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French Hotel Industry Performance

June 2016



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Rhône-Alpes

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Requalification of the Château Marguerite de Bourgogne to help strengthen the cultural and tourism offer of the territory

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Publications



What Brexit might mean for UK travel

ABTA and Deloitte report | Graham Pickett & Alistair Pritchard

On 23 June 2016, the UK public decided to leave the European Union (EU). What is the likely impact to the UK travel consumers and industry?

Harnessing the experience of the ABTA Membership, ABTA and Deloitte have considered what a vote to leave the EU might mean for UK travel businesses, and the UK travel consumer. No one knows for certain what a post-EU UK would look like. However, it is possible to look at how the UK's existing relationship with the EU has affected UK travel and what the likely impact of the leave vote might be on consumers and the industry. This report writing in March 2016 provides the travel businesses and travel consumer with facts and assessments to help inform the discussion of what a vote to leave the EU might mean for UK travel.

Download the study :



Articles

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Brice Chasles | Partner, Head of Advisory | July 2016

[Impact of the referendum on UK mergers and acquisitions](#)

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Euro 2016 boosts revenues...in regional France

Regional France was able to capitalise on the Euro 2016 championship to build on the encouraging results posted at the start of the year, with all categories recording higher RevPAR at the end of the first semester. Conversely, and for too long now, there was yet more bad news for Paris in June, with hotels finishing the month and the first semester in the red – fairly significantly so, and a definite cause for concern!

After a difficult start to the Euro with disturbances between supporters in Marseille, the championship finally went well, boosting hotel trading in the vast majority of host cities: Lille, Lyon, Marseille, but also Lens, Saint-Etienne, etc. Saint-Etienne notably welcomed supporters and delegations from Portugal, Iceland, Slovakia, etc., and on match days, the significant rise in average rates enabled the city's hotels to record RevPAR increases of around 50% in June, as confirmed by the president of the Saint-Etienne Metropole's Hotel Club.

Bordeaux was an exception, with hotels recording stable or decreasing RevPAR depending on the category – however, this is compared to June 2015, an exceptional month for the city's hotel performance. The semester finished on a positive note for regional France, with all hotels recording higher RevPAR – from +0,7% in the Super-budget category to +11,3% in the Luxury category.

Despite a dozen or so matches played in Paris or Saint-Denis, hotels in Ile-de-France did not appear to fully benefit from the Euro. The performances recorded accentuated the downward trend observed over the past few months, with notably a drop in RevPAR in the Luxury segment of almost 35%. Did the Euro have any impact, then? The daily statistics published by our partner, STR, provide some insight: in June, the event only managed to reduce the stall in occupancy. While certain days in early June saw occupancy declines of over 30%, the drop was less significant on nights either side of matches. In addition to security risks that continue to weigh heavily on the capital, Parisian hotels were hit by floods, strikes and Ramadan. Moreover, the “collaborative accommodation” sector attracted a proportion of supporters. The collapse in overseas demand is a definite cause for concern, and it is evident that it will take months for American, Japanese or Chinese visitors to consider returning to Paris. However, early indications of July's results collected by STR show that the last matches played in Paris boosted RevPAR growth... just before the Nice attacks.

Ultimately, the French hospitality industry, and the majority of categories, finished the first semester with RevPAR in decline. This trend is largely influenced by Ile-de-France, since regional France generally posted higher results. But at a time when regional France is also being attacked, the second semester's performances should be closely monitored. Unsurprisingly, these are likely to drop on the Côte d'Azur.

Monthly performance

June	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	71,2%	77,8%	71,3%	72,4%	67,9%
Var. /n-1	-6,0%	-5,1%	-11,9%	-9,5%	-4,5%
ADR 2016	501 €	239 €	125 €	73 €	43 €
Var. /n-1	-1,3%	-2,2%	2,3%	0,3%	2,6%
RevPAR 2016	356 €	186 €	89 €	53 €	29 €
Var. /n-1	-7,2%	-7,3%	-9,9%	-9,2%	-2,0%

Year To Date performance

Jan. to June	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	57,6%	63,9%	61,1%	63,2%	61,0%
Var. /n-1	6,0%	-2,1%	-4,8%	-3,7%	-1,6%
ADR 2016	420 €	193 €	107 €	65 €	41 €
Var. /n-1	-4,0%	-4,2%	-1,0%	-1,0%	0,9%
RevPAR 2016	242 €	123 €	65 €	41 €	25 €
Var. /n-1	1,7%	-6,2%	-5,7%	-4,6%	-0,7%

Definitions

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

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Performances Paris

June 2016



Paris-City

Monthly performance

June	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Luxury & Palace	68,6%	-22,9%	685 €	-14,7%	470 €	-34,3%
Upscale	73,1%	-19,8%	271 €	-11,4%	198 €	-28,9%
Upscale Boutique hotels	81,2%	-10,4%	314 €	-11,4%	255 €	-20,6%
Standard Upscale hotels	70,9%	-22,3%	258 €	-12,0%	183 €	-31,7%
Midscale	78,4%	-14,8%	165 €	-9,1%	130 €	-22,5%
Midscale Boutique hotels	83,6%	-9,1%	183 €	-7,3%	153 €	-15,8%
Standard Midscale hotels	74,8%	-18,6%	152 €	-11,6%	113 €	-28,1%
Budget	81,8%	-10,9%	108 €	-4,1%	89 €	-14,5%

Year To Date performance

Jan. to June	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Luxury & Palace	60,3%	-11,7%	587 €	-10,7%	354 €	-21,2%
Upscale	67,3%	-12,6%	223 €	-5,5%	150 €	-17,4%
Upscale Boutique hotels	72,0%	-7,1%	256 €	-8,5%	184 €	-15,0%
Standard Upscale hotels	66,0%	-14,1%	213 €	-4,9%	141 €	-18,3%
Midscale	71,2%	-10,5%	136 €	-7,2%	97 €	-16,9%
Midscale Boutique hotels	73,5%	-7,6%	150 €	-7,3%	110 €	-14,4%
Standard Midscale hotels	69,6%	-12,5%	126 €	-7,6%	88 €	-19,1%
Budget	74,4%	-9,4%	87 €	-6,0%	65 €	-14,8%

Paris suburbs (excluding Paris) – Luxury and Upscale

Monthly performance

June	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Paris	73,1%	-19,8%	271 €	-11,4%	198 €	-28,9%
La Défense	67,4%	-22,0%	177 €	-9,7%	119 €	-29,6%
Roissy CdG	79,9%	-7,6%	150 €	-0,7%	120 €	-8,3%
Other areas	78,1%	-12,5%	208 €	8,2%	163 €	-5,4%

Year To Date performance

Jan. to June	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Paris	67,3%	-12,6%	223 €	-5,5%	150 €	-17,4%
La Défense	60,8%	-16,1%	159 €	-2,5%	97 €	-18,2%
Roissy CdG	69,1%	-6,6%	130 €	1,8%	90 €	-5,0%
Other areas	70,8%	-3,2%	172 €	-0,4%	122 €	-3,6%

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Performance Regions

June 2016



Regions

Regions (excl. French Riviera)

Monthly performance

June	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	70,7%	75,3%	69,7%	70,4%	66,4%
Var. /n-1	0,5%	0,5%	-7,2%	-6,2%	-3,6%
ADR 2016	320 €	177 €	104 €	69 €	42 €
Var. /n-1	0,3%	12,3%	7,6%	3,2%	3,8%
RevPAR 2016	226 €	133 €	73 €	49 €	28 €
Var. /n-1	0,8%	12,9%	-0,2%	-3,2%	0,1%

Year To Date performance

Jan. to June	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	59,1%	59,7%	58,2%	60,9%	59,2%
Var. /n-1	11,8%	2,3%	0,6%	1,7%	-0,9%
ADR 2016	270 €	143 €	92 €	63 €	39 €
Var. /n-1	-0,5%	1,3%	2,3%	0,5%	1,6%
RevPAR 2016	160 €	85 €	54 €	38 €	23 €
Var. /n-1	11,3%	3,6%	3,0%	2,2%	0,7%

French Riviera

Monthly performance

June	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	77,8%	77,8%	75,5%	72,5%	66,6%
Var. /n-1	0,8%	-1,5%	-9,5%	-8,1%	-15,7%
ADR 2016	556 €	231 €	130 €	89 €	53 €
Var. /n-1	12,6%	15,4%	9,6%	8,2%	6,0%
RevPAR 2016	433 €	180 €	98 €	64 €	35 €
Var. /n-1	13,5%	13,7%	-0,8%	-0,6%	-10,6%

Year To Date performance

Jan. to June	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	58,7%	58,4%	58,4%	56,9%	56,8%
Var. /n-1	7,8%	0,6%	-4,2%	0,0%	-6,8%
ADR 2016	419 €	172 €	106 €	71 €	48 €
Var. /n-1	2,5%	2,3%	1,3%	0,1%	1,7%
RevPAR 2016	246 €	100 €	62 €	41 €	27 €
Var. /n-1	10,5%	2,9%	-2,9%	0,1%	-5,2%

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Performances Suburbs

June 2016



Paris suburbs (excluding Paris)

Midscale market	Monthly performance								
	June	departments							Average suburbs
		77	78	91	92	93	94	95	
	OR 2016	61,2%	62,5%	65,2%	65,2%	60,8%	70,5%	70,2%	65,7%
	Var. /n-1	-21,5%	-20,5%	-23,9%	-22,0%	-28,7%	-18,7%	-17,3%	-21,7%
	ADR 2016	95 €	114 €	99 €	133 €	105 €	103 €	116 €	115 €
	Var. /n-1	-3,0%	1,4%	-0,1%	-1,9%	-5,0%	3,9%	6,6%	0,2%
	RevPAR 2016	58 €	71 €	65 €	87 €	64 €	73 €	81 €	75 €
	Var. /n-1	-23,9%	-19,3%	-23,9%	-23,5%	-32,2%	-15,5%	-11,8%	-21,6%
Midscale market	Year To Date performance								
	Jan. to June	departments							Average suburbs
		77	78	91	92	93	94	95	
	OR 2016	50,4%	57,2%	61,3%	59,3%	53,9%	59,8%	64,2%	59,0%
	Var. /n-1	-13,6%	-11,6%	-8,7%	-13,2%	-20,5%	-13,5%	-5,9%	-12,4%
	ADR 2016	93 €	105 €	96 €	121 €	93 €	94 €	97 €	104 €
	Var. /n-1	-2,6%	3,4%	2,9%	3,2%	3,1%	4,4%	0,7%	2,7%
	RevPAR 2016	47 €	60 €	59 €	72 €	50 €	56 €	62 €	62 €
	Var. /n-1	-15,9%	-8,6%	-6,0%	-10,4%	-18,0%	-9,7%	-5,2%	-10,0%
Budget market	Monthly performance								
	June	departments							Average suburbs
		77	78	91	92	93	94	95	
	OR 2016	74,6%	73,3%	70,7%	70,8%	71,1%	79,5%	76,9%	73,7%
	Var. /n-1	-16,5%	-7,0%	-10,9%	-18,0%	-15,1%	-11,5%	-8,7%	-13,4%
	ADR 2016	61 €	84 €	64 €	87 €	68 €	72 €	63 €	71 €
	Var. /n-1	-2,7%	-4,7%	-7,3%	-3,3%	-4,4%	2,4%	-3,9%	-3,6%
	RevPAR 2016	46 €	62 €	45 €	62 €	48 €	58 €	49 €	52 €
	Var. /n-1	-18,7%	-11,3%	-17,4%	-20,7%	-18,9%	-9,4%	-12,3%	-16,6%
Budget market	Year To Date performance								
	Jan. to June	departments							Average suburbs
		77	78	91	92	93	94	95	
	OR 2016	65,6%	64,2%	59,1%	65,0%	57,0%	69,6%	68,6%	63,7%
	Var. /n-1	-11,7%	-5,1%	-11,2%	-10,8%	-15,9%	-8,4%	-4,7%	-10,5%
	ADR 2016	57 €	82 €	66 €	78 €	60 €	66 €	57 €	65 €
	Var. /n-1	-1,6%	3,5%	4,8%	0,2%	-0,1%	4,5%	-4,5%	0,4%
	RevPAR 2016	38 €	53 €	39 €	51 €	34 €	46 €	39 €	42 €
	Var. /n-1	-13,1%	-1,8%	-6,9%	-10,6%	-16,0%	-4,2%	-9,0%	-10,1%
Super Budget market	Monthly performance								
	June	departments							Average suburbs
		77	78	91	92	93	94	95	
	OR 2016	73,1%	71,5%	74,6%	73,5%	65,3%	69,2%	74,2%	71,3%
	Var. /n-1	-8,2%	-9,1%	-1,2%	-14,3%	-22,8%	-14,3%	-10,4%	-12,1%
	ADR 2016	41 €	44 €	41 €	59 €	53 €	47 €	49 €	47 €
	Var. /n-1	-8,3%	-2,3%	-4,3%	-2,2%	-0,8%	-5,7%	-3,7%	-4,2%
	RevPAR 2016	30 €	31 €	31 €	43 €	34 €	33 €	37 €	34 €
	Var. /n-1	-15,8%	-11,2%	-5,5%	-16,2%	-23,4%	-19,2%	-13,7%	-15,8%
Super Budget market	Year To Date performance								
	Jan. to June	departments							Average suburbs
		77	78	91	92	93	94	95	
	OR 2016	65,5%	67,8%	68,0%	70,7%	62,6%	65,9%	71,9%	67,1%
	Var. /n-1	-8,4%	-1,7%	-1,0%	-6,4%	-12,4%	-4,5%	-5,5%	-6,3%
	ADR 2016	40 €	43 €	40 €	54 €	48 €	46 €	46 €	45 €
	Var. /n-1	-4,7%	-0,9%	-1,0%	-1,5%	-2,0%	-3,3%	-3,0%	-2,5%
	RevPAR 2016	26 €	29 €	27 €	38 €	30 €	31 €	33 €	30 €
	Var. /n-1	-12,7%	-2,6%	-2,0%	-7,7%	-14,2%	-7,7%	-8,3%	-8,6%

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Performances North-East

June 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	74,1%	8,5%	165 €	16,0%	122 €	25,8%	57,2%	7,2%	136 €	1,3%	78 €	8,6%
Dijon	78,2%	1,1%	144 €	1,5%	112 €	2,6%	56,0%	2,1%	129 €	-0,5%	72 €	1,6%
Lille	71,1%	17,0%	214 €	56,3%	152 €	82,8%	63,3%	16,5%	143 €	8,5%	90 €	26,5%
Metz	insufficient supply						insufficient supply					
Nancy	insufficient supply						insufficient supply					
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	79,3%	8,2%	127 €	3,9%	101 €	12,4%	61,5%	4,4%	117 €	-3,7%	72 €	0,6%
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	64,9%	-9,1%	97 €	5,5%	63 €	-4,2%	56,2%	1,3%	90 €	1,0%	51 €	2,4%
Dijon	64,4%	-16,2%	102 €	3,6%	65 €	-13,1%	51,4%	-13,8%	95 €	3,5%	49 €	-10,7%
Lille	71,2%	-0,7%	113 €	18,6%	80 €	17,8%	65,8%	6,7%	97 €	6,1%	64 €	13,3%
Metz	in progress						in progress					
Nancy	67,8%	-19,5%	96 €	-1,5%	65 €	-20,7%	64,2%	-7,0%	93 €	4,3%	60 €	-3,0%
Reims	81,4%	0,0%	115 €	2,5%	94 €	2,5%	66,3%	6,7%	106 €	-0,1%	71 €	6,6%
Strasbourg	69,0%	-6,0%	98 €	1,3%	67 €	-4,8%	59,2%	0,3%	93 €	-2,1%	55 €	-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	73,5%	-5,3%	68 €	6,1%	50 €	0,5%	65,7%	3,0%	62 €	1,9%	40 €	5,0%
Dijon	78,6%	-8,8%	64 €	4,6%	50 €	-4,6%	65,4%	-4,3%	60 €	2,0%	39 €	-2,4%
Lille	77,1%	1,3%	99 €	26,0%	76 €	27,7%	70,8%	4,7%	76 €	7,3%	54 €	12,4%
Metz	68,8%	-15,2%	62 €	2,9%	43 €	-12,8%	61,7%	-3,7%	61 €	3,5%	38 €	-0,4%
Nancy	76,4%	-9,3%	69 €	-5,7%	53 €	-14,4%	69,8%	1,5%	65 €	2,2%	45 €	3,6%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	66,6%	-11,0%	66 €	-2,8%	44 €	-13,5%	62,4%	-1,3%	64 €	0,1%	40 €	-1,2%
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	66,9%	-1,8%	40 €	4,2%	27 €	2,3%	60,2%	1,3%	38 €	2,1%	23 €	3,4%
Dijon	72,9%	-3,8%	39 €	-1,9%	28 €	-5,6%	62,5%	-1,0%	38 €	0,3%	24 €	-0,7%
Lille	70,1%	-1,1%	57 €	32,6%	40 €	31,2%	65,6%	3,7%	45 €	6,9%	30 €	10,8%
Metz	65,5%	-3,0%	38 €	-0,6%	25 €	-3,6%	60,4%	-2,5%	38 €	-0,1%	23 €	-2,5%
Nancy	75,9%	6,2%	39 €	2,4%	30 €	8,7%	59,7%	-2,9%	39 €	2,8%	23 €	-0,2%
Reims	64,3%	7,4%	42 €	0,9%	27 €	8,4%	47,6%	-6,1%	42 €	2,0%	20 €	-4,2%
Strasbourg	65,8%	0,1%	40 €	0,6%	26 €	0,6%	59,4%	2,9%	40 €	0,7%	24 €	3,6%

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

June 2016



North-West & Cities

	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Luxury & Upscale												
North-West	69,5%	-1,0%	222 €	8,5%	154 €	7,4%	56,7%	6,5%	203 €	3,8%	115 €	10,5%
Amiens			insufficient supply						insufficient supply			
Angers			insufficient supply						insufficient supply			
Le Havre			insufficient supply						insufficient supply			
Nantes			insufficient supply						insufficient supply			
Niort			insufficient supply						insufficient supply			
Rennes			insufficient supply						insufficient supply			
Rouen			insufficient supply						insufficient supply			
Midscale												
North-West	73,5%	-5,8%	107 €	12,3%	78 €	5,8%	59,5%	2,5%	92 €	3,5%	55 €	6,0%
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	67,0%	-8,1%	87 €	-5,0%	58 €	-12,7%	56,1%	-9,8%	90 €	0,7%	50 €	-9,2%
Nantes	75,2%	-7,9%	101 €	4,8%	76 €	-3,5%	66,1%	6,8%	91 €	1,5%	60 €	8,4%
Niort	73,6%	-6,3%	79 €	0,5%	58 €	-5,8%	53,5%	4,0%	82 €	0,4%	44 €	4,5%
Rennes	60,4%	-12,8%	91 €	-4,3%	55 €	-16,6%	55,0%	1,6%	91 €	-1,6%	50 €	0,0%
Rouen	64,4%	-19,5%	98 €	0,5%	63 €	-19,0%	55,1%	-8,8%	95 €	3,4%	53 €	-5,7%
Budget												
North-West	66,2%	-9,4%	66 €	-2,4%	44 €	-11,5%	56,9%	1,1%	63 €	-0,7%	36 €	0,5%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	71,1%	-1,2%	66 €	-0,2%	47 €	-1,4%	58,8%	-1,3%	66 €	0,1%	39 €	-1,2%
Le Havre	46,9%	-23,0%	62 €	3,9%	29 €	-20,0%	46,5%	-6,9%	59 €	2,6%	28 €	-4,4%
Nantes	76,0%	-0,9%	74 €	1,9%	56 €	1,0%	65,5%	9,0%	68 €	0,7%	44 €	9,8%
Niort	65,2%	-11,0%	58 €	-3,9%	38 €	-14,5%	51,9%	-0,7%	57 €	-2,7%	30 €	-3,3%
Rennes	79,7%	6,3%	68 €	0,1%	54 €	6,5%	67,5%	7,4%	65 €	-1,1%	44 €	6,2%
Rouen	72,3%	-5,1%	65 €	-1,5%	47 €	-6,6%	61,7%	4,4%	63 €	0,6%	39 €	5,1%
Super Budget												
North-West	66,0%	-5,2%	41 €	2,0%	27 €	-3,3%	57,9%	-1,5%	39 €	1,9%	23 €	0,3%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	72,0%	2,7%	41 €	0,6%	30 €	3,3%	59,0%	5,1%	41 €	0,5%	24 €	5,6%
Le Havre	56,6%	-8,3%	38 €	-0,5%	22 €	-8,8%	56,3%	-4,8%	38 €	0,5%	22 €	-4,3%
Nantes	78,1%	-4,3%	47 €	3,1%	37 €	-1,3%	68,0%	1,3%	45 €	2,2%	31 €	3,5%
Niort	65,7%	-4,4%	36 €	-7,8%	24 €	-11,9%	59,0%	0,5%	36 €	-1,0%	21 €	-0,5%
Rennes	70,6%	2,0%	41 €	1,5%	29 €	3,5%	62,3%	3,7%	41 €	1,6%	25 €	5,4%
Rouen	66,0%	-10,5%	43 €	5,1%	28 €	-6,0%	61,8%	-2,9%	42 €	2,6%	26 €	-0,3%

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

June 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	79,7%	-2,9%	204 €	15,5%	162 €	12,1%	62,5%	2,1%	153 €	2,3%	95 €	4,4%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	84,7%	-4,0%	155 €	-5,1%	131 €	-8,9%	54,4%	0,9%	131 €	-7,5%	71 €	-6,6%
Grenoble	insufficient supply						insufficient supply					
Lyon	76,7%	-3,9%	205 €	26,0%	157 €	21,1%	68,3%	3,6%	154 €	3,7%	105 €	7,4%
Marseille	75,1%	-5,0%	236 €	39,8%	177 €	32,8%	62,7%	4,2%	150 €	7,3%	94 €	11,8%
Montpellier	84,1%	5,6%	162 €	14,4%	136 €	20,9%	62,9%	3,4%	142 €	7,3%	89 €	10,9%
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	70,8%	-6,9%	105 €	7,1%	74 €	-0,3%	58,9%	-0,3%	93 €	2,4%	55 €
Aix en Provence	73,6%	-14,8%	96 €	13,7%	70 €	-3,1%	59,3%	-2,6%	82 €	3,9%	49 €	1,2%
Avignon	92,3%	-3,1%	117 €	2,4%	108 €	-0,8%	62,5%	-7,3%	98 €	1,7%	61 €	-5,7%
Grenoble	60,8%	-8,3%	94 €	-3,7%	57 €	-11,7%	54,6%	4,2%	92 €	-2,5%	50 €	1,6%
Lyon	70,9%	-7,1%	119 €	11,7%	84 €	3,8%	62,7%	-1,0%	102 €	2,7%	64 €	1,7%
Marseille	74,8%	-9,7%	119 €	13,3%	89 €	2,3%	65,1%	-3,5%	97 €	3,0%	64 €	-0,6%
Montpellier	83,9%	8,8%	100 €	4,2%	84 €	13,4%	65,9%	4,8%	91 €	3,3%	60 €	8,2%
St Etienne	53,9%	4,0%	129 €	48,9%	69 €	54,9%	46,1%	8,1%	93 €	10,3%	43 €	19,2%
Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
	South-East	71,1%	-5,3%	74 €	5,5%	53 €	-0,1%	60,4%	1,5%	66 €	0,4%	40 €
Aix en Provence	79,3%	-1,1%	80 €	18,5%	64 €	17,2%	60,3%	5,5%	65 €	2,5%	39 €	8,1%
Avignon	76,1%	-9,7%	66 €	-5,7%	50 €	-14,9%	57,1%	-3,6%	62 €	-2,0%	36 €	-5,5%
Grenoble	56,3%	-4,9%	61 €	-5,1%	34 €	-9,7%	53,8%	2,5%	60 €	-3,4%	32 €	-1,0%
Lyon	75,9%	-1,7%	94 €	13,8%	71 €	11,9%	67,5%	1,7%	77 €	2,3%	52 €	4,0%
Marseille	70,7%	-9,9%	93 €	25,5%	66 €	13,1%	60,0%	-4,6%	69 €	2,7%	41 €	-2,1%
Montpellier	78,0%	-2,9%	75 €	0,7%	58 €	-2,2%	64,6%	-1,2%	71 €	1,3%	46 €	0,1%
St Etienne	65,7%	2,0%	113 €	62,9%	74 €	66,1%	51,7%	2,3%	75 €	7,5%	39 €	10,1%
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	65,0%	-2,3%	43 €	6,2%	28 €	3,7%	58,1%	-1,9%	40 €	0,9%	23 €
Aix en Provence	73,6%	-4,4%	43 €	4,8%	31 €	0,1%	63,2%	3,5%	39 €	-0,1%	25 €	3,3%
Avignon	65,5%	-3,6%	35 €	-1,2%	23 €	-4,8%	54,3%	-9,2%	35 €	1,9%	19 €	-7,5%
Grenoble	53,1%	-7,7%	37 €	-4,1%	20 €	-11,5%	49,0%	-11,4%	38 €	0,5%	19 €	-10,9%
Lyon	73,6%	6,3%	53 €	33,0%	39 €	41,4%	66,5%	-1,4%	44 €	3,7%	29 €	2,2%
Marseille	66,8%	-11,2%	54 €	19,5%	36 €	6,1%	58,3%	-5,9%	46 €	5,1%	27 €	-1,1%
Montpellier	68,8%	-3,7%	39 €	-1,0%	27 €	-4,7%	58,3%	-6,9%	37 €	1,3%	22 €	-5,6%
St Etienne	74,1%	13,7%	53 €	30,7%	40 €	48,6%	64,0%	6,3%	43 €	5,6%	27 €	12,3%

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

June 2016



South-West & Cities

Luxury & Upscale	Monthly performance						Year To Date performance					
	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
South-West	76,4%	2,7%	242 €	-0,8%	185 €	1,9%	59,6%	7,7%	189 €	-1,3%	113 €	6,3%
Bayonne-Anglet-Biarritz	75,5%	3,3%	257 €	-8,9%	194 €	-5,9%	56,3%	16,4%	218 €	-5,8%	123 €	9,7%
Bordeaux	80,8%	2,5%	340 €	1,8%	275 €	4,3%	60,8%	9,6%	238 €	-4,9%	144 €	4,3%
Pau	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Toulouse	81,1%	-1,0%	157 €	22,7%	127 €	21,6%	72,0%	1,5%	126 €	4,7%	91 €	6,3%
Midscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
	South-West	70,7%	-6,6%	106 €	5,0%	75 €	-1,9%	57,8%	-0,3%	93 €	2,8%	54 €
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Bordeaux	72,4%	-16,6%	119 €	1,1%	86 €	-15,7%	62,1%	-2,8%	97 €	2,6%	61 €	-0,3%
Pau	60,8%	-8,0%	78 €	-0,4%	47 €	-8,4%	52,0%	-1,3%	77 €	-1,8%	40 €	-3,0%
Toulouse	68,3%	-9,6%	112 €	10,5%	77 €	-0,1%	59,5%	1,1%	99 €	1,4%	59 €	2,5%
Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
	South-West	69,0%	-3,5%	72 €	5,1%	50 €	1,4%	58,4%	-0,7%	62 €	1,2%	36 €
Bayonne-Anglet-Biarritz	74,4%	2,4%	64 €	-0,8%	48 €	1,6%	56,5%	-0,7%	57 €	0,8%	32 €	0,1%
Bordeaux	78,3%	-3,7%	84 €	-0,1%	66 €	-3,8%	66,9%	2,5%	69 €	-0,2%	46 €	2,2%
Pau	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Toulouse	72,1%	-0,8%	79 €	7,8%	57 €	6,9%	64,1%	4,6%	69 €	0,8%	44 €	5,5%
Super Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
	South-West	68,4%	-7,3%	45 €	4,2%	31 €	-3,5%	60,7%	-3,3%	40 €	2,4%	24 €
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Bordeaux	72,2%	-11,2%	50 €	3,6%	36 €	-8,0%	64,2%	-3,3%	42 €	1,9%	27 €	-1,4%
Pau	52,4%	-8,9%	35 €	7,0%	18 €	-2,5%	48,4%	-5,7%	34 €	4,9%	17 €	-1,1%
Toulouse	76,5%	-4,2%	48 €	12,2%	37 €	7,5%	70,5%	0,7%	43 €	5,2%	30 €	6,0%

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

June 2016



French Riviera

June	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	77,8%	0,8%	556 €	12,6%	433 €	13,5%	58,7%	7,8%	419 €	2,5%	246 €	10,5%
French Riviera - Boutique Hotels	84,1%	3,1%	194 €	12,4%	163 €	15,9%	60,3%	-3,7%	158 €	5,8%	95 €	1,9%
French Riviera - Upscale	76,8%	-2,2%	237 €	16,1%	182 €	13,6%	58,1%	1,2%	174 €	1,9%	101 €	3,1%
Average Upscale & Luxury	77,8%	-0,6%	364 €	15,2%	283 €	14,5%	58,5%	3,4%	275 €	5,0%	161 €	8,6%
Average Midscale	75,5%	-9,5%	130 €	9,6%	98 €	-0,8%	58,4%	-4,2%	106 €	1,3%	62 €	-2,9%
Average Budget	72,5%	-8,1%	89 €	8,2%	64 €	-0,6%	56,9%	0,0%	71 €	0,1%	41 €	0,1%
Average Super-Budget	66,6%	-15,7%	53 €	6,0%	35 €	-10,6%	56,8%	-6,8%	48 €	1,7%	27 €	-5,2%

French Riviera Cities

June	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	75,2%	1,7%	536 €	12,5%	403 €	14,4%	55,2%	7,3%	436 €	1,5%	240 €	8,9%
Cannes - Boutique Hotels	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Cannes - Upscale	71,4%	-2,6%	234 €	12,8%	167 €	9,9%	53,2%	-0,7%	193 €	7,0%	103 €	6,3%
Cannes - Upscale & Luxury	73,7%	0,5%	411 €	15,4%	303 €	16,0%	54,4%	4,1%	340 €	6,4%	185 €	10,7%
Cannes - Midscale	70,7%	-6,2%	131 €	10,7%	93 €	3,8%	50,0%	-2,5%	110 €	0,6%	55 €	-1,9%
Cannes - Budget	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Cannes - Super Budget	69,8%	-16,4%	51 €	5,9%	35 €	-11,5%	58,1%	-9,1%	47 €	1,1%	27 €	-8,1%

June	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	84,3%	-6,9%	282 €	16,0%	237 €	8,0%	66,9%	2,2%	196 €	2,3%	131 €	4,5%
Nice - Midscale	78,5%	-12,2%	143 €	13,8%	112 €	-0,1%	60,7%	-8,2%	109 €	2,2%	66 €	-6,1%

June	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	77,9%	-0,4%	473 €	-14,7%	369 €	-15,1%	63,4%	0,1%	465 €	0,7%	295 €	0,8%
Monaco - Upscale	83,2%	-0,5%	302 €	15,6%	251 €	15,1%	65,0%	1,9%	261 €	3,5%	169 €	5,5%
Monaco - Upscale & Luxury	81,7%	-0,5%	347 €	2,7%	284 €	2,2%	64,6%	1,5%	315 €	1,6%	203 €	3,0%

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Performances Coast

June 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	66,0%	3,0%	181 €	4,8%	120 €	7,9%	47,9%	-6,6%	166 €	1,9%	80 €	-4,8%
Average Midscale	70,2%	-3,7%	100 €	-1,8%	70 €	-5,5%	57,9%	-4,6%	97 €	-0,5%	56 €	-5,0%
Average Budget	66,4%	-4,8%	66 €	-3,8%	44 €	-8,4%	64,6%	10,6%	62 €	-5,8%	40 €	4,2%
Average Super-Budget	66,6%	-5,1%	41 €	3,8%	27 €	-1,5%	60,9%	3,4%	40 €	3,4%	24 €	6,9%

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	70,5%	-2,9%	212 €	7,6%	149 €	4,5%	61,3%	14,1%	195 €	-0,4%	120 €	13,7%
Average Midscale	71,1%	-6,2%	109 €	13,3%	77 €	6,2%	59,1%	3,1%	99 €	5,8%	58 €	9,1%
Average Budget	68,7%	-5,1%	64 €	0,9%	44 €	-4,2%	57,4%	9,1%	61 €	1,8%	35 €	11,1%
Average Super-Budget	63,7%	-6,4%	42 €	1,6%	27 €	-5,0%	54,5%	-1,3%	41 €	1,9%	22 €	0,6%

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	76,1%	2,2%	246 €	-9,0%	187 €	-7,0%	56,4%	14,6%	214 €	-5,5%	120 €	8,3%
Average Midscale	72,7%	-5,0%	135 €	28,1%	98 €	21,6%	57,2%	3,4%	107 €	8,2%	61 €	11,9%
Average Budget	72,7%	-1,3%	62 €	-1,8%	45 €	-3,1%	48,4%	-0,2%	57 €	2,5%	28 €	2,3%
Average Super-Budget	70,8%	-5,0%	51 €	3,6%	36 €	-1,6%	55,7%	-5,7%	46 €	2,2%	25 €	-3,6%

Coastal areas samples under continuous development and likely to evolve

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Performances Main cities in Regions

June 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	84,7%	-4,0%	155 €	-5,1%	131 €	-8,9%	54,4%	0,9%	131 €	-7,5%	71 €	-6,6%
Bayonne-Anglet-Biarritz	75,5%	3,3%	257 €	-8,9%	194 €	-5,9%	56,3%	16,4%	218 €	-5,8%	123 €	9,7%
Bordeaux	80,8%	2,5%	340 €	1,8%	275 €	4,3%	60,8%	9,6%	238 €	-4,9%	144 €	4,3%
Cannes	73,7%	0,5%	411 €	15,4%	303 €	16,0%	54,4%	4,1%	340 €	6,4%	185 €	10,7%
Dijon	78,2%	1,1%	144 €	1,5%	112 €	2,6%	56,0%	2,1%	129 €	-0,5%	72 €	1,6%
Lille	71,1%	17,0%	214 €	56,3%	152 €	82,8%	63,3%	16,5%	143 €	8,5%	90 €	26,5%
Lyon	76,7%	-3,9%	205 €	26,0%	157 €	21,1%	68,3%	3,6%	154 €	3,7%	105 €	7,4%
Marseille	75,1%	-5,0%	236 €	39,8%	177 €	32,8%	62,7%	4,2%	150 €	7,3%	94 €	11,8%
Monaco	81,7%	-0,5%	347 €	2,7%	284 €	2,2%	64,6%	1,5%	315 €	1,6%	203 €	3,0%
Montpellier	84,1%	5,6%	162 €	14,4%	136 €	20,9%	62,9%	3,4%	142 €	7,3%	89 €	10,9%
Nice	84,3%	-6,9%	282 €	16,0%	237 €	8,0%	66,9%	2,2%	196 €	2,3%	131 €	4,5%
Strasbourg	79,3%	8,2%	127 €	3,9%	101 €	12,4%	61,5%	4,4%	117 €	-3,7%	72 €	0,6%
Toulouse	81,1%	-1,0%	157 €	22,7%	127 €	21,6%	72,0%	1,5%	126 €	4,7%	91 €	6,3%
Midscale	OR		ADR		RevPAR		OR		ADR		RevPAR	
Aix en Provence	73,6%	-14,8%	96 €	13,7%	70 €	-3,1%	59,3%	-2,6%	82 €	3,9%	49 €	1,2%
Avignon	92,3%	-3,1%	117 €	2,4%	108 €	-0,8%	62,5%	-7,3%	98 €	1,7%	61 €	-5,7%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Bordeaux	72,4%	-16,6%	119 €	1,1%	86 €	-15,7%	62,1%	-2,8%	97 €	2,6%	61 €	-0,3%
Cannes	70,7%	-6,2%	131 €	10,7%	93 €	3,8%	50,0%	-2,5%	110 €	0,6%	55 €	-1,9%
Dijon	64,4%	-16,2%	102 €	3,6%	65 €	-13,1%	51,4%	-13,8%	95 €	3,5%	49 €	-10,7%
Grenoble	60,8%	-8,3%	94 €	-3,7%	57 €	-11,7%	54,6%	4,2%	92 €	-2,5%	50 €	1,6%
Le Havre	67,0%	-8,1%	87 €	-5,0%	58 €	-12,7%	56,1%	-9,8%	90 €	0,7%	50 €	-9,2%
Lille	71,2%	-0,7%	113 €	18,6%	80 €	17,8%	65,8%	6,7%	97 €	6,1%	64 €	13,3%
Lyon	70,9%	-7,1%	119 €	11,7%	84 €	3,8%	62,7%	-1,0%	102 €	2,7%	64 €	1,7%
Marseille	74,8%	-9,7%	119 €	13,3%	89 €	2,3%	65,1%	-3,5%	97 €	3,0%	64 €	-0,6%
Montpellier	83,9%	8,8%	100 €	4,2%	84 €	13,4%	65,9%	4,8%	91 €	3,3%	60 €	8,2%
Nancy	67,8%	-19,5%	96 €	-1,5%	65 €	-20,7%	64,2%	-7,0%	93 €	4,3%	60 €	-3,0%
Nantes	75,2%	-7,9%	101 €	4,8%	76 €	-3,5%	66,1%	6,8%	91 €	1,5%	60 €	8,4%
Niort	73,6%	-6,3%	79 €	0,5%	58 €	-5,8%	53,5%	4,0%	82 €	0,4%	44 €	4,5%
Nice	78,5%	-12,2%	143 €	13,8%	112 €	-0,1%	60,7%	-8,2%	109 €	2,2%	66 €	-6,1%
Pau	60,8%	-8,0%	78 €	-0,4%	47 €	-8,4%	52,0%	-1,3%	77 €	-1,8%	40 €	-3,0%
Reims	81,4%	0,0%	115 €	2,5%	94 €	2,5%	66,3%	6,7%	106 €	-0,1%	71 €	6,6%
Rennes	60,4%	-12,8%	91 €	-4,3%	55 €	-16,6%	55,0%	1,6%	91 €	-1,6%	50 €	0,0%
Rouen	64,4%	-19,5%	98 €	0,5%	63 €	-19,0%	55,1%	-8,8%	95 €	3,4%	53 €	-5,7%
Saint Etienne	53,9%	4,0%	129 €	48,9%	69 €	54,9%	46,1%	8,1%	93 €	10,3%	43 €	19,2%
Strasbourg	69,0%	-6,0%	98 €	1,3%	67 €	-4,8%	59,2%	0,3%	93 €	-2,1%	55 €	-1,8%
Toulouse	68,3%	-9,6%	112 €	10,5%	77 €	-0,1%	59,5%	1,1%	99 €	1,4%	59 €	2,5%

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Performances Main cities in Regions

June 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	79,3%	-1,1%	80 €	18,5%	64 €	17,2%	60,3%	5,5%	65 €	2,5%	39 €	8,1%
Angers	71,1%	-1,2%	66 €	-0,2%	47 €	-1,4%	58,8%	-1,3%	66 €	0,1%	39 €	-1,2%
Avignon	76,1%	-9,7%	66 €	-5,7%	50 €	-14,9%	57,1%	-3,6%	62 €	-2,0%	36 €	-5,5%
Bayonne-Anglet-Biarritz	74,4%	2,4%	64 €	-0,8%	48 €	1,6%	56,5%	-0,7%	57 €	0,8%	32 €	0,1%
Bordeaux	78,3%	-3,7%	84 €	-0,1%	66 €	-3,8%	66,9%	2,5%	69 €	-0,2%	46 €	2,2%
Dijon	78,6%	-8,8%	64 €	4,6%	50 €	-4,6%	65,4%	-4,3%	60 €	2,0%	39 €	-2,4%
Grenoble	56,3%	-4,9%	61 €	-5,1%	34 €	-9,7%	53,8%	2,5%	60 €	-3,4%	32 €	-1,0%
Le Havre	46,9%	-23,0%	62 €	3,9%	29 €	-20,0%	46,5%	-6,9%	59 €	2,6%	28 €	-4,4%
Lille	77,1%	1,3%	99 €	26,0%	76 €	27,7%	70,8%	4,7%	76 €	7,3%	54 €	12,4%
Lyon	75,9%	-1,7%	94 €	13,8%	71 €	11,9%	67,5%	1,7%	77 €	2,3%	52 €	4,0%
Marseille	70,7%	-9,9%	93 €	25,5%	66 €	13,1%	60,0%	-4,6%	69 €	2,7%	41 €	-2,1%
Metz	68,8%	-15,2%	62 €	2,9%	43 €	-12,8%	61,7%	-3,7%	61 €	3,5%	38 €	-0,4%
Montpellier	78,0%	-2,9%	75 €	0,7%	58 €	-2,2%	64,6%	-1,2%	71 €	1,3%	46 €	0,1%
Nancy	76,4%	-9,3%	69 €	-5,7%	53 €	-14,4%	69,8%	1,5%	65 €	2,2%	45 €	3,6%
Nantes	76,0%	-0,9%	74 €	1,9%	56 €	1,0%	65,5%	9,0%	68 €	0,7%	44 €	9,8%
Niort	65,2%	-11,0%	58 €	-3,9%	38 €	-14,5%	51,9%	-0,7%	57 €	-2,7%	30 €	-3,3%
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	79,7%	6,3%	68 €	0,1%	54 €	6,5%	67,5%	7,4%	65 €	-1,1%	44 €	6,2%
Rouen	72,3%	-5,1%	65 €	-1,5%	47 €	-6,6%	61,7%	4,4%	63 €	0,6%	39 €	5,1%
Saint Etienne	65,7%	2,0%	113 €	62,9%	74 €	66,1%	51,7%	2,3%	75 €	7,5%	39 €	10,1%
Strasbourg	66,6%	-11,0%	66 €	-2,8%	44 €	-13,5%	62,4%	-1,3%	64 €	0,1%	40 €	-1,2%
Toulouse	72,1%	-0,8%	79 €	7,8%	57 €	6,9%	64,1%	4,6%	69 €	0,8%	44 €	5,5%

Super Budget	OR		ADR		RevPAR		OR		ADR		RevPAR	
	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1	2016	Var /m-1
	Angers	72,0%	2,7%	41 €	0,6%	30 €	3,3%	59,0%	5,1%	41 €	0,5%	24 €
Avignon	65,5%	-3,6%	35 €	-1,2%	23 €	-4,8%	54,3%	-9,2%	35 €	1,9%	19 €	-7,5%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Bordeaux	72,2%	-11,2%	50 €	3,6%	36 €	-8,0%	64,2%	-3,3%	42 €	1,9%	27 €	-1,4%
Cannes	69,8%	-16,4%	51 €	5,9%	35 €	-11,5%	58,1%	-9,1%	47 €	1,1%	27 €	-8,1%
Dijon	72,9%	-3,8%	39 €	-1,9%	28 €	-5,6%	62,5%	-1,0%	38 €	0,3%	24 €	-0,7%
Grenoble	53,1%	-7,7%	37 €	-4,1%	20 €	-11,5%	49,0%	-11,4%	38 €	0,5%	19 €	-10,9%
Le Havre	56,6%	-8,3%	38 €	-0,5%	22 €	-8,8%	56,3%	-4,8%	38 €	0,5%	22 €	-4,3%
Lille	70,1%	-1,1%	57 €	32,6%	40 €	31,2%	65,6%	3,7%	45 €	6,9%	30 €	10,8%
Lyon	73,6%	6,3%	53 €	33,0%	39 €	41,4%	66,5%	-1,4%	44 €	3,7%	29 €	2,2%
Marseille	66,8%	-11,2%	54 €	19,5%	36 €	6,1%	58,3%	-5,9%	46 €	5,1%	27 €	-1,1%
Metz	65,5%	-3,0%	38 €	-0,6%	25 €	-3,6%	60,4%	-2,5%	38 €	-0,1%	23 €	-2,5%
Montpellier	68,8%	-3,7%	39 €	-1,0%	27 €	-4,7%	58,3%	-6,9%	37 €	1,3%	22 €	-5,6%
Nancy	75,9%	6,2%	39 €	2,4%	30 €	8,7%	59,7%	-2,9%	39 €	2,8%	23 €	-0,2%
Nantes	78,1%	-4,3%	47 €	3,1%	37 €	-1,3%	68,0%	1,3%	45 €	2,2%	31 €	3,5%
Niort	65,7%	-4,4%	36 €	-7,8%	24 €	-11,9%	59,0%	0,5%	36 €	-1,0%	21 €	-0,5%
Pau	52,4%	-8,9%	35 €	7,0%	18 €	-2,5%	48,4%	-5,7%	34 €	4,9%	17 €	-1,1%
Rennes	70,6%	2,0%	41 €	1,5%	29 €	3,5%	62,3%	3,7%	41 €	1,6%	25 €	5,4%
Rouen	66,0%	-10,5%	43 €	5,1%	28 €	-6,0%	61,8%	-2,9%	42 €	2,6%	26 €	-0,3%
Saint Etienne	74,1%	13,7%	53 €	30,7%	40 €	48,6%	64,0%	6,3%	43 €	5,6%	27 €	12,3%
Strasbourg	65,8%	0,1%	40 €	0,6%	26 €	0,6%	59,4%	2,9%	40 €	0,7%	24 €	3,6%
Toulouse	76,5%	-4,2%	48 €	12,2%	37 €	7,5%	70,5%	0,7%	43 €	5,2%	30 €	6,0%

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Information

Definitions

Occupancy Rate (OR) : Rooms sold divided by rooms available multiplied by 100.

Rooms Available : The number of rooms times the number of days in the period.

Average Daily Rate (ADR) : Room revenue divided by rooms sold.

Revenue per Available Room (RevPAR) : Room revenue divided by rooms available.

ADR and RevPAR are expressed in Euros, excluding VAT.

General segmentation

Luxury Hotels: France's most prestigious hotels that distinguish themselves through their exceptional location, building and design, as well their outstanding product and service quality. Highly reputed, these establishments cater to a particularly discerning clientele.

Upscale Hotels: Hotels operating at the higher end of the market and consequently offering a wide range of amenities. These establishments are less prestigious than Luxury Hotels and cater to a wider range of guests.

Midscale Hotels: Veritable bridge between higher category and entry-level hotels, Midscale Hotels benefit from a wide range of facilities and amenities, but to a lesser extent than Upscale Hotels.

Budget Hotels: Hotels that offer a restricted range of facilities and amenities. Budget hotels primarily target those guests particularly preoccupied by value for money.

Super Budget Hotels: Hotels that offer a 'no frills' approach, with a very limited range of services. Price is the key decision-factor for guests.

Segmentation of Parisian hotels

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

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

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

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

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

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

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

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

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Tourism, Culture & Hospitality Desk

In Extenso is one of the leading advisors in Tourism, Culture & Hospitality industries worldwide. We provide many consulting services for different stakeholders of the tourism industry :

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

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