on their respective markets.
- Better present Parisian performances by refining the segmentation of supply, so that participants can more easily identify their own market.

The statistical data presented in this document is evidently still based on constant samples.

For questions concerning our benchmarks or to speak with one of our consultants, please contact Sacha Fournier or Grégory Fortems:

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- By phone: 01 72 29 68 15

Monthly performance

March	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	53,7%	62,4%	62,0%	64,9%	62,1%
Var. /n-1	18,6%	3,9%	2,8%	1,6%	1,6%
ADR 2016	362 €	174 €	102 €	64 €	40 €
Var. /n-1	-5,6%	-3,5%	-2,2%	-0,3%	0,8%
RevPAR 2016	194 €	109 €	64 €	42 €	25 €
Var. /n-1	12,0%	0,3%	0,6%	1,3%	2,4%

Year To Date performance

Jan. to March	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	48,5%	55,9%	55,0%	58,1%	56,7%
Var. /n-1	15,6%	0,7%	-0,9%	-0,2%	-0,9%
ADR 2016	318 €	166 €	100 €	63 €	40 €
Var. /n-1	-7,0%	-3,1%	-2,1%	-1,0%	0,3%
RevPAR 2016	154 €	93 €	55 €	37 €	22 €
Var. /n-1	7,5%	-2,4%	-3,0%	-1,2%	-0,6%

Definitions

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

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Performances Paris

March 2016



Paris-City

Monthly performance

March	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Luxury & Palace	64,2%	-2,8%	531 €	-6,5%	341 €	-9,1%
Upscale	72,0%	-3,8%	210 €	-1,0%	152 €	-4,7%
Upscale Boutique hotels	76,3%	1,1%	246 €	-2,6%	188 €	-1,5%
Standard Upscale hotels	70,8%	-5,2%	200 €	-0,9%	142 €	-6,1%
Midscale	75,8%	-3,4%	129 €	-5,1%	98 €	-8,3%
Midscale Boutique hotels	76,3%	-4,1%	142 €	-4,5%	108 €	-8,4%
Standard Midscale hotels	75,4%	-2,9%	120 €	-5,6%	91 €	-8,4%
Budget	78,9%	-3,7%	84 €	-2,9%	66 €	-6,5%

Year To Date performance

Jan. to March	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Luxury & Palace	55,1%	-5,8%	524 €	-6,1%	289 €	-11,5%
Upscale	62,7%	-9,3%	204 €	-0,9%	128 €	-10,0%
Upscale Boutique hotels	64,8%	-6,0%	235 €	-4,0%	153 €	-9,8%
Standard Upscale hotels	62,1%	-10,2%	194 €	-0,2%	121 €	-10,3%
Midscale	66,9%	-7,9%	124 €	-4,9%	83 €	-12,4%
Midscale Boutique hotels	67,8%	-5,9%	136 €	-5,7%	92 €	-11,3%
Standard Midscale hotels	66,3%	-9,3%	116 €	-4,5%	77 €	-13,4%
Budget	70,4%	-7,7%	80 €	-4,6%	56 €	-12,0%

Paris suburbs (excluding Paris) – Luxury and Upscale

Monthly performance

March	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Paris	72,0%	-3,8%	210 €	-1,0%	152 €	-4,7%
La Défense	65,0%	-6,8%	152 €	-1,6%	99 €	-8,2%
Roissy CdG	68,7%	-0,1%	130 €	9,9%	89 €	9,9%
Other areas	66,7%	-0,3%	160 €	4,2%	107 €	3,9%

Year To Date performance

Jan. to March	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Paris	62,7%	-9,3%	204 €	-0,9%	128 €	-10,0%
La Défense	56,8%	-16,1%	154 €	0,6%	87 €	-15,6%
Roissy CdG	65,3%	-7,7%	131 €	6,1%	85 €	-2,1%
Other areas	66,6%	2,0%	151 €	1,2%	101 €	3,2%

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Performance Regions

March 2016



Regions

Regions (excl. French Riviera)

Monthly performance

March	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	57,7%	56,9%	58,8%	62,2%	60,5%
Var. /n-1	21,9%	6,0%	8,7%	7,9%	2,3%
ADR 2016	234 €	129 €	89 €	63 €	38 €
Var. /n-1	5,7%	0,8%	0,2%	-1,2%	0,8%
RevPAR 2016	135 €	73 €	52 €	39 €	23 €
Var. /n-1	28,9%	6,8%	8,9%	6,7%	3,1%

Year To Date performance

Jan. to March	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	50,5%	51,8%	51,6%	55,5%	54,6%
Var. /n-1	16,3%	5,1%	4,5%	5,6%	-0,2%
ADR 2016	227 €	127 €	88 €	61 €	38 €
Var. /n-1	0,7%	-1,1%	0,2%	-1,1%	0,8%
RevPAR 2016	115 €	66 €	45 €	34 €	21 €
Var. /n-1	17,1%	4,0%	4,8%	4,4%	0,6%

French Riviera

Monthly performance

March	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	52,3%	52,4%	53,5%	54,1%	55,5%
Var. /n-1	15,6%	7,1%	3,0%	12,9%	4,1%
ADR 2016	340 €	139 €	92 €	64 €	46 €
Var. /n-1	4,6%	-0,1%	2,2%	1,3%	1,5%
RevPAR 2016	178 €	73 €	49 €	35 €	25 €
Var. /n-1	20,9%	7,1%	5,3%	14,3%	5,7%

Year To Date performance

Jan. to March	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	46,9%	45,2%	47,0%	46,9%	48,3%
Var. /n-1	23,3%	5,6%	2,5%	8,2%	-2,3%
ADR 2016	225 €	119 €	85 €	60 €	45 €
Var. /n-1	-2,4%	-1,5%	2,2%	0,0%	1,2%
RevPAR 2016	106 €	54 €	40 €	28 €	22 €
Var. /n-1	20,3%	4,0%	4,8%	33,5%	-1,2%

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Performances Suburbs

March 2016



Paris suburbs (excluding Paris)

Midscale market

Monthly performance		departments							Average suburbs
March		77	78	91	92	93	94	95	
OR 2016		51,4%	57,4%	63,3%	63,2%	59,0%	59,5%	60,6%	60,6%
Var. /n-1		-8,2%	-10,2%	-0,5%	-5,1%	-4,2%	-8,3%	4,9%	-4,3%
ADR 2016		92 €	108 €	96 €	116 €	87 €	95 €	97 €	102 €
Var. /n-1		-5,2%	0,1%	-5,9%	-0,4%	4,5%	4,4%	7,8%	0,7%
RevPAR 2016		47 €	62 €	61 €	74 €	51 €	56 €	59 €	62 €
Var. /n-1		-13,0%	-10,1%	-6,3%	-5,5%	0,1%	-4,3%	13,1%	-3,6%

Year To Date performance		departments							Average suburbs
Jan. to March		77	78	91	92	93	94	95	
OR 2016		43,6%	53,2%	59,8%	54,4%	49,8%	53,5%	61,3%	54,7%
Var. /n-1		-7,7%	-10,6%	-2,4%	-9,5%	-11,6%	-12,8%	-0,9%	-8,0%
ADR 2016		93 €	106 €	97 €	117 €	89 €	94 €	97 €	103 €
Var. /n-1		-1,3%	1,2%	-0,6%	0,1%	5,8%	2,8%	0,5%	1,0%
RevPAR 2016		41 €	56 €	58 €	64 €	45 €	50 €	59 €	56 €
Var. /n-1		-9,0%	-9,5%	-2,9%	-9,4%	-6,4%	-10,4%	-0,5%	-7,2%

Budget market

Monthly performance		departments							Average suburbs
March		77	78	91	92	93	94	95	
OR 2016		67,0%	67,3%	57,2%	66,2%	57,7%	70,0%	70,2%	64,6%
Var. /n-1		-7,5%	-0,7%	-12,0%	-8,4%	-10,9%	-5,2%	1,3%	-6,7%
ADR 2016		58 €	84 €	69 €	80 €	60 €	64 €	57 €	66 €
Var. /n-1		6,8%	0,6%	3,8%	-1,1%	7,7%	1,5%	4,2%	3,0%
RevPAR 2016		39 €	56 €	40 €	53 €	35 €	45 €	40 €	43 €
Var. /n-1		-1,2%	-0,2%	-8,7%	-9,4%	-4,1%	-3,8%	5,5%	-3,8%

Year To Date performance		departments							Average suburbs
Jan. to March		77	78	91	92	93	94	95	
OR 2016		58,8%	60,0%	52,2%	60,2%	50,3%	63,7%	64,7%	58,0%
Var. /n-1		-9,1%	-5,2%	-14,5%	-7,5%	-11,9%	-7,6%	-1,3%	-8,1%
ADR 2016		54 €	83 €	70 €	77 €	60 €	64 €	59 €	65 €
Var. /n-1		0,0%	4,0%	8,6%	-1,4%	2,3%	4,6%	-3,0%	1,4%
RevPAR 2016		32 €	50 €	36 €	46 €	30 €	41 €	38 €	38 €
Var. /n-1		-9,1%	-1,4%	-7,2%	-8,7%	-9,9%	-3,4%	-4,2%	-6,8%

Super Budget market

Monthly performance		departments							Average suburbs
March		77	78	91	92	93	94	95	
OR 2016		67,9%	68,7%	67,9%	74,6%	65,4%	66,8%	72,8%	68,8%
Var. /n-1		-1,3%	-1,1%	-2,3%	-5,2%	-6,5%	-1,6%	0,6%	-2,7%
ADR 2016		39 €	43 €	41 €	55 €	49 €	46 €	45 €	45 €
Var. /n-1		-2,5%	-2,3%	0,1%	0,3%	-0,8%	-4,6%	0,7%	-1,2%
RevPAR 2016		27 €	29 €	28 €	41 €	32 €	31 €	33 €	31 €
Var. /n-1		-3,7%	-3,4%	-2,2%	-4,9%	-7,3%	-6,1%	1,2%	-3,9%

Year To Date performance		departments							Average suburbs
Jan. to March		77	78	91	92	93	94	95	
OR 2016		60,8%	66,8%	64,8%	68,1%	60,3%	63,9%	69,9%	64,5%
Var. /n-1		-6,8%	-0,3%	-3,1%	-3,5%	-6,9%	-2,5%	-5,3%	-4,4%
ADR 2016		39 €	43 €	40 €	53 €	47 €	46 €	46 €	45 €
Var. /n-1		-2,1%	-0,8%	-0,2%	-1,9%	-1,9%	-3,1%	-2,2%	-1,7%
RevPAR 2016		24 €	28 €	26 €	36 €	28 €	29 €	32 €	29 €
Var. /n-1		-8,8%	-1,1%	-3,3%	-5,3%	-8,7%	-5,5%	-7,4%	-6,1%

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Performances North-East

March 2016



North-east & Cities

Luxury & Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
North-east	54,0%	14,8%	123 €	-0,4%	66 €	14,3%	49,0%	8,3%	124 €	-0,7%	61 €	7,5%
Dijon	53,6%	15,7%	120 €	1,8%	65 €	17,8%	44,8%	4,8%	115 €	-0,5%	52 €	4,2%
Lille	59,1%	17,8%	121 €	-4,6%	72 €	12,4%	59,3%	14,2%	127 €	-3,9%	75 €	9,8%
Metz	insufficient supply						insufficient supply					
Nancy	insufficient supply						insufficient supply					
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	58,3%	19,8%	110 €	-2,5%	64 €	16,8%	51,2%	1,3%	113 €	-1,4%	58 €	-0,1%

Midscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
North-east	57,1%	12,9%	89 €	-2,6%	51 €	10,0%	50,3%	7,0%	88 €	-1,7%	44 €	5,2%
Dijon	53,0%	-0,7%	92 €	3,0%	49 €	2,3%	45,0%	-5,1%	90 €	2,7%	41 €	-2,6%
Lille	67,2%	13,1%	93 €	0,0%	63 €	13,2%	61,3%	6,1%	95 €	1,1%	58 €	7,3%
Metz	in progress						in progress					
Nancy	70,7%	1,7%	94 €	4,7%	66 €	6,5%	61,3%	0,0%	92 €	5,2%	56 €	5,1%
Reims	71,1%	26,1%	104 €	-1,2%	74 €	24,6%	58,1%	18,0%	101 €	0,3%	59 €	18,4%
Strasbourg	57,4%	11,3%	90 €	-3,4%	52 €	7,5%	50,8%	1,7%	91 €	-3,5%	46 €	-1,9%

Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
North-east	66,7%	11,7%	60 €	-1,4%	40 €	10,2%	60,6%	8,7%	60 €	-0,6%	36 €	8,1%
Dijon	65,5%	12,5%	59 €	-0,5%	39 €	11,9%	57,7%	2,2%	58 €	-0,1%	34 €	2,1%
Lille	72,2%	10,0%	73 €	-0,1%	53 €	9,9%	65,5%	5,2%	72 €	-0,1%	47 €	5,2%
Metz	63,5%	4,9%	64 €	0,5%	40 €	5,4%	57,0%	10,0%	62 €	0,6%	35 €	10,7%
Nancy	74,7%	5,5%	64 €	-2,5%	48 €	2,9%	67,9%	5,0%	62 €	1,1%	42 €	6,1%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	63,0%	14,2%	64 €	1,3%	40 €	15,6%	56,3%	5,7%	63 €	-0,9%	35 €	4,8%

Super Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
North-east	61,2%	5,1%	38 €	1,2%	23 €	6,3%	55,7%	2,6%	38 €	1,3%	21 €	3,9%
Dijon	61,4%	0,1%	38 €	0,4%	23 €	0,5%	55,2%	-2,5%	38 €	0,2%	21 €	-2,3%
Lille	67,0%	11,2%	43 €	0,1%	29 €	11,3%	62,6%	5,5%	42 €	-0,5%	26 €	4,9%
Metz	61,4%	-0,2%	37 €	-1,0%	23 €	-1,2%	55,8%	-5,7%	37 €	0,4%	21 €	-5,3%
Nancy	60,7%	-0,8%	39 €	3,0%	24 €	2,1%	52,2%	-6,9%	39 €	2,8%	20 €	-4,3%
Reims	50,0%	-7,1%	42 €	1,7%	21 €	-5,5%	42,8%	-8,1%	42 €	3,0%	18 €	-5,4%
Strasbourg	59,7%	8,9%	39 €	1,3%	23 €	10,3%	52,9%	-0,2%	39 €	1,0%	21 €	0,8%

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

March 2016



North-West & Cities

	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Luxury & Upscale												
North-West	50,1%	-0,8%	188 €	8,4%	94 €	7,5%	50,1%	13,7%	183 €	5,9%	92 €	20,3%
Amiens			insufficient supply				insufficient supply					
Angers			insufficient supply				insufficient supply					
Le Havre			insufficient supply				insufficient supply					
Nantes			insufficient supply				insufficient supply					
Niort			insufficient supply				insufficient supply					
Rennes			insufficient supply				insufficient supply					
Rouen			insufficient supply				insufficient supply					
Midscale												
North-West	59,6%	11,9%	87 €	3,5%	52 €	15,8%	52,3%	5,9%	86 €	2,3%	45 €	8,4%
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	53,6%	-18,2%	94 €	7,9%	50 €	-11,7%	49,0%	-14,2%	92 €	5,1%	45 €	-9,8%
Nantes	68,1%	12,2%	88 €	-5,1%	60 €	6,5%	60,7%	7,5%	87 €	-0,9%	53 €	6,5%
Niort	53,1%	8,2%	84 €	1,0%	45 €	9,3%	48,3%	5,4%	82 €	-2,1%	39 €	3,2%
Rennes	61,0%	0,2%	103 €	1,8%	63 €	2,0%	53,1%	2,5%	95 €	-0,7%	50 €	1,8%
Rouen	54,7%	1,6%	96 €	6,9%	53 €	8,6%	49,1%	-5,0%	95 €	5,4%	47 €	0,1%
Budget												
North-West	58,7%	6,9%	63 €	-0,3%	37 €	6,5%	51,7%	5,2%	63 €	-0,1%	33 €	5,1%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	59,0%	2,9%	63 €	-0,5%	37 €	2,5%	54,4%	-2,6%	68 €	-1,1%	37 €	-3,8%
Le Havre	50,0%	1,2%	63 €	8,9%	32 €	10,3%	43,5%	0,1%	58 €	2,4%	25 €	2,5%
Nantes	67,7%	11,9%	67 €	-2,5%	45 €	9,1%	60,7%	9,3%	66 €	-0,7%	40 €	8,5%
Niort	53,7%	-3,0%	59 €	-0,7%	32 €	-3,6%	47,8%	-3,4%	59 €	-0,2%	28 €	-3,5%
Rennes	69,4%	1,8%	73 €	3,4%	51 €	5,3%	64,1%	5,3%	67 €	0,6%	43 €	5,9%
Rouen	63,7%	12,9%	63 €	-1,4%	40 €	11,3%	55,8%	7,6%	64 €	0,8%	36 €	8,4%
Super Budget												
North-West	58,7%	1,0%	39 €	1,8%	23 €	2,8%	52,6%	-0,7%	38 €	1,7%	20 €	0,9%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	61,1%	21,6%	40 €	2,1%	24 €	24,1%	55,2%	8,1%	41 €	-0,4%	23 €	7,7%
Le Havre	54,2%	-9,5%	38 €	-0,6%	21 €	-10,0%	53,1%	-8,0%	37 €	-0,3%	20 €	-8,2%
Nantes	68,1%	-1,2%	44 €	0,0%	30 €	-1,3%	62,6%	-0,6%	44 €	1,2%	28 €	0,5%
Niort	56,9%	-4,9%	37 €	6,5%	21 €	1,2%	53,6%	-2,7%	36 €	0,9%	19 €	-1,8%
Rennes	68,2%	-1,9%	42 €	2,8%	29 €	0,9%	60,7%	2,3%	41 €	1,7%	25 €	4,0%
Rouen	68,9%	5,4%	42 €	1,6%	29 €	7,1%	60,6%	1,6%	42 €	1,1%	25 €	2,8%

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

March 2016



South-East (excl. French Riviera) & Cities

Luxury & Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
South-East	62,7%	9,6%	133 €	4,0%	83 €	14,0%	54,8%	9,5%	129 €	0,1%	71 €	9,6%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	47,0%	41,0%	107 €	-15,3%	50 €	19,4%	36,8%	21,2%	107 €	-1,0%	39 €	20,0%
Grenoble	insufficient supply						insufficient supply					
Lyon	74,5%	11,2%	145 €	3,8%	108 €	15,4%	64,9%	6,2%	144 €	-0,9%	93 €	5,2%
Marseille	60,8%	5,8%	121 €	2,4%	74 €	8,2%	55,8%	17,1%	118 €	-1,1%	66 €	15,8%
Montpellier	61,1%	17,8%	128 €	-0,3%	78 €	17,5%	52,0%	5,4%	129 €	0,2%	67 €	5,6%
St Etienne	insufficient supply						insufficient supply					
Midscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
	South-East	59,7%	5,7%	90 €	1,1%	54 €	7,0%	52,4%	2,2%	89 €	0,5%	46 €
Aix en Provence	58,1%	9,5%	86 €	8,7%	50 €	19,0%	49,8%	9,3%	79 €	0,5%	39 €	9,9%
Avignon	59,1%	-1,2%	84 €	-4,2%	50 €	-5,3%	45,6%	-2,8%	84 €	0,7%	38 €	-2,1%
Grenoble	59,9%	2,1%	92 €	-6,9%	55 €	-4,9%	53,1%	0,7%	92 €	-3,7%	49 €	-3,0%
Lyon	67,6%	5,7%	101 €	3,4%	69 €	9,3%	58,7%	-3,3%	98 €	-3,6%	57 €	-6,8%
Marseille	66,7%	3,5%	91 €	1,5%	61 €	5,1%	58,0%	4,9%	89 €	0,3%	52 €	5,2%
Montpellier	64,8%	14,6%	89 €	1,5%	57 €	16,3%	56,1%	4,5%	87 €	1,8%	49 €	6,3%
St Etienne	43,8%	-10,2%	82 €	-3,6%	36 €	-13,3%	43,4%	0,3%	84 €	0,9%	37 €	1,2%
Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
	South-East	62,0%	8,0%	65 €	-1,2%	40 €	6,8%	55,4%	6,0%	63 €	-2,6%	35 €
Aix en Provence	59,2%	20,7%	61 €	-3,0%	36 €	17,1%	50,3%	8,8%	60 €	0,0%	30 €	8,8%
Avignon	57,2%	8,6%	61 €	3,7%	35 €	12,6%	47,0%	2,8%	60 €	-0,4%	28 €	2,4%
Grenoble	57,5%	-2,9%	59 €	-7,7%	34 €	-10,3%	53,0%	-1,3%	59 €	-5,6%	31 €	-6,9%
Lyon	72,5%	2,4%	78 €	1,4%	56 €	3,8%	63,8%	1,0%	74 €	-4,1%	47 €	-3,2%
Marseille	64,7%	7,9%	61 €	-7,2%	40 €	0,1%	55,7%	4,2%	60 €	-5,5%	33 €	-1,5%
Montpellier	61,5%	5,1%	70 €	0,7%	43 €	5,8%	57,2%	1,4%	68 €	0,1%	39 €	1,5%
St Etienne	51,5%	-12,0%	65 €	-11,6%	33 €	-22,2%	48,6%	-5,4%	65 €	-7,1%	32 €	-12,0%
Super Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
	South-East	59,9%	1,1%	39 €	-0,8%	23 €	0,3%	54,4%	-1,8%	39 €	-1,0%	21 €
Aix en Provence	61,5%	10,1%	39 €	-1,8%	24 €	8,2%	57,0%	9,4%	38 €	-0,8%	22 €	8,5%
Avignon	49,1%	-15,5%	35 €	4,0%	17 €	-12,1%	48,2%	-9,3%	34 €	2,5%	16 €	-7,0%
Grenoble	52,9%	-14,3%	38 €	1,2%	20 €	-13,3%	48,1%	-17,5%	39 €	2,4%	19 €	-15,5%
Lyon	73,0%	-0,5%	42 €	-2,2%	31 €	-2,7%	64,8%	-7,2%	42 €	-4,6%	27 €	-11,4%
Marseille	57,3%	1,3%	44 €	2,4%	25 €	3,8%	52,5%	3,0%	44 €	1,0%	23 €	4,0%
Montpellier	59,3%	3,4%	36 €	2,4%	21 €	5,9%	54,5%	-2,7%	36 €	2,2%	20 €	-0,6%
St Etienne	64,9%	-3,6%	40 €	-1,1%	26 €	-4,7%	61,9%	2,6%	40 €	-1,1%	25 €	1,4%

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

March 2016



South-West & Cities

Luxury & Upscale	Monthly performance						Year To Date performance						
	OR		ADR		RevPAR		OR		ADR		RevPAR		
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	
South-West	54,7%	9,4%	162 €	1,0%	88 €	10,4%	49,5%	9,8%	157 €	0,3%	78 €	10,1%	
Bayonne-Anglet-Biarritz	49,3%	25,2%	187 €	-1,7%	92 €	23,0%	44,9%	21,3%	179 €	-2,4%	80 €	18,3%	
Bordeaux	54,1%	11,0%	189 €	-4,2%	102 €	6,3%	46,8%	8,0%	187 €	-4,7%	88 €	3,0%	
Pau	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-	
Toulouse	73,1%	-2,4%	120 €	-0,5%	88 €	-2,8%	67,9%	1,4%	120 €	1,2%	81 €	2,6%	
Midscale	OR		ADR		RevPAR		OR		ADR		RevPAR		
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	
	South-West	57,1%	4,6%	89 €	-1,0%	51 €	3,5%	50,7%	3,8%	88 €	0,4%	44 €	4,2%
	Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
	Bordeaux	64,5%	8,4%	91 €	-1,9%	59 €	6,3%	54,0%	3,3%	89 €	0,9%	48 €	4,2%
	Pau	53,3%	12,3%	77 €	-3,3%	41 €	8,5%	48,0%	5,9%	76 €	-4,4%	36 €	1,2%
Toulouse	60,5%	-2,2%	97 €	-4,0%	58 €	-6,1%	55,5%	1,9%	96 €	-2,6%	53 €	-0,8%	
Budget	OR		ADR		RevPAR		OR		ADR		RevPAR		
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	
	South-West	59,8%	1,0%	61 €	-1,0%	37 €	0,0%	52,8%	-1,5%	60 €	0,0%	32 €	-1,6%
	Bayonne-Anglet-Biarritz	55,4%	-1,6%	55 €	0,8%	30 €	-0,8%	47,0%	-4,0%	53 €	4,5%	25 €	0,3%
	Bordeaux	69,3%	5,5%	68 €	-2,4%	47 €	3,0%	59,7%	3,7%	66 €	-0,7%	39 €	3,0%
	Pau	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Toulouse	66,6%	4,8%	68 €	-2,0%	45 €	2,7%	59,0%	4,8%	67 €	-2,1%	39 €	2,6%	
Super Budget	OR		ADR		RevPAR		OR		ADR		RevPAR		
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	
	South-West	62,7%	0,7%	39 €	1,9%	25 €	2,6%	55,8%	-1,8%	39 €	2,3%	22 €	0,5%
	Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
	Bordeaux	65,5%	0,8%	40 €	1,9%	26 €	2,8%	58,2%	0,0%	39 €	1,1%	23 €	1,2%
	Pau	50,9%	-1,6%	34 €	0,7%	17 €	-0,8%	46,2%	-2,7%	35 €	5,6%	16 €	2,8%
Toulouse	75,8%	4,3%	42 €	2,6%	32 €	7,0%	67,0%	1,2%	41 €	2,8%	28 €	4,1%	

Departments in the South-western set :

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

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Performances French Riviera

March 2016



French Riviera

March	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
French Riviera - Luxury	52,3%	15,6%	340 €	4,6%	178 €	20,9%	46,9%	23,3%	225 €	-2,4%	106 €	20,3%
French Riviera - Boutique Hotels	53,3%	-10,4%	133 €	20,6%	71 €	8,0%	45,4%	-6,8%	112 €	9,0%	51 €	1,6%
French Riviera - Upscale	52,2%	9,9%	140 €	-2,6%	73 €	7,0%	45,2%	7,5%	120 €	-2,9%	54 €	4,3%
Average Upscale & Luxury	52,3%	10,3%	222 €	6,0%	116 €	17,0%	45,9%	12,4%	165 €	1,4%	76 €	14,0%
Average Midscale	53,5%	3,0%	92 €	2,2%	49 €	5,3%	47,0%	2,5%	85 €	2,2%	40 €	4,8%
Average Budget	54,1%	12,9%	64 €	1,3%	35 €	14,3%	46,9%	8,2%	60 €	0,0%	28 €	8,2%
Average Super-Budget	55,5%	4,1%	46 €	1,5%	25 €	5,7%	48,3%	-2,3%	45 €	1,2%	22 €	-1,2%

French Riviera Cities

March	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Cannes - Luxury	47,8%	13,4%	376 €	2,6%	180 €	16,4%	43,4%	28,0%	228 €	-6,5%	99 €	19,6%
Cannes - Boutique Hotels	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Cannes - Upscale	44,8%	11,4%	184 €	3,9%	82 €	15,8%	41,8%	9,7%	136 €	0,2%	57 €	9,9%
Cannes - Upscale & Luxury	46,5%	12,9%	300 €	6,0%	140 €	19,7%	42,8%	20,5%	194 €	-1,3%	83 €	18,9%
Cannes - Midscale	42,3%	6,5%	112 €	-5,1%	47 €	1,0%	35,7%	5,7%	93 €	2,1%	33 €	7,9%
Cannes - Budget	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Cannes - Super Budget	56,0%	-1,9%	45 €	0,6%	25 €	-1,3%	49,0%	-3,6%	44 €	0,1%	21 €	-3,4%

March	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Nice - Upscale & Luxury	64,6%	9,7%	148 €	2,0%	96 €	11,9%	53,6%	10,2%	133 €	0,7%	71 €	10,9%
Nice - Midscale	58,6%	-0,4%	85 €	-0,1%	50 €	-0,5%	49,5%	-1,7%	82 €	1,4%	41 €	-0,4%

March	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Monaco - Luxury	55,2%	1,8%	332 €	1,3%	183 €	3,2%	51,7%	-8,2%	304 €	1,9%	157 €	-6,5%
Monaco - Upscale	54,0%	7,1%	167 €	-5,6%	90 €	1,1%	51,5%	1,5%	160 €	-0,7%	82 €	0,7%
Monaco - Upscale & Luxury	54,3%	5,5%	213 €	-4,3%	116 €	1,0%	51,5%	-1,4%	197 €	-2,1%	102 €	-3,5%

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Performances Coast

March 2016



Normandy – Nord-Pas-de-Calais coast

Normandy – Nord-Pas-de-Calais coast	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Average Upscale & Luxury	35,7%	-27,4%	152 €	6,4%	54 €	-22,7%	38,5%	-12,4%	144 €	2,0%	55 €	-10,7%
Average Midscale	58,6%	2,8%	97 €	5,7%	57 €	8,7%	50,0%	-2,0%	94 €	3,8%	47 €	1,7%
Average Budget	66,7%	20,1%	64 €	-2,3%	43 €	17,4%	62,1%	22,7%	60 €	-6,1%	37 €	15,2%
Average Super-Budget	59,3%	4,5%	39 €	3,1%	23 €	7,7%	55,1%	10,6%	38 €	4,7%	21 €	15,8%

Brittany – Pays-de-la-Loire coast

Brittany – Pays-de-la-Loire coast	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Average Upscale & Luxury	66,8%	25,0%	182 €	4,9%	121 €	31,2%	58,1%	31,7%	175 €	-1,0%	102 €	30,3%
Average Midscale	58,4%	12,3%	94 €	8,9%	55 €	22,3%	51,8%	6,0%	91 €	5,7%	47 €	12,0%
Average Budget	57,2%	17,3%	59 €	6,4%	34 €	24,9%	48,7%	17,3%	59 €	6,2%	29 €	24,6%
Average Super-Budget	52,5%	-2,0%	41 €	4,1%	21 €	2,0%	47,7%	1,7%	40 €	2,8%	19 €	4,5%

Charente-Maritime – Aquitaine coast

Charente-Maritime – Aquitaine coast	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Average Upscale & Luxury	48,4%	23,4%	183 €	-1,2%	88 €	21,9%	44,7%	20,7%	177 €	-2,3%	79 €	17,9%
Average Midscale	55,8%	13,3%	95 €	8,1%	53 €	22,6%	50,2%	13,9%	91 €	4,6%	45 €	19,1%
Average Budget	44,4%	10,7%	53 €	5,5%	24 €	16,7%	34,8%	-0,4%	53 €	7,2%	18 €	6,7%
Average Super-Budget	51,8%	-5,0%	42 €	2,9%	22 €	-2,3%	46,7%	-1,9%	41 €	2,9%	19 €	0,9%

Coastal areas samples under continuous development and likely to evolve

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Performances Main cities in Regions

March 2016



Main cities in Regions – Luxury upscale and midscale

Luxury & Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Avignon	47,0%	41,0%	107 €	-15,3%	50 €	19,4%	36,8%	21,2%	107 €	-1,0%	39 €	20,0%
Bayonne-Anglet-Biarritz	49,3%	25,2%	187 €	-1,7%	92 €	23,0%	44,9%	21,3%	179 €	-2,4%	80 €	18,3%
Bordeaux	54,1%	11,0%	189 €	-4,2%	102 €	6,3%	46,8%	8,0%	187 €	-4,7%	88 €	3,0%
Cannes	46,5%	12,9%	300 €	6,0%	140 €	19,7%	42,8%	20,5%	194 €	-1,3%	83 €	18,9%
Dijon	53,6%	15,7%	120 €	1,8%	65 €	17,8%	44,8%	4,8%	115 €	-0,5%	52 €	4,2%
Lille	59,1%	17,8%	121 €	-4,6%	72 €	12,4%	59,3%	14,2%	127 €	-3,9%	75 €	9,8%
Lyon	74,5%	11,2%	145 €	3,8%	108 €	15,4%	64,9%	6,2%	144 €	-0,9%	93 €	5,2%
Marseille	60,8%	5,8%	121 €	2,4%	74 €	8,2%	55,8%	17,1%	118 €	-1,1%	66 €	15,8%
Monaco	54,3%	5,5%	213 €	-4,3%	116 €	1,0%	51,5%	-1,4%	197 €	-2,1%	102 €	-3,5%
Montpellier	61,1%	17,8%	128 €	-0,3%	78 €	17,5%	52,0%	5,4%	129 €	0,2%	67 €	5,6%
Nice	64,6%	9,7%	148 €	2,0%	96 €	11,9%	53,6%	10,2%	133 €	0,7%	71 €	10,9%
Strasbourg	58,3%	19,8%	110 €	-2,5%	64 €	16,8%	51,2%	1,3%	113 €	-1,4%	58 €	-0,1%
Toulouse	73,1%	-2,4%	120 €	-0,5%	88 €	-2,8%	67,9%	1,4%	120 €	1,2%	81 €	2,6%

Midscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Aix en Provence	58,1%	9,5%	86 €	8,7%	50 €	19,0%	49,8%	9,3%	79 €	0,5%	39 €	9,9%
Avignon	59,1%	-1,2%	84 €	-4,2%	50 €	-5,3%	45,6%	-2,8%	84 €	0,7%	38 €	-2,1%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Bordeaux	64,5%	8,4%	91 €	-1,9%	59 €	6,3%	54,0%	3,3%	89 €	0,9%	48 €	4,2%
Cannes	42,3%	6,5%	112 €	-5,1%	47 €	1,0%	35,7%	5,7%	93 €	2,1%	33 €	7,9%
Dijon	53,0%	-0,7%	92 €	3,0%	49 €	2,3%	45,0%	-5,1%	90 €	2,7%	41 €	-2,6%
Grenoble	59,9%	2,1%	92 €	-6,9%	55 €	-4,9%	53,1%	0,7%	92 €	-3,7%	49 €	-3,0%
Le Havre	53,6%	-18,2%	94 €	7,9%	50 €	-11,7%	49,0%	-14,2%	92 €	5,1%	45 €	-9,8%
Lille	67,2%	13,1%	93 €	0,0%	63 €	13,2%	61,3%	6,1%	95 €	1,1%	58 €	7,3%
Lyon	67,6%	5,7%	101 €	3,4%	69 €	9,3%	58,7%	-3,3%	98 €	-3,6%	57 €	-6,8%
Marseille	66,7%	3,5%	91 €	1,5%	61 €	5,1%	58,0%	4,9%	89 €	0,3%	52 €	5,2%
Montpellier	64,8%	14,6%	89 €	1,5%	57 €	16,3%	56,1%	4,5%	87 €	1,8%	49 €	6,3%
Nancy	70,7%	1,7%	94 €	4,7%	66 €	6,5%	61,3%	0,0%	92 €	5,2%	56 €	5,1%
Nantes	68,1%	12,2%	88 €	-5,1%	60 €	6,5%	60,7%	7,5%	87 €	-0,9%	53 €	6,5%
Niort	53,1%	8,2%	84 €	1,0%	45 €	9,3%	48,3%	5,4%	82 €	-2,1%	39 €	3,2%
Nice	58,6%	-0,4%	85 €	-0,1%	50 €	-0,5%	49,5%	-1,7%	82 €	1,4%	41 €	-0,4%
Pau	53,3%	12,3%	77 €	-3,3%	41 €	8,5%	48,0%	5,9%	76 €	-4,4%	36 €	1,2%
Reims	71,1%	26,1%	104 €	-1,2%	74 €	24,6%	58,1%	18,0%	101 €	0,3%	59 €	18,4%
Rennes	61,0%	0,2%	103 €	1,8%	63 €	2,0%	53,1%	2,5%	95 €	-0,7%	50 €	1,8%
Rouen	54,7%	1,6%	96 €	6,9%	53 €	8,6%	49,1%	-5,0%	95 €	5,4%	47 €	0,1%
Saint Etienne	43,8%	-10,2%	82 €	-3,6%	36 €	-13,3%	43,4%	0,3%	84 €	0,9%	37 €	1,2%
Strasbourg	57,4%	11,3%	90 €	-3,4%	52 €	7,5%	50,8%	1,7%	91 €	-3,5%	46 €	-1,9%
Toulouse	60,5%	-2,2%	97 €	-4,0%	58 €	-6,1%	55,5%	1,9%	96 €	-2,6%	53 €	-0,8%

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Performances Main cities in Regions

March 2016



Main cities in regions – Budget and Super Budget

Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1
Aix en Provence	59,2%	20,7%	61 €	-3,0%	36 €	17,1%	50,3%	8,8%	60 €	0,0%	30 €	8,8%
Angers	59,0%	2,9%	63 €	-0,5%	37 €	2,5%	54,4%	-2,6%	68 €	-1,1%	37 €	-3,8%
Avignon	57,2%	8,6%	61 €	3,7%	35 €	12,6%	47,0%	2,8%	60 €	-0,4%	28 €	2,4%
Bayonne-Anglet-Biarritz	55,4%	-1,6%	55 €	0,8%	30 €	-0,8%	47,0%	-4,0%	53 €	4,5%	25 €	0,3%
Bordeaux	69,3%	5,5%	68 €	-2,4%	47 €	3,0%	59,7%	3,7%	66 €	-0,7%	39 €	3,0%
Dijon	65,5%	12,5%	59 €	-0,5%	39 €	11,9%	57,7%	2,2%	58 €	-0,1%	34 €	2,1%
Grenoble	57,5%	-2,9%	59 €	-7,7%	34 €	-10,3%	53,0%	-1,3%	59 €	-5,6%	31 €	-6,9%
Le Havre	50,0%	1,2%	63 €	8,9%	32 €	10,3%	43,5%	0,1%	58 €	2,4%	25 €	2,5%
Lille	72,2%	10,0%	73 €	-0,1%	53 €	9,9%	65,5%	5,2%	72 €	-0,1%	47 €	5,2%
Lyon	72,5%	2,4%	78 €	1,4%	56 €	3,8%	63,8%	1,0%	74 €	-4,1%	47 €	-3,2%
Marseille	64,7%	7,9%	61 €	-7,2%	40 €	0,1%	55,7%	4,2%	60 €	-5,5%	33 €	-1,5%
Metz	63,5%	4,9%	64 €	0,5%	40 €	5,4%	57,0%	10,0%	62 €	0,6%	35 €	10,7%
Montpellier	61,5%	5,1%	70 €	0,7%	43 €	5,8%	57,2%	1,4%	68 €	0,1%	39 €	1,5%
Nancy	74,7%	5,5%	64 €	-2,5%	48 €	2,9%	67,9%	5,0%	62 €	1,1%	42 €	6,1%
Nantes	67,7%	11,9%	67 €	-2,5%	45 €	9,1%	60,7%	9,3%	66 €	-0,7%	40 €	8,5%
Niort	53,7%	-3,0%	59 €	-0,7%	32 €	-3,6%	47,8%	-3,4%	59 €	-0,2%	28 €	-3,5%
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	69,4%	1,8%	73 €	3,4%	51 €	5,3%	64,1%	5,3%	67 €	0,6%	43 €	5,9%
Rouen	63,7%	12,9%	63 €	-1,4%	40 €	11,3%	55,8%	7,6%	64 €	0,8%	36 €	8,4%
Saint Etienne	51,5%	-12,0%	65 €	-11,6%	33 €	-22,2%	48,6%	-5,4%	65 €	-7,1%	32 €	-12,0%
Strasbourg	63,0%	14,2%	64 €	1,3%	40 €	15,6%	56,3%	5,7%	63 €	-0,9%	35 €	4,8%
Toulouse	66,6%	4,8%	68 €	-2,0%	45 €	2,7%	59,0%	4,8%	67 €	-2,1%	39 €	2,6%

Super Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1
	Angers	61,1%	21,6%	40 €	2,1%	24 €	24,1%	55,2%	8,1%	41 €	-0,4%	23 €
Avignon	49,1%	-15,5%	35 €	4,0%	17 €	-12,1%	48,2%	-9,3%	34 €	2,5%	16 €	-7,0%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Bordeaux	65,5%	0,8%	40 €	1,9%	26 €	2,8%	58,2%	0,0%	39 €	1,1%	23 €	1,2%
Cannes	56,0%	-1,9%	45 €	0,6%	25 €	-1,3%	49,0%	-3,6%	44 €	0,1%	21 €	-3,4%
Dijon	61,4%	0,1%	38 €	0,4%	23 €	0,5%	55,2%	-2,5%	38 €	0,2%	21 €	-2,3%
Grenoble	52,9%	-14,3%	38 €	1,2%	20 €	-13,3%	48,1%	-17,5%	39 €	2,4%	19 €	-15,5%
Le Havre	54,2%	-9,5%	38 €	-0,6%	21 €	-10,0%	53,1%	-8,0%	37 €	-0,3%	20 €	-8,2%
Lille	67,0%	11,2%	43 €	0,1%	29 €	11,3%	62,6%	5,5%	42 €	-0,5%	26 €	4,9%
Lyon	73,0%	-0,5%	42 €	-2,2%	31 €	-2,7%	64,8%	-7,2%	42 €	-4,6%	27 €	-11,4%
Marseille	57,3%	1,3%	44 €	2,4%	25 €	3,8%	52,5%	3,0%	44 €	1,0%	23 €	4,0%
Metz	61,4%	-0,2%	37 €	-1,0%	23 €	-1,2%	55,8%	-5,7%	37 €	0,4%	21 €	-5,3%
Montpellier	59,3%	3,4%	36 €	2,4%	21 €	5,9%	54,5%	-2,7%	36 €	2,2%	20 €	-0,6%
Nancy	60,7%	-0,8%	39 €	3,0%	24 €	2,1%	52,2%	-6,9%	39 €	2,8%	20 €	-4,3%
Nantes	68,1%	-1,2%	44 €	0,0%	30 €	-1,3%	62,6%	-0,6%	44 €	1,2%	28 €	0,5%
Niort	56,9%	-4,9%	37 €	6,5%	21 €	1,2%	53,6%	-2,7%	36 €	0,9%	19 €	-1,8%
Pau	50,9%	-1,6%	34 €	0,7%	17 €	-0,8%	46,2%	-2,7%	35 €	5,6%	16 €	2,8%
Rennes	68,2%	-1,9%	42 €	2,8%	29 €	0,9%	60,7%	2,3%	41 €	1,7%	25 €	4,0%
Rouen	68,9%	5,4%	42 €	1,6%	29 €	7,1%	60,6%	1,6%	42 €	1,1%	25 €	2,8%
Saint Etienne	64,9%	-3,6%	40 €	-1,1%	26 €	-4,7%	61,9%	2,6%	40 €	-1,1%	25 €	1,4%
Strasbourg	59,7%	8,9%	39 €	1,3%	23 €	10,3%	52,9%	-0,2%	39 €	1,0%	21 €	0,8%
Toulouse	75,8%	4,3%	42 €	2,6%	32 €	7,0%	67,0%	1,2%	41 €	2,8%	28 €	4,1%

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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.

General segmentation

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.

Segmentation of Parisian hotels

Luxury and Palace hotels: Classified 5 star, a third of whom carry the Palace distinction, Luxury hotels offer minimum rates of 450 to 500 € inc. VAT (flexible rates, excluding promotional offers). These establishments tend to be located in the 1st, 8th and 16th districts of Paris. Characterised by a high proportion of suites, they propose exceptional product and service quality.

Upscale hotels: Mostly classified 4 star, Upscale hotels represent just under 20% of Parisian supply. Upscale hotels propose rates (flexible) starting at 280 to 300 € inc. VAT, depending on location. They can be divided into two groups:

- **Boutique hotels:** As with their Midscale counterparts, Boutique hotels offer a limited rooms capacity (around 60 rooms on average) and differentiate themselves through their individual design. Operated independently or under a non-standardised brand name, they offer a higher level of comfort and service and larger guest rooms than Midscale Boutique hotels.

- **Standard hotels:** Mostly operated by international chains, standard Upscale hotels have a high capacity in common (over 200 rooms, on average). They offer a full range of services (F&B, meeting rooms or conference centre, wellness / spa, etc.).

Midscale hotels: Classified 3 or 4 star, Midscale hotels represent almost 40% of Parisian hotel room capacity. Rooms rates do not tend to surpass 250 to 280 € exc. VAT (flexible rates, excluding promotional offers), depending on location. Midscale hotels can be divided into two subgroups:

- **Boutique hotels:** primarily small, independent hotels (around 40 rooms, on average) offering an individual product and design, which can compensate for the more limited size of guest rooms.

- **Standard hotels:** Operated by brands or independently-run, these hotels tend to be larger (80 rooms, on average) and offer a wider range of services and facilities (F&B, meeting rooms). Rooms are often standardised.

Budget hotels: Predominantly 3 star, Budget hotels represent a third of Parisian hotel room capacity. Whether branded or operated independently, these hotels generally offer fewer services, and rates that do not tend to exceed 130 to 150 € inc. VAT (flexible rates, excluding special offers).

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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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