

French Hotel Industry Performances



Return to growth

Following a somewhat inconsistent month of March, the French hotel industry picked up in April, recording significant increases in performances.

However, these encouraging results should be put in perspective: April 2010 saw the Icelandic volcano disturbing air traffic – an event that affected the hotel industry to a certain extent, notably through the curbing of trips by overseas visitors and corporate clients. As a result, April 2011 was more favorable for airline traffic (French airports recorded spectacular growth in traffic: +28% in Parisian airports, for instance), and consequently, for the hotel industry, too.

Virtually all sectors experienced growth in April 2011, with the luxury segment taking the crown by recording increasing occupancy practically everywhere. On the other hand, performances in the budget sector were rather muted.

French market

Monthly performance

April	5* - 4 *	3 *	2 *
OR 2011	68,8%	65,9%	66,2%
Var. /n-1	11,8%	4,7%	2,1%
ADR 2011	220 €	94 €	62 €
Var. /n-1	7,0%	3,3%	1,1%
RevPAR 2011	151 €	62 €	41 €
Var. /n-1	19,7%	8,1%	3,1%

Year To Date performance

April	5* - 4 *	3 *	2 *
OR 2011	59,5%	59,3%	59,3%
Var. /n-1	5,4%	2,3%	-1,1%
ADR 2011	210 €	95 €	64 €
Var. /n-1	4,9%	4,2%	2,6%
RevPAR 2011	125 €	57 €	38 €
Var. /n-1	10,6%	6,6%	1,5%

Definitions

OR = Occupancy Rate

ADR = Average Daily Rate

RevPAR = Revenue per available room

Following a solid first trimester, Paris continued to forge ahead. All segments posted significant growth, particularly in the 3, 4 and 5 star markets, that are catching up after the economic crisis. These positive performances were chiefly the result of considerable growth in occupancy (up to +21% in the superior 4 star / 5 star sector). Although satisfactory, growth in average rates was more moderate.

In Ile-de-France, month-end performances were positive on the whole, with 3 star hotels recording the highest increases. Only the Seine-et-Marne experienced stagnating RevPAR, due to a deterioration in occupancy in most hotel segments.

Upscale regional hotels were feted in April this year. As with Paris, a number of destinations managed to record double digit growth (Avignon, Bordeaux, Cannes, Dijon, Nice, Strasbourg). The significant increases in RevPAR (up to 32.4% in Bordeaux, for instance), were mostly down to sharp rises in occupancy, since ARR tended to stagnate or drop. The excellent results achieved in Rouen and Reims in the midscale market can be noted. Conversely, midscale hotels posted lower results in Marseille and Aix-en-Provence – the removal of a number of Ryanair flight routes was not without consequence in these destinations.

The Côte d'Azur also followed this upward trend. With the exception of superior 4 star hotels in Cannes, the luxury segment had to settle for lower rates, however.

Thanks to the excellent occupancy rates in French hotels during April – symbolized by the return of foreign guests – a second positive trimester can be envisaged.

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Performances Paris

April 2011



Paris-City

Monthly performance

April	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris Superior 5* - 4*	81,5%	21,0%	534 €	4,0%	435 €	25,9%
Paris Boutique Hotels	82,4%	19,4%	278 €	5,3%	229 €	25,8%
Paris Standard 5* - 4*	81,6%	13,7%	179 €	9,4%	146 €	24,4%
Paris average - 5* - 4 *	81,6%	15,5%	257 €	9,3%	210 €	26,2%
Paris Superior 3*	88,6%	15,7%	148 €	5,9%	131 €	22,6%
Paris Standard 3*	85,5%	8,9%	103 €	5,2%	88 €	14,6%
Paris - 3*	86,4%	10,8%	116 €	6,5%	100 €	18,0%
Paris - 2*	89,4%	4,9%	80 €	4,1%	71 €	9,2%

Year To Date performance

April	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris Superior 5* - 4*	70,4%	7,2%	525 €	4,6%	369 €	12,1%
Paris Boutique Hotels	71,8%	7,8%	276 €	3,9%	198 €	12,0%
Paris Standard 5* - 4*	71,3%	5,1%	175 €	6,5%	125 €	12,0%
Paris average - 5* - 4 *	71,2%	5,7%	250 €	6,4%	178 €	12,5%
Paris Superior 3*	80,7%	8,7%	142 €	4,2%	114 €	13,3%
Paris Standard 3*	77,3%	3,9%	100 €	5,2%	77 €	9,3%
Paris - 3*	78,3%	5,2%	112 €	5,5%	88 €	11,1%
Paris - 2*	82,1%	1,0%	75 €	3,3%	62 €	4,4%

Paris suburbs (excluding Paris)

Monthly performance

April	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris - 5* - 4*	81,6%	15,5%	257 €	9,3%	210 €	26,2%
La Défense - 5* - 4*	n.d.	-	n.d.	-	n.d.	-
Roissy CdG - 5* - 4*	63,5%	1,8%	88 €	-9,9%	56 €	-8,2%
Paris suburbs* - 5* - 4*	79,2%	8,7%	246 €	8,5%	195 €	17,9%

Year To Date performance

April	OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Paris - 5* - 4*	71,2%	5,7%	250 €	6,4%	178 €	12,5%
La Défense - 5* - 4*	n.d.	-	n.d.	-	n.d.	-
Roissy CdG - 5* - 4*	63,7%	-2,3%	101 €	0,0%	64 €	-2,2%
Paris suburbs* - 5* - 4*	72,7%	5,2%	198 €	5,2%	144 €	10,7%

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Performance Regions

April 2011



Regions

		<i>Monthly performance</i>				
		<i>April</i>	5* - 4 *	3 *	2 *	
Regions (excl. French Riviera)	OR 2011		58,2%	59,7%	62,9%	
	<i>Var. /n-1</i>		5,0%	3,8%	2,4%	
	ADR 2011		153 €	88 €	63 €	
	<i>Var. /n-1</i>		4,8%	2,9%	1,2%	
	RevPAR 2011		89 €	52 €	39 €	
	<i>Var. /n-1</i>		10,0%	6,8%	3,7%	
	<i>Year To Date performance</i>					
			<i>April</i>	5* - 4 *	3 *	2 *
		OR 2011		50,6%	53,8%	56,6%
		<i>Var. /n-1</i>		5,1%	3,1%	-0,2%
	ADR 2011		143 €	88 €	64 €	
	<i>Var. /n-1</i>		3,4%	2,9%	2,3%	
	RevPAR 2011		72 €	47 €	36 €	
	<i>Var. /n-1</i>		8,6%	6,1%	2,0%	
French Riviera	<i>Monthly performance</i>					
			<i>April</i>	5* - 4 *	3 *	2 *
		OR 2011		58,6%	64,8%	n.d.
		<i>Var. /n-1</i>		14,1%	3,5%	n.d.
		ADR 2011		194 €	87 €	n.d.
		<i>Var. /n-1</i>		0,7%	0,6%	n.d.
		RevPAR 2011		113 €	56 €	n.d.
		<i>Var. /n-1</i>		14,9%	4,2%	n.d.
	<i>Year To Date performance</i>					
			<i>April</i>	5* - 4 *	3 *	2 *
	OR 2011		44,4%	51,7%	n.d.	
	<i>Var. /n-1</i>		6,9%	1,6%	n.d.	
	ADR 2011		178 €	81 €	n.d.	
	<i>Var. /n-1</i>		1,3%	1,9%	n.d.	
	RevPAR 2011		79 €	42 €	n.d.	
	<i>Var. /n-1</i>		8,3%	3,5%	n.d.	

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Performances Suburbs

April 2011



Paris suburbs (excluding Paris)

3 star market	Monthly performance								Average suburbs
	April	departments							
		77	78	91	92	93	94	95	
OR 2011	73,5%	63,0%	60,6%	68,4%	64,1%	77,2%	64,6%	67,3%	
Var. /n-1	-5,3%	16,4%	10,9%	2,5%	8,3%	5,4%	-0,4%	3,1%	
ADR 2011	141 €	97 €	83 €	95 €	65 €	76 €	85 €	96 €	
Var. /n-1	5,0%	-7,5%	0,9%	2,5%	0,1%	2,4%	2,7%	1,5%	
RevPAR 2011	103 €	61 €	50 €	65 €	42 €	59 €	55 €	65 €	
Var. /n-1	-0,5%	7,7%	11,9%	5,1%	8,5%	7,9%	2,3%	4,6%	
Year To Date performance									
April	departments							Average suburbs	
OR 2011	71,8%	60,3%	56,2%	59,9%	55,1%	68,3%	63,2%	62,1%	
Var. /n-1	-1,1%	7,2%	6,2%	-4,2%	-2,5%	0,7%	-2,8%	-0,8%	
ADR 2011	110 €	109 €	94 €	108 €	74 €	81 €	97 €	100 €	
Var. /n-1	3,9%	-1,8%	2,9%	9,2%	3,5%	8,1%	6,5%	5,6%	
RevPAR 2011	79 €	66 €	53 €	65 €	41 €	56 €	61 €	62 €	
Var. /n-1	2,8%	5,2%	9,3%	4,6%	0,9%	8,8%	3,5%	4,8%	
2 star market	Monthly performance								Average suburbs
	April	departments							
		77	78	91	92	93	94	95	
OR 2011	69,8%	61,7%	60,1%	71,5%	77,3%	81,8%	66,9%	71,0%	
Var. /n-1	1,0%	-6,8%	11,2%	3,2%	7,5%	6,7%	6,8%	4,2%	
ADR 2011	61 €	81 €	61 €	63 €	54 €	61 €	50 €	59 €	
Var. /n-1	5,2%	2,1%	-9,2%	-1,3%	-1,1%	0,1%	-2,4%	-0,4%	
RevPAR 2011	43 €	50 €	36 €	45 €	41 €	50 €	33 €	42 €	
Var. /n-1	6,3%	-4,9%	1,0%	1,8%	6,3%	6,7%	4,2%	3,8%	
Year To Date performance									
April	départements							IDF (hors Paris)	
OR 2011	58,5%	59,5%	60,2%	64,3%	65,0%	73,4%	59,8%	62,7%	
Var. /n-1	0,5%	-5,6%	5,2%	1,9%	2,7%	-1,2%	-7,0%	-1,2%	
ADR 2011	59 €	85 €	66 €	71 €	58 €	67 €	59 €	64 €	
Var. /n-1	3,5%	4,0%	-1,1%	2,3%	0,4%	3,1%	4,8%	2,7%	
RevPAR 2011	34 €	51 €	40 €	46 €	38 €	49 €	35 €	40 €	
Var. /n-1	4,1%	-1,8%	4,0%	4,2%	3,0%	1,9%	-2,5%	1,4%	
0/1 star market	Monthly performance								IDF (hors Paris)
	April	departments							
		77	78	91	92	93	94	95	
OR 2011	64,1%	72,2%	68,9%	n.d.	80,2%	79,7%	72,1%	73,3%	
Var. /n-1	-6,5%	-3,9%	4,6%	-	1,9%	-1,6%	-2,3%	-0,6%	
ADR 2011	41 €	42 €	39 €	n.d.	41 €	43 €	40 €	42 €	
Var. /n-1	6,1%	4,4%	4,8%	-	2,7%	3,9%	1,1%	3,6%	
RevPAR 2011	26 €	30 €	27 €	n.d.	33 €	34 €	29 €	31 €	
Var. /n-1	-0,8%	0,4%	9,6%	-	4,7%	2,2%	-1,2%	3,0%	
Year To Date performance									
April	departments							IDF (hors Paris)	
OR 2011	58,9%	72,4%	67,5%	n.d.	77,0%	77,5%	71,2%	71,2%	
Var. /n-1	-11,0%	-0,5%	3,4%	-	4,2%	-2,9%	3,3%	0,1%	
ADR 2011	40 €	42 €	39 €	n.d.	41 €	44 €	41 €	42 €	
Var. /n-1	8,1%	3,8%	4,9%	-	2,6%	4,8%	0,4%	3,8%	
RevPAR 2011	24 €	30 €	27 €	n.d.	32 €	34 €	29 €	30 €	
Var. /n-1	-3,8%	3,3%	8,4%	-	6,9%	1,7%	3,7%	3,9%	

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Performances North-East

April 2011



North-east & Cities

5/4-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
North-East - 5*- 4*	58,8%	8,9%	130 €	1,4%	76 €	10,5%	50,1%	10,0%	125 €	-0,7%	63 €	9,2%
Dijon	63,7%	11,7%	127 €	5,1%	81 €	17,4%	48,9%	2,7%	119 €	3,8%	58 €	6,7%
Lille	53,4%	3,5%	108 €	1,2%	57 €	4,7%	52,7%	7,3%	115 €	0,0%	61 €	7,3%
Metz	insufficient supply						insufficient supply					
Nancy	insufficient supply						insufficient supply					
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	60,6%	18,0%	120 €	-0,9%	73 €	17,0%	53,4%	12,8%	118 €	-2,4%	63 €	10,1%
3-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
North-East - 3*	57,6%	5,5%	85 €	3,4%	49 €	9,1%	50,0%	2,2%	87 €	3,0%	44 €	5,3%
Dijon	62,9%	-2,7%	83 €	1,8%	52 €	-0,9%	51,6%	-5,1%	81 €	2,0%	42 €	-3,2%
Lille	62,8%	1,8%	84 €	3,3%	53 €	5,1%	63,6%	3,1%	90 €	2,9%	57 €	6,1%
Metz	in progress						in progress					
Nancy	55,4%	2,5%	77 €	4,9%	43 €	7,5%	49,7%	0,1%	81 €	4,4%	41 €	4,5%
Reims	68,3%	8,4%	91 €	5,0%	62 €	13,8%	54,1%	1,1%	89 €	1,7%	48 €	2,8%
Strasbourg	65,5%	9,9%	90 €	1,5%	59 €	11,6%	55,8%	2,7%	91 €	3,3%	51 €	6,1%
2-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
North-East - 2*	62,7%	1,9%	61 €	0,8%	38 €	2,7%	56,3%	0,9%	63 €	1,9%	35 €	2,8%
Dijon	61,8%	-1,6%	61 €	-2,8%	38 €	-4,3%	55,9%	-9,6%	62 €	2,1%	34 €	-7,6%
Lille	71,4%	11,5%	68 €	-0,2%	49 €	11,2%	67,9%	8,1%	72 €	1,9%	49 €	10,1%
Metz	66,5%	4,5%	65 €	2,1%	44 €	6,6%	57,5%	3,7%	68 €	3,1%	39 €	6,9%
Nancy	56,1%	4,0%	57 €	1,6%	32 €	5,6%	50,8%	-5,9%	58 €	2,0%	30 €	-4,1%
Reims	74,4%	27,3%	62 €	0,3%	46 €	27,6%	57,7%	6,3%	63 €	1,6%	36 €	7,9%
Strasbourg	66,7%	-0,9%	62 €	1,2%	41 €	0,3%	58,7%	2,6%	64 €	0,3%	38 €	2,9%
0/1-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
North-East - 0/1 star	66,2%	-2,9%	40 €	3,6%	26 €	0,5%	61,7%	0,2%	39 €	3,3%	24 €	3,5%
Dijon	77,1%	10,0%	39 €	1,7%	30 €	11,8%	71,7%	5,9%	39 €	4,7%	28 €	10,9%
Lille	71,9%	5,3%	38 €	1,9%	27 €	7,4%	67,2%	0,7%	38 €	2,2%	25 €	2,9%
Metz	70,0%	4,1%	37 €	2,3%	26 €	6,5%	68,3%	11,8%	37 €	1,6%	25 €	13,6%
Nancy	59,9%	-11,3%	38 €	6,3%	23 €	-5,8%	58,7%	-4,9%	38 €	5,7%	22 €	0,5%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	60,0%	1,9%	39 €	5,8%	23 €	7,8%	56,8%	14,4%	39 €	7,3%	22 €	22,7%

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 2011



North-West & Cities

5/4-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
North-West - 5* - 4*	63,8%	1,0%	187 €	6,0%	119 €	7,0%	56,4%	2,5%	170 €	4,8%	96 €	7,5%
Amiens			insufficient supply				insufficient supply					
Angers			insufficient supply				insufficient supply					
Le Have			insufficient supply				insufficient supply					
Nantes			insufficient supply				insufficient supply					
Rennes			insufficient supply				insufficient supply					
Rouen			insufficient supply				insufficient supply					
3-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
North-West - 3*	59,7%	10,4%	89 €	2,1%	53 €	12,7%	52,9%	9,1%	85 €	1,1%	45 €	10,2%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	54,9%	22,8%	88 €	4,6%	48 €	28,5%	56,8%	20,8%	94 €	-3,8%	53 €	16,2%
Le Have	68,0%	16,9%	87 €	-2,4%	59 €	14,1%	54,7%	-2,3%	89 €	2,1%	49 €	-0,3%
Nantes	57,2%	11,4%	87 €	0,0%	50 €	11,4%	58,5%	4,4%	88 €	1,3%	51 €	5,8%
Rennes	61,0%	6,5%	84 €	6,1%	51 €	13,0%	59,0%	3,5%	89 €	4,9%	53 €	8,5%
Rouen	61,3%	19,6%	89 €	-0,3%	55 €	19,3%	51,8%	4,9%	93 €	2,3%	48 €	7,3%
2-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
North-West - 2*	62,0%	3,4%	62 €	2,2%	39 €	5,7%	55,6%	-0,8%	63 €	2,1%	35 €	1,3%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	60,9%	11,2%	64 €	6,1%	39 €	18,0%	56,3%	2,8%	69 €	3,4%	39 €	6,3%
Le Have	53,3%	-1,6%	60 €	2,5%	32 €	0,9%	51,2%	0,1%	58 €	-0,4%	30 €	-0,3%
Nantes	64,2%	0,9%	66 €	3,6%	42 €	4,5%	62,7%	-0,8%	68 €	2,9%	42 €	2,1%
Rennes	64,9%	1,4%	64 €	4,4%	41 €	5,8%	61,4%	-3,1%	67 €	3,4%	41 €	0,1%
Rouen	62,4%	11,2%	59 €	0,1%	37 €	11,3%	56,1%	2,0%	61 €	5,2%	34 €	7,4%
0/1-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
North-West - 0/1 star	69,1%	-1,3%	40 €	2,5%	28 €	1,2%	62,2%	0,5%	40 €	2,1%	25 €	2,6%
Amiens	79,6%	6,5%	40 €	0,5%	32 €	7,0%	71,9%	5,3%	40 €	0,5%	29 €	5,8%
Angers	73,7%	2,7%	37 €	0,5%	27 €	3,2%	68,6%	3,7%	37 €	0,6%	25 €	4,3%
Le Have	74,1%	-1,4%	39 €	6,6%	29 €	5,1%	70,1%	13,6%	39 €	7,2%	27 €	21,8%
Nantes	71,1%	1,1%	43 €	3,6%	30 €	4,7%	67,2%	-0,6%	42 €	2,2%	28 €	1,6%
Rennes	58,9%	-5,7%	37 €	1,3%	22 €	-4,5%	57,0%	-4,1%	37 €	0,8%	21 €	-3,4%
Rouen	76,3%	15,7%	40 €	1,6%	31 €	17,6%	65,4%	-2,1%	40 €	4,4%	26 €	2,2%

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

April 2011



South-East (excl. French Riviera) & Cities

5/4-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
South-East - 5* - 4*	59,2%	5,1%	141 €	1,3%	84 €	6,4%	52,1%	4,0%	135 €	2,8%	70 €	7,0%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	64,3%	40,2%	125 €	-6,4%	80 €	31,2%	46,5%	31,2%	112 €	-5,5%	52 €	24,0%
Grenoble	insufficient supply						insufficient supply					
Lyon	63,1%	13,0%	116 €	-6,6%	73 €	5,6%	63,2%	12,0%	125 €	6,3%	79 €	19,0%
Marseille	59,5%	7,5%	125 €	-2,1%	74 €	5,2%	48,8%	2,3%	126 €	-3,5%	61 €	-1,3%
Montpellier	61,8%	-9,7%	143 €	5,7%	88 €	-4,6%	55,1%	-10,1%	134 €	0,3%	74 €	-9,9%
St Etienne	insufficient supply						insufficient supply					
3-star	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
	South-East - 3*	61,8%	1,8%	89 €	2,3%	55 €	4,1%	58,5%	2,0%	90 €	3,5%	53 €
Aix en Provence	59,5%	-12,6%	86 €	9,5%	51 €	-4,4%	53,9%	-10,3%	87 €	5,9%	47 €	-5,0%
Avignon	69,4%	11,9%	81 €	3,6%	56 €	16,0%	52,8%	10,5%	80 €	2,3%	42 €	13,0%
Grenoble	53,2%	10,0%	103 €	2,7%	55 €	12,9%	57,8%	1,5%	104 €	5,1%	60 €	6,7%
Lyon	62,9%	4,9%	99 €	1,8%	62 €	6,8%	63,7%	6,2%	105 €	7,4%	67 €	14,0%
Marseille	64,4%	-6,8%	94 €	1,1%	61 €	-5,8%	60,3%	-2,2%	94 €	0,0%	57 €	-2,2%
Montpellier	63,6%	2,2%	95 €	5,8%	60 €	8,1%	60,5%	2,5%	94 €	2,7%	57 €	5,3%
St Etienne	in progress						in progress					
2-star	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
	South-East - 2*	64,3%	0,9%	64 €	1,3%	41 €	2,2%	59,5%	-1,6%	65 €	3,0%	39 €
Aix en Provence	63,5%	-9,3%	68 €	6,8%	43 €	-3,1%	53,9%	-7,4%	68 €	2,5%	37 €	-5,1%
Avignon	65,6%	7,9%	60 €	4,9%	40 €	13,1%	53,3%	11,2%	56 €	0,3%	30 €	11,6%
Grenoble	63,7%	8,3%	66 €	3,0%	42 €	11,5%	65,1%	-2,5%	67 €	3,6%	44 €	1,0%
Lyon	68,8%	2,1%	71 €	5,6%	49 €	7,8%	68,3%	0,0%	74 €	6,9%	51 €	6,9%
Marseille	66,3%	-0,5%	70 €	-0,2%	46 €	-0,6%	58,9%	-4,3%	70 €	-0,4%	41 €	-4,7%
Montpellier	72,1%	-3,1%	66 €	-4,0%	48 €	-7,0%	66,2%	-5,0%	66 €	3,0%	44 €	-2,1%
St Etienne	in progress						in progress					
0/1-star	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
	South-East - 0/1 star	66,2%	-4,2%	40 €	0,9%	27 €	-3,4%	61,1%	-0,9%	40 €	1,2%	25 €
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	76,7%	-2,1%	35 €	0,8%	27 €	-1,3%	63,3%	-1,7%	35 €	1,2%	22 €	-0,5%
Grenoble	72,5%	-0,5%	41 €	-0,2%	30 €	-0,7%	74,5%	-0,5%	41 €	-0,5%	30 €	-1,0%
Lyon	69,4%	-0,3%	40 €	2,6%	27 €	2,3%	72,2%	5,5%	40 €	0,9%	29 €	6,5%
Marseille	69,9%	-10,4%	40 €	-3,2%	28 €	-13,3%	66,8%	-1,9%	40 €	-2,7%	27 €	-4,6%
Montpellier	75,8%	2,0%	39 €	1,9%	30 €	3,9%	70,3%	9,6%	38 €	0,4%	27 €	10,1%
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

April 2011



French Riviera

April	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Superior 5* - 4*	57,8%	21,2%	275 €	2,1%	159 €	23,7%	43,8%	13,9%	254 €	-0,5%	111 €	13,3%
Boutique Hotel	71,0%	13,8%	119 €	-0,2%	85 €	13,5%	51,2%	10,7%	107 €	-3,2%	55 €	7,1%
Standard 5* - 4*	57,4%	9,8%	156 €	-2,5%	89 €	7,0%	43,8%	2,6%	143 €	0,6%	63 €	3,3%
Average 5/4 star	58,6%	14,1%	194 €	0,7%	113 €	14,9%	44,4%	6,9%	178 €	1,3%	79 €	8,3%
Average 3 star	64,8%	3,5%	87 €	0,6%	56 €	4,2%	51,7%	1,6%	81 €	1,9%	42 €	3,5%

French Riviera Cities

April	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Cannes Superior 5* - 4*	57,7%	21,8%	274 €	12,1%	158 €	36,5%	41,7%	11,6%	259 €	1,7%	108 €	13,5%
Cannes Boutique Hotels	60,7%	31,5%	127 €	-21,9%	77 €	2,7%	42,5%	18,2%	127 €	-14,2%	54 €	1,4%
Cannes Standard 5* - 4*	49,3%	13,0%	140 €	-5,8%	69 €	6,5%	35,2%	7,7%	141 €	-1,7%	50 €	5,9%
Cannes - 5* - 4*	54,0%	18,4%	209 €	5,8%	113 €	25,2%	38,8%	10,5%	203 €	1,4%	79 €	12,1%
Cannes - 3*	57,5%	12,7%	95 €	2,0%	54 €	15,0%	41,3%	5,5%	91 €	4,9%	38 €	10,7%

April	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Nice - 5* - 4*	70,0%	15,3%	145 €	-0,4%	101 €	14,9%	52,1%	4,6%	133 €	-0,2%	69 €	4,4%
Nice - 3*	72,0%	4,5%	87 €	0,5%	63 €	5,1%	57,5%	2,0%	80 €	1,3%	46 €	3,3%

April	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Monaco Superior 5* - 4*	52,0%	29,2%	333 €	-16,1%	173 €	8,4%	42,3%	28,1%	298 €	-9,3%	126 €	16,1%
Monaco Standard 5* - 4*	54,9%	1,7%	213 €	-0,6%	117 €	1,0%	46,3%	2,9%	174 €	1,2%	81 €	4,1%
Monaco - 5* - 4*	53,8%	11,2%	259 €	-6,6%	139 €	3,9%	44,7%	11,5%	220 €	-2,1%	98 €	9,1%

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

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Performances South West

April 2011



South-West & Cities

	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
5/4-star	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
South-West - 5* - 4*	52,5%	2,8%	186 €	15,3%	98 €	18,5%	45,5%	2,8%	166 €	9,2%	75 €	12,2%
Bordeaux	47,1%	9,1%	207 €	21,4%	97 €	32,4%	34,4%	0,9%	181 €	11,8%	62 €	12,9%
Toulouse	58,5%	7,1%	120 €	3,4%	70 €	10,8%	59,3%	9,9%	122 €	0,2%	72 €	10,2%
3-star	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
South-West - 3*	59,2%	-2,2%	88 €	4,2%	52 €	1,9%	52,9%	2,6%	88 €	3,4%	47 €	6,1%
Bordeaux	57,7%	-1,3%	81 €	3,5%	47 €	2,2%	51,3%	-2,0%	81 €	2,3%	42 €	0,3%
Toulouse	65,1%	0,1%	98 €	8,1%	64 €	8,3%	60,8%	4,6%	98 €	2,4%	59 €	7,2%
2-star	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
South-West - 2*	61,2%	3,1%	65 €	1,2%	40 €	4,4%	52,7%	0,0%	65 €	2,5%	35 €	2,5%
Bordeaux	60,5%	-3,4%	67 €	1,8%	40 €	-1,7%	56,7%	-4,4%	69 €	2,7%	39 €	-1,8%
Toulouse	61,4%	-0,3%	68 €	3,5%	42 €	3,1%	57,3%	3,0%	71 €	1,6%	40 €	4,7%
0/1-star	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
South-West - 0/1 star	68,2%	-2,5%	39 €	0,9%	26 €	-1,6%	60,8%	-1,0%	38 €	1,2%	23 €	0,1%
Bordeaux	66,4%	-3,7%	36 €	0,2%	24 €	-3,4%	62,5%	0,4%	36 €	-0,7%	23 €	-0,3%
Toulouse	77,5%	4,1%	39 €	-2,3%	30 €	1,7%	71,1%	4,9%	39 €	-2,3%	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 Main cities in Regions

April 2011



Main cities in Regions – 5/4* and 3*

5/4-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Avignon	64,3%	40,2%	125 €	-6,4%	80 €	31,2%	46,5%	31,2%	112 €	-5,5%	52 €	24,0%
Bordeaux	47,1%	9,1%	207 €	21,4%	97 €	32,4%	34,4%	0,9%	181 €	11,8%	62 €	12,9%
Cannes	54,0%	18,4%	209 €	5,8%	113 €	25,2%	38,8%	10,5%	203 €	1,4%	79 €	12,1%
Lille	53,4%	3,5%	108 €	1,2%	57 €	4,7%	52,7%	7,3%	115 €	0,0%	61 €	7,3%
Lyon	63,1%	13,0%	116 €	-6,6%	73 €	5,6%	63,2%	12,0%	125 €	6,3%	79 €	19,0%
Marseille	59,5%	7,5%	125 €	-2,1%	74 €	5,2%	48,8%	2,3%	126 €	-3,5%	61 €	-1,3%
Monaco	53,8%	11,2%	259 €	-6,6%	139 €	3,9%	44,7%	11,5%	220 €	-2,1%	98 €	9,1%
Montpellier	61,8%	-9,7%	143 €	5,7%	88 €	-4,6%	55,1%	-10,1%	134 €	0,3%	74 €	-9,9%
Nice	70,0%	15,3%	145 €	-0,4%	101 €	14,9%	52,1%	4,6%	133 €	-0,2%	69 €	4,4%
Strasbourg	60,6%	18,0%	120 €	-0,9%	73 €	17,0%	53,4%	12,8%	118 €	-2,4%	63 €	10,1%
Toulouse	58,5%	7,1%	120 €	3,4%	70 €	10,8%	59,3%	9,9%	122 €	0,2%	72 €	10,2%

3-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Aix en Provence	59,5%	-12,6%	86 €	9,5%	51 €	-4,4%	53,9%	-10,3%	87 €	5,9%	47 €	-5,0%
Angers	54,9%	22,8%	88 €	4,6%	48 €	28,5%	56,8%	20,8%	94 €	-3,8%	53 €	16,2%
Avignon	69,4%	11,9%	81 €	3,6%	56 €	16,0%	52,8%	10,5%	80 €	2,3%	42 €	13,0%
Bordeaux	57,7%	-1,3%	81 €	3,5%	47 €	2,2%	51,3%	-2,0%	81 €	2,3%	42 €	0,3%
Cannes	57,5%	12,7%	95 €	2,0%	54 €	15,0%	41,3%	5,5%	91 €	4,9%	38 €	10,7%
Grenoble	53,2%	10,0%	103 €	2,7%	55 €	12,9%	57,8%	1,5%	104 €	5,1%	60 €	6,7%
Lille	62,8%	1,8%	84 €	3,3%	53 €	5,1%	63,6%	3,1%	90 €	2,9%	57 €	6,1%
Lyon	62,9%	4,9%	99 €	1,8%	62 €	6,8%	63,7%	6,2%	105 €	7,4%	67 €	14,0%
Marseille	64,4%	-6,8%	94 €	1,1%	61 €	-5,8%	60,3%	-2,2%	94 €	0,0%	57 €	-2,2%
Montpellier	63,6%	2,2%	95 €	5,8%	60 €	8,1%	60,5%	2,5%	94 €	2,7%	57 €	5,3%
Nancy	55,4%	2,5%	77 €	4,9%	43 €	7,5%	49,7%	0,1%	81 €	4,4%	41 €	4,5%
Nantes	57,2%	11,4%	87 €	0,0%	50 €	11,4%	58,5%	4,4%	88 €	1,3%	51 €	5,8%
Nice	72,0%	4,5%	87 €	0,5%	63 €	5,1%	57,5%	2,0%	80 €	1,3%	46 €	3,3%
Reims	68,3%	8,4%	91 €	5,0%	62 €	13,8%	54,1%	1,1%	89 €	1,7%	48 €	2,8%
Rennes	61,0%	6,5%	84 €	6,1%	51 €	13,0%	59,0%	3,5%	89 €	4,9%	53 €	8,5%
Rouen	61,3%	19,6%	89 €	-0,3%	55 €	19,3%	51,8%	4,9%	93 €	2,3%	48 €	7,3%
Strasbourg	65,5%	9,9%	90 €	1,5%	59 €	11,6%	55,8%	2,7%	91 €	3,3%	51 €	6,1%
Toulouse	65,1%	0,1%	98 €	8,1%	64 €	8,3%	60,8%	4,6%	98 €	2,4%	59 €	7,2%

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Performances Main cities in Regions

April 2011



Main cities in regions – 2* and 0/1*

2-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Aix en Provence	63,5%	-9,3%	68 €	6,8%	43 €	-3,1%	53,9%	-7,4%	68 €	2,5%	37 €	-5,1%
Angers	60,9%	11,2%	64 €	6,1%	39 €	18,0%	56,3%	2,8%	69 €	3,4%	39 €	6,3%
Avignon	65,6%	7,9%	60 €	4,9%	40 €	13,1%	53,3%	11,2%	56 €	0,3%	30 €	11,6%
Bordeaux	60,5%	-3,4%	67 €	1,8%	40 €	-1,7%	56,7%	-4,4%	69 €	2,7%	39 €	-1,8%
Grenoble	63,7%	8,3%	66 €	3,0%	42 €	11,5%	65,1%	-2,5%	67 €	3,6%	44 €	1,0%
Lille	71,4%	11,5%	68 €	-0,2%	49 €	11,2%	67,9%	8,1%	72 €	1,9%	49 €	10,1%
Lyon	68,8%	2,1%	71 €	5,6%	49 €	7,8%	68,3%	0,0%	74 €	6,9%	51 €	6,9%
Marseille	66,3%	-0,5%	70 €	-0,2%	46 €	-0,6%	58,9%	-4,3%	70 €	-0,4%	41 €	-4,7%
Metz	66,5%	4,5%	65 €	2,1%	44 €	6,6%	57,5%	3,7%	68 €	3,1%	39 €	6,9%
Montpellier	72,1%	-3,1%	66 €	-4,0%	48 €	-7,0%	66,2%	-5,0%	66 €	3,0%	44 €	-2,1%
Nancy	56,1%	4,0%	57 €	1,6%	32 €	5,6%	50,8%	-5,9%	58 €	2,0%	30 €	-4,1%
Nantes	64,2%	0,9%	66 €	3,6%	42 €	4,5%	62,7%	-0,8%	68 €	2,9%	42 €	2,1%
Reims	74,4%	27,3%	62 €	0,3%	46 €	27,6%	57,7%	6,3%	63 €	1,6%	36 €	7,9%
Rennes	64,9%	1,4%	64 €	4,4%	41 €	5,8%	61,4%	-3,1%	67 €	3,4%	41 €	0,1%
Rouen	62,4%	11,2%	59 €	0,1%	37 €	11,3%	56,1%	2,0%	61 €	5,2%	34 €	7,4%
Strasbourg	66,7%	-0,9%	62 €	1,2%	41 €	0,3%	58,7%	2,6%	64 €	0,3%	38 €	2,9%
Toulouse	61,4%	-0,3%	68 €	3,5%	42 €	3,1%	57,3%	3,0%	71 €	1,6%	40 €	4,7%

0/1-star	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1	2011	Var /n-1
Amiens	79,6%	6,5%	40 €	0,5%	32 €	7,0%	71,9%	5,3%	40 €	0,5%	29 €	5,8%
Angers	73,7%	2,7%	37 €	0,5%	27 €	3,2%	68,6%	3,7%	37 €	0,6%	25 €	4,3%
Avignon	76,7%	-2,1%	35 €	0,8%	27 €	-1,3%	63,3%	-1,7%	35 €	1,2%	22 €	-0,5%
Bordeaux	66,4%	-3,7%	36 €	0,2%	24 €	-3,4%	62,5%	0,4%	36 €	-0,7%	23 €	-0,3%
Grenoble	72,5%	-0,5%	41 €	-0,2%	30 €	-0,7%	74,5%	-0,5%	41 €	-0,5%	30 €	-1,0%
Lille	71,9%	5,3%	38 €	1,9%	27 €	7,4%	67,2%	0,7%	38 €	2,2%	25 €	2,9%
Lyon	69,4%	-0,3%	40 €	2,6%	27 €	2,3%	72,2%	5,5%	40 €	0,9%	29 €	6,5%
Marseille	69,9%	-10,4%	40 €	-3,2%	28 €	-13,3%	66,8%	-1,9%	40 €	-2,7%	27 €	-4,6%
Metz	70,0%	4,1%	37 €	2,3%	26 €	6,5%	68,3%	11,8%	37 €	1,6%	25 €	13,6%
Montpellier	75,8%	2,0%	39 €	1,9%	30 €	3,9%	70,3%	9,6%	38 €	0,4%	27 €	10,1%
Nancy	59,9%	-11,3%	38 €	6,3%	23 €	-5,8%	58,7%	-4,9%	38 €	5,7%	22 €	0,5%
Nantes	71,1%	1,1%	43 €	3,6%	30 €	4,7%	67,2%	-0,6%	42 €	2,2%	28 €	1,6%
Rennes	58,9%	-5,7%	37 €	1,3%	22 €	-4,5%	57,0%	-4,1%	37 €	0,8%	21 €	-3,4%
Rouen	76,3%	15,7%	40 €	1,6%	31 €	17,6%	65,4%	-2,1%	40 €	4,4%	26 €	2,2%
Strasbourg	60,0%	1,9%	39 €	5,8%	23 €	7,8%	56,8%	14,4%	39 €	7,3%	22 €	22,7%
Toulouse	77,5%	4,1%	39 €	-2,3%	30 €	1,7%	71,1%	4,9%	39 €	-2,3%	28 €	2,5%

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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

Informations

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Tourism, Hospitality & Leisure Desk

Deloitte is one of the leading advisors in Tourism, Hospitality and leisure industries worldwide. We provide many consulting services for different stakeholders of the tourism industry.

Market and feasibility studies	Valuation of hotel and tourist assets	Urban tourism development plans	Human Capital	Others services
<ul style="list-style-type: none"> Detailed market study Operational recommendations to respond to the requirements of potential clients Determination of the product-service concept Determination of client target the price positioning Revenue estimations (accommodation, food and beverage, other...) Operating forecasts over several years : establishment of expense items to determine the project's profitability (GOP, cash-flows) 	<ul style="list-style-type: none"> A detailed market study Product analysis (strengths, weaknesses, necessary renovations and refurbishments) Forecasts over several years The application of the discounted cash-flow method, completed by market references (recent and comparable transactions) and the use of the others methods, specially adapted to each case (multiple of turnover or GOP, approaches linked to the real estate market, etc). 	<ul style="list-style-type: none"> Dynamic review of existing supply Analysis of the impact of development factors (economy, transportation, tourist markets, etc.) Analysis of supply/demand situation Assessment of development ambitions and objectives Recommendations on strategy 	<ul style="list-style-type: none"> Aligning Human Resources with the strategic goals of the company Mastering operational risks in terms of HR and abiding by the regulations Incorporating the human dimension in all your reorganization and transformation processes Developing an attractive and incentive remuneration policy 	<ul style="list-style-type: none"> Hotel benchmark survey Identification of operators and investors Optimize your information systems Marketing audits Quality control Organizational audits and management support Etc.

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