

# In Extenso

tourisme, culture & hôtellerie

## French Hotel Industry Performance

April 2016



### Recent references

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*Repositioning analysis for a hotel, and operator search assistance*

Paris 10

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**Investor**

*Valuation of two hotel portfolios, c. 50 independent and branded establishments*

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*Study relating to the reconversion of an office building into a hotel (> 5 000 m²)*

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Company apartment*

Pas de Calais

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Vosges

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*Instruction for the sale of a 2\* hotel without restaurant > 45 rooms  
Project to transform into a 4\* hotel*

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**Communauté de Communes (18)**

*Additional feasibility study for an aeronautical cluster project in Avord (Cher)*

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**Syndicat mixte du Musée de la Mine (57)**

*Assistance in developing an F&B concept at Parc Expor Wendel  
With Fabien Darbon*

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### Publications



#### Tech Trends 2016 – Innovating in the Digital Era

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Download the study here:



### Articles

#### [Hospitality and digital: a dogged transformation... in response to the explosion of the collaborative economy](#)

François-Xavier Leroux, Director, Deloitte Digital | 2016

#### [How to become a creative company](#)

Antoine Oliveau, Consulting Associate, Responsible for the Retail Banking Industry | 2016

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# The security risk continues to weigh heavily

March's generally positive results led us to believe there was some hope for recovery. Unfortunately, April's performances dropped in the majority of categories and throughout most of France. The attacks in Brussels at the end of March reminded international visitors of the ongoing security threat in this part of Europe. The school holiday and events calendars were also somewhat unfavourable in April, which accentuated the weak trading activity during this period.

While March gave us some hope, the accumulation of unfavourable socio-economic factors had a negative impact on French hotel trading in April. The Brussels terrorist attacks at the end of March and the resulting actions of the Belgian and French police were widely discussed in the Media, serving as a reminder that the security threat is still very much present. International leisure travellers were particularly sensitive to this, and French leisure visitors chose not to travel either – given the dismal economic context, safety fears and generally miserable weather. Moreover, in an even-numbered year and during a month that concentrated the bulk of Easter school holidays, business travellers were not particularly present, and could not be relied on to compensate for the absence of leisure guests. Given this, all client segments were affected, which heavily weighed on April's performances. Within this difficult context, many hoteliers adopted an aggressive pricing strategy, which ultimately had little impact on occupancy rates – the double whammy of lower occupancy and average rates thus drove down RevPAR.

Paris and l'Île de France were particularly affected, with a 20% or more drop in RevPAR, making the situation observed at the end of March even worse. In addition, a "new" phenomenon took place in April – regional France was also impacted, and the Côte d'Azur in particular (especially the Midscale category whose RevPAR dropped by 18,1%). In this hostile environment, the regional Luxury category was the only one to keep its head above water, recording positive performances. However, this was in comparison with the very weak results observed at the beginning of 2015.

The same situation could be observed in cities. With a few exceptions, main French cities rely both on international visitors and business visitors, attracted by a busy events calendar. In this respect, April 2016 was a bad month. Take, for example, Nice and Marseille, or Avignon and Rouen...

However, looking on the brighter side, certain economic indicators are improving. Furthermore, the fight against terrorism is achieving some tangible results and the Euro 2016 football championships are coming up. All these factors should go somewhat towards boosting hotel trading at the end of the first semester 2016.

## Monthly performance

April	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	58,4%	64,7%	60,5%	63,2%	60,9%
Var. /n-1	7,5%	-4,9%	-9,2%	-9,3%	-5,8%
ADR 2016	336 €	172 €	101 €	62 €	40 €
Var. /n-1	-7,9%	-7,3%	-2,3%	-4,2%	0,4%
RevPAR 2016	196 €	111 €	61 €	39 €	24 €
Var. /n-1	-1,0%	-11,9%	-11,3%	-13,1%	-5,4%

## Year To Date performance

Jan. to April	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	51,2%	58,0%	56,4%	59,3%	57,8%
Var. /n-1	13,2%	-1,3%	-3,4%	-2,6%	-2,2%
ADR 2016	324 €	168 €	100 €	63 €	40 €
Var. /n-1	-7,4%	-4,5%	-2,2%	-1,9%	0,3%
RevPAR 2016	166 €	97 €	57 €	37 €	23 €
Var. /n-1	4,9%	-5,8%	-5,5%	-4,4%	-1,9%

### Definitions

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

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# Performances Paris

April 2016



## Paris-City

### Monthly performance

April	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
<b>Luxury &amp; Palace</b>	<b>61,7%</b>	<b>-10,7%</b>	<b>522 €</b>	<b>-13,6%</b>	<b>322 €</b>	<b>-22,8%</b>
<b>Upscale</b>	<b>70,4%</b>	<b>-13,4%</b>	<b>205 €</b>	<b>-5,6%</b>	<b>145 €</b>	<b>-18,2%</b>
Upscale Boutique hotels	76,3%	-8,4%	231 €	-10,7%	177 €	-18,2%
Standard Upscale hotels	68,8%	-14,8%	197 €	-4,2%	136 €	-18,3%
<b>Midscale</b>	<b>71,6%</b>	<b>-14,0%</b>	<b>127 €</b>	<b>-9,3%</b>	<b>91 €</b>	<b>-22,0%</b>
Midscale Boutique hotels	73,5%	-12,6%	139 €	-10,2%	102 €	-21,6%
Standard Midscale hotels	70,2%	-15,0%	119 €	-8,8%	83 €	-22,6%
<b>Budget</b>	<b>73,8%</b>	<b>-13,8%</b>	<b>83 €</b>	<b>-10,2%</b>	<b>61 €</b>	<b>-22,6%</b>

### Year To Date performance

Jan. to April	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
<b>Luxury &amp; Palace</b>	<b>56,5%</b>	<b>-8,1%</b>	<b>549 €</b>	<b>-8,2%</b>	<b>310 €</b>	<b>-15,6%</b>
<b>Upscale</b>	<b>64,7%</b>	<b>-10,3%</b>	<b>204 €</b>	<b>-2,3%</b>	<b>132 €</b>	<b>-12,4%</b>
Upscale Boutique hotels	67,7%	-6,7%	234 €	-6,0%	159 €	-12,3%
Standard Upscale hotels	63,9%	-11,3%	195 €	-1,5%	125 €	-12,6%
<b>Midscale</b>	<b>68,0%</b>	<b>-9,7%</b>	<b>125 €</b>	<b>-6,2%</b>	<b>85 €</b>	<b>-15,3%</b>
Midscale Boutique hotels	69,2%	-7,8%	137 €	-7,0%	95 €	-14,3%
Standard Midscale hotels	67,2%	-10,9%	116 €	-5,8%	78 €	-16,1%
<b>Budget</b>	<b>71,2%</b>	<b>-9,5%</b>	<b>80 €</b>	<b>-6,4%</b>	<b>57 €</b>	<b>-15,3%</b>

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

### Monthly performance

April	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Paris	70,4%	-13,4%	205 €	-5,6%	145 €	-18,2%
La Défense	59,5%	-17,4%	146 €	-3,1%	87 €	-20,0%
Roissy CdG	66,7%	-5,4%	119 €	-7,3%	79 €	-12,3%
Other areas	72,0%	-3,7%	173 €	-5,9%	124 €	-9,4%

### Year To Date performance

Jan. to April	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Paris	64,7%	-10,3%	204 €	-2,3%	132 €	-12,4%
La Défense	57,5%	-16,5%	152 €	-0,3%	87 €	-16,8%
Roissy CdG	65,6%	-7,1%	128 €	2,7%	84 €	-4,6%
Other areas	67,9%	0,4%	157 €	-1,2%	107 €	-0,8%

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# Performance Regions

April 2016



## Regions

Regions (excl. French Riviera)

### Monthly performance

April	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	61,8%	57,9%	57,5%	60,9%	59,3%
Var. /n-1	9,5%	-2,8%	-3,7%	-2,8%	-5,4%
ADR 2016	257 €	131 €	89 €	61 €	39 €
Var. /n-1	-5,0%	-5,8%	1,3%	-1,4%	1,5%
RevPAR 2016	159 €	76 €	51 €	37 €	23 €
Var. /n-1	4,0%	-8,4%	-2,5%	-4,2%	-4,0%

### Year To Date performance

Jan. to April	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	53,7%	53,5%	53,1%	56,9%	55,8%
Var. /n-1	14,7%	2,8%	2,1%	3,2%	-1,6%
ADR 2016	237 €	128 €	88 €	61 €	38 €
Var. /n-1	-1,1%	-2,5%	0,5%	-1,2%	1,0%
RevPAR 2016	127 €	69 €	47 €	35 €	21 €
Var. /n-1	13,4%	0,2%	2,6%	1,9%	-0,7%

French Riviera

### Monthly performance

April	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	57,8%	62,9%	58,0%	55,5%	56,4%
Var. /n-1	4,7%	2,1%	-13,9%	-7,8%	-9,0%
ADR 2016	284 €	141 €	94 €	62 €	46 €
Var. /n-1	1,9%	-4,6%	-4,9%	-7,0%	-1,4%
RevPAR 2016	164 €	89 €	54 €	34 €	26 €
Var. /n-1	6,7%	-2,6%	-18,1%	-14,3%	-10,3%

### Year To Date performance

Jan. to April	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	49,8%	49,4%	49,8%	49,0%	50,3%
Var. /n-1	16,7%	3,1%	-2,8%	3,1%	-4,3%
ADR 2016	244 €	127 €	87 €	61 €	45 €
Var. /n-1	-1,6%	-3,5%	-0,8%	-2,5%	0,3%
RevPAR 2016	121 €	63 €	44 €	30 €	23 €
Var. /n-1	14,8%	-0,5%	-3,6%	16,5%	-4,0%

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# Performances Suburbs

April 2016



## Paris suburbs (excluding Paris)

Midscale market

Monthly performance								
April	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	47,4%	55,1%	58,6%	57,7%	50,7%	59,3%	63,0%	57,2%
Var. /n-1	-24,8%	-15,3%	-6,3%	-18,4%	-30,3%	-16,3%	-9,6%	-17,0%
ADR 2016	92 €	102 €	96 €	117 €	87 €	89 €	91 €	100 €
Var. /n-1	-5,6%	5,2%	7,8%	10,3%	3,8%	4,4%	-5,5%	4,9%
RevPAR 2016	44 €	56 €	56 €	67 €	44 €	53 €	57 €	57 €
Var. /n-1	-29,0%	-10,9%	1,0%	-10,0%	-27,7%	-12,5%	-14,6%	-12,9%

Year To Date performance								
Jan. to April	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	44,6%	53,7%	59,5%	55,2%	50,0%	55,0%	61,7%	55,3%
Var. /n-1	-13,3%	-11,9%	-3,4%	-12,0%	-17,2%	-13,8%	-3,3%	-10,6%
ADR 2016	93 €	105 €	97 €	117 €	89 €	93 €	95 €	102 €
Var. /n-1	-2,7%	2,3%	1,5%	2,8%	5,3%	3,3%	-1,0%	2,1%
RevPAR 2016	41 €	56 €	58 €	64 €	44 €	51 €	59 €	56 €
Var. /n-1	-15,7%	-9,9%	-1,9%	-9,6%	-12,8%	-11,0%	-4,3%	-8,7%

Budget market

Monthly performance								
April	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	69,2%	65,1%	58,3%	67,2%	53,7%	72,3%	67,3%	63,8%
Var. /n-1	-15,7%	-9,1%	-13,5%	-14,0%	-28,1%	-11,5%	-12,2%	-16,8%
ADR 2016	58 €	80 €	64 €	72 €	55 €	63 €	52 €	62 €
Var. /n-1	-3,3%	6,1%	8,8%	1,7%	-5,7%	3,3%	-12,3%	-1,4%
RevPAR 2016	40 €	52 €	37 €	48 €	30 €	45 €	35 €	39 €
Var. /n-1	-18,5%	-3,6%	-5,9%	-12,5%	-32,2%	-8,5%	-23,1%	-17,9%

Year To Date performance								
Jan. to April	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	61,4%	61,3%	53,7%	61,8%	51,1%	67,2%	65,3%	59,5%
Var. /n-1	-11,1%	-6,3%	-14,3%	-9,4%	-16,9%	-6,5%	-4,4%	-10,4%
ADR 2016	55 €	82 €	68 €	76 €	59 €	65 €	57 €	65 €
Var. /n-1	-1,2%	4,6%	8,7%	-0,4%	0,2%	4,2%	-5,3%	0,7%
RevPAR 2016	34 €	50 €	37 €	47 €	30 €	44 €	38 €	38 €
Var. /n-1	-12,1%	-2,0%	-6,8%	-9,8%	-16,7%	-2,6%	-9,4%	-9,7%

Super Budget market

Monthly performance								
April	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	66,5%	66,2%	66,5%	69,5%	61,4%	66,0%	70,7%	66,3%
Var. /n-1	-14,8%	-5,0%	-2,4%	-12,8%	-17,9%	-4,1%	-10,0%	-10,7%
ADR 2016	39 €	43 €	40 €	52 €	47 €	46 €	45 €	44 €
Var. /n-1	-6,6%	0,3%	-0,6%	1,0%	-5,5%	-3,5%	-5,9%	-3,6%
RevPAR 2016	26 €	28 €	27 €	36 €	29 €	31 €	32 €	29 €
Var. /n-1	-20,5%	-4,7%	-3,0%	-12,0%	-22,4%	-7,5%	-15,3%	-13,9%

Year To Date performance								
Jan. to April	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	62,2%	66,6%	65,2%	68,4%	60,6%	64,4%	70,1%	64,9%
Var. /n-1	-9,1%	-1,5%	-3,0%	-6,1%	-9,9%	-2,9%	-6,5%	-6,1%
ADR 2016	39 €	43 €	40 €	53 €	47 €	46 €	45 €	45 €
Var. /n-1	-3,5%	-0,5%	-0,3%	-1,1%	-2,9%	-3,2%	-3,2%	-2,2%
RevPAR 2016	25 €	28 €	26 €	36 €	28 €	30 €	32 €	29 €
Var. /n-1	-12,3%	-2,0%	-3,2%	-7,1%	-12,6%	-6,0%	-9,5%	-8,2%

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# Performances North-East

April 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	56,8%	7,9%	125 €	-7,5%	71 €	-0,2%	50,9%	8,0%	124 €	-2,8%	63 €	5,1%
Dijon	52,7%	-7,8%	127 €	-5,8%	67 €	-13,2%	46,7%	0,9%	118 €	-2,6%	55 €	-1,8%
Lille	61,2%	10,1%	119 €	-6,4%	73 €	3,1%	59,8%	13,1%	125 €	-4,4%	75 €	8,1%
Metz	insufficient supply						insufficient supply					
Nancy	insufficient supply						insufficient supply					
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	64,2%	16,9%	113 €	-8,6%	72 €	6,8%	54,4%	5,3%	113 €	-3,5%	61 €	1,6%
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
North-east	55,0%	-3,8%	89 €	1,7%	49 €	-2,2%	51,5%	3,9%	88 €	-0,8%	45 €	3,1%
Dijon	50,3%	-23,0%	95 €	4,8%	48 €	-19,3%	46,3%	-10,8%	92 €	3,1%	42 €	-8,0%
Lille	62,8%	-0,2%	93 €	4,8%	58 €	4,6%	61,7%	4,4%	94 €	2,1%	58 €	6,6%
Metz	in progress						in progress					
Nancy	64,3%	-10,8%	91 €	4,3%	59 €	-7,0%	62,1%	-3,1%	92 €	4,9%	57 €	1,7%
Reims	67,6%	-2,6%	105 €	0,2%	71 €	-2,4%	60,5%	11,6%	102 €	0,2%	62 €	11,8%
Strasbourg	60,7%	-1,9%	93 €	0,3%	56 €	-1,7%	53,2%	0,6%	92 €	-2,4%	49 €	-1,8%
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	65,7%	-2,2%	59 €	-0,3%	39 €	-2,5%	61,9%	5,5%	60 €	-0,5%	37 €	5,0%
Dijon	68,1%	-6,4%	59 €	-0,3%	40 €	-6,7%	60,3%	-0,4%	58 €	-0,2%	35 €	-0,6%
Lille	71,7%	0,5%	68 €	2,6%	49 €	3,1%	67,0%	3,9%	71 €	0,7%	47 €	4,6%
Metz	60,9%	-12,2%	61 €	5,0%	37 €	-7,8%	58,0%	3,1%	61 €	2,0%	36 €	5,2%
Nancy	66,3%	4,5%	65 €	8,6%	43 €	13,5%	67,5%	4,9%	63 €	2,9%	43 €	7,9%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	61,4%	-12,3%	63 €	2,1%	39 €	-10,5%	57,5%	0,2%	63 €	0,0%	36 €	0,2%
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	60,2%	-3,5%	38 €	2,2%	23 €	-1,4%	56,8%	0,9%	38 €	1,5%	22 €	2,4%
Dijon	63,0%	-0,7%	38 €	1,1%	24 €	0,4%	57,2%	-2,0%	38 €	0,4%	22 €	-1,6%
Lille	64,6%	-1,7%	42 €	1,0%	27 €	-0,7%	63,1%	3,5%	42 €	-0,1%	27 €	3,4%
Metz	59,3%	-1,8%	38 €	-0,6%	22 €	-2,4%	56,7%	-4,7%	37 €	0,2%	21 €	-4,6%
Nancy	59,3%	-10,3%	39 €	3,4%	23 €	-7,2%	54,0%	-7,9%	39 €	3,0%	21 €	-5,1%
Reims	39,8%	-20,5%	42 €	1,1%	17 €	-19,7%	42,1%	-11,3%	42 €	2,5%	18 €	-9,2%
Strasbourg	60,6%	0,8%	40 €	-0,4%	24 €	0,3%	54,8%	0,0%	39 €	0,6%	22 €	0,6%

### 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

April 2016



## North-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
North-West	56,3%	2,0%	196 €	-2,1%	110 €	-0,1%	52,1%	10,3%	187 €	3,1%	98 €	13,7%
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	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-West	58,9%	0,4%	88 €	0,8%	52 €	1,2%	53,9%	4,0%	86 €	1,9%	47 €
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	56,2%	-11,1%	92 €	2,8%	51 €	-8,6%	50,8%	-13,4%	92 €	4,5%	47 €	-9,5%
Nantes	67,0%	5,9%	90 €	2,2%	60 €	8,2%	62,2%	6,9%	88 €	-0,1%	55 €	6,8%
Niort	47,1%	-3,6%	87 €	6,9%	41 €	3,0%	48,0%	3,0%	83 €	0,1%	40 €	3,1%
Rennes	52,1%	4,2%	89 €	3,9%	46 €	8,3%	52,9%	2,9%	93 €	0,4%	49 €	3,3%
Rouen	53,6%	-18,0%	93 €	0,8%	50 €	-17,3%	50,2%	-8,9%	94 €	4,0%	47 €	-5,2%
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
	North-West	56,0%	-4,2%	61 €	-1,7%	34 €	-5,8%	52,8%	2,5%	62 €	-0,5%	33 €
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	54,2%	-6,1%	63 €	1,6%	34 €	-4,6%	54,4%	-3,5%	67 €	-0,4%	36 €	-3,9%
Le Havre	47,5%	-12,2%	58 €	1,9%	28 €	-10,6%	44,5%	-3,5%	58 €	2,2%	26 €	-1,4%
Nantes	66,1%	4,0%	64 €	-0,7%	42 €	3,3%	62,0%	7,8%	65 €	-0,7%	41 €	7,0%
Niort	49,6%	7,5%	54 €	-7,0%	27 €	0,0%	48,3%	-0,8%	58 €	-1,9%	28 €	-2,7%
Rennes	62,8%	7,8%	59 €	-10,5%	37 €	-3,5%	63,8%	5,8%	65 €	-2,2%	42 €	3,5%
Rouen	59,3%	-3,3%	62 €	-0,6%	37 €	-3,9%	56,7%	4,3%	63 €	0,5%	36 €	4,9%
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
	North-West	58,8%	-4,6%	40 €	2,5%	23 €	-2,2%	54,1%	-1,8%	39 €	1,9%	21 €
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	54,8%	-5,4%	40 €	1,8%	22 €	-3,7%	55,1%	4,4%	41 €	0,3%	22 €	4,7%
Le Havre	59,8%	5,8%	40 €	2,4%	24 €	8,3%	54,8%	-4,6%	38 €	0,6%	21 €	-4,0%
Nantes	69,9%	1,1%	45 €	2,5%	31 €	3,7%	64,4%	-0,2%	44 €	1,5%	29 €	1,3%
Niort	60,5%	1,0%	35 €	3,7%	21 €	4,7%	55,3%	-1,8%	36 €	1,6%	20 €	-0,2%
Rennes	57,6%	-0,9%	39 €	0,3%	23 €	-0,6%	59,9%	1,5%	40 €	1,4%	24 €	2,9%
Rouen	62,0%	-11,0%	42 €	1,6%	26 €	-9,6%	61,0%	-1,9%	42 €	1,3%	26 €	-0,7%

### Departments in the North-western set :

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

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# Performances South-East

April 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	59,3%	-7,0%	137 €	-4,1%	81 €	-10,8%	55,9%	4,4%	131 €	-1,5%	73 €	2,8%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	54,3%	1,9%	123 €	-7,5%	67 €	-5,7%	41,4%	11,3%	112 €	-5,3%	46 €	5,4%
Grenoble	insufficient supply						insufficient supply					
Lyon	66,8%	-1,1%	137 €	-4,1%	91 €	-5,1%	65,4%	4,3%	142 €	-1,7%	93 €	2,5%
Marseille	64,4%	-9,3%	126 €	-6,6%	81 €	-15,2%	57,9%	8,3%	120 €	-3,4%	70 €	4,6%
Montpellier	58,2%	-16,1%	138 €	7,5%	80 €	-9,8%	54,6%	0,2%	132 €	4,1%	72 €	4,3%
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	58,6%	-4,5%	89 €	0,9%	52 €	-3,6%	54,0%	0,3%	89 €	0,7%	48 €
Aix en Provence	60,6%	-11,2%	78 €	6,1%	47 €	-5,8%	52,5%	2,2%	79 €	2,4%	41 €	4,6%
Avignon	65,6%	-19,3%	91 €	3,3%	60 €	-16,6%	50,6%	-8,7%	87 €	1,4%	44 €	-7,4%
Grenoble	54,9%	22,3%	94 €	0,5%	51 €	22,9%	53,6%	5,5%	92 €	-2,7%	50 €	2,7%
Lyon	61,5%	0,0%	95 €	3,0%	58 €	3,0%	59,3%	-2,6%	97 €	-2,1%	58 €	-4,6%
Marseille	65,5%	-17,0%	91 €	-3,4%	60 €	-19,9%	59,9%	-2,2%	90 €	-1,1%	54 €	-3,3%
Montpellier	68,0%	1,6%	86 €	0,1%	58 €	1,7%	59,0%	3,6%	87 €	1,3%	51 €	4,9%
St Etienne	43,9%	14,6%	84 €	-1,7%	37 €	12,7%	43,5%	3,6%	84 €	0,3%	37 €	3,9%
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	61,4%	-2,1%	63 €	-1,7%	38 €	-3,7%	56,9%	3,7%	63 €	-2,4%	36 €
Aix en Provence	64,1%	7,7%	59 €	-6,5%	38 €	0,8%	53,7%	8,4%	60 €	-2,0%	32 €	6,2%
Avignon	57,8%	-10,7%	60 €	-3,4%	35 €	-13,8%	49,7%	-1,6%	60 €	-1,4%	30 €	-3,0%
Grenoble	54,7%	21,0%	61 €	1,1%	33 €	22,4%	53,4%	3,6%	59 €	-4,1%	32 €	-0,7%
Lyon	67,6%	0,5%	71 €	0,0%	48 €	0,4%	64,7%	0,8%	73 €	-3,1%	47 €	-2,3%
Marseille	64,6%	-13,3%	62 €	-8,8%	40 €	-20,9%	57,9%	-1,4%	61 €	-6,7%	35 €	-8,0%
Montpellier	66,0%	-5,6%	70 €	1,4%	46 €	-4,3%	59,4%	-0,7%	69 €	0,4%	41 €	-0,3%
St Etienne	46,3%	-1,5%	63 €	-10,2%	29 €	-11,6%	48,0%	-4,4%	65 €	-7,8%	31 €	-11,9%
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	57,7%	-6,2%	39 €	0,3%	22 €	-5,9%	55,2%	-3,0%	39 €	-0,6%	21 €
Aix en Provence	61,6%	-5,0%	38 €	-2,5%	24 €	-7,4%	58,2%	5,2%	38 €	-1,4%	22 €	3,7%
Avignon	55,1%	-20,5%	35 €	2,5%	19 €	-18,5%	50,0%	-12,7%	34 €	2,4%	17 €	-10,6%
Grenoble	51,9%	1,6%	37 €	-1,7%	19 €	-0,1%	49,0%	-13,2%	38 €	1,3%	19 €	-12,0%
Lyon	64,0%	-3,3%	41 €	-1,8%	26 €	-5,0%	64,6%	-6,2%	41 €	-4,0%	27 €	-9,9%
Marseille	58,2%	-16,1%	44 €	2,5%	26 €	-13,9%	53,9%	-3,0%	44 €	1,4%	24 €	-1,6%
Montpellier	58,0%	-12,6%	37 €	3,0%	21 €	-9,9%	55,4%	-5,5%	36 €	2,4%	20 €	-3,3%
St Etienne	62,2%	3,9%	40 €	-0,3%	25 €	3,6%	61,9%	2,9%	40 €	-0,9%	25 €	2,0%

### 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

April 2016



## South-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
<b>Luxury &amp; Upscale</b>												
South-West	60,6%	4,8%	179 €	-3,7%	108 €	0,9%	52,3%	8,3%	164 €	-1,2%	86 €	7,0%
Bayonne-Anglet-Biarritz	56,8%	20,7%	210 €	-8,8%	119 €	10,1%	48,0%	21,0%	188 €	-4,8%	90 €	15,3%
Bordeaux	65,4%	6,7%	213 €	-10,5%	139 €	-4,5%	51,5%	7,6%	195 €	-6,8%	101 €	0,3%
Pau	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Toulouse	72,1%	-1,2%	117 €	0,1%	85 €	-1,1%	68,9%	0,7%	119 €	0,9%	82 €	1,6%
<b>Midscale</b>												
South-West	55,7%	-6,7%	89 €	2,0%	50 €	-4,8%	52,0%	0,8%	88 €	0,8%	46 €	1,6%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Bordeaux	60,7%	-11,2%	93 €	4,8%	57 €	-6,9%	55,6%	-1,1%	90 €	2,0%	50 €	0,8%
Pau	48,7%	-7,7%	76 €	-2,0%	37 €	-9,5%	48,2%	2,1%	76 €	-3,7%	37 €	-1,7%
Toulouse	57,8%	0,7%	94 €	-0,8%	54 €	-0,1%	56,1%	1,6%	95 €	-2,1%	54 €	-0,6%
<b>Budget</b>												
South-West	59,5%	-2,6%	59 €	-2,6%	35 €	-5,1%	54,5%	-1,9%	60 €	-0,7%	32 €	-2,6%
Bayonne-Anglet-Biarritz	59,4%	-2,6%	55 €	-5,4%	32 €	-7,9%	50,1%	-4,1%	54 €	1,1%	27 €	-3,0%
Bordeaux	67,2%	-3,3%	64 €	-1,3%	43 €	-4,6%	61,6%	1,6%	65 €	-0,8%	40 €	0,7%
Pau	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Toulouse	63,7%	0,9%	66 €	-0,9%	42 €	0,0%	61,3%	4,2%	66 €	-2,3%	41 €	1,8%
<b>Super Budget</b>												
South-West	61,1%	-9,0%	40 €	0,8%	24 €	-8,2%	57,1%	-3,8%	39 €	1,9%	22 €	-2,0%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Bordeaux	63,5%	-9,7%	40 €	0,9%	25 €	-8,9%	59,5%	-2,8%	39 €	1,0%	23 €	-1,8%
Pau	48,1%	-13,1%	34 €	3,0%	16 €	-10,4%	46,7%	-5,6%	34 €	5,0%	16 €	-0,9%
Toulouse	70,5%	-3,3%	42 €	1,5%	29 €	-1,8%	67,9%	0,0%	41 €	2,5%	28 €	2,5%

### 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

April 2016



## French Riviera

April	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	57,8%	4,7%	284 €	1,9%	164 €	6,7%	49,8%	16,7%	244 €	-1,6%	121 €	14,8%
French Riviera - Boutique Hotels	60,2%	-7,8%	145 €	-5,6%	87 €	-13,0%	49,7%	-6,6%	124 €	3,3%	62 €	-3,5%
French Riviera - Upscale	63,3%	3,5%	140 €	-4,5%	89 €	-1,1%	49,4%	4,4%	127 €	-4,3%	63 €	-0,1%
Average Upscale & Luxury	60,8%	2,9%	198 €	0,5%	120 €	3,5%	49,6%	8,2%	176 €	0,2%	87 €	8,5%
Average Midscale	58,0%	-13,9%	94 €	-4,9%	54 €	-18,1%	49,8%	-2,8%	87 €	-0,8%	44 €	-3,6%
Average Budget	55,5%	-7,8%	62 €	-7,0%	34 €	-14,3%	49,0%	3,1%	61 €	-2,5%	30 €	0,5%
Average Super-Budget	56,4%	-9,0%	46 €	-1,4%	26 €	-10,3%	50,3%	-4,3%	45 €	0,3%	23 €	-4,0%

## French Riviera Cities

April	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	52,3%	-2,0%	270 €	-1,4%	141 €	-3,3%	45,8%	17,0%	241 €	-5,5%	110 €	10,6%
Cannes - Boutique Hotels	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Cannes - Upscale	52,9%	0,6%	140 €	3,0%	74 €	3,6%	45,1%	6,1%	137 €	1,2%	62 €	7,3%
Cannes - Upscale & Luxury	52,4%	-0,6%	216 €	1,3%	113 €	0,7%	45,5%	12,6%	201 €	-0,8%	91 €	11,7%
Cannes - Midscale	54,2%	-4,5%	96 €	1,2%	52 €	-3,3%	40,5%	1,6%	94 €	1,6%	38 €	3,3%
Cannes - Budget	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Cannes - Super Budget	57,1%	-15,6%	45 €	-1,3%	26 €	-16,6%	51,0%	-7,3%	44 €	-0,4%	22 €	-7,6%

April	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	74,9%	1,9%	170 €	-2,8%	127 €	-0,9%	58,2%	5,8%	145 €	-1,7%	84 €
Nice - Midscale	59,6%	-21,7%	96 €	-6,4%	57 €	-26,7%	52,0%	-8,0%	86 €	-2,2%	45 €	-10,0%

April	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	65,7%	6,0%	445 €	-0,4%	292 €	5,6%	55,4%	-4,2%	348 €	2,4%	193 €
Monaco - Upscale	74,1%	6,3%	241 €	2,1%	178 €	8,6%	57,1%	2,8%	186 €	0,6%	106 €	3,4%
Monaco - Upscale & Luxury	71,8%	6,3%	293 €	0,6%	210 €	6,9%	56,7%	0,8%	228 €	-0,6%	129 €	0,3%

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# Performances Coast

April 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	48,3%	-7,3%	158 €	-8,7%	76 €	-15,3%	41,5%	-10,5%	149 €	-1,8%	62 €	-12,1%
Average Midscale	60,1%	-10,0%	99 €	-2,7%	59 €	-12,4%	52,4%	-5,0%	95 €	1,5%	50 €	-3,5%
Average Budget	65,5%	2,8%	62 €	-6,4%	41 €	-3,8%	62,9%	16,6%	60 €	-6,4%	38 €	9,1%
Average Super-Budget	61,8%	-6,7%	40 €	2,4%	25 €	-4,4%	56,8%	5,3%	39 €	3,8%	22 €	9,3%

## 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	60,9%	3,1%	196 €	-7,8%	119 €	-4,9%	58,9%	23,1%	181 €	-3,4%	107 €	18,9%
Average Midscale	61,1%	3,8%	99 €	4,2%	60 €	8,2%	54,3%	5,3%	93 €	5,2%	51 €	10,8%
Average Budget	63,4%	14,0%	59 €	-1,8%	37 €	11,9%	52,3%	16,2%	59 €	3,5%	31 €	20,3%
Average Super-Budget	56,2%	-3,9%	41 €	1,6%	23 €	-2,3%	49,8%	0,0%	40 €	2,4%	20 €	2,4%

## 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	55,9%	17,2%	203 €	-8,2%	113 €	7,6%	47,7%	19,5%	185 €	-4,6%	88 €	14,0%
Average Midscale	55,1%	-0,5%	102 €	-0,2%	56 €	-0,7%	51,0%	8,3%	93 €	2,4%	48 €	10,9%
Average Budget	50,7%	-6,6%	55 €	-1,3%	28 €	-7,8%	38,7%	-3,6%	53 €	3,6%	21 €	-0,1%
Average Super-Budget	63,2%	-5,3%	45 €	0,5%	29 €	-4,8%	50,8%	-3,1%	42 €	1,9%	22 €	-1,2%

Coastal areas samples under continuous development and likely to evolve

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# Performances Main cities in Regions

April 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	54,3%	1,9%	123 €	-7,5%	67 €	-5,7%	41,4%	11,3%	112 €	-5,3%	46 €	5,4%
Bayonne-Anglet-Biarritz	56,8%	20,7%	210 €	-8,8%	119 €	10,1%	48,0%	2,10%	188 €	-4,8%	90 €	15,3%
Bordeaux	65,4%	6,7%	213 €	-10,5%	139 €	-4,5%	51,5%	7,6%	195 €	-6,8%	101 €	0,3%
Cannes	52,4%	-0,6%	216 €	1,3%	113 €	0,7%	45,5%	12,6%	201 €	-0,8%	91 €	11,7%
Dijon	52,7%	-7,8%	127 €	-5,8%	67 €	-13,2%	46,7%	0,9%	118 €	-2,6%	55 €	-1,8%
Lille	61,2%	10,1%	119 €	-6,4%	73 €	3,1%	59,8%	13,1%	125 €	-4,4%	75 €	8,1%
Lyon	66,8%	-1,1%	137 €	-4,1%	91 €	-5,1%	65,4%	4,3%	142 €	-1,7%	93 €	2,5%
Marseille	64,4%	-9,3%	126 €	-6,6%	81 €	-15,2%	57,9%	8,3%	120 €	-3,4%	70 €	4,6%
Monaco	71,8%	6,3%	293 €	0,6%	210 €	6,9%	56,7%	0,8%	228 €	-0,6%	129 €	0,3%
Montpellier	58,2%	-16,1%	138 €	7,5%	80 €	-9,8%	54,6%	0,2%	132 €	4,1%	72 €	4,3%
Nice	74,9%	1,9%	170 €	-2,8%	127 €	-0,9%	58,2%	5,8%	145 €	-1,7%	84 €	4,0%
Strasbourg	64,2%	16,9%	113 €	-8,6%	72 €	6,8%	54,4%	5,3%	113 €	-3,5%	61 €	1,6%
Toulouse	72,1%	-1,2%	117 €	0,1%	85 €	-1,1%	68,9%	0,7%	119 €	0,9%	82 €	1,6%
Midscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
Aix en Provence	60,6%	-11,2%	78 €	6,1%	47 €	-5,8%	52,5%	2,2%	79 €	2,4%	41 €	4,6%
Avignon	65,6%	-19,3%	91 €	3,3%	60 €	-16,6%	50,6%	-8,7%	87 €	1,4%	44 €	-7,4%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Bordeaux	60,7%	-11,2%	93 €	4,8%	57 €	-6,9%	55,6%	-1,1%	90 €	2,0%	50 €	0,8%
Cannes	54,2%	-4,5%	96 €	1,2%	52 €	-3,3%	40,5%	1,6%	94 €	1,6%	38 €	3,3%
Dijon	50,3%	-23,0%	95 €	4,8%	48 €	-19,3%	46,3%	-10,8%	92 €	3,1%	42 €	-8,0%
Grenoble	54,9%	22,3%	94 €	0,5%	51 €	22,9%	53,6%	5,5%	92 €	-2,7%	50 €	2,7%
Le Havre	56,2%	-11,1%	92 €	2,8%	51 €	-8,6%	50,8%	-13,4%	92 €	4,5%	47 €	-9,5%
Lille	62,8%	-0,2%	93 €	4,8%	58 €	4,6%	61,7%	4,4%	94 €	2,1%	58 €	6,6%
Lyon	61,5%	0,0%	95 €	3,0%	58 €	3,0%	59,3%	-2,6%	97 €	-2,1%	58 €	-4,6%
Marseille	65,5%	-17,0%	91 €	-3,4%	60 €	-19,9%	59,9%	-2,2%	90 €	-1,1%	54 €	-3,3%
Montpellier	68,0%	1,6%	86 €	0,1%	58 €	1,7%	59,0%	3,6%	87 €	1,3%	51 €	4,9%
Nancy	64,3%	-10,8%	91 €	4,3%	59 €	-7,0%	62,1%	-3,1%	92 €	4,9%	57 €	1,7%
Nantes	67,0%	5,9%	90 €	2,2%	60 €	8,2%	62,2%	6,9%	88 €	-0,1%	55 €	6,8%
Niort	47,1%	-3,6%	87 €	6,9%	41 €	3,0%	48,0%	3,0%	83 €	0,1%	40 €	3,1%
Nice	59,6%	-21,7%	96 €	-6,4%	57 €	-26,7%	52,0%	-8,0%	86 €	-2,2%	45 €	-10,0%
Pau	48,7%	-7,7%	76 €	-2,0%	37 €	-9,5%	48,2%	2,1%	76 €	-3,7%	37 €	-1,7%
Reims	67,6%	-2,6%	105 €	0,2%	71 €	-2,4%	60,5%	11,6%	102 €	0,2%	62 €	11,8%
Rennes	52,1%	4,2%	89 €	3,9%	46 €	8,3%	52,9%	2,9%	93 €	0,4%	49 €	3,3%
Rouen	53,6%	-18,0%	93 €	0,8%	50 €	-17,3%	50,2%	-8,9%	94 €	4,0%	47 €	-5,2%
Saint Etienne	43,9%	14,6%	84 €	-1,7%	37 €	12,7%	43,5%	3,6%	84 €	0,3%	37 €	3,9%
Strasbourg	60,7%	-1,9%	93 €	0,3%	56 €	-1,7%	53,2%	0,6%	92 €	-2,4%	49 €	-1,8%
Toulouse	57,8%	0,7%	94 €	-0,8%	54 €	-0,1%	56,1%	1,6%	95 €	-2,1%	54 €	-0,6%

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# Performances Main cities in Regions

April 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	64,1%	7,7%	59 €	-6,5%	38 €	0,8%	53,7%	8,4%	60 €	-2,0%	32 €	6,2%
Angers	54,2%	-6,1%	63 €	1,6%	34 €	-4,6%	54,4%	-3,5%	67 €	-0,4%	36 €	-3,9%
Avignon	57,8%	-10,7%	60 €	-3,4%	35 €	-13,8%	49,7%	-1,6%	60 €	-1,4%	30 €	-3,0%
Bayonne-Anglet-Biarritz	59,4%	-2,6%	55 €	-5,4%	32 €	-7,9%	50,1%	-4,1%	54 €	1,1%	27 €	-3,0%
Bordeaux	67,2%	-3,3%	64 €	-1,3%	43 €	-4,6%	61,6%	1,6%	65 €	-0,8%	40 €	0,7%
Dijon	68,1%	-6,4%	59 €	-0,3%	40 €	-6,7%	60,3%	-0,4%	58 €	-0,2%	35 €	-0,6%
Grenoble	54,7%	21,0%	61 €	1,1%	33 €	22,4%	53,4%	3,6%	59 €	-4,1%	32 €	-0,7%
Le Havre	47,5%	-12,2%	58 €	1,9%	28 €	-10,6%	44,5%	-3,5%	58 €	2,2%	26 €	-1,4%
Lille	71,7%	0,5%	68 €	2,6%	49 €	3,1%	67,0%	3,9%	71 €	0,7%	47 €	4,6%
Lyon	67,6%	0,5%	71 €	0,0%	48 €	0,4%	64,7%	0,8%	73 €	-3,1%	47 €	-2,3%
Marseille	64,6%	-13,3%	62 €	-8,8%	40 €	-20,9%	57,9%	-1,4%	61 €	-6,7%	35 €	-8,0%
Metz	60,9%	-12,2%	61 €	5,0%	37 €	-7,8%	58,0%	3,1%	61 €	2,0%	36 €	5,2%
Montpellier	66,0%	-5,6%	70 €	1,4%	46 €	-4,3%	59,4%	-0,7%	69 €	0,4%	41 €	-0,3%
Nancy	66,3%	4,5%	65 €	8,6%	43 €	13,5%	67,5%	4,9%	63 €	2,9%	43 €	7,9%
Nantes	66,1%	4,0%	64 €	-0,7%	42 €	3,3%	62,0%	7,8%	65 €	-0,7%	41 €	7,0%
Niort	49,6%	7,5%	54 €	-7,0%	27 €	0,0%	48,3%	-0,8%	58 €	-1,9%	28 €	-2,7%
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	62,8%	7,8%	59 €	-10,5%	37 €	-3,5%	63,8%	5,8%	65 €	-2,2%	42 €	3,5%
Rouen	59,3%	-3,3%	62 €	-0,6%	37 €	-3,9%	56,7%	4,3%	63 €	0,5%	36 €	4,9%
Saint Etienne	46,3%	-1,5%	63 €	-10,2%	29 €	-11,6%	48,0%	-4,4%	65 €	-7,8%	31 €	-11,9%
Strasbourg	61,4%	-12,3%	63 €	2,1%	39 €	-10,5%	57,5%	0,2%	63 €	0,0%	36 €	0,2%
Toulouse	63,7%	0,9%	66 €	-0,9%	42 €	0,0%	61,3%	4,2%	66 €	-2,3%	41 €	1,8%

  

Super 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
Angers	54,8%	-5,4%	40 €	1,8%	22 €	-3,7%	55,1%	4,4%	41 €	0,3%	22 €	4,7%
Avignon	55,1%	-20,5%	35 €	2,5%	19 €	-18,5%	50,0%	-12,7%	34 €	2,4%	17 €	-10,6%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Bordeaux	63,5%	-9,7%	40 €	0,9%	25 €	-8,9%	59,5%	-2,8%	39 €	1,0%	23 €	-1,8%
Cannes	57,1%	-15,6%	45 €	-1,3%	26 €	-16,6%	51,0%	-7,3%	44 €	-0,4%	22 €	-7,6%
Dijon	63,0%	-0,7%	38 €	1,1%	24 €	0,4%	57,2%	-2,0%	38 €	0,4%	22 €	-1,6%
Grenoble	51,9%	1,6%	37 €	-1,7%	19 €	-0,1%	49,0%	-13,2%	38 €	1,3%	19 €	-12,0%
Le Havre	59,8%	5,8%	40 €	2,4%	24 €	8,3%	54,8%	-4,6%	38 €	0,6%	21 €	-4,0%
Lille	64,6%	-1,7%	42 €	1,0%	27 €	-0,7%	63,1%	3,5%	42 €	-0,1%	27 €	3,4%
Lyon	64,0%	-3,3%	41 €	-1,8%	26 €	-5,0%	64,6%	-6,2%	41 €	-4,0%	27 €	-9,9%
Marseille	58,2%	-16,1%	44 €	2,5%	26 €	-13,9%	53,9%	-3,0%	44 €	1,4%	24 €	-1,6%
Metz	59,3%	-1,8%	38 €	-0,6%	22 €	-2,4%	56,7%	-4,7%	37 €	0,2%	21 €	-4,6%
Montpellier	58,0%	-12,6%	37 €	3,0%	21 €	-9,9%	55,4%	-5,5%	36 €	2,4%	20 €	-3,3%
Nancy	59,3%	-10,3%	39 €	3,4%	23 €	-7,2%	54,0%	-7,9%	39 €	3,0%	21 €	-5,1%
Nantes	69,9%	1,1%	45 €	2,5%	31 €	3,7%	64,4%	-0,2%	44 €	1,5%	29 €	1,3%
Niort	60,5%	1,0%	35 €	3,7%	21 €	4,7%	55,3%	-1,8%	36 €	1,6%	20 €	-0,2%
Pau	48,1%	-13,1%	34 €	3,0%	16 €	-10,4%	46,7%	-5,6%	34 €	5,0%	16 €	-0,9%
Rennes	57,6%	-0,9%	39 €	0,3%	23 €	-0,6%	59,9%	1,5%	40 €	1,4%	24 €	2,9%
Rouen	62,0%	-11,0%	42 €	1,6%	26 €	-9,6%	61,0%	-1,9%	42 €	1,3%	26 €	-0,7%
Saint Etienne	62,2%	3,9%	40 €	-0,3%	25 €	3,6%	61,9%	2,9%	40 €	-0,9%	25 €	2,0%
Strasbourg	60,6%	0,8%	40 €	-0,4%	24 €	0,3%	54,8%	0,0%	39 €	0,6%	22 €	0,6%
Toulouse	70,5%	-3,3%	42 €	1,5%	29 €	-1,8%	67,9%	0,0%	41 €	2,5%	28 €	2,5%

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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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# Information

## 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, 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"> <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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