

# In Extenso

tourisme, hôtellerie et restauration

## French Hotel Industry Performances

January 2013



Membre de **Deloitte**.

# January: a tough start to the year

The year 2013 started badly for the French hotel industry. With the exception of a few destinations currently benefitting from locally-held events, the majority of French cities recorded results inferior to last year's. Declining occupancy had a harmful effect on rooms revenue in Paris and on the Côte d'Azur, too.

2013 got off to a bad start, with January's performances down on last year's. Rooms revenue declined by 2% to 3% compared to 2012; a phenomenon affecting most destinations in France. Paris and the Côte d'Azur proved no exception, recording lower RevPAR performances than last year. Regional France was hit especially hard, with hotels posting 2% to 12% drops in rooms revenue.

Although average rates appeared to hold up, occupancy fell significantly. The start of the year was characterised by a difficult economic context, rendering this traditionally calm period even more challenging.

However, a couple of destinations stood out, managing to record higher activity. Hotels in Lyon and Monaco, for instance, benefitted respectively from Syrah 2013 and a busy events calendar. Yet, such cases remained the exception, as hotels in the majority of cities experienced a decline in business.

## Monthly performance

January	Luxury	Upscale	Midscale	Budget	Super Budget
<b>OR 2013</b>	52,0%	50,6%	50,7%	50,6%	53,8%
<b>Var. /n-1</b>	-6,0%	-4,0%	-3,6%	-3,4%	-3,3%
<b>ADR 2013</b>	317 €	166 €	97 €	66 €	40 €
<b>Var. /n-1</b>	4,7%	0,6%	0,7%	0,9%	1,4%
<b>RevPAR 2013</b>	165 €	84 €	49 €	34 €	22 €
<b>Var. /n-1</b>	-1,6%	-3,4%	-2,9%	-2,5%	-1,9%

## Year To Date performance

Jan. to January	Luxury	Upscale	Midscale	Budget	Super Budget
<b>OR 2013</b>	52,0%	50,6%	50,7%	50,6%	53,8%
<b>Var. /n-1</b>	-6,0%	-4,0%	-3,6%	-3,4%	-3,3%
<b>ADR 2013</b>	317 €	166 €	97 €	66 €	40 €
<b>Var. /n-1</b>	4,7%	0,6%	0,7%	0,9%	1,4%
<b>RevPAR 2013</b>	165 €	84 €	49 €	34 €	22 €
<b>Var. /n-1</b>	-1,6%	-3,4%	-2,9%	-2,5%	-1,9%

### Definitions

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

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# Performances Paris

## January 2013



### Paris-City

#### Monthly performance

January	OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
Paris - Luxury	68,8%	-2,9%	461 €	2,9%	317 €	-0,1%
Paris - Boutique Hotels	66,3%	0,4%	292 €	5,6%	193 €	6,0%
Paris - Upscale	65,5%	-7,8%	184 €	1,9%	121 €	-6,0%
<b>Paris - Luxury &amp; Upscale</b>	<b>66,1%</b>	<b>-6,4%</b>	<b>243 €</b>	<b>3,4%</b>	<b>161 €</b>	<b>-3,2%</b>
Paris - Superior midscale	74,3%	-2,3%	145 €	3,6%	108 €	1,2%
Paris - Standard midscale	68,2%	-2,1%	104 €	2,6%	71 €	0,5%
<b>Paris - Midscale</b>	<b>70,6%</b>	<b>-2,1%</b>	<b>121 €</b>	<b>3,6%</b>	<b>86 €</b>	<b>1,4%</b>
<b>Paris - Budget</b>	<b>71,6%</b>	<b>-6,4%</b>	<b>79 €</b>	<b>3,6%</b>	<b>57 €</b>	<b>-3,1%</b>

#### Year To Date performance

Jan. to January	OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
Paris - Luxury	68,8%	-2,9%	461 €	2,9%	317 €	-0,1%
Paris - Boutique Hotels	66,3%	0,4%	292 €	5,6%	193 €	6,0%
Paris - Upscale	65,5%	-7,8%	184 €	1,9%	121 €	-6,0%
<b>Paris - Haut de gamme &amp; Gd luxe</b>	<b>66,1%</b>	<b>-6,4%</b>	<b>243 €</b>	<b>3,4%</b>	<b>161 €</b>	<b>-3,2%</b>
Paris - Superior midscale	74,3%	-2,3%	145 €	3,6%	108 €	1,2%
Paris - Standard midscale	68,2%	-2,1%	104 €	2,6%	71 €	0,5%
<b>Paris - Midscale</b>	<b>70,6%</b>	<b>-2,1%</b>	<b>121 €</b>	<b>3,6%</b>	<b>86 €</b>	<b>1,4%</b>
<b>Paris - Budget</b>	<b>71,6%</b>	<b>-6,4%</b>	<b>79 €</b>	<b>3,6%</b>	<b>57 €</b>	<b>-3,1%</b>

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

#### Monthly performance

January	OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
Paris	66,1%	-6,4%	243 €	3,4%	161 €	-3,2%
La Défense	n.d.	-	n.d.	-	n.d.	-
Roissy CdG	65,1%	-0,1%	104 €	-4,3%	68 €	-4,4%
IDF (hors Paris et pôles)	57,5%	-5,0%	198 €	4,5%	114 €	-0,8%

#### Year To Date performance

Jan. to January	OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
Paris	66,1%	-6,4%	243 €	3,4%	161 €	-3,2%
La Défense	n.d.	-	n.d.	-	n.d.	-
Roissy CdG	65,1%	-0,1%	104 €	-4,3%	68 €	-4,4%
IDF (hors Paris et pôles)	57,5%	-5,0%	198 €	4,5%	114 €	-0,8%

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# Performance Regions

January 2013



## Regions

Regions (excl. French Riviera)

### Monthly performance

January	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2013	38,9%	39,8%	44,3%	47,4%	51,4%
Var. /n-1	-16,9%	-8,4%	-5,5%	-2,9%	-3,0%
ADR 2013	208 €	128 €	87 €	65 €	38 €
Var. /n-1	6,2%	3,7%	-1,5%	0,6%	0,8%
RevPAR 2013	81 €	51 €	38 €	31 €	20 €
Var. /n-1	-11,8%	-5,0%	-6,9%	-2,3%	-2,2%

### Year To Date performance

Jan. to January	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2013	38,9%	39,8%	44,3%	47,4%	51,4%
Var. /n-1	-16,9%	-8,4%	-5,5%	-2,9%	-3,0%
ADR 2013	208 €	128 €	87 €	65 €	38 €
Var. /n-1	6,2%	3,7%	-1,5%	0,6%	0,8%
RevPAR 2013	81 €	51 €	38 €	31 €	20 €
Var. /n-1	-11,8%	-5,0%	-6,9%	-2,3%	-2,2%

French Riviera

### Monthly performance

January	Luxury	Upscale *	Midscale	Budget	Super Budget
OR 2013	39,1%	29,1%	37,8%	n.d.	47,3%
Var. /n-1	-7,9%	-11,6%	-4,9%	-	-9,2%
ADR 2013	193 €	116 €	82 €	n.d.	44 €
Var. /n-1	1,0%	-0,5%	4,2%	-	1,6%
RevPAR 2013	75 €	34 €	31 €	n.d.	21 €
Var. /n-1	-6,9%	-12,0%	-0,9%	-	-7,7%

### Year To Date performance

Jan. to January	Luxury	Upscale *	Midscale	Budget	Super Budget
OR 2013	39,1%	29,1%	37,8%	n.d.	47,3%
Var. /n-1	-7,9%	-11,6%	-4,9%	-	-9,2%
ADR 2013	193 €	116 €	82 €	n.d.	44 €
Var. /n-1	1,0%	-0,5%	4,2%	-	1,6%
RevPAR 2013	75 €	34 €	31 €	n.d.	21 €
Var. /n-1	-6,9%	-12,0%	-0,9%	-	-7,7%

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

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# Performances Suburbs

## January 2013



### Paris suburbs (excluding Paris)

Midscale market	Monthly performance							
	January	departments						Average suburbs
		77	78	91	92	93	94	
OR 2013	37,8%	53,3%	54,0%	51,0%	54,6%	66,9%	60,6%	54,9%
Var. /n-1	34,1%	-0,9%	-5,6%	0,8%	6,9%	-3,8%	-1,9%	-0,7%
ADR 2013	104 €	112 €	100 €	117 €	76 €	83 €	104 €	103 €
Var. /n-1	-0,9%	0,1%	2,2%	0,1%	-4,1%	-3,0%	-3,4%	-0,8%
RevPAR 2013	39 €	60 €	54 €	60 €	42 €	56 €	63 €	57 €
Var. /n-1	32,8%	-0,8%	-3,6%	0,9%	2,5%	-6,7%	-5,3%	-1,5%
Midscale market	Year To Date performance							
	Jan. to January	departments						Average suburbs
		77	78	91	92	93	94	
OR 2013	37,8%	53,3%	54,0%	51,0%	54,6%	66,9%	60,6%	54,9%
Var. /n-1	34,1%	-0,9%	-5,6%	0,8%	6,9%	-3,8%	-1,9%	-0,7%
ADR 2013	104 €	112 €	100 €	117 €	76 €	83 €	104 €	103 €
Var. /n-1	-0,9%	0,1%	2,2%	0,1%	-4,1%	-3,0%	-3,4%	-0,8%
RevPAR 2013	39 €	60 €	54 €	60 €	42 €	56 €	63 €	57 €
Var. /n-1	32,8%	-0,8%	-3,6%	0,9%	2,5%	-6,7%	-5,3%	-1,5%
Budget market	Monthly performance							
	January	departments						Average suburbs
		77	78	91	92	93	94	
OR 2013	50,3%	56,0%	53,5%	53,2%	49,4%	62,5%	59,0%	54,3%
Var. /n-1	-5,5%	-4,0%	-2,6%	-9,6%	-10,9%	-0,7%	2,7%	-4,7%
ADR 2013	61 €	83 €	68 €	80 €	63 €	69 €	66 €	69 €
Var. /n-1	3,8%	-3,7%	-5,8%	0,7%	0,2%	-1,2%	0,6%	0,0%
RevPAR 2013	31 €	47 €	37 €	43 €	31 €	43 €	39 €	37 €
Var. /n-1	-1,9%	-7,5%	-8,3%	-9,0%	-10,6%	-1,9%	3,3%	-4,7%
Budget market	Year To Date performance							
	Jan. to January	departments						Average suburbs
		77	78	91	92	93	94	
OR 2013	50,3%	56,0%	53,5%	53,2%	49,4%	62,5%	59,0%	54,3%
Var. /n-1	-5,5%	-4,0%	-2,6%	-9,6%	-10,9%	-0,7%	2,7%	-4,7%
ADR 2013	61 €	83 €	68 €	80 €	63 €	69 €	66 €	69 €
Var. /n-1	3,8%	-3,7%	-5,8%	0,7%	0,2%	-1,2%	0,6%	0,0%
RevPAR 2013	31 €	47 €	37 €	43 €	31 €	43 €	39 €	37 €
Var. /n-1	-1,9%	-7,5%	-8,3%	-9,0%	-10,6%	-1,9%	3,3%	-4,7%
Super Budget market	Monthly performance							
	January	departments						IDF (hors Paris)
		77	78	91	92	93	94	
OR 2013	59,5%	66,6%	63,4%	n.d.	67,0%	71,1%	69,0%	65,3%
Var. /n-1	1,2%	-0,3%	-0,5%	-	-7,5%	-2,3%	-5,6%	-4,4%
ADR 2013	42 €	43 €	40 €	n.d.	45 €	44 €	47 €	45 €
Var. /n-1	6,5%	0,5%	0,0%	-	3,8%	1,2%	8,1%	3,4%
RevPAR 2013	25 €	28 €	25 €	n.d.	30 €	32 €	33 €	29 €
Var. /n-1	7,8%	0,2%	-0,5%	-	-4,0%	-1,1%	2,0%	-1,1%
Super Budget market	Year To Date performance							
	Jan. to January	departments						IDF (hors Paris)
		77	78	91	92	93	94	
OR 2013	59,5%	66,6%	63,4%	n.d.	67,0%	71,1%	69,0%	65,3%
Var. /n-1	1,2%	-0,3%	-0,5%	-	-7,5%	-2,3%	-5,6%	-4,4%
ADR 2013	42 €	43 €	40 €	n.d.	45 €	44 €	47 €	45 €
Var. /n-1	6,5%	0,5%	0,0%	-	3,8%	1,2%	8,1%	3,4%
RevPAR 2013	25 €	28 €	25 €	n.d.	30 €	32 €	33 €	29 €
Var. /n-1	7,8%	0,2%	-0,5%	-	-4,0%	-1,1%	2,0%	-1,1%

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# Performances North-East

## January 2013



### North-east & Cities

Luxury Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
North-east	41,1%	0,1%	123 €	-3,5%	50 €	-3,4%	41,1%	0,1%	123 €	-3,5%	50 €	-3,4%
Dijon	30,6%	-20,5%	120 €	3,3%	37 €	-17,9%	30,6%	-20,5%	120 €	3,3%	37 €	-17,9%
Lille	44,1%	-4,4%	126 €	-0,4%	55 €	-4,8%	44,1%	-4,4%	126 €	-0,4%	55 €	-4,8%
Metz	insufficient supply						insufficient supply					
Nancy	insufficient supply						insufficient supply					
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	46,0%	14,5%	117 €	-8,1%	54 €	5,2%	46,0%	14,5%	117 €	-8,1%	54 €	5,2%

  

Midscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
North-east	39,5%	-7,3%	86 €	-2,1%	34 €	-9,3%	39,5%	-7,3%	86 €	-2,1%	34 €	-9,3%
Dijon	36,3%	-20,8%	80 €	-0,4%	29 €	-21,1%	36,3%	-20,8%	80 €	-0,4%	29 €	-21,1%
Lille	52,2%	3,8%	95 €	2,1%	50 €	5,9%	52,2%	3,8%	95 €	2,1%	50 €	5,9%
Metz	in progress						in progress					
Nancy	42,6%	-8,2%	84 €	4,1%	36 €	-4,4%	42,6%	-8,2%	84 €	4,1%	36 €	-4,4%
Reims	40,3%	-9,6%	85 €	-8,4%	34 €	-17,2%	40,3%	-9,6%	85 €	-8,4%	34 €	-17,2%
Strasbourg	38,0%	-14,2%	94 €	-4,2%	36 €	-17,8%	38,0%	-14,2%	94 €	-4,2%	36 €	-17,8%

  

Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
North-east	48,5%	2,0%	63 €	-2,2%	30 €	-0,3%	48,5%	2,0%	63 €	-2,2%	30 €	-0,3%
Dijon	50,3%	-11,4%	64 €	0,7%	32 €	-10,8%	50,3%	-11,4%	64 €	0,7%	32 €	-10,8%
Lille	60,2%	-0,8%	75 €	1,3%	45 €	0,5%	60,2%	-0,8%	75 €	1,3%	45 €	0,5%
Metz	43,6%	-10,2%	70 €	1,7%	30 €	-8,7%	43,6%	-10,2%	70 €	1,7%	30 €	-8,7%
Nancy	47,5%	5,5%	59 €	-8,6%	28 €	-3,6%	47,5%	5,5%	59 €	-8,6%	28 €	-3,6%
Reims	42,9%	0,2%	65 €	1,7%	28 €	1,9%	42,9%	0,2%	65 €	1,7%	28 €	1,9%
Strasbourg	45,7%	-5,5%	66 €	1,6%	30 €	-4,0%	45,7%	-5,5%	66 €	1,6%	30 €	-4,0%

  

Super Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
North-east	50,0%	-2,1%	37 €	0,2%	19 €	-2,0%	50,0%	-2,1%	37 €	0,2%	19 €	-2,0%
Dijon	59,0%	-6,3%	39 €	-2,7%	23 €	-8,9%	59,0%	-6,3%	39 €	-2,7%	23 €	-8,9%
Lille	57,3%	-6,8%	41 €	2,0%	23 €	-4,9%	57,3%	-6,8%	41 €	2,0%	23 €	-4,9%
Metz	54,4%	-8,7%	39 €	0,3%	21 €	-8,5%	54,4%	-8,7%	39 €	0,3%	21 €	-8,5%
Nancy	55,8%	-2,9%	39 €	3,1%	22 €	0,1%	55,8%	-2,9%	39 €	3,1%	22 €	0,1%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	48,3%	10,2%	41 €	6,7%	20 €	17,6%	48,3%	10,2%	41 €	6,7%	20 €	17,6%

#### 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

## January 2013



### North-West & Cities

Luxury Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
North-West	34,9%	-19,8%	161 €	6,6%	56 €	-14,5%	34,9%	-19,8%	161 €	6,6%	56 €	-14,5%
Amiens			insufficient supply						insufficient supply			
Angers			insufficient supply						insufficient supply			
Le Havre			insufficient supply						insufficient supply			
Niort			insufficient supply						insufficient supply			
Nantes			insufficient supply						insufficient supply			
Rennes			insufficient supply						insufficient supply			
Rouen			insufficient supply						insufficient supply			

Midscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
North-West	42,9%	-5,8%	83 €	0,4%	35 €	-5,5%	42,9%	-5,8%	83 €	0,4%	35 €	-5,5%
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	54,7%	6,1%	88 €	3,3%	48 €	9,6%	54,7%	6,1%	88 €	3,3%	48 €	9,6%
Nantes	50,7%	-3,9%	83 €	-7,0%	42 €	-10,6%	50,7%	-3,9%	83 €	-7,0%	42 €	-10,6%
Niort	53,5%	1,5%	78 €	-1,4%	42 €	0,0%	53,5%	1,5%	78 €	-1,4%	42 €	0,0%
Rennes	47,9%	-7,9%	85 €	-2,7%	41 €	-10,4%	47,9%	-7,9%	85 €	-2,7%	41 €	-10,4%
Rouen	50,3%	6,8%	89 €	-5,4%	45 €	1,0%	50,3%	6,8%	89 €	-5,4%	45 €	1,0%

Niort : in development, sample subject to change

Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
North-West	45,0%	-9,1%	65 €	1,6%	29 €	-7,7%	45,0%	-9,1%	65 €	1,6%	29 €	-7,7%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	52,7%	-4,3%	73 €	2,5%	39 €	-2,0%	52,7%	-4,3%	73 €	2,5%	39 €	-2,0%
Le Havre	40,1%	-26,9%	69 €	15,5%	28 €	-15,5%	40,1%	-26,9%	69 €	15,5%	28 €	-15,5%
Nantes	51,2%	-4,0%	66 €	-4,9%	34 €	-8,7%	51,2%	-4,0%	66 €	-4,9%	34 €	-8,7%
Niort	48,0%	-8,4%	64 €	0,8%	31 €	-7,7%	48,0%	-8,4%	64 €	0,8%	31 €	-7,7%
Rennes	58,5%	-5,8%	71 €	6,9%	41 €	0,6%	58,5%	-5,8%	71 €	6,9%	41 €	0,6%
Rouen	47,5%	-2,5%	64 €	3,6%	30 €	1,0%	47,5%	-2,5%	64 €	3,6%	30 €	1,0%

Niort : in development, sample subject to change

Super Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
North-West	50,1%	-4,3%	38 €	0,5%	19 €	-3,8%	50,1%	-4,3%	38 €	0,5%	19 €	-3,8%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	55,8%	-13,2%	39 €	4,0%	22 €	-9,8%	55,8%	-13,2%	39 €	4,0%	22 €	-9,8%
Le Havre	56,0%	-5,9%	40 €	1,1%	22 €	-4,9%	56,0%	-5,9%	40 €	1,1%	22 €	-4,9%
Nantes	58,4%	-7,6%	43 €	1,0%	25 €	-6,7%	58,4%	-7,6%	43 €	1,0%	25 €	-6,7%
Niort	45,5%	-7,2%	39 €	8,6%	18 €	0,7%	45,5%	-7,2%	39 €	8,6%	18 €	0,7%
Rennes	54,2%	-10,2%	40 €	-0,2%	22 €	-10,4%	54,2%	-10,2%	40 €	-0,2%	22 €	-10,4%
Rouen	58,4%	8,1%	43 €	-1,0%	25 €	7,1%	58,4%	8,1%	43 €	-1,0%	25 €	7,1%

Niort : in development, sample subject to change

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

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

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# Performances South-East

## January 2013



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

	Monthly performance						Year To Date performance					
Luxury Upscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
South-East	39,7%	-10,6%	140 €	5,9%	56 €	-5,4%	39,7%	-10,6%	140 €	5,9%	56 €	-5,4%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	30,2%	-19,2%	108 €	0,0%	33 €	-19,2%	30,2%	-19,2%	108 €	0,0%	33 €	-19,2%
Grenoble	insufficient supply						insufficient supply					
Lyon	61,8%	13,5%	147 €	12,8%	91 €	28,1%	61,8%	13,5%	147 €	12,8%	91 €	28,1%
Marseille	32,4%	-24,5%	131 €	5,2%	42 €	-20,6%	32,4%	-24,5%	131 €	5,2%	42 €	-20,6%
Montpellier	30,2%	-29,0%	122 €	-1,3%	37 €	-29,9%	30,2%	-29,0%	122 €	-1,3%	37 €	-29,9%
St Etienne	insufficient supply						insufficient supply					
Midscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
South-East	48,9%	-3,0%	90 €	-1,2%	44 €	-4,1%	48,9%	-3,0%	90 €	-1,2%	44 €	-4,1%
Aix en Provence	46,1%	-1,0%	84 €	-5,5%	39 €	-6,4%	46,1%	-1,0%	84 €	-5,5%	39 €	-6,4%
Avignon	44,9%	-4,0%	80 €	0,5%	36 €	-3,5%	44,9%	-4,0%	80 €	0,5%	36 €	-3,5%
Grenoble	45,9%	-10,6%	107 €	0,0%	49 €	-10,6%	45,9%	-10,6%	107 €	0,0%	49 €	-10,6%
Lyon	58,9%	5,0%	117 €	16,1%	69 €	21,9%	58,9%	5,0%	117 €	16,1%	69 €	21,9%
Marseille	55,2%	15,5%	92 €	-4,1%	51 €	10,7%	55,2%	15,5%	92 €	-4,1%	51 €	10,7%
Montpellier	47,4%	-8,0%	87 €	-3,5%	41 €	-11,2%	47,4%	-8,0%	87 €	-3,5%	41 €	-11,2%
St Etienne	in progress						in progress					
Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
South-East	49,9%	-0,5%	68 €	2,9%	34 €	2,4%	49,9%	-0,5%	68 €	2,9%	34 €	2,4%
Aix en Provence	37,0%	-13,7%	68 €	-0,9%	25 €	-14,5%	37,0%	-13,7%	68 €	-0,9%	25 €	-14,5%
Avignon	44,0%	-7,5%	61 €	3,8%	27 €	-4,0%	44,0%	-7,5%	61 €	3,8%	27 €	-4,0%
Grenoble	52,2%	-5,4%	64 €	-1,7%	33 €	-7,0%	52,2%	-5,4%	64 €	-1,7%	33 €	-7,0%
Lyon	61,5%	5,1%	86 €	14,9%	53 €	20,8%	61,5%	5,1%	86 €	14,9%	53 €	20,8%
Marseille	49,7%	6,5%	65 €	-7,0%	32 €	-0,9%	49,7%	6,5%	65 €	-7,0%	32 €	-0,9%
Montpellier	52,1%	-8,1%	68 €	-0,1%	35 €	-8,2%	52,1%	-8,1%	68 €	-0,1%	35 €	-8,2%
St Etienne	in progress						in progress					
Super Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
South-East	53,3%	-2,3%	39 €	1,5%	21 €	-0,9%	53,3%	-2,3%	39 €	1,5%	21 €	-0,9%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	54,6%	-2,6%	35 €	0,7%	19 €	-2,0%	54,6%	-2,6%	35 €	0,7%	19 €	-2,0%
Grenoble	57,5%	-10,4%	40 €	-0,5%	23 €	-10,9%	57,5%	-10,4%	40 €	-0,5%	23 €	-10,9%
Lyon	65,3%	8,2%	42 €	5,9%	28 €	14,6%	65,3%	8,2%	42 €	5,9%	28 €	14,6%
Marseille	54,3%	-5,0%	42 €	3,0%	23 €	-2,1%	54,3%	-5,0%	42 €	3,0%	23 €	-2,1%
Montpellier	55,3%	-10,1%	38 €	3,3%	21 €	-7,1%	55,3%	-10,1%	38 €	3,3%	21 €	-7,1%
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

## January 2013



### French Riviera

January	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
French Riviera - Luxury	39,1%	-7,9%	193 €	1,0%	75 €	-6,9%	39,1%	-7,9%	193 €	1,0%	75 €	-6,9%
French Riviera - Boutique Hotels**	40,4%	9,4%	109 €	2,4%	44 €	12,0%	40,4%	9,4%	109 €	2,4%	44 €	12,0%
French Riviera - Upscale	28,1%	-13,3%	117 €	-0,9%	33 €	-14,1%	28,1%	-13,3%	117 €	-0,9%	33 €	-14,1%
Average Upscale & Luxury	32,3%	-10,7%	146 €	-0,4%	47 €	-11,1%	32,3%	-10,7%	146 €	-0,4%	47 €	-11,1%
Average Midscale	37,8%	-4,9%	82 €	4,2%	31 €	-0,9%	37,8%	-4,9%	82 €	4,2%	31 €	-0,9%
Average Budget	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Average Super-Budget	47,3%	-9,2%	44 €	1,6%	21 €	-7,7%	47,3%	-9,2%	44 €	1,6%	21 €	-7,7%

### French Riviera Cities

January	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	37,5%	-2,2%	194 €	-2,8%	73 €	-5,0%	37,5%	-2,2%	194 €	-2,8%	73 €	-5,0%
Cannes - Boutique Hotels	35,4%	10,0%	158 €	13,0%	56 €	24,3%	35,4%	10,0%	158 €	13,0%	56 €	24,3%
Cannes - Upscale	23,8%	-11,2%	113 €	-8,7%	27 €	-19,0%	23,8%	-11,2%	113 €	-8,7%	27 €	-19,0%
Cannes - Upscale & Luxury	31,7%	-7,2%	167 €	-5,6%	53 €	-12,4%	31,7%	-7,2%	167 €	-5,6%	53 €	-12,4%
Cannes - Midscale	34,1%	-4,6%	93 €	5,7%	32 €	0,8%	34,1%	-4,6%	93 €	5,7%	32 €	0,8%

January	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	33,5%	-13,1%	123 €	-0,5%	41 €	-13,6%	33,5%	-13,1%	123 €	-0,5%	41 €	-13,6%
Nice - Midscale	40,8%	-8,8%	79 €	5,3%	32 €	-4,0%	40,8%	-8,8%	79 €	5,3%	32 €	-4,0%

January	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	45,0%	10,2%	306 €	2,8%	138 €	13,3%	45,0%	10,2%	306 €	2,8%	138 €	13,3%
Monaco - Upscale	54,1%	39,0%	146 €	-6,2%	79 €	30,4%	54,1%	39,0%	146 €	-6,2%	79 €	30,4%
Monaco - Upscale & Luxury	50,9%	28,7%	195 €	-4,3%	99 €	23,2%	50,9%	28,7%	195 €	-4,3%	99 €	23,2%

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

\*\* Boutique Hotels: sample excludes Luxury hotels

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# Performances South West

## January 2013



### South-West & Cities

	Monthly performance						Year To Date performance					
Luxury Upscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
South-West	37,5%	-14,7%	161 €	1,5%	60 €	-13,5%	37,5%	-14,7%	161 €	1,5%	60 €	-13,5%
Bayonne-Anglet-Biarritz	31,8%	-14,9%	183 €	-0,8%	58 €	-15,6%	31,8%	-14,9%	183 €	-0,8%	58 €	-15,6%
Bordeaux	32,9%	-8,0%	163 €	-6,8%	54 €	-14,3%	32,9%	-8,0%	163 €	-6,8%	54 €	-14,3%
Pau	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Toulouse	54,4%	-3,1%	127 €	4,5%	69 €	1,3%	54,4%	-3,1%	127 €	4,5%	69 €	1,3%
<i>Bayonne-Anglet-Biarritz : in development, sample subject to change</i>												
Midscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
South-West	44,8%	-8,1%	86 €	-3,4%	39 €	-11,3%	44,8%	-8,1%	86 €	-3,4%	39 €	-11,3%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Bordeaux	43,2%	-7,1%	81 €	-3,9%	35 €	-10,8%	43,2%	-7,1%	81 €	-3,9%	35 €	-10,8%
Pau	45,9%	-1,3%	79 €	0,3%	36 €	-1,1%	45,9%	-1,3%	79 €	0,3%	36 €	-1,1%
Toulouse	52,5%	-6,7%	96 €	-4,7%	50 €	-11,1%	52,5%	-6,7%	96 €	-4,7%	50 €	-11,1%
<i>Bayonne-Anglet-Biarritz : in development, sample subject to change</i>												
Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
South-West	44,0%	-7,4%	63 €	-0,1%	28 €	-7,5%	44,0%	-7,4%	63 €	-0,1%	28 €	-7,5%
Bayonne-Anglet-Biarritz	40,2%	8,1%	52 €	-2,7%	21 €	5,2%	40,2%	8,1%	52 €	-2,7%	21 €	5,2%
Bordeaux	48,3%	-9,3%	70 €	-0,5%	34 €	-9,8%	48,3%	-9,3%	70 €	-0,5%	34 €	-9,8%
Pau	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Toulouse	56,0%	4,9%	69 €	3,4%	39 €	8,5%	56,0%	4,9%	69 €	3,4%	39 €	8,5%
<i>Bayonne-Anglet-Biarritz : in development, sample subject to change</i>												
Super Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2012	Var /n-1	2012	Var /n-1	2012	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
South-West	52,3%	-4,5%	38 €	1,2%	20 €	-3,4%	52,3%	-4,5%	38 €	1,2%	20 €	-3,4%
Bayonne-Anglet-Biarritz	n.d.	-	-	-	-	-	n.d.	-	n.d.	-	-	-
Bordeaux	56,6%	-4,2%	37 €	4,3%	21 €	-0,1%	56,6%	-4,2%	37 €	4,3%	21 €	-0,1%
Pau	50,4%	11,4%	33 €	-4,9%	17 €	6,0%	50,4%	11,4%	33 €	-4,9%	17 €	6,0%
Toulouse	57,6%	-8,5%	39 €	-1,4%	22 €	-9,8%	57,6%	-8,5%	39 €	-1,4%	22 €	-9,8%
<i>Bayonne-Anglet-Biarritz : in development, sample subject to change</i>												

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

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

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# Performances Main cities in Regions

## January 2013



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

Luxury Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
Avignon	30,2%	-19,2%	108 €	0,0%	33 €	-19,2%	30,2%	-19,2%	108 €	0,0%	33 €	-19,2%
Bayonne-Anglet-Biarritz	31,8%	-14,9%	183 €	-0,8%	58 €	-15,6%	31,8%	-14,9%	183 €	-0,8%	58 €	-15,6%
Bordeaux	32,9%	-8,0%	163 €	-6,8%	54 €	-14,3%	32,9%	-8,0%	163 €	-6,8%	54 €	-14,3%
Cannes	31,7%	-7,2%	167 €	-5,6%	53 €	-12,4%	31,7%	-7,2%	167 €	-5,6%	53 €	-12,4%
Dijon	30,6%	-20,5%	120 €	3,3%	37 €	-17,9%	30,6%	-20,5%	120 €	3,3%	37 €	-17,9%
Lille	44,1%	-4,4%	126 €	-0,4%	55 €	-4,8%	44,1%	-4,4%	126 €	-0,4%	55 €	-4,8%
Lyon	61,8%	13,5%	147 €	12,8%	91 €	28,1%	61,8%	13,5%	147 €	12,8%	91 €	28,1%
Marseille	32,4%	-24,5%	131 €	5,2%	42 €	-20,6%	32,4%	-24,5%	131 €	5,2%	42 €	-20,6%
Monaco	50,9%	28,7%	195 €	-4,3%	99 €	23,2%	50,9%	28,7%	195 €	-4,3%	99 €	23,2%
Montpellier	30,2%	-29,0%	122 €	-1,3%	37 €	-29,9%	30,2%	-29,0%	122 €	-1,3%	37 €	-29,9%
Nice	33,5%	-13,1%	123 €	-0,5%	41 €	-13,6%	33,5%	-13,1%	123 €	-0,5%	41 €	-13,6%
Strasbourg	46,0%	14,5%	117 €	-8,1%	54 €	5,2%	46,0%	14,5%	117 €	-8,1%	54 €	5,2%
Toulouse	54,4%	-3,1%	127 €	4,5%	69 €	1,3%	54,4%	-3,1%	127 €	4,5%	69 €	1,3%

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

Midscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
Aix en Provence	46,1%	-1,0%	84 €	-5,5%	39 €	-6,4%	46,1%	-1,0%	84 €	-5,5%	39 €	-6,4%
Avignon	44,9%	-4,0%	80 €	0,5%	36 €	-3,5%	44,9%	-4,0%	80 €	0,5%	36 €	-3,5%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Bordeaux	43,2%	-7,1%	81 €	-3,9%	35 €	-10,8%	43,2%	-7,1%	81 €	-3,9%	35 €	-10,8%
Cannes	34,1%	-4,6%	93 €	5,7%	32 €	0,8%	34,1%	-4,6%	93 €	5,7%	32 €	0,8%
Dijon	36,3%	-20,8%	80 €	-0,4%	29 €	-21,1%	36,3%	-20,8%	80 €	-0,4%	29 €	-21,1%
Grenoble	45,9%	-10,6%	107 €	0,0%	49 €	-10,6%	45,9%	-10,6%	107 €	0,0%	49 €	-10,6%
Le Havre	54,7%	6,1%	88 €	3,3%	48 €	9,6%	54,7%	6,1%	88 €	3,3%	48 €	9,6%
Lille	52,2%	3,8%	95 €	2,1%	50 €	5,9%	52,2%	3,8%	95 €	2,1%	50 €	5,9%
Lyon	58,9%	5,0%	117 €	16,1%	69 €	21,9%	58,9%	5,0%	117 €	16,1%	69 €	21,9%
Marseille	55,2%	15,5%	92 €	-4,1%	51 €	10,7%	55,2%	15,5%	92 €	-4,1%	51 €	10,7%
Montpellier	47,4%	-8,0%	87 €	-3,5%	41 €	-11,2%	47,4%	-8,0%	87 €	-3,5%	41 €	-11,2%
Nancy	42,6%	-8,2%	84 €	4,1%	36 €	-4,4%	42,6%	-8,2%	84 €	4,1%	36 €	-4,4%
Nantes	50,7%	-3,9%	83 €	-7,0%	42 €	-10,6%	50,7%	-3,9%	83 €	-7,0%	42 €	-10,6%
Niort	53,5%	1,5%	78 €	-1,4%	42 €	0,0%	53,5%	1,5%	78 €	-1,4%	42 €	0,0%
Nice	40,8%	-8,8%	79 €	5,3%	32 €	-4,0%	40,8%	-8,8%	79 €	5,3%	32 €	-4,0%
Pau	45,9%	-1,3%	79 €	0,3%	36 €	-1,1%	45,9%	-1,3%	79 €	0,3%	36 €	-1,1%
Reims	40,3%	-9,6%	85 €	-8,4%	34 €	-17,2%	40,3%	-9,6%	85 €	-8,4%	34 €	-17,2%
Rennes	47,9%	-7,9%	85 €	-2,7%	41 €	-10,4%	47,9%	-7,9%	85 €	-2,7%	41 €	-10,4%
Rouen	50,3%	6,8%	89 €	-5,4%	45 €	1,0%	50,3%	6,8%	89 €	-5,4%	45 €	1,0%
Strasbourg	38,0%	-14,2%	94 €	-4,2%	36 €	-17,8%	38,0%	-14,2%	94 €	-4,2%	36 €	-17,8%
Toulouse	52,5%	-6,7%	96 €	-4,7%	50 €	-11,1%	52,5%	-6,7%	96 €	-4,7%	50 €	-11,1%

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

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# Performances Main cities in Regions

## January 2013



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

Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
Aix en Provence	37,0%	-13,7%	68 €	-0,9%	25 €	-14,5%	37,0%	-13,7%	68 €	-0,9%	25 €	-14,5%
Angers	52,7%	-4,3%	73 €	2,5%	39 €	-2,0%	52,7%	-4,3%	73 €	2,5%	39 €	-2,0%
Avignon	44,0%	-7,5%	61 €	3,8%	27 €	-4,0%	44,0%	-7,5%	61 €	3,8%	27 €	-4,0%
Bayonne-Anglet-Biarritz	40,2%	8,1%	52 €	-2,7%	21 €	5,2%	40,2%	8,1%	52 €	-2,7%	21 €	5,2%
Bordeaux	48,3%	-9,3%	70 €	-0,5%	34 €	-9,8%	48,3%	-9,3%	70 €	-0,5%	34 €	-9,8%
Dijon	50,3%	-11,4%	64 €	0,7%	32 €	-10,8%	50,3%	-11,4%	64 €	0,7%	32 €	-10,8%
Grenoble	52,2%	-5,4%	64 €	-1,7%	33 €	-7,0%	52,2%	-5,4%	64 €	-1,7%	33 €	-7,0%
Le Havre	40,1%	-26,9%	69 €	15,5%	28 €	-15,5%	40,1%	-26,9%	69 €	15,5%	28 €	-15,5%
Lille	60,2%	-0,8%	75 €	1,3%	45 €	0,5%	60,2%	-0,8%	75 €	1,3%	45 €	0,5%
Lyon	61,5%	5,1%	86 €	14,9%	53 €	20,8%	61,5%	5,1%	86 €	14,9%	53 €	20,8%
Marseille	49,7%	6,5%	65 €	-7,0%	32 €	-0,9%	49,7%	6,5%	65 €	-7,0%	32 €	-0,9%
Metz	43,6%	-10,2%	70 €	1,7%	30 €	-8,7%	43,6%	-10,2%	70 €	1,7%	30 €	-8,7%
Montpellier	52,1%	-8,1%	68 €	-0,1%	35 €	-8,2%	52,1%	-8,1%	68 €	-0,1%	35 €	-8,2%
Nancy	47,5%	5,5%	59 €	-8,6%	28 €	-3,6%	47,5%	5,5%	59 €	-8,6%	28 €	-3,6%
Nantes	51,2%	-4,0%	66 €	-4,9%	34 €	-8,7%	51,2%	-4,0%	66 €	-4,9%	34 €	-8,7%
Niort	48,0%	-8,4%	64 €	0,8%	31 €	-7,7%	48,0%	-8,4%	64 €	0,8%	31 €	-7,7%
Pau	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Reims	42,9%	0,2%	65 €	1,7%	28 €	1,9%	42,9%	0,2%	65 €	1,7%	28 €	1,9%
Rennes	58,5%	-5,8%	71 €	6,9%	41 €	0,6%	58,5%	-5,8%	71 €	6,9%	41 €	0,6%
Rouen	47,5%	-2,5%	64 €	3,6%	30 €	1,0%	47,5%	-2,5%	64 €	3,6%	30 €	1,0%
Strasbourg	45,7%	-5,5%	66 €	1,6%	30 €	-4,0%	45,7%	-5,5%	66 €	1,6%	30 €	-4,0%
Toulouse	56,0%	4,9%	69 €	3,4%	39 €	8,5%	56,0%	4,9%	69 €	3,4%	39 €	8,5%

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

Super Budget	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1	2013	Var /n-1
Angers	55,8%	-13,2%	39 €	4,0%	22 €	-9,8%	55,8%	-13,2%	39 €	4,0%	22 €	-9,8%
Avignon	54,6%	-2,6%	35 €	0,7%	19 €	-2,0%	54,6%	-2,6%	35 €	0,7%	19 €	-2,0%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Bordeaux	56,6%	-4,2%	37 €	4,3%	21 €	-0,1%	56,6%	-4,2%	37 €	4,3%	21 €	-0,1%
Dijon	59,0%	-6,3%	39 €	-2,7%	23 €	-8,9%	59,0%	-6,3%	39 €	-2,7%	23 €	-8,9%
Grenoble	57,5%	-10,4%	40 €	-0,5%	23 €	-10,9%	57,5%	-10,4%	40 €	-0,5%	23 €	-10,9%
Le Havre	56,0%	-5,9%	40 €	1,1%	22 €	-4,9%	56,0%	-5,9%	40 €	1,1%	22 €	-4,9%
Lille	57,3%	-6,8%	41 €	2,0%	23 €	-4,9%	57,3%	-6,8%	41 €	2,0%	23 €	-4,9%
Lyon	65,3%	8,2%	42 €	5,9%	28 €	14,6%	65,3%	8,2%	42 €	5,9%	28 €	14,6%
Marseille	54,3%	-5,0%	42 €	3,0%	23 €	-2,1%	54,3%	-5,0%	42 €	3,0%	23 €	-2,1%
Metz	54,4%	-8,7%	39 €	0,3%	21 €	-8,5%	54,4%	-8,7%	39 €	0,3%	21 €	-8,5%
Montpellier	55,3%	-10,1%	38 €	3,3%	21 €	-7,1%	55,3%	-10,1%	38 €	3,3%	21 €	-7,1%
Nancy	55,8%	-2,9%	39 €	3,1%	22 €	0,1%	55,8%	-2,9%	39 €	3,1%	22 €	0,1%
Nantes	58,4%	-7,6%	43 €	1,0%	25 €	-6,7%	58,4%	-7,6%	43 €	1,0%	25 €	-6,7%
Niort	45,5%	-7,2%	39 €	8,6%	18 €	0,7%	45,5%	-7,2%	39 €	8,6%	18 €	0,7%
Pau	50,4%	11,4%	33 €	-4,9%	17 €	6,0%	50,4%	11,4%	33 €	-4,9%	17 €	6,0%
Rennes	54,2%	-10,2%	40 €	-0,2%	22 €	-10,4%	54,2%	-10,2%	40 €	-0,2%	22 €	-10,4%
Rouen	58,4%	8,1%	43 €	-1,0%	25 €	7,1%	58,4%	8,1%	43 €	-1,0%	25 €	7,1%
Strasbourg	48,3%	10,2%	41 €	6,7%	20 €	17,6%	48,3%	10,2%	41 €	6,7%	20 €	17,6%
Toulouse	57,6%	-8,5%	39 €	-1,4%	22 €	-9,8%	57,6%	-8,5%	39 €	-1,4%	22 €	-9,8%

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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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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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