

# In Extenso

tourisme, hôtellerie et restauration

## French Hotel Industry Performances

November 2012



Membre de **Deloitte**.

# November: will the recession ever end?

A traditionally calm month, anyway, November merely confirmed the tense situation in which the French hotel industry finds itself. Even destinations that have so far managed to resist – such as Paris and the Côte d'Azur – saw hotel activity drop in November. The French hotel industry remains weakened by the economic context and circumstances could become even more difficult with a less busy events calendar or the occurrence of isolated incidents.

Market recovery was not on the agenda in November, a traditionally quieter month in terms of both business and leisure. November 2012 proved no exception to this rule, and even tended to mark a new low point, with occupancy rates taking a nosedive.

Unlike October, hotels in Paris and on the Côte d'Azur experienced rather a turbulent time. Paris saw demand fall, and for the first time in a number of months, rooms revenue in certain categories (upscale and midscale) was down on last year's figures. Indeed, the absence of the Batimat trade show in 2012 certainly impacted the market: with over 350 000 visitors, including 19% from overseas, the show brings a very welcome clientele to Paris in what is usually a quiet time. The situation on the Côte d'Azur was more of a mixed bag, but overall revenues were lower than those in 2011. While Monaco and Nice put up some resistance, Cannes experienced a real drop in performance.

Regional France continued to suffer, even though November saw a surge in Luxury hotel activity. Luxury hotels managed to combine rising occupancy and average rates, resulting in rooms revenues increasing by over 10% in November. However, this growth spurt remained the exception and the declining or stagnating demand in other hotel categories cannot be forgotten. Budget and midscale establishments are particularly vulnerable, as price competition is rife, leaving little room for manoeuvre. Furthermore, in these segments, the clientele has no qualms about shifting from one category to another or even to switching to alternative accommodation types. The regional hotel industry – in large cities, too – remains weakened by the current recession. Such difficulties are even more pronounced when fewer events are hosted or when hoteliers have to face one-off incidents – this is currently the case for hoteliers in Marseille who are having to contend with the heavy road works in the city centre.

## Monthly performance

November	Luxury	Upscale	Midscale	Budget	Super Budget
<b>OR 2012</b>	57,3%	59,9%	60,6%	60,5%	63,5%
<b>Var. /n-1</b>	-0,3%	-3,6%	-1,6%	-0,9%	1,4%
<b>ADR 2012</b>	334 €	167 €	99 €	67 €	40 €
<b>Var. /n-1</b>	-1,6%	-0,3%	-1,2%	1,1%	1,3%
<b>RevPAR 2012</b>	191 €	100 €	60 €	41 €	25 €
<b>Var. /n-1</b>	-1,9%	-3,9%	-2,8%	0,2%	2,8%

## Year To Date performance

Jan. to November	Luxury	Upscale	Midscale	Budget	Super Budget
<b>OR 2012</b>	67,4%	68,6%	66,6%	65,3%	67,7%
<b>Var. /n-1</b>	0,7%	-1,1%	-2,3%	-0,8%	-2,7%
<b>ADR 2012</b>	391 €	185 €	100 €	66 €	40 €
<b>Var. /n-1</b>	2,7%	3,2%	2,1%	1,1%	1,7%
<b>RevPAR 2012</b>	263 €	127 €	67 €	43 €	27 €
<b>Var. /n-1</b>	3,4%	2,0%	-0,2%	0,3%	-1,1%

### Definitions

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

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# Performances Paris

## November 2012



### Paris-City

#### Monthly performance

November	OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Paris - Luxury	75,9%	-5,3%	515 €	12,2%	391 €	6,3%
Paris - Boutique Hotels	81,4%	4,5%	279 €	0,9%	227 €	5,4%
Paris - Upscale	76,5%	-4,1%	189 €	-1,0%	144 €	-5,1%
<b>Paris - Luxury &amp; Upscale</b>	<b>76,7%</b>	<b>-3,7%</b>	<b>244 €</b>	<b>2,2%</b>	<b>187 €</b>	<b>-1,6%</b>
Paris - Superior midscale	85,6%	1,6%	153 €	-0,6%	131 €	1,0%
Paris - Standard midscale	80,9%	-0,4%	111 €	0,2%	90 €	-0,3%
<b>Paris - Midscale</b>	<b>82,4%</b>	<b>0,3%</b>	<b>125 €</b>	<b>0,6%</b>	<b>103 €</b>	<b>0,9%</b>
<b>Paris - Budget</b>	<b>83,6%</b>	<b>2,5%</b>	<b>84 €</b>	<b>-0,7%</b>	<b>70 €</b>	<b>1,8%</b>

#### Year To Date performance

Jan. to November	OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Paris - Luxury	80,8%	1,7%	528 €	4,3%	427 €	6,1%
Paris - Boutique Hotels	78,6%	2,0%	303 €	1,8%	238 €	3,8%
Paris - Upscale	79,4%	-0,2%	204 €	3,5%	162 €	3,2%
<b>Paris - Haut de gamme &amp; Gd luxe</b>	<b>79,5%</b>	<b>0,2%</b>	<b>262 €</b>	<b>3,7%</b>	<b>208 €</b>	<b>3,9%</b>
Paris - Superior midscale	85,1%	-0,5%	159 €	4,8%	135 €	4,3%
Paris - Standard midscale	81,1%	-2,0%	114 €	5,9%	92 €	3,8%
<b>Paris - Midscale</b>	<b>82,3%</b>	<b>-1,5%</b>	<b>128 €</b>	<b>5,9%</b>	<b>106 €</b>	<b>4,4%</b>
<b>Paris - Budget</b>	<b>85,1%</b>	<b>-0,3%</b>	<b>84 €</b>	<b>4,5%</b>	<b>72 €</b>	<b>4,2%</b>

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

#### Monthly performance

November	OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Paris	76,7%	-3,7%	244 €	2,2%	187 €	-1,6%
La Défense	n.d.	-	n.d.	-	n.d.	-
Roissy CdG	66,7%	-2,8%	109 €	-3,6%	73 €	-6,2%
IDF (hors Paris et pôles)	74,4%	1,3%	195 €	0,0%	145 €	1,2%

#### Year To Date performance

Jan. to November	OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1
Paris	79,5%	0,2%	262 €	3,7%	208 €	3,9%
La Défense	n.d.	-	n.d.	-	n.d.	-
Roissy CdG	70,9%	-0,7%	104 €	-0,3%	74 €	-1,0%
IDF (hors Paris et pôles)	77,3%	-0,6%	233 €	4,9%	180 €	4,3%

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# Performance Regions

## November 2012



### Regions

Regions (excl. French Riviera)	Monthly performance					
	November	Luxury	Upscale	Midscale	Budget	Super Budget
	OR 2012	53,2%	51,7%	54,4%	57,7%	61,2%
	Var. /n-1	7,7%	-6,9%	-2,4%	0,6%	1,6%
	ADR 2012	213 €	132 €	89 €	65 €	38 €
	Var. /n-1	5,3%	2,9%	0,2%	0,8%	1,2%
	RevPAR 2012	113 €	68 €	48 €	38 €	23 €
	Var. /n-1	13,4%	-4,2%	-2,2%	1,4%	2,8%
	Year To Date performance					
	Jan. to November	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2012	58,1%	58,4%	60,7%	61,8%	66,0%	
Var. /n-1	-3,8%	-3,9%	-3,3%	-1,6%	-3,0%	
ADR 2012	265 €	135 €	91 €	65 €	39 €	
Var. /n-1	0,2%	1,2%	0,4%	0,1%	1,3%	
RevPAR 2012	154 €	79 €	55 €	40 €	26 €	
Var. /n-1	-3,7%	-2,7%	-2,9%	-1,5%	-1,7%	

French Riviera	Monthly performance					
	November	Luxury	Upscale *	Midscale	Budget	Super Budget
	OR 2012	40,6%	39,3%	48,5%	n.d.	n.d.
	Var. /n-1	4,2%	4,7%	4,7%	-	-
	ADR 2012	228 €	126 €	81 €	n.d.	n.d.
	Var. /n-1	-31,3%	-5,5%	2,6%	-	-
	RevPAR 2012	92 €	50 €	39 €	n.d.	n.d.
	Var. /n-1	-28,4%	-1,1%	7,4%	-	-
	Year To Date performance					
	Jan. to November	Luxury	Upscale *	Midscale	Budget	Super Budget
OR 2012	61,1%	60,9%	68,6%	n.d.	n.d.	
Var. /n-1	2,7%	0,3%	-0,6%	-	-	
ADR 2012	430 €	193 €	101 €	n.d.	n.d.	
Var. /n-1	3,1%	4,6%	5,1%	-	-	
RevPAR 2012	262 €	117 €	70 €	n.d.	n.d.	
Var. /n-1	5,9%	4,9%	4,4%	-	-	

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

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# Performances Suburbs

## November 2012



### Paris suburbs (excluding Paris)

Midscale market	Monthly performance								
	November	departments							Average suburbs
		77	78	91	92	93	94	95	
	OR 2012	55,7%	55,4%	56,3%	70,2%	54,6%	74,9%	64,2%	63,7%
	Var. /n-1	9,2%	-9,5%	-7,4%	2,0%	-7,5%	-1,2%	-4,9%	-2,9%
	ADR 2012	104 €	97 €	95 €	119 €	78 €	84 €	108 €	104 €
	Var. /n-1	-1,2%	-13,7%	-5,9%	-5,1%	-10,5%	-2,4%	-1,9%	-5,4%
	RevPAR 2012	58 €	54 €	54 €	84 €	43 €	63 €	69 €	66 €
	Var. /n-1	7,9%	-21,9%	-12,9%	-3,2%	-17,3%	-3,5%	-6,7%	-8,1%
Midscale market	Year To Date performance								
	Jan. to November	departments							Average suburbs
		77	78	91	92	93	94	95	
	OR 2012	58,1%	63,5%	64,8%	72,1%	64,0%	78,2%	70,4%	69,0%
	Var. /n-1	3,1%	-3,8%	-0,7%	1,3%	0,0%	-0,5%	-2,9%	-0,6%
	ADR 2012	104 €	101 €	89 €	109 €	76 €	82 €	102 €	98 €
	Var. /n-1	1,2%	0,6%	-1,1%	2,3%	0,2%	0,1%	1,3%	1,0%
	RevPAR 2012	60 €	64 €	58 €	79 €	49 €	64 €	72 €	67 €
	Var. /n-1	4,4%	-3,2%	-1,8%	3,7%	0,3%	-0,4%	-1,7%	0,3%
Budget market	Monthly performance								
	November	departments							Average suburbs
		77	78	91	92	93	94	95	
	OR 2012	61,6%	66,7%	63,5%	63,8%	62,6%	66,8%	60,1%	62,8%
	Var. /n-1	0,3%	1,7%	10,5%	-9,8%	-10,3%	0,4%	-4,4%	-4,4%
	ADR 2012	62 €	83 €	62 €	82 €	63 €	74 €	67 €	69 €
	Var. /n-1	7,1%	-2,4%	-10,7%	1,5%	2,5%	3,1%	0,2%	1,4%
	RevPAR 2012	38 €	55 €	40 €	52 €	40 €	49 €	40 €	43 €
	Var. /n-1	7,4%	-0,7%	-1,4%	-8,4%	-8,1%	3,5%	-4,4%	-3,1%
Budget market	Year To Date performance								
	Jan. to November	departments							Average suburbs
		77	78	91	92	93	94	95	
	OR 2012	71,9%	64,4%	62,4%	71,3%	72,7%	70,8%	65,0%	69,2%
	Var. /n-1	4,0%	-3,3%	4,7%	-0,9%	-0,1%	-3,0%	1,4%	0,4%
	ADR 2012	63 €	81 €	62 €	75 €	58 €	66 €	62 €	65 €
	Var. /n-1	1,5%	0,5%	-5,8%	3,5%	-0,3%	4,0%	3,3%	1,6%
	RevPAR 2012	45 €	52 €	39 €	53 €	42 €	47 €	40 €	45 €
	Var. /n-1	5,5%	-2,9%	-1,3%	2,6%	-0,4%	0,9%	4,7%	2,0%
Super Budget market	Monthly performance								
	November	departments							IDF (hors Paris)
		77	78	91	92	93	94	95	
	OR 2012	69,4%	74,7%	70,0%	n.d.	76,2%	79,4%	74,0%	74,1%
	Var. /n-1	10,1%	3,9%	0,3%	-	-5,5%	3,4%	-1,5%	0,5%
	ADR 2012	42 €	42 €	40 €	n.d.	44 €	44 €	45 €	44 €
	Var. /n-1	5,4%	-2,2%	0,9%	-	3,0%	1,2%	6,7%	2,2%
	RevPAR 2012	29 €	31 €	28 €	n.d.	33 €	35 €	34 €	33 €
	Var. /n-1	16,0%	1,6%	1,3%	-	-2,6%	4,6%	5,1%	2,7%
Super Budget market	Year To Date performance								
	Jan. to November	departments							IDF (hors Paris)
		77	78	91	92	93	94	95	
	OR 2012	70,3%	70,3%	69,7%	n.d.	79,5%	76,4%	76,9%	74,4%
	Var. /n-1	6,8%	-2,6%	-0,6%	-	-0,1%	-1,6%	-2,5%	-0,3%
	ADR 2012	42 €	42 €	39 €	n.d.	43 €	44 €	44 €	43 €
	Var. /n-1	2,1%	1,2%	1,9%	-	4,8%	1,3%	4,6%	2,9%
	RevPAR 2012	29 €	30 €	27 €	n.d.	34 €	34 €	34 €	32 €
	Var. /n-1	9,0%	-1,4%	1,3%	-	4,7%	-0,3%	2,0%	2,6%

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# Performances North-East

## November 2012



### North-east & 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-east	56,5%	4,0%	130 €	-0,2%	73 €	3,7%	57,9%	-2,4%	132 €	1,2%	76 €	-1,2%
Dijon	51,5%	-8,9%	131 €	12,4%	68 €	2,4%	63,3%	-4,1%	133 €	7,7%	84 €	3,3%
Lille	63,1%	12,4%	126 €	3,5%	80 €	16,3%	53,3%	2,0%	121 €	-2,2%	65 €	-0,3%
Metz	insufficient supply						insufficient supply					
Nancy	insufficient supply						insufficient supply					
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	67,7%	0,2%	128 €	-1,6%	87 €	-1,4%	62,9%	-2,6%	120 €	1,8%	76 €	-0,8%

  

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-east	52,3%	-4,9%	90 €	1,4%	47 €	-3,5%	58,1%	-3,6%	87 €	0,4%	51 €	-3,3%
Dijon	53,3%	12,5%	81 €	-0,6%	43 €	11,9%	64,1%	1,0%	86 €	2,7%	55 €	3,8%
Lille	66,9%	0,8%	100 €	6,5%	67 €	7,3%	60,6%	-7,3%	89 €	-1,4%	54 €	-8,5%
Metz	in progress						in progress					
Nancy	61,6%	7,0%	86 €	4,1%	53 €	11,4%	57,0%	-2,2%	82 €	1,0%	47 €	-1,2%
Reims	58,4%	-2,4%	97 €	7,5%	56 €	4,9%	61,9%	-7,8%	94 €	-0,2%	58 €	-8,1%
Strasbourg	63,1%	1,3%	98 €	-5,6%	62 €	-4,3%	63,6%	2,2%	91 €	-0,8%	58 €	1,4%

  

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-east	60,3%	2,1%	64 €	0,0%	39 €	2,1%	62,9%	-1,3%	63 €	-0,4%	40 €	-1,7%
Dijon	67,4%	6,5%	63 €	-2,0%	42 €	4,3%	71,7%	9,8%	64 €	-1,9%	46 €	7,8%
Lille	74,5%	0,4%	76 €	0,4%	56 €	0,8%	66,6%	-2,3%	74 €	1,7%	49 €	-0,7%
Metz	56,6%	-15,4%	68 €	-1,0%	38 €	-16,2%	64,6%	-5,8%	65 €	-2,6%	42 €	-8,2%
Nancy	64,3%	5,9%	63 €	2,8%	41 €	8,9%	54,8%	-1,3%	61 €	-0,8%	33 €	-2,1%
Reims	59,7%	7,9%	67 €	7,4%	40 €	16,0%	59,8%	-8,8%	65 €	3,6%	39 €	-5,5%
Strasbourg	70,0%	6,0%	70 €	-1,3%	49 €	4,6%	69,1%	2,7%	63 €	-1,7%	44 €	1,0%

  

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-east	60,7%	2,2%	37 €	0,2%	23 €	2,3%	64,3%	-3,5%	38 €	1,0%	24 €	-2,4%
Dijon	73,8%	-7,4%	38 €	-2,0%	28 €	-9,2%	74,1%	-4,8%	39 €	0,6%	29 €	-4,2%
Lille	72,1%	-2,1%	41 €	2,8%	30 €	0,7%	67,1%	-4,8%	40 €	2,3%	27 €	-2,6%
Metz	68,0%	0,7%	38 €	2,0%	26 €	2,7%	69,7%	-7,8%	39 €	4,1%	27 €	-4,0%
Nancy	63,9%	-1,6%	39 €	2,0%	25 €	0,4%	66,7%	6,0%	39 €	0,8%	26 €	6,9%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	70,3%	10,8%	41 €	4,7%	29 €	15,9%	62,0%	-5,3%	40 €	2,0%	25 €	-3,4%

#### 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

## November 2012



### North-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>												
North-West	51,4%	-2,3%	172 €	10,6%	88 €	8,0%	56,4%	-7,1%	195 €	1,3%	110 €	-5,8%
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					
<b>Midscale</b>												
North-West	49,0%	-2,2%	86 €	1,0%	42 €	-1,3%	58,3%	-4,3%	91 €	0,3%	53 €	-4,1%
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	66,9%	12,0%	86 €	-4,8%	58 €	6,6%	62,7%	1,0%	87 €	-3,0%	54 €	-2,0%
Nantes	58,9%	0,4%	84 €	-4,2%	49 €	-3,8%	57,1%	-4,8%	86 €	-4,7%	49 €	-9,3%
Rennes	55,5%	-4,9%	90 €	2,0%	50 €	-3,1%	55,6%	-7,8%	90 €	1,8%	50 €	-6,1%
Rouen	47,7%	-12,8%	91 €	-3,9%	43 €	-16,3%	61,5%	1,5%	92 €	-1,6%	57 €	-0,1%
<b>Budget</b>												
North-West	56,3%	1,5%	64 €	-0,3%	36 €	1,3%	59,6%	-2,2%	65 €	1,4%	39 €	-0,8%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	59,3%	2,4%	65 €	-3,8%	38 €	-1,5%	60,2%	2,7%	67 €	1,0%	40 €	3,8%
Le Havre	61,8%	-1,5%	60 €	-4,2%	37 €	-5,7%	62,8%	5,1%	63 €	3,9%	40 €	9,3%
Nantes	63,5%	6,5%	68 €	-1,7%	43 €	4,7%	58,5%	-5,0%	68 €	1,2%	40 €	-3,8%
Rennes	65,9%	-1,5%	65 €	-0,2%	43 €	-1,7%	61,9%	-4,1%	66 €	4,1%	41 €	-0,1%
Rouen	56,2%	0,0%	62 €	-0,1%	35 €	-0,1%	59,4%	-2,6%	62 €	-0,1%	37 €	-2,7%
<b>Super Budget</b>												
North-West	59,8%	0,4%	39 €	2,1%	23 €	2,6%	65,6%	-2,2%	39 €	1,7%	26 €	-0,6%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	64,6%	-4,3%	38 €	4,6%	25 €	0,1%	68,8%	-2,7%	38 €	2,6%	26 €	-0,1%
Le Havre	72,4%	7,0%	41 €	1,9%	29 €	9,0%	73,8%	-1,1%	40 €	2,2%	30 €	1,2%
Nantes	65,3%	4,3%	43 €	3,1%	28 €	7,5%	65,3%	-3,4%	43 €	1,2%	28 €	-2,2%
Rennes	61,2%	1,1%	40 €	2,0%	24 €	3,1%	59,1%	-2,0%	40 €	2,2%	24 €	0,2%
Rouen	70,7%	7,8%	41 €	1,5%	29 €	9,3%	68,4%	-0,7%	41 €	1,3%	28 €	0,5%

#### 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

## November 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	50,1%	-11,4%	144 €	5,8%	72 €	-6,3%	61,0%	-4,1%	160 €	1,0%	97 €	-3,1%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	41,5%	-16,5%	117 €	9,1%	48 €	-8,8%	64,2%	-3,2%	152 €	9,1%	98 €	5,6%
Grenoble	insufficient supply						insufficient supply					
Lyon	68,7%	8,5%	143 €	8,0%	98 €	17,2%	65,0%	-0,2%	127 €	-1,0%	83 €	-1,2%
Marseille	43,1%	-24,5%	134 €	3,2%	58 €	-22,1%	60,0%	-3,9%	142 €	1,9%	85 €	-2,1%
Montpellier	46,9%	-32,5%	148 €	11,4%	69 €	-24,8%	59,7%	-6,8%	141 €	-1,2%	84 €	-8,0%
St Etienne	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
South-East	56,7%	-2,8%	89 €	-1,6%	50 €	-4,4%	63,8%	-3,1%	93 €	0,0%	59 €	-3,1%
Aix en Provence	47,0%	-5,4%	86 €	-5,6%	41 €	-10,7%	66,3%	1,2%	87 €	-2,6%	58 €	-1,4%
Avignon	49,0%	8,9%	80 €	-3,6%	39 €	5,0%	72,1%	4,3%	97 €	5,0%	70 €	9,5%
Grenoble	56,1%	-5,0%	104 €	-2,2%	58 €	-7,2%	53,1%	-7,3%	104 €	0,4%	55 €	-7,0%
Lyon	68,2%	1,4%	112 €	7,5%	76 €	8,9%	61,3%	-5,9%	97 €	-1,1%	60 €	-7,0%
Marseille	58,9%	-9,0%	92 €	-4,1%	54 €	-12,7%	65,7%	-5,2%	98 €	0,8%	64 €	-4,4%
Montpellier	63,4%	-5,6%	86 €	-6,0%	54 €	-11,2%	68,6%	-2,8%	92 €	-2,7%	63 €	-5,4%
St Etienne	in progress						in progress					

  

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
South-East	58,4%	-0,3%	67 €	1,9%	39 €	1,6%	62,9%	-2,4%	67 €	0,6%	42 €	-1,8%
Aix en Provence	42,8%	-16,6%	67 €	-2,7%	29 €	-18,9%	64,1%	-2,8%	71 €	-0,5%	45 €	-3,3%
Avignon	48,6%	6,1%	58 €	1,1%	28 €	7,3%	66,3%	-1,1%	67 €	2,1%	44 €	1,1%
Grenoble	61,0%	-2,1%	64 €	-0,4%	39 €	-2,6%	59,1%	-4,8%	64 €	-0,7%	38 €	-5,5%
Lyon	73,0%	5,4%	83 €	9,6%	61 €	15,5%	64,4%	-2,6%	74 €	0,4%	48 €	-2,3%
Marseille	57,9%	-5,1%	69 €	-2,7%	40 €	-7,6%	65,6%	-3,7%	70 €	-0,8%	46 €	-4,4%
Montpellier	67,2%	-12,1%	69 €	0,2%	47 €	-11,9%	72,0%	-4,4%	71 €	2,9%	51 €	-1,7%
St Etienne	in progress						in progress					

  

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
South-East	60,7%	1,7%	38 €	1,4%	23 €	3,1%	66,7%	-4,3%	40 €	1,5%	26 €	-2,9%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	55,2%	-8,1%	34 €	1,0%	19 €	-7,1%	69,5%	-5,1%	36 €	1,8%	25 €	-3,4%
Grenoble	65,3%	-2,2%	38 €	-7,4%	25 €	-9,5%	62,7%	-9,9%	40 €	-3,1%	25 €	-12,7%
Lyon	74,3%	6,8%	41 €	3,9%	30 €	11,0%	67,3%	-5,0%	40 €	2,0%	27 €	-3,1%
Marseille	66,0%	4,1%	42 €	2,5%	28 €	6,8%	70,8%	-0,7%	42 €	1,7%	30 €	1,0%
Montpellier	62,9%	-4,9%	38 €	0,8%	24 €	-4,1%	75,5%	-4,3%	40 €	3,2%	30 €	-1,2%
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

## November 2012



### French Riviera

November	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	40,6%	4,2%	228 €	-31,3%	92 €	-28,4%	61,1%	2,7%	430 €	3,1%	262 €	5,9%
French Riviera - Boutique Hotels**	43,6%	1,4%	101 €	-8,7%	44 €	-7,4%	60,9%	-2,7%	159 €	0,7%	97 €	-2,1%
French Riviera - Upscale	39,0%	5,3%	129 €	-5,6%	50 €	-0,7%	60,9%	0,7%	197 €	4,9%	120 €	5,6%
Average Upscale & Luxury	39,8%	4,5%	164 €	-21,3%	65 €	-17,7%	61,0%	1,1%	277 €	4,3%	169 €	5,5%
Average Midscale	48,5%	4,7%	81 €	2,6%	39 €	7,4%	68,6%	-0,6%	101 €	5,1%	70 €	4,4%

### French Riviera Cities

November	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	34,2%	-1,3%	216 €	-48,1%	74 €	-48,8%	57,5%	-1,7%	417 €	0,6%	240 €	-1,1%
Cannes - Boutique Hotels	24,5%	-29,3%	144 €	5,3%	35 €	-25,6%	50,9%	-9,9%	190 €	7,4%	97 €	-3,2%
Cannes - Upscale	23,7%	-30,3%	135 €	-13,1%	32 €	-39,4%	53,6%	-1,6%	180 €	3,0%	97 €	1,3%
Cannes - Upscale & Luxury	29,5%	-14,1%	187 €	-34,0%	55 €	-43,3%	55,4%	-2,1%	305 €	2,6%	169 €	0,5%
Cannes - Midscale	31,9%	-18,5%	117 €	-3,2%	37 €	-21,1%	55,3%	-8,0%	115 €	5,5%	63 €	-2,9%

November	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	48,5%	5,7%	122 €	-3,3%	59 €	2,2%	69,7%	0,5%	191 €	6,0%	133 €	6,5%
Nice - Midscale	53,9%	7,9%	79 €	9,1%	43 €	17,7%	74,0%	0,3%	102 €	7,3%	75 €	7,6%

November	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	45,6%	16,4%	278 €	3,8%	127 €	20,8%	61,3%	11,8%	456 €	6,3%	280 €	18,8%
Monaco - Upscale	47,7%	24,2%	155 €	0,5%	74 €	24,8%	61,6%	2,9%	273 €	4,9%	168 €	7,9%
Monaco - Upscale & Luxury	46,9%	21,1%	202 €	0,8%	95 €	22,1%	61,4%	6,2%	343 €	6,2%	211 €	12,7%

\* 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

## November 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%	-2,1%	158 €	1,2%	77 €	-0,9%	56,2%	-1,8%	197 €	0,7%	111 €	-1,1%
Bordeaux	47,7%	14,0%	177 €	0,4%	84 €	14,4%	54,7%	8,6%	191 €	-4,3%	104 €	3,9%
Toulouse	60,1%	-10,7%	121 €	-1,0%	73 €	-11,6%	59,9%	-6,2%	121 €	0,1%	72 €	-6,1%
<b>Midscale</b>												
South-West	60,6%	2,6%	90 €	1,5%	54 €	4,2%	62,3%	-1,9%	91 €	1,8%	57 €	-0,2%
Bordeaux	60,1%	6,7%	90 €	8,6%	54 €	15,9%	62,3%	1,6%	86 €	1,2%	54 €	2,8%
Toulouse	63,0%	-6,4%	98 €	-4,5%	62 €	-10,5%	63,9%	-4,1%	98 €	1,0%	63 €	-3,2%
<b>Budget</b>												
South-West	53,6%	-2,3%	65 €	2,4%	35 €	0,1%	60,9%	0,3%	66 €	-1,5%	40 €	-1,2%
Bordeaux	59,7%	-1,9%	75 €	9,0%	45 €	6,9%	62,7%	-2,4%	69 €	0,6%	44 €	-1,8%
Toulouse	56,9%	-14,1%	72 €	9,2%	41 €	-6,2%	59,5%	-2,2%	67 €	1,4%	40 €	-0,8%
<b>Super Budget</b>												
South-West	65,6%	1,6%	39 €	1,4%	26 €	3,1%	69,2%	-1,4%	40 €	1,2%	28 €	-0,3%
Bordeaux	71,7%	5,8%	37 €	2,3%	27 €	8,2%	73,3%	4,2%	37 €	-0,7%	27 €	3,4%
Toulouse	71,4%	-1,0%	40 €	0,3%	29 €	-0,7%	70,1%	-4,7%	40 €	1,7%	28 €	-3,1%

#### 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 Main cities in Regions

## November 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	41,5%	-16,5%	117 €	9,1%	48 €	-8,8%	64,2%	-3,2%	152 €	9,1%	98 €	5,6%
Bordeaux	47,7%	14,0%	177 €	0,4%	84 €	14,4%	54,7%	8,6%	191 €	-4,3%	104 €	3,9%
Cannes	29,5%	-14,1%	187 €	-34,0%	55 €	-43,3%	55,4%	-2,1%	305 €	2,6%	169 €	0,5%
Dijon	51,5%	-8,9%	131 €	12,4%	68 €	2,4%	63,3%	-4,1%	133 €	7,7%	84 €	3,3%
Lille	63,1%	12,4%	126 €	3,5%	80 €	16,3%	53,3%	2,0%	121 €	-2,2%	65 €	-0,3%
Lyon	68,7%	8,5%	143 €	8,0%	98 €	17,2%	65,0%	-0,2%	127 €	-1,0%	83 €	-1,2%
Marseille	43,1%	-24,5%	134 €	3,2%	58 €	-22,1%	60,0%	-3,9%	142 €	1,9%	85 €	-2,1%
Monaco	46,9%	21,1%	202 €	0,8%	95 €	22,1%	61,4%	6,2%	343 €	6,2%	211 €	12,7%
Montpellier	46,9%	-32,5%	148 €	11,4%	69 €	-24,8%	59,7%	-6,8%	141 €	-1,2%	84 €	-8,0%
Nice	48,5%	5,7%	122 €	-3,3%	59 €	2,2%	69,7%	0,5%	191 €	6,0%	133 €	6,5%
Strasbourg	67,7%	0,2%	128 €	-1,6%	87 €	-1,4%	62,9%	-2,6%	120 €	1,8%	76 €	-0,8%
Toulouse	60,1%	-10,7%	121 €	-1,0%	73 €	-11,6%	59,9%	-6,2%	121 €	0,1%	72 €	-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	47,0%	-5,4%	86 €	-5,6%	41 €	-10,7%	66,3%	1,2%	87 €	-2,6%	58 €	-1,4%
Avignon	49,0%	8,9%	80 €	-3,6%	39 €	5,0%	72,1%	4,3%	97 €	5,0%	70 €	9,5%
Bordeaux	60,1%	6,7%	90 €	8,6%	54 €	15,9%	62,3%	1,6%	86 €	1,2%	54 €	2,8%
Cannes	31,9%	-18,5%	117 €	-3,2%	37 €	-21,1%	55,3%	-8,0%	115 €	5,5%	63 €	-2,9%
Dijon	53,3%	12,5%	81 €	-0,6%	43 €	11,9%	64,1%	1,0%	86 €	2,7%	55 €	3,8%
Grenoble	56,1%	-5,0%	104 €	-2,2%	58 €	-7,2%	53,1%	-7,3%	104 €	0,4%	55 €	-7,0%
Le Havre	66,9%	12,0%	86 €	-4,8%	58 €	6,6%	62,7%	1,0%	87 €	-3,0%	54 €	-2,0%
Lille	66,9%	0,8%	100 €	6,5%	67 €	7,3%	60,6%	-7,3%	89 €	-1,4%	54 €	-8,5%
Lyon	68,2%	1,4%	112 €	7,5%	76 €	8,9%	61,3%	-5,9%	97 €	-1,1%	60 €	-7,0%
Marseille	58,9%	-9,0%	92 €	-4,1%	54 €	-12,7%	65,7%	-5,2%	98 €	0,8%	64 €	-4,4%
Montpellier	63,4%	-5,6%	86 €	-6,0%	54 €	-11,2%	68,6%	-2,8%	92 €	-2,7%	63 €	-5,4%
Nancy	61,6%	7,0%	86 €	4,1%	53 €	11,4%	57,0%	-2,2%	82 €	1,0%	47 €	-1,2%
Nantes	58,9%	0,4%	84 €	-4,2%	49 €	-3,8%	57,1%	-4,8%	86 €	-4,7%	49 €	-9,3%
Nice	53,9%	7,9%	79 €	9,1%	43 €	17,7%	74,0%	0,3%	102 €	7,3%	75 €	7,6%
Reims	58,4%	-2,4%	97 €	7,5%	56 €	4,9%	61,9%	-7,8%	94 €	-0,2%	58 €	-8,1%
Rennes	55,5%	-4,9%	90 €	2,0%	50 €	-3,1%	55,6%	-7,8%	90 €	1,8%	50 €	-6,1%
Rouen	47,7%	-12,8%	91 €	-3,9%	43 €	-16,3%	61,5%	1,5%	92 €	-1,6%	57 €	-0,1%
Strasbourg	63,1%	1,3%	98 €	-5,6%	62 €	-4,3%	63,6%	2,2%	91 €	-0,8%	58 €	1,4%
Toulouse	63,0%	-6,4%	98 €	-4,5%	62 €	-10,5%	63,9%	-4,1%	98 €	1,0%	63 €	-3,2%

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# Performances Main cities in Regions

## November 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	42,8%	-16,6%	67 €	-2,7%	29 €	-18,9%	64,1%	-2,8%	71 €	-0,5%	45 €	-3,3%
Angers	59,3%	2,4%	65 €	-3,8%	38 €	-1,5%	60,2%	2,7%	67 €	1,0%	40 €	3,8%
Avignon	48,6%	6,1%	58 €	1,1%	28 €	7,3%	66,3%	-1,1%	67 €	2,1%	44 €	1,1%
Bordeaux	59,7%	-1,9%	75 €	9,0%	45 €	6,9%	62,7%	-2,4%	69 €	0,6%	44 €	-1,8%
Dijon	67,4%	6,5%	63 €	-2,0%	42 €	4,3%	71,7%	9,8%	64 €	-1,9%	46 €	7,8%
Grenoble	61,0%	-2,1%	64 €	-0,4%	39 €	-2,6%	59,1%	-4,8%	64 €	-0,7%	38 €	-5,5%
Le Havre	61,8%	-1,5%	60 €	-4,2%	37 €	-5,7%	62,8%	5,1%	63 €	3,9%	40 €	9,3%
Lille	74,5%	0,4%	76 €	0,4%	56 €	0,8%	66,6%	-2,3%	74 €	1,7%	49 €	-0,7%
Lyon	73,0%	5,4%	83 €	9,6%	61 €	15,5%	64,4%	-2,6%	74 €	0,4%	48 €	-2,3%
Marseille	57,9%	-5,1%	69 €	-2,7%	40 €	-7,6%	65,6%	-3,7%	70 €	-0,8%	46 €	-4,4%
Metz	56,6%	-15,4%	68 €	-1,0%	38 €	-16,2%	64,6%	-5,8%	65 €	-2,6%	42 €	-8,2%
Montpellier	67,2%	-12,1%	69 €	0,2%	47 €	-11,9%	72,0%	-4,4%	71 €	2,9%	51 €	-1,7%
Nancy	64,3%	5,9%	63 €	2,8%	41 €	8,9%	54,8%	-1,3%	61 €	-0,8%	33 €	-2,1%
Nantes	63,5%	6,5%	68 €	-1,7%	43 €	4,7%	58,5%	-5,0%	68 €	1,2%	40 €	-3,8%
Reims	59,7%	7,9%	67 €	7,4%	40 €	16,0%	59,8%	-8,8%	65 €	3,6%	39 €	-5,5%
Rennes	65,9%	-1,5%	65 €	-0,2%	43 €	-1,7%	61,9%	-4,1%	66 €	4,1%	41 €	-0,1%
Rouen	56,2%	0,0%	62 €	-0,1%	35 €	-0,1%	59,4%	-2,6%	62 €	-0,1%	37 €	-2,7%
Strasbourg	70,0%	6,0%	70 €	-1,3%	49 €	4,6%	69,1%	2,7%	63 €	-1,7%	44 €	1,0%
Toulouse	56,9%	-14,1%	72 €	9,2%	41 €	-6,2%	59,5%	-2,2%	67 €	1,4%	40 €	-0,8%

  

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	64,6%	-4,3%	38 €	4,6%	25 €	0,1%	68,8%	-2,7%	38 €	2,6%	26 €	-0,1%
Avignon	55,2%	-8,1%	34 €	1,0%	19 €	-7,1%	69,5%	-5,1%	36 €	1,8%	25 €	-3,4%
Bordeaux	71,7%	5,8%	37 €	2,3%	27 €	8,2%	73,3%	4,2%	37 €	-0,7%	27 €	3,4%
Dijon	73,8%	-7,4%	38 €	-2,0%	28 €	-9,2%	74,1%	-4,8%	39 €	0,6%	29 €	-4,2%
Grenoble	65,3%	-2,2%	38 €	-7,4%	25 €	-9,5%	62,7%	-9,9%	40 €	-3,1%	25 €	-12,7%
Le Havre	72,4%	7,0%	41 €	1,9%	29 €	9,0%	73,8%	-1,1%	40 €	2,2%	30 €	1,2%
Lille	72,1%	-2,1%	41 €	2,8%	30 €	0,7%	67,1%	-4,8%	40 €	2,3%	27 €	-2,6%
Lyon	74,3%	6,8%	41 €	3,9%	30 €	11,0%	67,3%	-5,0%	40 €	2,0%	27 €	-3,1%
Marseille	66,0%	4,1%	42 €	2,5%	28 €	6,8%	70,8%	-0,7%	42 €	1,7%	30 €	1,0%
Metz	68,0%	0,7%	38 €	2,0%	26 €	2,7%	69,7%	-7,8%	39 €	4,1%	27 €	-4,0%
Montpellier	62,9%	-4,9%	38 €	0,8%	24 €	-4,1%	75,5%	-4,3%	40 €	3,2%	30 €	-1,2%
Nancy	63,9%	-1,6%	39 €	2,0%	25 €	0,4%	66,7%	6,0%	39 €	0,8%	26 €	6,9%
Nantes	65,3%	4,3%	43 €	3,1%	28 €	7,5%	65,3%	-3,4%	43 €	1,2%	28 €	-2,2%
Rennes	61,2%	1,1%	40 €	2,0%	24 €	3,1%	59,1%	-2,0%	40 €	2,2%	24 €	0,2%
Rouen	70,7%	7,8%	41 €	1,5%	29 €	9,3%	68,4%	-0,7%	41 €	1,3%	28 €	0,5%
Strasbourg	70,3%	10,8%	41 €	4,7%	29 €	15,9%	62,0%	-5,3%	40 €	2,0%	25 €	-3,4%
Toulouse	71,4%	-1,0%	40 €	0,3%	29 €	-0,7%	70,1%	-4,7%	40 €	1,7%	28 €	-3,1%

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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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