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tourisme, culture & hôtellerie

French Hotel Industry Performance

July 2016



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Publications



Passion for leisure – A view of the UK leisure consumer

Simon Oaten | Partner | Travel, Hospitality & Leisure, Deloitte LLP

In this report we look at the key drivers of the UK leisure market, how consumer behaviour is changing and the impact the growth of the leisure sector is having on the broader economy. This report is based on two consumer surveys carried out by an independent market research agency, YouGov, on our behalf. The surveys were conducted online with a nationally representative sample of over 3,000 UK adults aged 18+ using a set of questions designed by Deloitte LLP. The research for Q4 2015 was carried out between 4 and 6 January, 2016 and research for Q1 2016 took place between 18 and 20 March 2016.

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Regional France withstood

The Euro championships organised in France and the daily hotel performances communicated by our partner, STR, signalled some hope for July. Paris and the Côte d'Azur finished July on a very negative note, with RevPAR significantly dropping in all categories, given the sharp decline in occupancy. However, Regional France withstood better, recording encouraging increases in RevPAR (+4% to +9%, depending on the category), boosted by growth in average rates.

The Euro 2016 championships had little or no impact in Paris. Although the performances recorded over the first half of July appeared encouraging, the month ended along the same lines as those observed since the start of the year. All categories recorded a steep drop in Rooms revenue (down -13,4% for Upscale hotels and -18,3% for Luxury hotels). Can we conclude, then, that Euro 2016 had the opposite effect? A proportion of the traditional clientele in Paris's hotels chose not to stay in the city during the tournament, preferring calmer periods. Furthermore, football supporters would have likely preferred cheaper or shared accommodation, and it is not innocuous to suggest that AirBnB may have achieved record results in July.

As feared, the image of Ile de France and the Côte d'Azur took a hit in July. Occupancy dropped steeply in all categories, particularly in more upscale segments. Luxury hotels recorded a 15% drop in RevPAR in July, but year-to-date results are still slightly better than last year (+2,1%), thanks to a solid performance over the first semester. All other categories recorded a decline in performance, both in July and year-to-date. The attacks in Nice obviously had a serious impact and August is unfortunately likely to be heavily affected, too. However, let's not forget that 2016's results are being compared to n-1, and 2015 was an excellent year: for example, the Luxury segment on the Côte d'Azur recorded a 69% increase in RevPAR in July 2015!

There were a couple of positive points, however. Regional France confirmed the solid results recorded over the first semester 2016 – and the same period last year had also been encouraging. For Euro host cities, July was a good, or a very good, month. Bordeaux, Lille, Lyon, Marseille, Saint Etienne, etc., and more contrastingly, the coast (Brittany, the Loire) finished the month on a high note, with an overall increase in average rates. However, and somewhat exceptionally, looking at the whole of France, the Super-budget category was the only one to have recorded RevPAR growth (+4,3%), given the combined rise in occupancy and average rates. In a context where performances are generally dropping, this rebound is definitely good news.

Monthly performance

July	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	69,6%	78,2%	70,6%	70,5%	71,5%
Var. /n-1	-12,0%	-5,1%	-7,6%	-4,1%	2,7%
ADR 2016	612 €	219 €	107 €	63 €	43 €
Var. /n-1	4,1%	-1,8%	2,4%	2,3%	1,6%
RevPAR 2016	426 €	171 €	76 €	44 €	31 €
Var. /n-1	-8,5%	-6,9%	-5,4%	-1,9%	4,3%

Year To Date performance

Jan. to July	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	59,6%	66,0%	62,5%	64,3%	62,6%
Var. /n-1	2,3%	-2,7%	-5,3%	-3,6%	-0,9%
ADR 2016	456 €	197 €	107 €	65 €	41 €
Var. /n-1	-2,9%	-3,8%	-0,5%	-0,4%	1,0%
RevPAR 2016	272 €	130 €	67 €	42 €	26 €
Var. /n-1	-0,6%	-6,4%	-5,7%	-4,1%	0,2%

Definitions

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

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Performances Paris

July 2016



Paris-City

Monthly performance

July	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Luxury & Palace	69,9%	-17,3%	696 €	-1,1%	487 €	-18,3%
Upscale	74,4%	-16,7%	238 €	3,9%	177 €	-13,4%
Upscale Boutique hotels	81,5%	-8,3%	273 €	-5,9%	223 €	-13,6%
Standard Upscale hotels	72,5%	-19,0%	228 €	6,9%	165 €	-13,4%
Midscale	76,6%	-12,2%	131 €	-5,9%	100 €	-17,4%
Midscale Boutique hotels	80,0%	-7,9%	146 €	-8,7%	117 €	-15,9%
Standard Midscale hotels	74,3%	-15,1%	120 €	-4,7%	89 €	-19,2%
Budget	75,2%	-11,9%	79 €	-5,0%	60 €	-16,4%

Year To Date performance

Jan. to July	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Luxury & Palace	61,7%	-12,8%	605 €	-9,1%	374 €	-20,7%
Upscale	68,4%	-13,3%	226 €	-4,0%	154 €	-16,7%
Upscale Boutique hotels	73,4%	-7,3%	259 €	-8,1%	190 €	-14,8%
Standard Upscale hotels	67,0%	-14,9%	216 €	-3,1%	145 €	-17,5%
Midscale	72,2%	-10,6%	135 €	-7,1%	98 €	-16,9%
Midscale Boutique hotels	75,1%	-6,8%	149 €	-7,7%	112 €	-13,9%
Standard Midscale hotels	70,3%	-13,2%	125 €	-7,1%	88 €	-19,4%
Budget	74,5%	-9,8%	86 €	-5,8%	64 €	-15,0%

Paris suburbs (excluding Paris) – Luxury and Upscale

Monthly performance

July	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Paris	74,4%	-16,7%	238 €	3,9%	177 €	-13,4%
La Défense	71,8%	-17,0%	144 €	7,7%	104 €	-10,6%
Roissy CdG	75,0%	-7,6%	113 €	1,5%	85 €	-6,2%
Other areas	71,0%	-16,0%	212 €	4,9%	150 €	-11,9%

Year To Date performance

Jan. to July	OR		ADR		RevPAR	
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Paris	68,4%	-13,3%	226 €	-4,0%	154 €	-16,7%
La Défense	62,4%	-16,3%	157 €	-1,0%	98 €	-17,1%
Roissy CdG	70,0%	-6,8%	128 €	1,8%	89 €	-5,1%
Other areas	70,9%	-5,3%	178 €	0,2%	126 €	-5,1%

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Performance Regions

July 2016



Regions

Regions (excl. French Riviera)

Monthly performance

July	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	75,0%	71,7%	69,2%	68,5%	71,3%
Var. /n-1	1,4%	0,0%	-0,5%	0,8%	3,7%
ADR 2016	392 €	164 €	97 €	64 €	43 €
Var. /n-1	7,2%	5,6%	5,0%	4,0%	3,1%
RevPAR 2016	294 €	117 €	67 €	44 €	31 €
Var. /n-1	8,7%	5,6%	4,5%	4,9%	7,0%

Year To Date performance

Jan. to July	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	61,9%	61,5%	59,7%	62,1%	61,0%
Var. /n-1	10,3%	1,9%	0,3%	1,7%	-0,1%
ADR 2016	296 €	146 €	93 €	63 €	40 €
Var. /n-1	1,8%	2,0%	2,7%	1,1%	2,0%
RevPAR 2016	183 €	90 €	56 €	39 €	24 €
Var. /n-1	12,3%	3,9%	3,1%	2,8%	1,9%

French Riviera

Monthly performance

July	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	68,9%	82,5%	82,8%	79,6%	78,2%
Var. /n-1	-22,9%	-5,8%	-6,4%	-6,9%	-3,5%
ADR 2016	755 €	206 €	125 €	80 €	58 €
Var. /n-1	10,2%	-4,8%	1,8%	-0,5%	1,3%
RevPAR 2016	520 €	170 €	104 €	64 €	46 €
Var. /n-1	-15,0%	-10,3%	-4,7%	-7,3%	-2,3%

Year To Date performance

Jan. to July	Luxury	Upscale	Midscale	Budget	Super Budget
OR 2016	60,3%	62,1%	62,0%	60,2%	59,9%
Var. /n-1	0,8%	-0,7%	-4,7%	-1,4%	-6,2%
ADR 2016	478 €	179 €	110 €	73 €	50 €
Var. /n-1	1,2%	0,3%	1,4%	-0,1%	1,7%
RevPAR 2016	288 €	111 €	68 €	44 €	30 €
Var. /n-1	2,1%	-0,4%	-3,4%	-1,5%	-4,6%

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Performances Suburbs

July 2016



Paris suburbs (excluding Paris)

Midscale market

Monthly performance

July	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	67,6%	61,9%	63,8%	62,8%	63,9%	68,0%	70,6%	65,2%
Var. /n-1	-9,9%	-20,4%	-17,7%	-23,1%	-26,2%	-16,6%	-13,4%	-19,6%
ADR 2016	90 €	89 €	84 €	97 €	89 €	80 €	80 €	88 €
Var. /n-1	-3,2%	9,4%	11,8%	8,6%	20,1%	7,4%	6,9%	9,1%
RevPAR 2016	61 €	55 €	54 €	61 €	57 €	54 €	56 €	57 €
Var. /n-1	-12,8%	-12,9%	-8,0%	-16,4%	-11,3%	-10,4%	-7,4%	-12,3%

Year To Date performance

Jan. to July	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	52,9%	57,9%	61,7%	59,8%	55,4%	61,0%	65,1%	59,9%
Var. /n-1	-13,1%	-13,1%	-10,1%	-14,8%	-21,5%	-14,0%	-7,2%	-13,6%
ADR 2016	92 €	103 €	95 €	118 €	92 €	92 €	94 €	102 €
Var. /n-1	-2,7%	4,5%	4,3%	4,3%	5,7%	4,9%	1,8%	3,8%
RevPAR 2016	49 €	59 €	58 €	70 €	51 €	56 €	61 €	61 €
Var. /n-1	-15,5%	-9,2%	-6,3%	-11,2%	-17,0%	-9,8%	-5,5%	-10,3%

Budget market

Monthly performance

July	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	75,7%	57,8%	52,3%	63,7%	65,3%	75,8%	69,5%	66,8%
Var. /n-1	-12,3%	-8,8%	-23,4%	-18,8%	-11,5%	-8,3%	-6,4%	-12,4%
ADR 2016	66 €	70 €	58 €	57 €	48 €	53 €	48 €	55 €
Var. /n-1	-2,2%	1,9%	1,2%	0,2%	3,5%	-0,3%	-1,4%	0,1%
RevPAR 2016	50 €	41 €	30 €	37 €	31 €	40 €	34 €	37 €
Var. /n-1	-14,3%	-7,1%	-22,5%	-18,6%	-8,4%	-8,6%	-7,7%	-12,3%

Year To Date performance

Jan. to July	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	67,1%	63,3%	58,1%	65,3%	58,2%	70,5%	68,7%	64,2%
Var. /n-1	-11,8%	-5,6%	-13,0%	-11,4%	-15,2%	-8,4%	-5,0%	-10,7%
ADR 2016	59 €	80 €	65 €	75 €	58 €	64 €	56 €	64 €
Var. /n-1	-1,7%	3,4%	4,5%	0,8%	0,2%	3,9%	-4,0%	0,4%
RevPAR 2016	39 €	51 €	37 €	49 €	34 €	45 €	38 €	41 €
Var. /n-1	-13,3%	-2,5%	-9,1%	-10,7%	-15,1%	-4,8%	-8,8%	-10,3%

Super Budget market

Monthly performance

July	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	76,2%	64,8%	62,8%	63,3%	62,5%	65,8%	73,6%	67,1%
Var. /n-1	6,0%	0,9%	8,6%	-15,4%	-11,9%	-1,5%	0,4%	-2,3%
ADR 2016	41 €	41 €	39 €	48 €	51 €	45 €	45 €	44 €
Var. /n-1	-8,4%	-0,4%	-4,7%	-0,8%	13,2%	-2,7%	-0,7%	-0,3%
RevPAR 2016	31 €	27 €	25 €	30 €	32 €	30 €	33 €	30 €
Var. /n-1	-2,9%	0,5%	3,5%	-16,2%	-0,3%	-4,2%	-0,3%	-2,7%

Year To Date performance

Jan. to July	departments							Average suburbs
	77	78	91	92	93	94	95	
OR 2016	67,1%	67,4%	67,2%	69,6%	62,6%	65,9%	72,1%	67,1%
Var. /n-1	-6,3%	-1,3%	0,2%	-7,7%	-12,3%	-4,1%	-4,7%	-5,8%
ADR 2016	40 €	43 €	40 €	53 €	49 €	46 €	46 €	45 €
Var. /n-1	-5,2%	-0,8%	-1,5%	-1,2%	0,0%	-3,2%	-2,7%	-2,2%
RevPAR 2016	27 €	29 €	27 €	37 €	31 €	30 €	33 €	30 €
Var. /n-1	-11,2%	-2,1%	-1,3%	-8,8%	-12,3%	-7,2%	-7,3%	-7,8%

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Performances North-East

July 2016



North-east & Cities

	Monthly performance						Year To Date performance					
Luxury & Upscale	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	65,8%	3,6%	137 €	2,3%	90 €	6,0%	58,5%	6,6%	136 €	1,4%	79 €	8,1%
Dijon	73,1%	2,3%	135 €	-2,6%	99 €	-0,3%	58,5%	2,0%	130 €	-1,0%	76 €	1,0%
Lille	54,0%	12,8%	137 €	13,2%	74 €	27,7%	61,9%	16,1%	142 €	9,1%	88 €	26,7%
Metz			insufficient supply						insufficient supply			
Nancy			insufficient supply						insufficient supply			
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	67,2%	-4,7%	111 €	-0,3%	75 €	-5,0%	62,3%	2,9%	116 €	-3,1%	72 €	-0,3%
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
North-east	66,5%	-4,4%	90 €	4,6%	60 €	-0,1%	57,6%	0,2%	90 €	1,6%	52 €	1,8%
Dijon	71,0%	-13,7%	98 €	4,6%	70 €	-9,8%	54,3%	-13,8%	95 €	3,7%	52 €	-10,6%
Lille	52,4%	-5,6%	91 €	13,8%	48 €	7,3%	62,8%	3,5%	97 €	7,2%	61 €	10,9%
Metz			in progress						in progress			
Nancy	73,3%	-10,3%	88 €	6,5%	65 €	-4,5%	65,5%	-7,6%	92 €	4,6%	60 €	-3,3%
Reims	74,9%	-1,9%	102 €	-6,2%	76 €	-8,0%	67,5%	5,8%	106 €	-1,1%	71 €	4,7%
Strasbourg	71,0%	-3,7%	84 €	-2,5%	60 €	-6,0%	60,9%	-0,4%	92 €	-2,1%	56 €	-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
North-east	69,5%	-3,5%	59 €	3,5%	41 €	-0,2%	66,4%	2,3%	61 €	2,3%	41 €	4,6%
Dijon	78,1%	-9,5%	63 €	5,6%	49 €	-4,4%	67,2%	-5,2%	61 €	2,6%	41 €	-2,8%
Lille	57,6%	-2,0%	66 €	6,5%	38 €	4,4%	68,9%	3,9%	75 €	7,3%	52 €	11,5%
Metz	70,1%	-10,5%	52 €	-2,4%	37 €	-12,7%	62,9%	-4,9%	60 €	2,7%	38 €	-2,3%
Nancy	63,5%	-13,9%	57 €	3,8%	36 €	-10,6%	68,9%	-0,9%	64 €	2,6%	44 €	1,7%
Reims	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Strasbourg	69,8%	-8,3%	59 €	0,8%	41 €	-7,6%	63,5%	-2,5%	64 €	0,2%	40 €	-2,3%
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-east	70,4%	5,9%	40 €	2,0%	28 €	7,9%	61,7%	2,0%	39 €	2,1%	24 €	4,1%
Dijon	80,6%	9,5%	39 €	-4,4%	31 €	4,7%	65,2%	0,8%	38 €	-0,5%	25 €	0,2%
Lille	52,3%	-6,6%	42 €	4,5%	22 €	-2,3%	63,7%	2,4%	45 €	6,7%	28 €	9,2%
Metz	68,1%	0,5%	36 €	-2,9%	24 €	-2,4%	65,3%	6,0%	37 €	0,3%	24 €	6,3%
Nancy	61,8%	1,8%	39 €	0,3%	24 €	2,1%	60,0%	-2,3%	39 €	2,4%	23 €	0,1%
Reims	47,3%	1,1%	41 €	-1,7%	20 €	-0,7%	47,6%	-5,1%	42 €	1,5%	20 €	-3,7%
Strasbourg	64,9%	5,4%	39 €	-2,2%	25 €	3,1%	60,2%	3,3%	40 €	0,2%	24 €	3,5%

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

July 2016



North-West & Cities

Monthly performance							Year To Date performance					
Luxury & Upscale	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	74,0%	-1,3%	248 €	3,2%	184 €	1,9%	59,6%	4,7%	213 €	3,4%	127 €	8,3%
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	70,2%	-0,6%	98 €	4,3%	69 €	3,7%	60,8%	1,4%	92 €	2,8%	56 €	4,2%
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	65,7%	-4,5%	88 €	-5,4%	58 €	-9,7%	57,5%	-9,0%	89 €	-0,4%	51 €	-9,3%
Nantes	63,9%	1,7%	78 €	-3,0%	50 €	-1,3%	65,8%	6,0%	89 €	1,1%	59 €	7,2%
Niort	63,8%	6,7%	80 €	4,2%	51 €	11,2%	55,0%	4,4%	81 €	1,1%	45 €	5,5%
Rennes	51,6%	-10,5%	76 €	-7,6%	39 €	-17,2%	54,5%	-0,3%	89 €	-2,2%	48 €	-2,4%
Rouen	69,4%	-10,8%	95 €	5,3%	66 €	-6,0%	57,0%	-9,1%	95 €	3,7%	54 €	-5,8%
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	64,5%	2,9%	62 €	2,4%	40 €	5,3%	58,0%	1,4%	63 €	-0,2%	37 €	1,2%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	59,7%	1,8%	55 €	4,5%	33 €	6,3%	58,9%	-0,9%	64 €	0,5%	38 €	-0,4%
Le Havre	59,3%	-4,8%	59 €	1,7%	35 €	-3,1%	48,4%	-6,5%	59 €	2,5%	29 €	-4,2%
Nantes	56,9%	-0,6%	57 €	-2,5%	32 €	-3,1%	64,2%	7,7%	66 €	0,5%	43 €	8,2%
Niort	61,2%	4,9%	56 €	-2,0%	34 €	2,8%	53,3%	0,2%	57 €	-2,6%	30 €	-2,4%
Rennes	55,2%	-6,3%	56 €	-1,3%	31 €	-7,5%	65,7%	5,4%	64 €	-0,9%	42 €	4,5%
Rouen	69,4%	6,9%	58 €	-1,6%	40 €	5,2%	62,8%	4,8%	63 €	0,3%	39 €	5,1%
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
North-West	68,8%	4,6%	43 €	3,7%	30 €	8,5%	59,5%	-0,6%	40 €	2,3%	24 €	1,7%
Amiens	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Angers	59,0%	9,4%	38 €	0,4%	23 €	9,8%	59,0%	5,7%	40 €	0,4%	24 €	6,2%
Le Havre	69,3%	-2,8%	42 €	4,4%	29 €	1,5%	58,2%	-4,5%	39 €	1,2%	23 €	-3,3%
Nantes	63,1%	-2,5%	44 €	0,7%	27 €	-1,8%	67,2%	0,8%	45 €	2,0%	30 €	2,8%
Niort	79,0%	6,3%	36 €	-3,4%	29 €	2,7%	61,9%	1,5%	36 €	-1,4%	22 €	0,0%
Rennes	49,6%	-5,6%	39 €	0,5%	20 €	-5,1%	60,5%	2,5%	40 €	1,5%	24 €	4,0%
Rouen	63,3%	-9,7%	44 €	4,1%	28 €	-6,0%	62,0%	-3,9%	42 €	2,8%	26 €	-1,3%

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

July 2016



South-East (excl. French Riviera) & Cities

Monthly performance							Year To Date performance					
Luxury & Upscale	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	81,4%	0,1%	201 €	9,2%	164 €	9,4%	65,3%	1,6%	161 €	3,6%	105 €	5,2%
Aix en Provence	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Avignon	85,6%	-8,6%	223 €	0,2%	190 €	-8,4%	59,1%	-2,1%	151 €	-6,7%	89 €	-8,6%
Grenoble	insufficient supply						insufficient supply					
Lyon	72,0%	7,3%	157 €	6,7%	113 €	14,5%	68,8%	4,2%	155 €	4,1%	106 €	8,4%
Marseille	79,1%	-7,6%	184 €	25,8%	145 €	16,2%	65,1%	1,9%	156 €	10,6%	102 €	12,7%
Montpellier	79,9%	3,4%	158 €	11,1%	126 €	14,9%	65,4%	3,4%	145 €	8,0%	95 €	11,7%
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	70,9%	0,7%	104 €	5,5%	74 €	6,3%	60,7%	0,1%	95 €	3,2%	58 €	3,3%
Aix en Provence	81,5%	-2,1%	91 €	16,0%	74 €	13,5%	62,5%	-1,9%	84 €	6,2%	52 €	4,1%
Avignon	94,0%	-3,8%	161 €	2,9%	152 €	-1,0%	67,1%	-6,6%	111 €	2,4%	75 €	-4,3%
Grenoble	43,5%	-13,9%	86 €	-7,3%	37 €	-20,2%	53,0%	1,7%	92 €	-3,1%	49 €	-1,4%
Lyon	66,4%	4,4%	102 €	19,3%	68 €	24,5%	63,4%	0,0%	102 €	4,9%	65 €	4,9%
Marseille	76,0%	-5,2%	107 €	13,8%	81 €	7,9%	66,7%	-3,6%	99 €	4,8%	66 €	1,0%
Montpellier	81,2%	11,1%	90 €	3,8%	73 €	15,3%	68,1%	5,8%	91 €	3,3%	62 €	9,4%
St Etienne	41,1%	0,1%	89 €	9,1%	36 €	9,1%	45,4%	7,0%	92 €	10,2%	42 €	17,9%
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	71,9%	3,5%	70 €	6,9%	50 €	10,6%	62,2%	2,0%	66 €	1,6%	41 €	3,7%
Aix en Provence	72,2%	-1,1%	67 €	2,2%	49 €	1,0%	62,0%	4,3%	65 €	2,4%	40 €	6,8%
Avignon	86,7%	-5,7%	99 €	7,3%	86 €	1,2%	61,4%	-4,1%	70 €	0,4%	43 €	-3,7%
Grenoble	43,2%	-17,3%	55 €	-2,3%	24 €	-19,2%	52,2%	-0,4%	59 €	-3,1%	31 €	-3,4%
Lyon	68,3%	11,7%	74 €	19,2%	50 €	33,1%	68,1%	3,8%	77 €	4,6%	52 €	8,6%
Marseille	71,4%	-1,7%	71 €	17,2%	51 €	15,2%	61,6%	-4,2%	69 €	4,9%	43 €	0,5%
Montpellier	78,4%	8,9%	66 €	-4,3%	52 €	4,2%	66,6%	-0,7%	70 €	0,2%	46 €	-0,5%
St Etienne	43,0%	-0,6%	60 €	-6,4%	26 €	-6,9%	50,9%	3,0%	73 €	5,8%	37 €	9,0%
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	73,5%	3,1%	45 €	3,2%	33 €	6,4%	60,5%	-0,8%	41 €	1,5%	25 €	0,7%
Aix en Provence	66,7%	-8,9%	45 €	4,7%	30 €	-4,6%	63,7%	1,4%	40 €	0,5%	26 €	1,9%
Avignon	82,2%	0,4%	50 €	4,7%	41 €	5,1%	58,4%	-7,4%	38 €	3,2%	22 €	-4,4%
Grenoble	44,5%	-2,0%	35 €	-5,4%	16 €	-7,3%	48,0%	-10,9%	37 €	-0,1%	18 €	-11,0%
Lyon	66,5%	6,7%	44 €	12,6%	30 €	20,1%	66,5%	-0,3%	44 €	4,8%	29 €	4,5%
Marseille	70,2%	-1,9%	49 €	10,1%	34 €	8,0%	60,0%	-5,3%	46 €	6,0%	28 €	0,4%
Montpellier	78,6%	1,0%	46 €	-0,1%	36 €	0,9%	61,3%	-5,5%	39 €	1,3%	24 €	-4,3%
St Etienne	62,4%	10,1%	39 €	-2,3%	25 €	7,6%	63,7%	6,8%	42 €	4,5%	27 €	11,6%

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

July 2016



South-West & Cities

	Monthly performance						Year To Date performance					
Luxury & Upscale	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	75,2%	1,2%	297 €	7,4%	223 €	8,7%	61,9%	6,5%	209 €	0,4%	129 €	6,9%
Bayonne-Anglet-Biarritz	85,1%	-1,0%	409 €	-0,4%	348 €	-1,4%	60,6%	12,2%	258 €	-5,9%	157 €	5,6%
Bordeaux	78,4%	6,6%	346 €	39,0%	271 €	48,2%	63,3%	9,0%	257 €	3,0%	163 €	12,3%
Pau	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Toulouse	68,5%	1,7%	109 €	-1,6%	75 €	0,1%	71,5%	1,5%	124 €	3,9%	89 €	5,5%
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	69,4%	4,7%	93 €	4,5%	64 €	9,4%	59,4%	0,4%	93 €	3,1%	55 €	3,5%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Bordeaux	79,6%	6,2%	99 €	18,0%	79 €	25,3%	64,7%	-1,3%	98 €	4,9%	63 €	3,6%
Pau	48,2%	-14,0%	77 €	-11,0%	37 €	-23,4%	51,4%	-3,3%	77 €	-3,3%	39 €	-6,6%
Toulouse	63,0%	8,1%	83 €	-3,7%	52 €	4,1%	60,0%	2,1%	96 €	0,6%	58 €	2,8%
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	64,8%	2,3%	65 €	2,3%	42 €	4,6%	59,4%	-0,2%	63 €	1,4%	37 €	1,2%
Bayonne-Anglet-Biarritz	79,9%	-4,0%	87 €	9,5%	70 €	5,1%	59,9%	-1,6%	63 €	2,4%	38 €	0,8%
Bordeaux	74,7%	9,0%	65 €	10,3%	48 €	20,2%	68,0%	3,4%	68 €	1,2%	47 €	4,7%
Pau	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Toulouse	60,2%	7,1%	59 €	-4,0%	36 €	2,8%	63,5%	5,0%	68 €	0,2%	43 €	5,2%
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	72,2%	-0,7%	46 €	5,3%	33 €	4,6%	62,4%	-2,9%	41 €	3,0%	26 €	0,0%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	-	-	n.d.	-	n.d.	-	-	-
Bordeaux	74,6%	0,8%	45 €	8,6%	33 €	9,4%	65,7%	-2,6%	42 €	3,0%	28 €	0,3%
Pau	54,1%	-11,4%	38 €	3,8%	20 €	-8,0%	49,2%	-6,7%	35 €	4,6%	17 €	-2,4%
Toulouse	70,2%	3,3%	40 €	2,8%	28 €	6,1%	70,5%	1,1%	43 €	4,8%	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

July 2016



French Riviera

July	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	68,9%	-22,9%	755 €	10,2%	520 €	-15,0%	60,3%	0,8%	478 €	1,2%	288 €	2,1%
French Riviera - Boutique Hotels	82,3%	-6,0%	179 €	-1,8%	147 €	-7,8%	63,8%	-4,3%	162 €	3,8%	104 €	-0,7%
French Riviera - Upscale	82,5%	-5,8%	209 €	-5,1%	173 €	-10,5%	61,9%	-0,2%	181 €	-0,1%	112 €	-0,3%
Average Upscale & Luxury	76,9%	-12,8%	406 €	0,0%	312 €	-12,8%	61,4%	-0,1%	300 €	2,3%	184 €	2,1%
Average Midscale	82,8%	-6,4%	125 €	1,8%	104 €	-4,7%	62,0%	-4,7%	110 €	1,4%	68 €	-3,4%
Average Budget	79,6%	-6,9%	80 €	-0,5%	64 €	-7,3%	60,2%	-1,4%	73 €	-0,1%	44 €	-1,5%
Average Super-Budget	78,2%	-3,5%	58 €	1,3%	46 €	-2,3%	59,9%	-6,2%	50 €	1,7%	30 €	-4,6%

French Riviera Cities

July	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	64,4%	-26,8%	737 €	7,1%	475 €	-21,7%	56,6%	-0,7%	488 €	-0,4%	276 €	-1,1%
Cannes - Boutique Hotels	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Cannes - Upscale	82,7%	-3,5%	227 €	-2,8%	187 €	-6,2%	58,2%	-0,8%	201 €	4,4%	117 €	3,6%
Cannes - Upscale & Luxury	72,1%	-16,9%	482 €	-0,3%	348 €	-17,2%	57,3%	-0,7%	369 €	2,9%	211 €	2,2%
Cannes - Midscale	76,8%	-6,1%	122 €	12,4%	94 €	5,6%	54,1%	-1,6%	112 €	3,3%	61 €	1,7%
Cannes - Budget	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Cannes - Super Budget	75,2%	-10,3%	56 €	-0,6%	42 €	-10,8%	60,6%	-9,3%	49 €	0,7%	29 €	-8,7%

July	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	85,2%	-9,9%	248 €	-5,3%	212 €	-14,7%	69,6%	-0,3%	206 €	-0,1%	143 €	-0,4%
Nice - Midscale	83,3%	-9,4%	136 €	3,4%	113 €	-6,4%	64,1%	-8,4%	114 €	2,4%	73 €	-6,3%

July	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	75,8%	-0,9%	756 €	8,5%	573 €	7,5%	65,3%	0,0%	517 €	2,9%	338 €	2,9%
Monaco - Upscale	83,0%	-4,3%	335 €	2,0%	278 €	-2,4%	67,7%	0,7%	274 €	2,8%	185 €	3,4%
Monaco - Upscale & Luxury	81,0%	-3,5%	446 €	5,9%	361 €	2,2%	67,0%	0,5%	339 €	2,3%	227 €	2,8%

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Performances Coast

July 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	71,1%	-1,5%	192 €	3,5%	137 €	1,9%	51,6%	-5,5%	172 €	2,4%	89 €	-3,2%
Average Midscale	74,6%	-1,6%	113 €	-1,1%	84 €	-2,8%	60,3%	-4,1%	100 €	-0,5%	60 €	-4,6%
Average Budget	67,8%	-6,5%	71 €	2,7%	48 €	-3,9%	65,0%	7,5%	64 €	-4,6%	41 €	2,6%
Average Super-Budget	72,0%	-3,9%	44 €	2,9%	32 €	-1,1%	62,6%	2,1%	40 €	3,2%	25 €	5,3%

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	76,9%	-0,4%	250 €	2,2%	192 €	1,7%	63,8%	11,5%	206 €	0,0%	131 €	11,5%
Average Midscale	79,6%	2,6%	121 €	5,5%	96 €	8,3%	62,8%	4,0%	102 €	5,4%	64 €	9,7%
Average Budget	74,8%	3,6%	72 €	1,7%	54 €	5,4%	59,9%	8,0%	63 €	1,6%	38 €	9,7%
Average Super-Budget	70,8%	1,2%	48 €	5,3%	34 €	6,5%	56,8%	-0,9%	42 €	2,7%	24 €	1,7%

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	84,8%	-1,7%	394 €	0,0%	334 €	-1,8%	60,7%	10,6%	252 €	-5,5%	153 €	4,6%
Average Midscale	83,9%	-0,2%	132 €	6,2%	111 €	6,1%	61,3%	2,7%	112 €	7,6%	69 €	10,6%
Average Budget	80,1%	-5,3%	82 €	11,1%	66 €	5,2%	53,0%	-1,8%	63 €	4,2%	33 €	2,3%
Average Super-Budget	79,8%	-6,0%	65 €	9,0%	52 €	2,5%	59,1%	-5,9%	49 €	3,7%	29 €	-2,4%

Coastal areas samples under continuous development and likely to evolve

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Performances Main cities in Regions

July 2016



Main cities in Regions – Luxury upscale and midscale

Monthly performance							Year To Date performance					
Luxury & Upscale	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	85,6%	-8,6%	223 €	0,2%	190 €	-8,4%	59,1%	-2,1%	151 €	-6,7%	89 €	-8,6%
Bayonne-Anglet-Biarritz	85,1%	-1,0%	409 €	-0,4%	348 €	-1,4%	60,6%	12,2%	258 €	-5,9%	157 €	5,6%
Bordeaux	78,4%	6,6%	346 €	39,0%	271 €	48,2%	63,3%	9,0%	257 €	3,0%	163 €	12,3%
Cannes	72,1%	-16,9%	482 €	-0,3%	348 €	-17,2%	57,3%	-0,7%	369 €	2,9%	211 €	2,2%
Dijon	73,1%	2,3%	135 €	-2,6%	99 €	-0,3%	58,5%	2,0%	130 €	-1,0%	76 €	1,0%
Lille	54,0%	12,8%	137 €	13,2%	74 €	27,7%	61,9%	16,1%	142 €	9,1%	88 €	26,7%
Lyon	72,0%	7,3%	157 €	6,7%	113 €	14,5%	68,8%	4,2%	155 €	4,1%	106 €	8,4%
Marseille	79,1%	-7,6%	184 €	25,8%	145 €	16,2%	65,1%	1,9%	156 €	10,6%	102 €	12,7%
Monaco	81,0%	-3,5%	446 €	5,9%	361 €	2,2%	67,0%	0,5%	339 €	2,3%	227 €	2,8%
Montpellier	79,9%	3,4%	158 €	11,1%	126 €	14,9%	65,4%	3,4%	145 €	8,0%	95 €	11,7%
Nice	85,2%	-9,9%	248 €	-5,3%	212 €	-14,7%	69,6%	-0,3%	206 €	-0,1%	143 €	-0,4%
Strasbourg	67,2%	-4,7%	111 €	-0,3%	75 €	-5,0%	62,3%	2,9%	116 €	-3,1%	72 €	-0,3%
Toulouse	68,5%	1,7%	109 €	-1,6%	75 €	0,1%	71,5%	1,5%	124 €	3,9%	89 €	5,5%

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
Aix en Provence	81,5%	-2,1%	91 €	16,0%	74 €	13,5%	62,5%	-1,9%	84 €	6,2%	52 €	4,1%
Avignon	94,0%	-3,8%	161 €	2,9%	152 €	-1,0%	67,1%	-6,6%	111 €	2,4%	75 €	-4,3%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Bordeaux	79,6%	6,2%	99 €	18,0%	79 €	25,3%	64,7%	-1,3%	98 €	4,9%	63 €	3,6%
Cannes	76,8%	-6,1%	122 €	12,4%	94 €	5,6%	54,1%	-1,6%	112 €	3,3%	61 €	1,7%
Dijon	71,0%	-13,7%	98 €	4,6%	70 €	-9,8%	54,3%	-13,8%	95 €	3,7%	52 €	-10,6%
Grenoble	43,5%	-13,9%	86 €	-7,3%	37 €	-20,2%	53,0%	1,7%	92 €	-3,1%	49 €	-1,4%
Le Havre	65,7%	-4,5%	88 €	-5,4%	58 €	-9,7%	57,5%	-9,0%	89 €	-0,4%	51 €	-9,3%
Lille	52,4%	-5,6%	91 €	13,8%	48 €	7,3%	62,8%	3,5%	97 €	7,2%	61 €	10,9%
Lyon	66,4%	4,4%	102 €	19,3%	68 €	24,5%	63,4%	0,0%	102 €	4,9%	65 €	4,9%
Marseille	76,0%	-5,2%	107 €	13,8%	81 €	7,9%	66,7%	-3,6%	99 €	4,8%	66 €	1,0%
Montpellier	81,2%	11,1%	90 €	3,8%	73 €	15,3%	68,1%	5,8%	91 €	3,3%	62 €	9,4%
Nancy	73,3%	-10,3%	88 €	6,5%	65 €	-4,5%	65,5%	-7,6%	92 €	4,6%	60 €	-3,3%
Nantes	63,9%	1,7%	78 €	-3,0%	50 €	-1,3%	65,8%	6,0%	89 €	1,1%	59 €	7,2%
Niort	63,8%	6,7%	80 €	4,2%	51 €	11,2%	55,0%	4,4%	81 €	1,1%	45 €	5,5%
Nice	83,3%	-9,4%	136 €	3,4%	113 €	-6,4%	64,1%	-8,4%	114 €	2,4%	73 €	-6,3%
Pau	48,2%	-14,0%	77 €	-11,0%	37 €	-23,4%	51,4%	-3,3%	77 €	-3,3%	39 €	-6,6%
Reims	74,9%	-1,9%	102 €	-6,2%	76 €	-8,0%	67,5%	5,8%	106 €	-1,1%	71 €	4,7%
Rennes	51,6%	-10,5%	76 €	-7,6%	39 €	-17,2%	54,5%	-0,3%	89 €	-2,2%	48 €	-2,4%
Rouen	69,4%	-10,8%	95 €	5,3%	66 €	-6,0%	57,0%	-9,1%	95 €	3,7%	54 €	-5,8%
Saint Etienne	41,1%	0,1%	89 €	9,1%	36 €	9,1%	45,4%	7,0%	92 €	10,2%	42 €	17,9%
Strasbourg	71,0%	-3,7%	84 €	-2,5%	60 €	-6,0%	60,9%	-0,4%	92 €	-2,1%	56 €	-2,5%
Toulouse	63,0%	8,1%	83 €	-3,7%	52 €	4,1%	60,0%	2,1%	96 €	0,6%	58 €	2,8%

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Performances Main cities in Regions

July 2016



Main cities in regions – Budget and Super Budget

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
Aix en Provence	72,2%	-1,1%	67 €	2,2%	49 €	1,0%	62,0%	4,3%	65 €	2,4%	40 €	6,8%
Angers	59,7%	1,8%	55 €	4,5%	33 €	6,3%	58,9%	-0,9%	64 €	0,5%	38 €	-0,4%
Avignon	86,7%	-5,7%	99 €	7,3%	86 €	1,2%	61,4%	-4,1%	70 €	0,4%	43 €	-3,7%
Bayonne-Anglet-Biarritz	79,9%	-4,0%	87 €	9,5%	70 €	5,1%	59,9%	-1,6%	63 €	2,4%	38 €	0,8%
Bordeaux	74,7%	9,0%	65 €	10,3%	48 €	20,2%	68,0%	3,4%	68 €	1,2%	47 €	4,7%
Dijon	78,1%	-9,5%	63 €	5,6%	49 €	-4,4%	67,2%	-5,2%	61 €	2,6%	41 €	-2,8%
Grenoble	43,2%	-17,3%	55 €	-2,3%	24 €	-19,2%	52,2%	-0,4%	59 €	-3,1%	31 €	-3,4%
Le Havre	59,3%	-4,8%	59 €	1,7%	35 €	-3,1%	48,4%	-6,5%	59 €	2,5%	29 €	-4,2%
Lille	57,6%	-2,0%	66 €	6,5%	38 €	4,4%	68,9%	3,9%	75 €	7,3%	52 €	11,5%
Lyon	68,3%	11,7%	74 €	19,2%	50 €	33,1%	68,1%	3,8%	77 €	4,6%	52 €	8,6%
Marseille	71,4%	-1,7%	71 €	17,2%	51 €	15,2%	61,6%	-4,2%	69 €	4,9%	43 €	0,5%
Metz	70,1%	-10,5%	52 €	-2,4%	37 €	-12,7%	62,9%	-4,9%	60 €	2,7%	38 €	-2,3%
Montpellier	78,4%	8,9%	66 €	-4,3%	52 €	4,2%	66,6%	-0,7%	70 €	0,2%	46 €	-0,5%
Nancy	63,5%	-13,9%	57 €	3,8%	36 €	-10,6%	68,9%	-0,9%	64 €	2,6%	44 €	1,7%
Nantes	56,9%	-0,6%	57 €	-2,5%	32 €	-3,1%	64,2%	7,7%	66 €	0,5%	43 €	8,2%
Niort	61,2%	4,9%	56 €	-2,0%	34 €	2,8%	53,3%	0,2%	57 €	-2,6%	30 €	-2,4%
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	55,2%	-6,3%	56 €	-1,3%	31 €	-7,5%	65,7%	5,4%	64 €	-0,9%	42 €	4,5%
Rouen	69,4%	6,9%	58 €	-1,6%	40 €	5,2%	62,8%	4,8%	63 €	0,3%	39 €	5,1%
Saint Etienne	43,0%	-0,6%	60 €	-6,4%	26 €	-6,9%	50,9%	3,0%	73 €	5,8%	37 €	9,0%
Strasbourg	69,8%	-8,3%	59 €	0,8%	41 €	-7,6%	63,5%	-2,5%	64 €	0,2%	40 €	-2,3%
Toulouse	60,2%	7,1%	59 €	-4,0%	36 €	2,8%	63,5%	5,0%	68 €	0,2%	43 €	5,2%

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
	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1	2016	Var /n-1
Angers	59,0%	9,4%	38 €	0,4%	23 €	9,8%	59,0%	5,7%	40 €	0,4%	24 €	6,2%
Avignon	82,2%	0,4%	50 €	4,7%	41 €	5,1%	58,4%	-7,4%	38 €	3,2%	22 €	-4,4%
Bayonne-Anglet-Biarritz	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-	n.d.	-
Bordeaux	74,6%	0,8%	45 €	8,6%	33 €	9,4%	65,7%	-2,6%	42 €	3,0%	28 €	0,3%
Cannes	75,2%	-10,3%	56 €	-0,6%	42 €	-10,8%	60,6%	-9,3%	49 €	0,7%	29 €	-8,7%
Dijon	80,6%	9,5%	39 €	-4,4%	31 €	4,7%	65,2%	0,8%	38 €	-0,5%	25 €	0,2%
Grenoble	44,5%	-2,0%	35 €	-5,4%	16 €	-7,3%	48,0%	-10,9%	37 €	-0,1%	18 €	-11,0%
Le Havre	69,3%	-2,8%	42 €	4,4%	29 €	1,5%	58,2%	-4,5%	39 €	1,2%	23 €	-3,3%
Lille	52,3%	-6,6%	42 €	4,5%	22 €	-2,3%	63,7%	2,4%	45 €	6,7%	28 €	9,2%
Lyon	66,5%	6,7%	44 €	12,6%	30 €	20,1%	66,5%	-0,3%	44 €	4,8%	29 €	4,5%
Marseille	70,2%	-1,9%	49 €	10,1%	34 €	8,0%	60,0%	-5,3%	46 €	6,0%	28 €	0,4%
Metz	68,1%	0,5%	36 €	-2,9%	24 €	-2,4%	65,3%	6,0%	37 €	0,3%	24 €	6,3%
Montpellier	78,6%	1,0%	46 €	-0,1%	36 €	0,9%	61,3%	-5,5%	39 €	1,3%	24 €	-4,3%
Nancy	61,8%	1,8%	39 €	0,3%	24 €	2,1%	60,0%	-2,3%	39 €	2,4%	23 €	0,1%
Nantes	63,1%	-2,5%	44 €	0,7%	27 €	-1,8%	67,2%	0,8%	45 €	2,0%	30 €	2,8%
Niort	79,0%	6,3%	36 €	-3,4%	29 €	2,7%	61,9%	1,5%	36 €	-1,4%	22 €	0,0%
Pau	54,1%	-11,4%	38 €	3,8%	20 €	-8,0%	49,2%	-6,7%	35 €	4,6%	17 €	-2,4%
Rennes	49,6%	-5,6%	39 €	0,5%	20 €	-5,1%	60,5%	2,5%	40 €	1,5%	24 €	4,0%
Rouen	63,3%	-9,7%	44 €	4,1%	28 €	-6,0%	62,0%	-3,9%	42 €	2,8%	26 €	-1,3%
Saint Etienne	62,4%	10,1%	39 €	-2,3%	25 €	7,6%	63,7%	6,8%	42 €	4,5%	27 €	11,6%
Strasbourg	64,9%	5,4%	39 €	-2,2%	25 €	3,1%	60,2%	3,3%	40 €	0,2%	24 €	3,5%
Toulouse	70,2%	3,3%	40 €	2,8%	28 €	6,1%	70,5%	1,1%	43 €	4,8%	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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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
• 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)	• 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).	• 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	• 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	• 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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