

Accor French Hotels 1Q13 SURVEY

 Survey completed April 1st, 2013

 MAJOR TAKEAWAYS

No. of responses

Our survey includes a total of 53 respondents. We surveyed CEOs and senior executives from Accor franchised hotels in France, which include responses from 16 different regions. 1/3rd of the survey responses are from Ile de France, and 10% of the survey results are from Mercure branded hotels, with the remainder from the Ibis branded hotels.

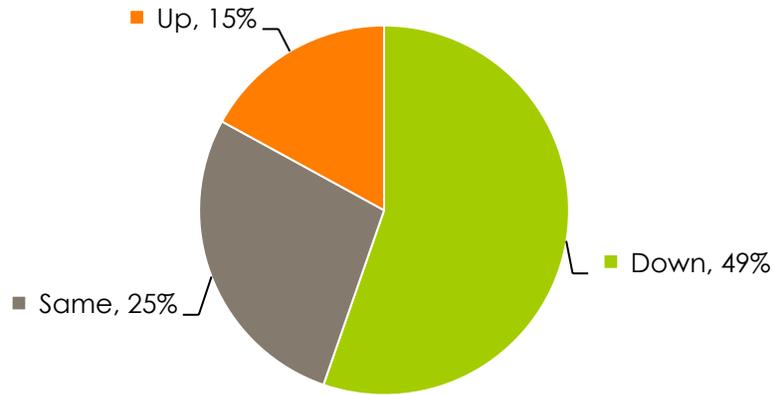
Respondent REVPAR Rate	4Q12	1Q13
Average	0.25 %	-4.18 %

Brands	Count	Percentage
Ibis	17	32%
Mercure	1	2%
Total	53	100%

Regions	Count	Percentage
Ile de France	17	32%
Nord-Pas de Calais	5	9%
Provence-Alpes-Côte d'Azur	5	9%
Bretagne	3	6%
Languedoc-Roussillon	3	6%
Lorraine	3	6%
Basse-Normandie	2	4%
Bourgogne	2	4%
Midi-Pyrénées	2	4%
Pays de la Loire	2	4%
Picardie	2	4%
Poitou-Charentes	2	4%
Rhône-Alpes	2	4%
ALSACE	1	2%
Aquitaine	1	2%
Champagne Ardenne	1	2%
Total	53	100%

QUESTION 1

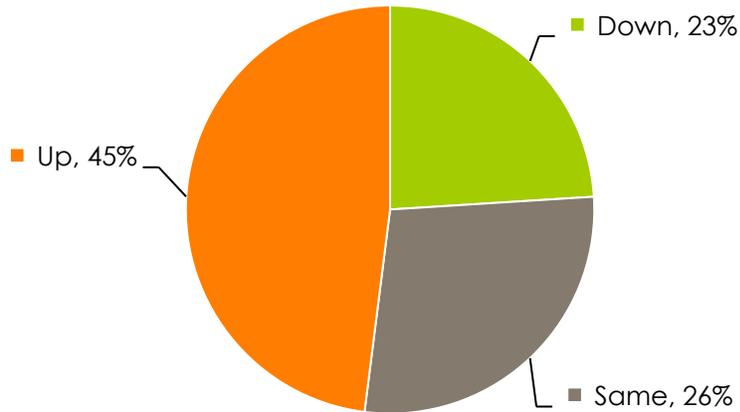
Looking ahead, what do you expect your 2Q13 occupancy rates to be (relative to 2Q 2012)?



	Count	Percentage
Down	26	49%
Same	13	25%
Up	8	15%
Total	53	100%

QUESTION 2

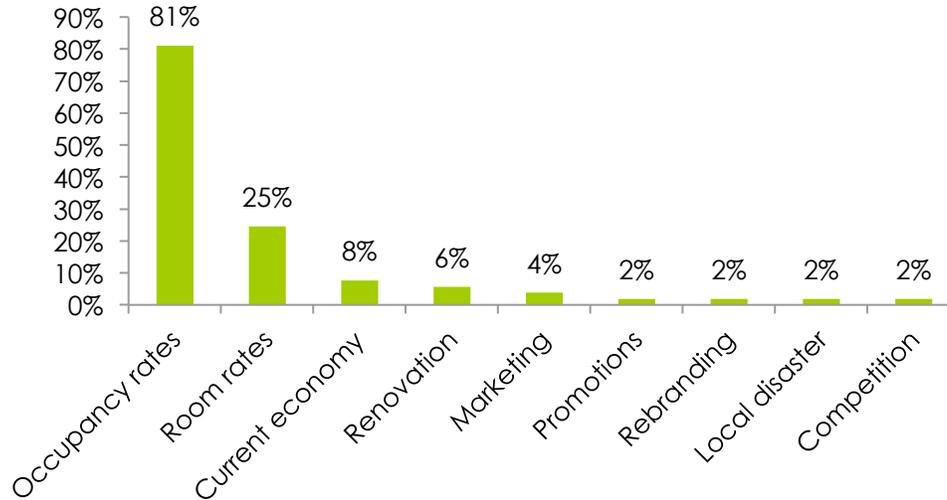
Looking ahead, what do you expect your 2Q13 occupancy rates to be (relative to 2Q 2012)?



	Count	Percentage
Down	12	23%
Same	14	26%
Up	24	45%
Total	53	100%

QUESTION 3

What's been the biggest driver of your 1Q13 REVPAR – better occupancy rates, higher room rates, or something else?



	Count	Percentage
Occupancy rates	43	81%
Room rates	13	25%
Current economy	4	8%
Renovation	3	6%
Marketing	2	4%
Promotions	1	2%
Rebranding	1	2%
Local disaster	1	2%
Competition	1	2%
Total	53	100%