

EDITION 2011

Chiffres clés

Key figures

The French Riviera refers to the county of Alpes-Maritimes including the Principality of Monaco.

The French Riviera refers to the county of Alpes-Maritimes including the Principality of Monaco. Its resident population exceeds one million inhabitants, of whom 12% are foreigners.

The French Riviera Tourism Observatory provides data on the economy of tourism, related to stays and cruises, which excludes local residents and excursionists not generating any night.

WORLD TOURISM & THE FRENCH RIVIERA

Travellers are considered as tourists if : they are not in their usual environment, for a stay lasting at least one night and a maximum of one year, for any purpose not related to an activity generating income from the visited place. Visitors staying less than 24h are defined as excursionnists or same-day visitors.

WORLD INTERNATIONAL TOURISM

Over 935 million international tourists in the world in 2010 (+6.7% compared to 2009), among them 471 million in Europe (+3%). Source UNWTO.

This total results from a detailed account of entries per country (an american tourist visiting Europe will be counted every time he enters one of european states). Tourists staying in a country several times in a year will be counted as so many stays. Tourists staying within their country boundaries as well as same-day visitors are not aggregated at a world level.

THE FRENCH RIVIERA :
1% OF WORLD INTERNATIONAL TOURISM

This share is calculated on international tourists, including outgoing travel, and taking into account multiple destinations in a single trip.

INTERNATIONAL TOURISM IN FRANCE

France ranks 1st among destinations for the number of international tourists, with 76.8 million stays in 2010 (same in 2009), above the USA and China, having overtaken Spain. These stays altogether represent 515 million overnight stays in France, with an average length of stay of 6,7 nights (however 46 % of stays in France are only 1 to 3 nights long).

The french tourism balance (difference between expenditures in France by foreign visitors and expenditures abroad by the French) shows a positive result of 6.4 billion euros in 2010 (-18% vs 2009, but -45% vs 2007). Foreigners spend 59 euros per night in France.

THE FRENCH RIVIERA :
6% OF FOREIGN TOURISTS TO FRANCE,
7.5% OF FOREIGN HOTEL NIGHTS IN FRANCE
8 % OF RECEIPTS FROM INTERNATIONAL TOURISM IN FRANCE

DOMESTIC TOURISM IN FRANCE

In 2010, the French made 176 million trips within France for a total of 940 million overnight stays (5.3 nights on average). For personal purpose trips alone (non professional), PACA region ranks 3rd behind Ile de France and Rhône-Alpes, with 16.2 million trips. The French spend 41 euros per night in France.

THE FRENCH RIVIERA :
4.5% OF FRENCH AND FOREIGN OVERNIGHT STAYS IN FRANCE

ACCESS TRANSPORTATION

AIRPORTS

Nice Côte d'Azur Airport

- 1st after Paris with 9 603 014 passengers in 2010 (-2.3%), for a maximum capacity of 13 million
- 105 destinations served in summer by 58 airlines and to 35 countries
- 1 274 flight frequencies per week
- 3rd european airport for business aviation behind Le Bourget and Geneva : 73 740 passengers in 2010 (+ 15.3%)

Cannes-Mandelieu Airport

- 3rd french airport for business aviation with a total of 70 735 passengers in 2010 (-1.2%), including 10 950 for business aviation (+3.1%).

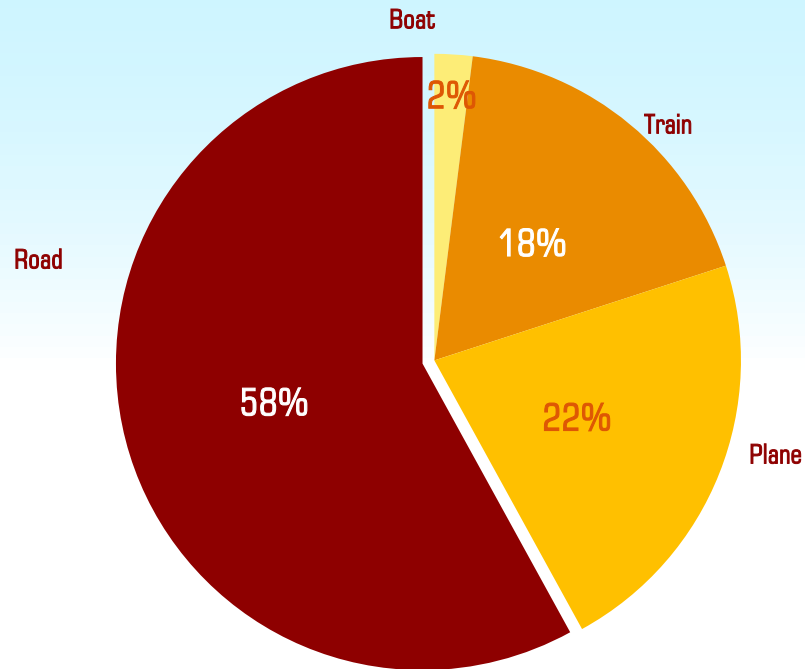
HARBOURS AND CRUISES

36 pleasure ports offering 18 271 boat sites

729 stopovers and 994 055 cruise passengers in 2010 (+ 1.4 % compared to 2009) in 6 cruise ports (Villefranche, Monaco, Cannes, Nice, Antibes and Golfe Juan). 92% of passengers are only on stopover cruises.

MEANS OF TRANSPORT USED BY TOURISTS

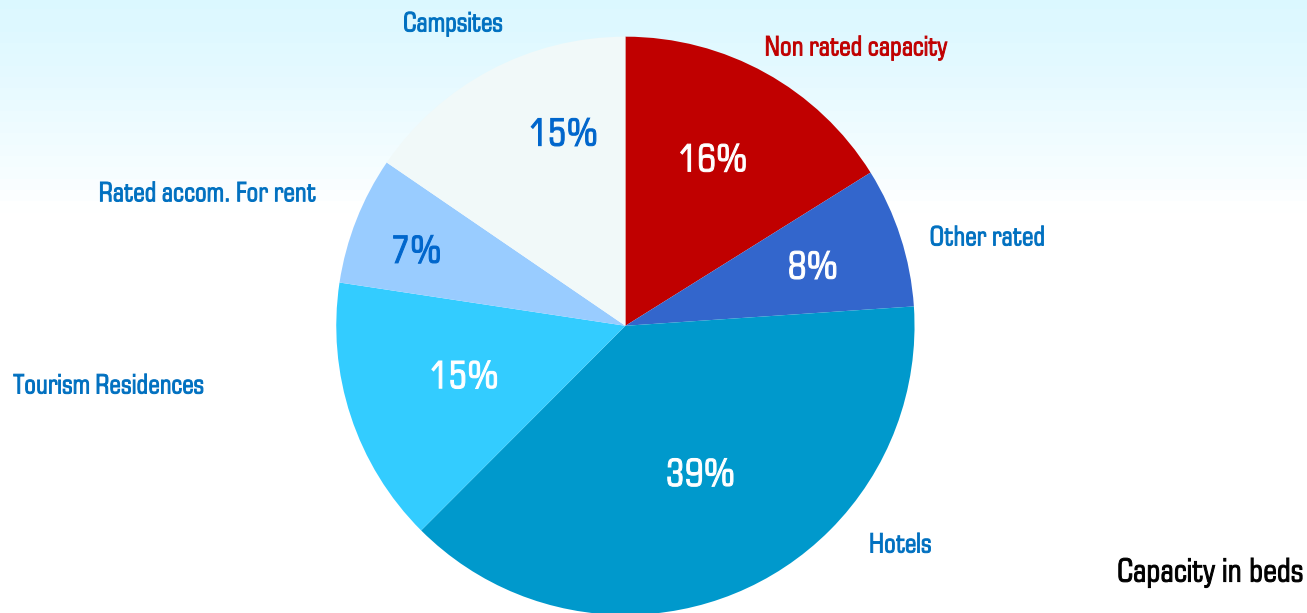
Access transportation to reach the French Riviera, excluding same-day visitors



The plane is used by 12 % of the French, but 35 % of the foreigners. The « Road » mode includes groups in coaches and rented vehicles.

ACCOMMODATION SUPPLY

152 000 BEDS IN COMMERCIAL ESTABLISHMENTS



84 % OF BEDS ARE OFFICIALLY RATED

ACCOMMODATION CAPACITY - supply for rent as of 1.1.2009

	Establishments	Beds
Hotels (rated)	658	58 482
Campsites (rated)*	97	23 439
Tourism Residences	47	22 612
Accommodation for rent (rated)	2 803	10 858
Holiday villages (rated)	17	6 613
Accommodation for young people	25	1 945
Gites	514	2 313
Holiday centres « Maisons familiales de vacances »	9	999
Total rated capacity	4 170	127 261
Non rated hotel Residences	50	11 191
Non rated Hotels	138	3 926
Other Residences	37	3 270
Private holiday centres**	25	2 425
Mountain refuges and gites	66	1 674
Non rated villages and centres	6	1 017
Bed and Breakfast « Chambres d'hôtes »	86	593
Non rated Campsites	7	339
Total commercial capacity	4 585	151 696

* Includes campsites labelled as « gites » ; 1 camping place is counted as 3 beds

** corporate accommodations, pension funds, administrations,...

Capacities in beds (persons)

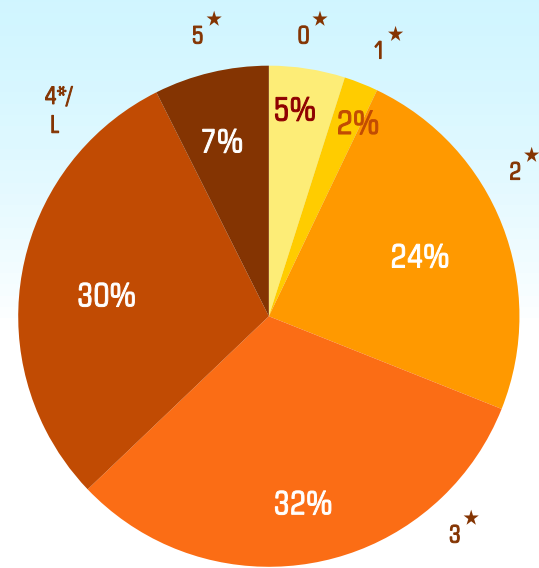
Excluding : non rated accommodation for rent, time-share, centres for children, student residences, language schools, boats and caravans.

ACCOMMODATION SUPPLY

OVER ONE THIRD OF HOTEL CAPACITY IN 4* OR 5*

As of 1.1.2010

Categ.	Hotels	Rooms	Beds
5*	16	2 178	4 473
4* & 4 L	84	8 656	17 331
3*	205	9 255	19 679
2*	256	6 956	14 862
1*	38	644	1 410
0*	50	1 450	3 965
Total	649	29 139	61 720

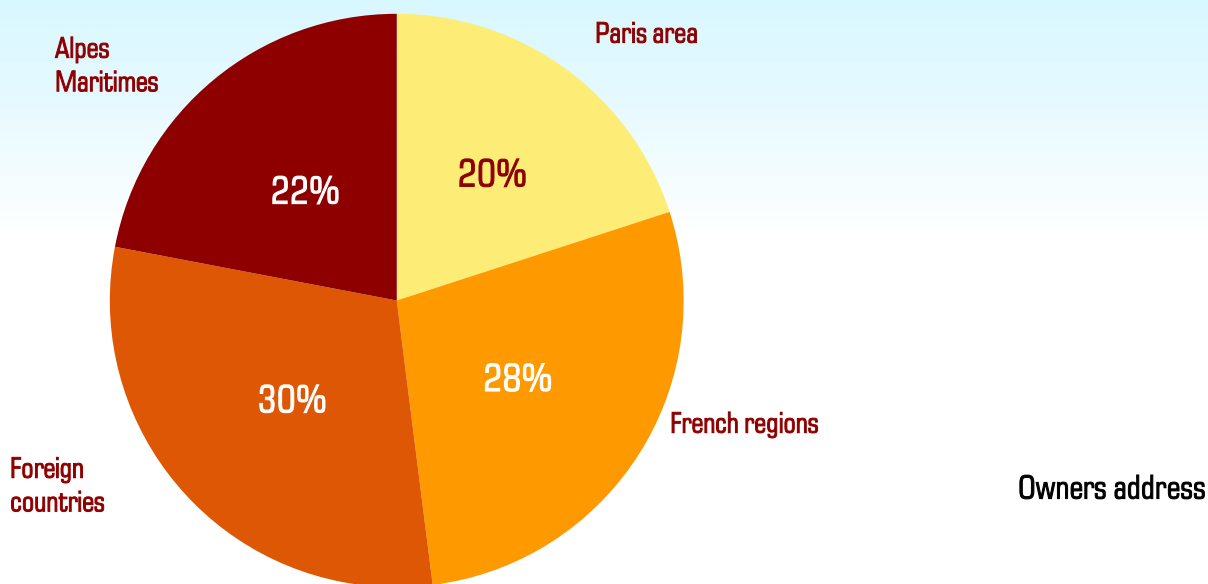


% of rated rooms

Almost one 4-5* hotel room in France out of 6 is located on the French Riviera.

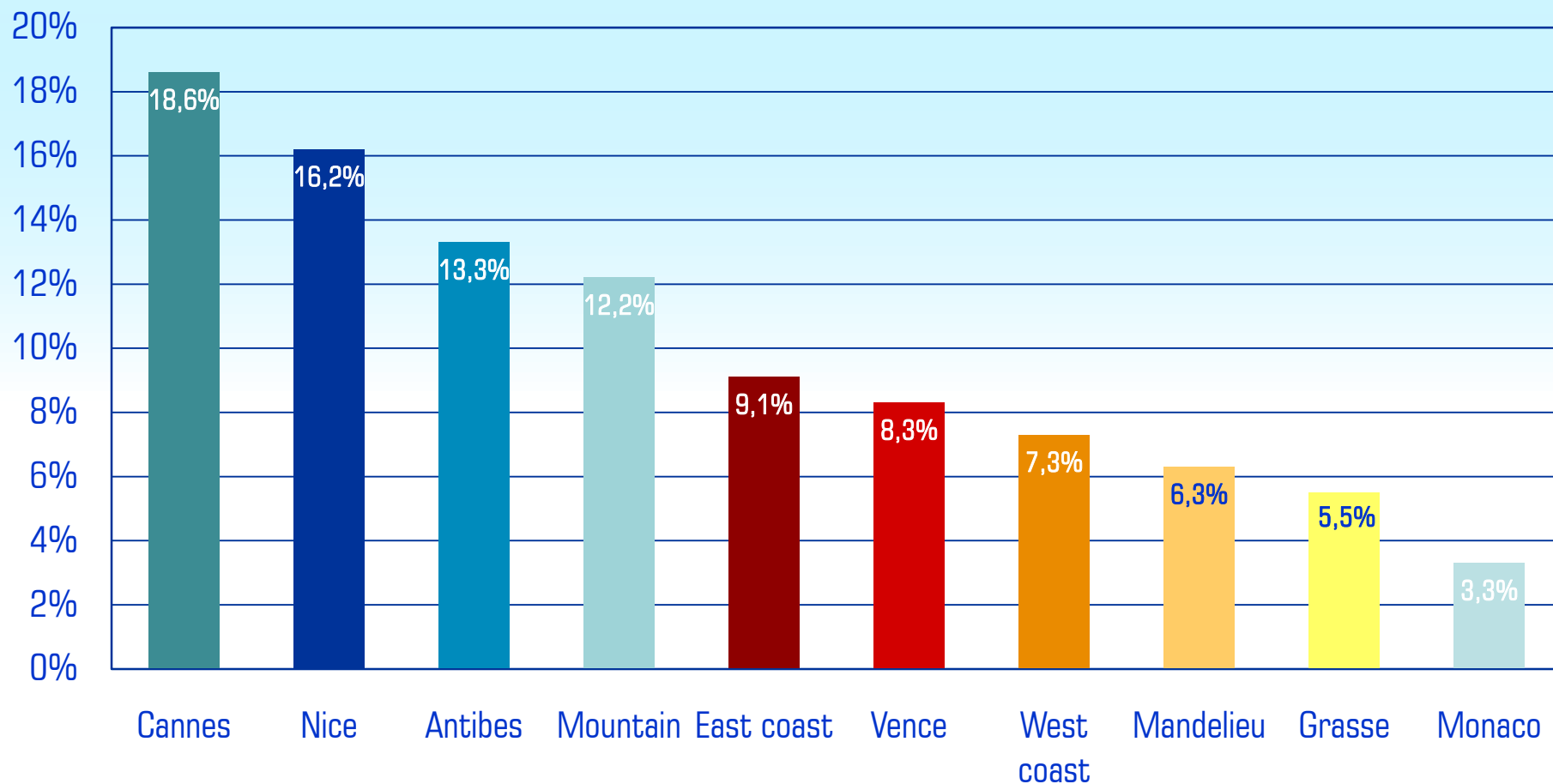
160 000 SECOND HOMES

The county of Alpes-Maritimes represents 5.4 % of all second homes in France and 34 % of second homes in the PACA region.



Around 120 000 owners are not residents in the Alpes-Maritimes, including almost 48 000 residing abroad (51 % in Italy, 16 % in the British Isles, 8% in Scandinavia and 6% in Belgium-Luxembourg).

GEOGRAPHICAL DISTRIBUTION OF BEDS



Total capacity (2009) in beds in commercial accommodations. Cannes-Mandelieu area groups 25% of the total beds.

WINTER SPORTS 15 RESORTS, 700 KM OF SLOPES

Resorts 2010/11	Classified (1)	Regional (2)	Cross-country centres (3)	TOTAL
Number of resorts	3	8	4	15
Slopes for alpine skiing	136	96	0	232
Slopes for cross-country skiing	0	24	11	35
Km alpine slopes	345	136	0	481
Km cross-country slopes	0	142	57	199
Ski-lifts	61	35	0	96

(1) Isola 2000, Auron, Valberg

(2) Gréolières, La Colmiane, Roubion-les-Buisses, l'Audibergue, Val Pelens, Turini-Camp d'Argent, Peïra Cava (provisoirement fermée), Beuil-les-Launes

(3) Le Boréon, Castérino, St-Dalmas-le-Selvage, Estenc-Entraunes

Accommodation capacity in the resorts : 8 805 beds in 242 establishments

Capacity excluding time-share, private centres, centres for children and second homes.

Total capacity in beds for all 16 communes with resorts : 12 352 beds in 485 establishments

BUSINESS TOURISM

CONVENTION AND EXHIBITION CENTRES

	Nb of rooms	Capacity of Auditorium	Capacity of Main hall	Total surface for exhibition (m ²)
ANTIBES PALAIS DES CONGRÈS *	12	500	500	2 000
CANNES PALAIS DES FESTIVALS	26	2 250	1 000	23 000
GRASSE PALAIS DES CONGRÈS	7	-	250	560
MANDELIEU CENTRE EXPO CONGRES	12	1 000	1 500	3 800
MENTON PALAIS DE L'EUROPE	7	-	1 000	1 700
MONACO GRIMALDI FORUM	25	1 850	2 000	10 000
NICE ACROPOLIS CONGRES ET EXPOS	22	2 500	1 750	24 000
VILLEFRANCHE CITADELLE	5	185	400	600

* Closed for renovation

THE CONVENTION CENTRES IN NICE, CANNES ET MONACO OFFER AUDITORIUMS WITH MORE THAN 1800 SEATS

OVER 30 PLACES FOR EVENTS, MEETINGS AND EXHIBITION FROM 70 TO 6600 SEATS

145 HOTELS FOR SEMINARS WITH
470 MEETING ROOMS OVER 50 M²

OTHER

- **5 212** restaurants (Monaco not included)
- **257** travel agencies (Monaco not included)
- **58** tourist offices
- **20** golf courses and **20** courses including 10 « 18-hole » courses
- **17** casinos (including **5** in Monaco)
- More than **130** museums and monuments opened to the public
- **100** parks and gardens opened to the public
- **10** leisure parks
- **200** private beaches
- **14** spas
- **1** thermal spa (Berthemont-les-Bains)

5 MILLION ADMISSIONS IN ALL ATTRACTIONS

This total of admissions in all attractions includes 3,2 million admissions (visitors and residents) in 102 museums, monuments and cultural sites opened to the public in 2010, including 3 119 877 admissions in 61 museums and monuments each counting more than 5 000 visitors (visitors stable compared to 2009).

MAJOR SITES ATTRACTING SEVERAL MILLION OF VISITORS

- Monaco : 7.5 millions de visiteurs (among them 654 895 visited the Oceanographic Museum in 2010).
- Old town, Promenade des Anglais and old Port in Nice
- La Croisette in Cannes
- Antibes cape and old town

OTHER SITES ATTRACTING MORE THAN ONE MILLION VISITORS

- Village of Saint Paul, Village of Eze, Cape Ferrat, Marineland leisure park (1 270 000 en 2010), Perfumeries in Grasse, Cimiez hill in Nice, Menton old town

OTHER SITES ATTRACTING BETWEEN 0.5 AND 1 MILLION VISITORS

- Glass factory in Biot (700 237), Potters' village in Vallauris, Citadel in Villefranche-sur-Mer

OTHER SITES ATTRACTING MORE THAN 300 000 VISITORS

•Phoenix tropical park in Nice (406 927), Mercantour national Park, Village of Gourdon, Lérins Islands, Village of Tourrettes-sur-Loup.

OTHER SITES ATTRACTING MORE THAN 100 000 VISITORS

Attractions

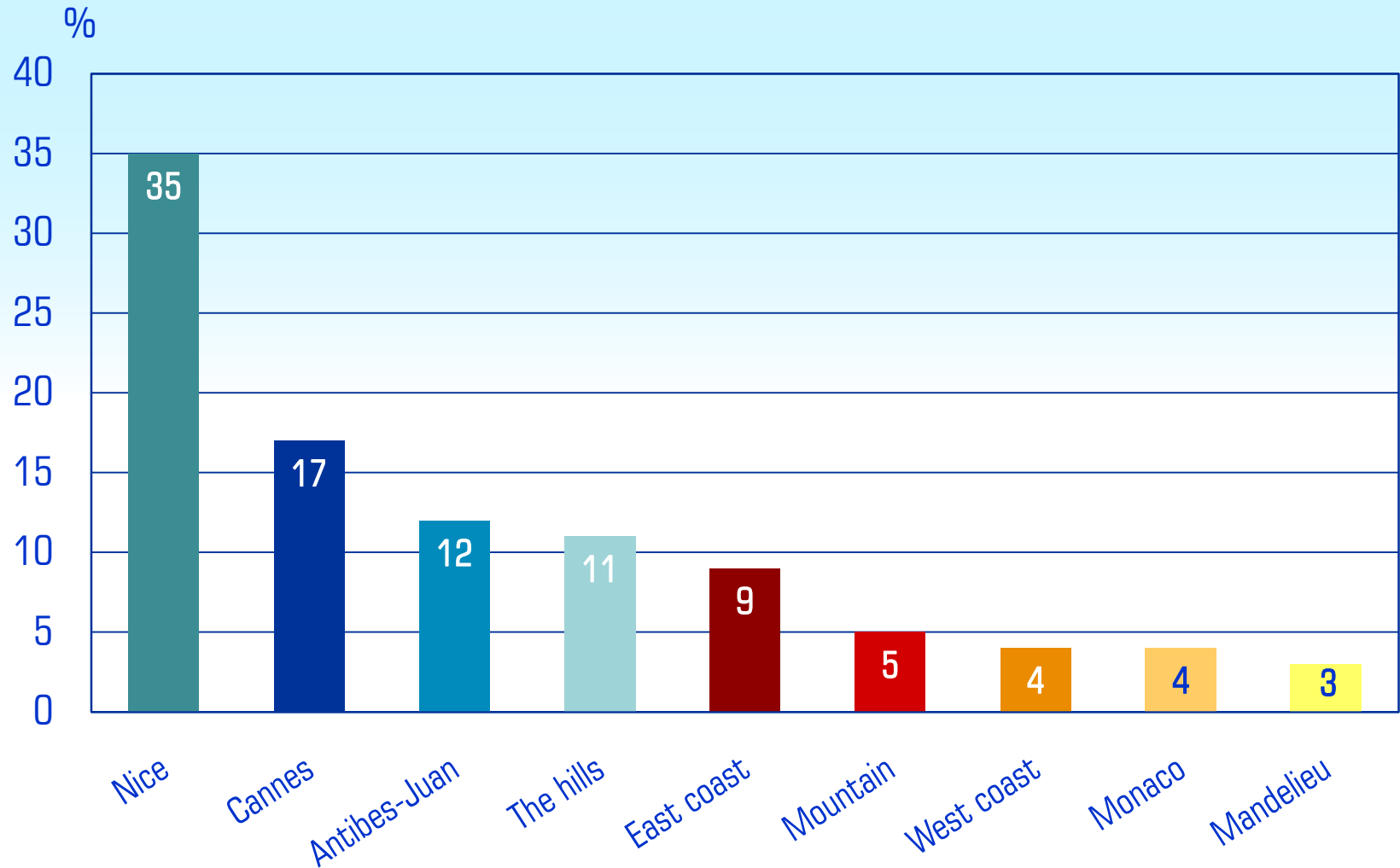
Visitors 2010

(Tourists and Residents)

Russian orthodox church in Nice	273 427
Maeght Foundation in Saint-Paul	165 736
MAMAC in Nice	162 951
Chagall national Museum in Nice	150 976
Rothschild Foundation in Saint-Jean	136 238
Matisse in Nice	135 715
Picasso in Antibes	132 968
Exotic garden in Monaco	128 788
Exotic garden in Eze	124 629
Race course in Cagnes-sur-Mer	105 532 <small>(2009)</small>

62% of all admissions in the 10 main museums and monuments

OVER 1 STAY OUT OF 3 IN NICE



600 000 TOURISTS IN THE MOUNTAIN AREA

Residents not included

IN WINTER (2006/7) 286 000 tourist stays in the snow area and 163 000 stays by residents of the Alpes-Maritimes and Monaco, staying 5,2 nights on average.

IN JULY-AUGUST (2009), in the mountain area (not including Préalpes d'Azur area) : 200 000 tourist stays (including 32% foreigners), staying on average 9.3 nights and spending 260 € per stay/person, and 104 000 stays by residents of the Alpes-Maritimes and Monaco, staying 11,1 nights on average.

THE TOTAL NUMBER OF NIGHTS IN THE SNOW ZONE of the Alpes-Maritimes (visitors and residents, all types of accommodation) totalled 2 565 384 nights in 2009/10 (+ 1,1 % compared to winter 2008/9).

THE MERCANTOUR NATIONAL PARK

Around 500 000 visitors go to the Mercantour Park each year, over 30 000 of them visit the Vallée des Merveilles. In 2007, 338 000 visitors between July 1st and September 15th. 2/3 are hikers, 35% of visitors were day-trippers travelling from home.

MOUNTAIN AREA : MOST VISITED ATTRACTIONS

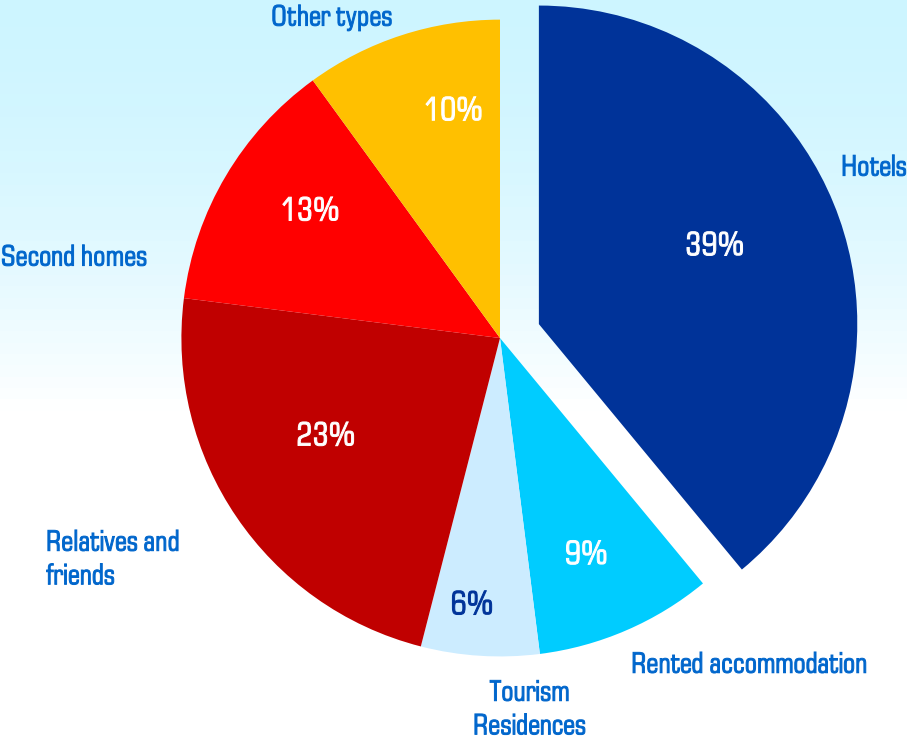
MOST VISITED ATTRACTIONS

(not included : natural sites, leisure centres and villages)

Visitors 2010

Alpha le Temps du Loup	St-Martin-Vésubie	50 733
Musée des Merveilles	Tende	30 194
Réserve des Monts d'Azur-Haut Thorenc	Andon	18 000
Maison du Parc national du Mercantour	Tende	14 384
Eglise N.D. des Fontaines	La Brigue	10 630
Arboretum Marcel Kroenlein	Roure	7 925
Monastère de Saorge	Saorge	6 789

40% OF STAYS IN HOTELS



The share of the main types of accommodation is reversed in terms of overnight stays : second homes and relatives/friends account for 52% of all overnight stays and hotels account for 14%.

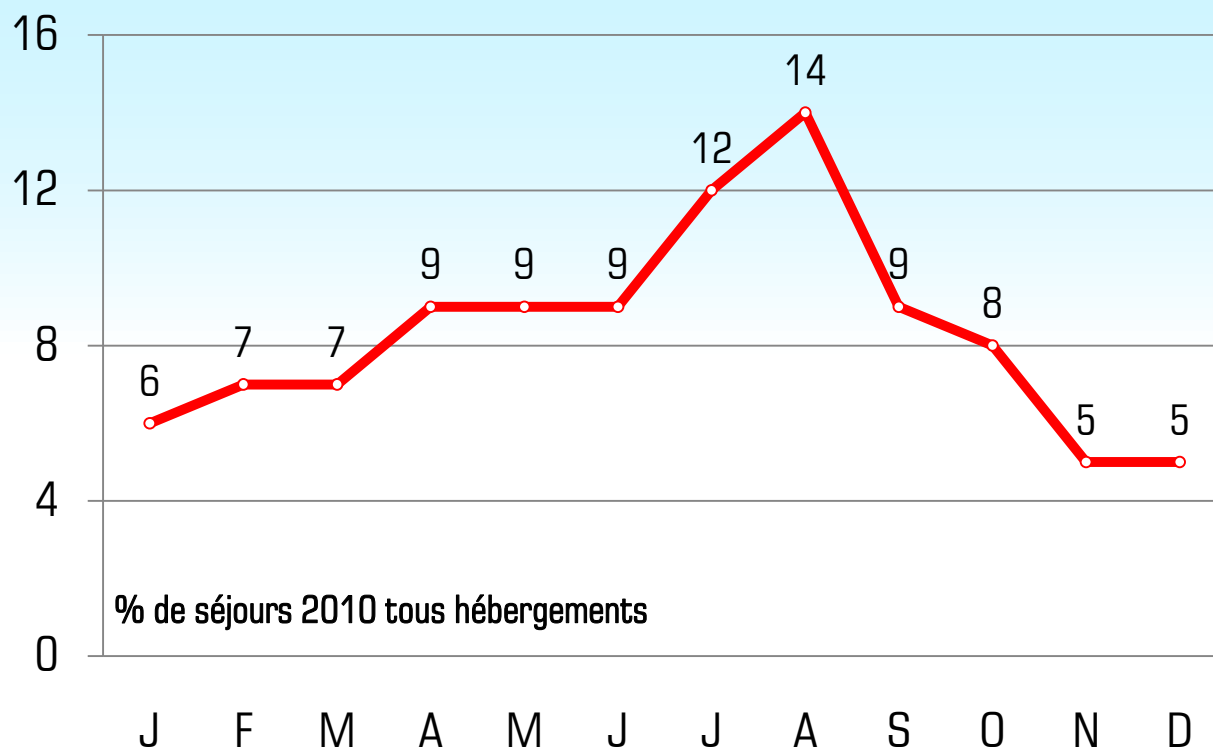
% of stays

60% OCCUPANCY RATE OVER THE YEAR

2010	J	F	M	A	M	J	J	A	S	O	N	D	YEAR
Hotels	37	40	44	54	66	71	78	84	72	55	38	34	57
Tourism Res.	50	54	59	59	67	69	82	88	76	60	43	44	63

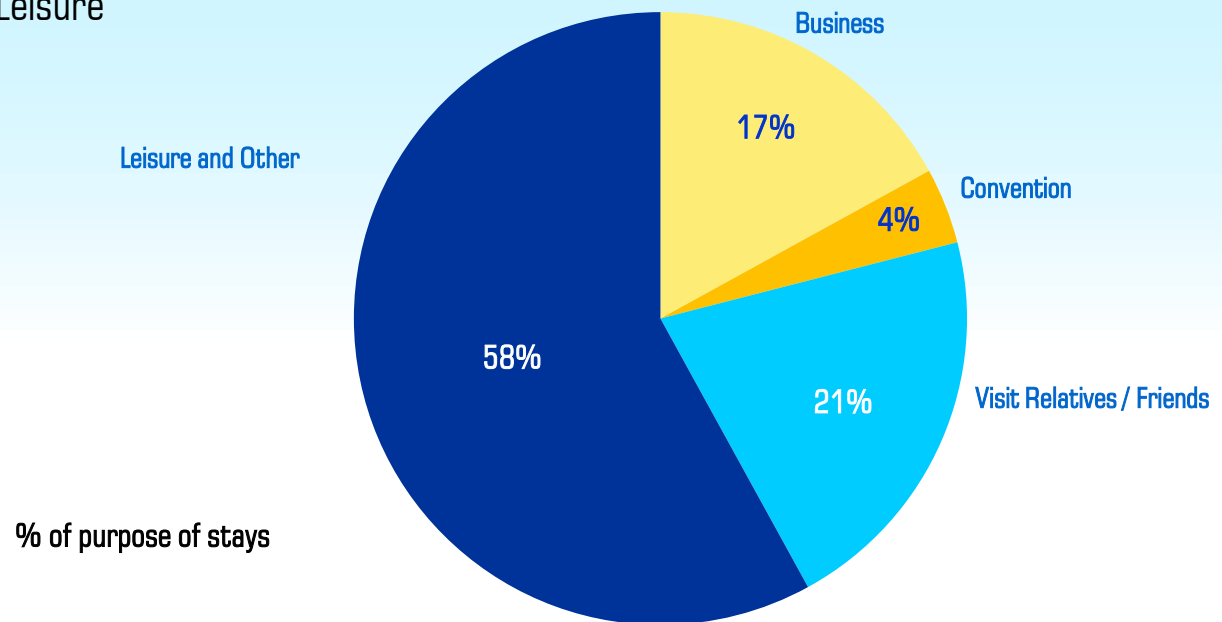
LESS THAN 1 OUT OF 2 STAYS IN THE SUMMER MONTHS

June to September
concentrate only 44%
of all arrivals



1 STAY OUT OF 5 FOR BUSINESS

Business visitors stay 4.5 nights on average, Leisure visitors stay 6.5 nights.



200 000 Convention visitors by plane spending
235€ per day (average 09-10)

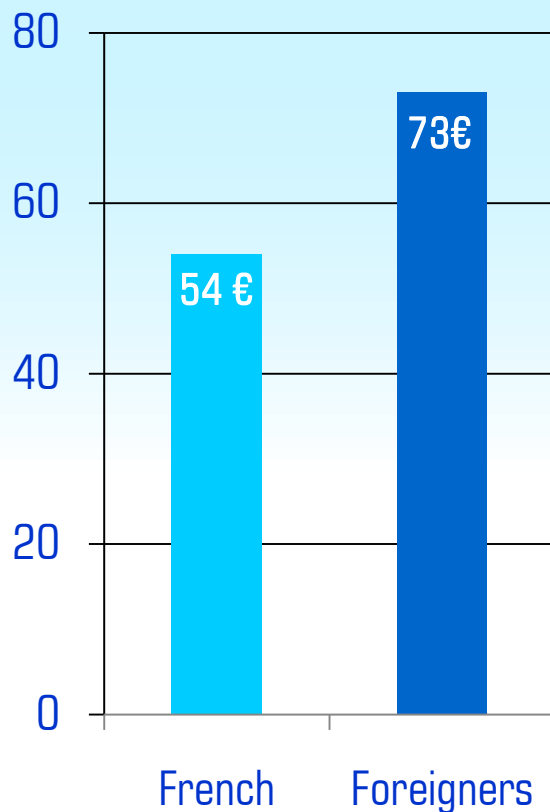
4.5 BILLION EUROS IN TOURIST EXPENDITURES

Tourist expenditures (2010) related to stays, excluding transport to reach the region, to which must be added the casinos games products : 422 million euros en 2009/10 (47.5% in Monaco).

69 € SPENT PER DAY BY AIR VISITORS

Air visitors average daily spending in 2010, excluding same day visitors, for all accommodations, resulting in an average spending per stay of 565 euros.

OVER ¼ OF TOTAL EXPENDITURES BY BUSINESS VISITORS



SPENDING PER DAY (AIR VISITORS - AVERAGE 09/10)

Short stay (1 to 3 nights).....	168 €
Long stay (4 nights and +).....	60 €
Commercial accommodation.....	105 €
Private accommodation.....	44 €
Business stay.....	123 €
Leisure stay.....	60 €
1 st stay.....	72 €
Repeat stay.....	67 €

Over 60 % of the total expenditure is made by foreign tourists

HOTEL REVENUE

Rated hotels 2009	Average room real rate	Revenue per room (RevPar)
Hotels 4*	226 €	122 €
Hotels 3*	93 €	54 €
Hotels 2*	65 €	35 €
Hotels 0-1 *	48 €	29 €

Based on real income, tax included, excluding catering.

VISITOR TAX

33 towns collected the visitor tax in 2009, for a total amount of 10 millions d'euros. This represents 37 % of the amount collected in PACA Region.

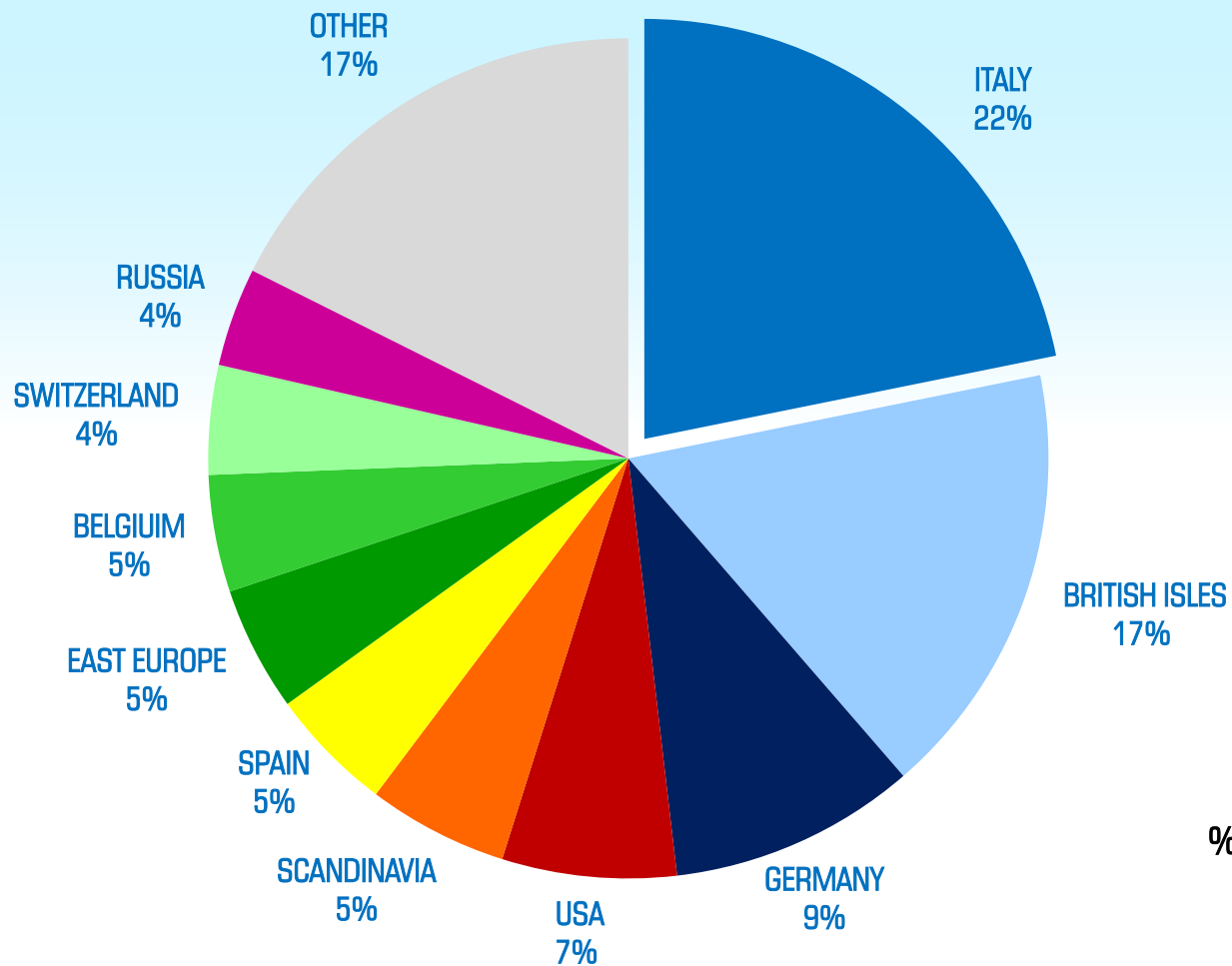
75 000 JOBS IN THE TOURISM INDUSTRY

This total represents 18 % of all jobs in the county of Alpes-Maritimes.

INSEE (national Institute for Statistics) estimation of the total employment directly generated by tourists spendings in 2003 = 49 333 (Monaco not included), representing 13,5 % of total employment in summer period. Independant working people are not included.

Seasonal jobs represent only 17,5% of total tourism employment.

OVER 50 % OF NIGHTS ARE SPENT BY FOREIGNERS



Of all arrivals, 44% are from foreign countries, with breakdown as shown

% of foreign visitors

Top tourist markets 2010	Thousand stays	%
1 Italy	1049	21.8
2 British Isles	809	16.8
3 Germany	459	9.5
4 USA	323	6.7
5 Scandinavia	263	5.4
6 Spain	234	4.8
7 East Europe	230	4.8
8 Belgium	218	4.5
9 Switzerland	204	4.2
10 Russia	183	3.8
11 Netherlands	181	3.8
12 Asia except Japan	97	2.0
13 Africa	91	1.9
14 Middle East	72	1.5
15 Canada	67	1.4
Other	340	7.1
TOTAL	4820	

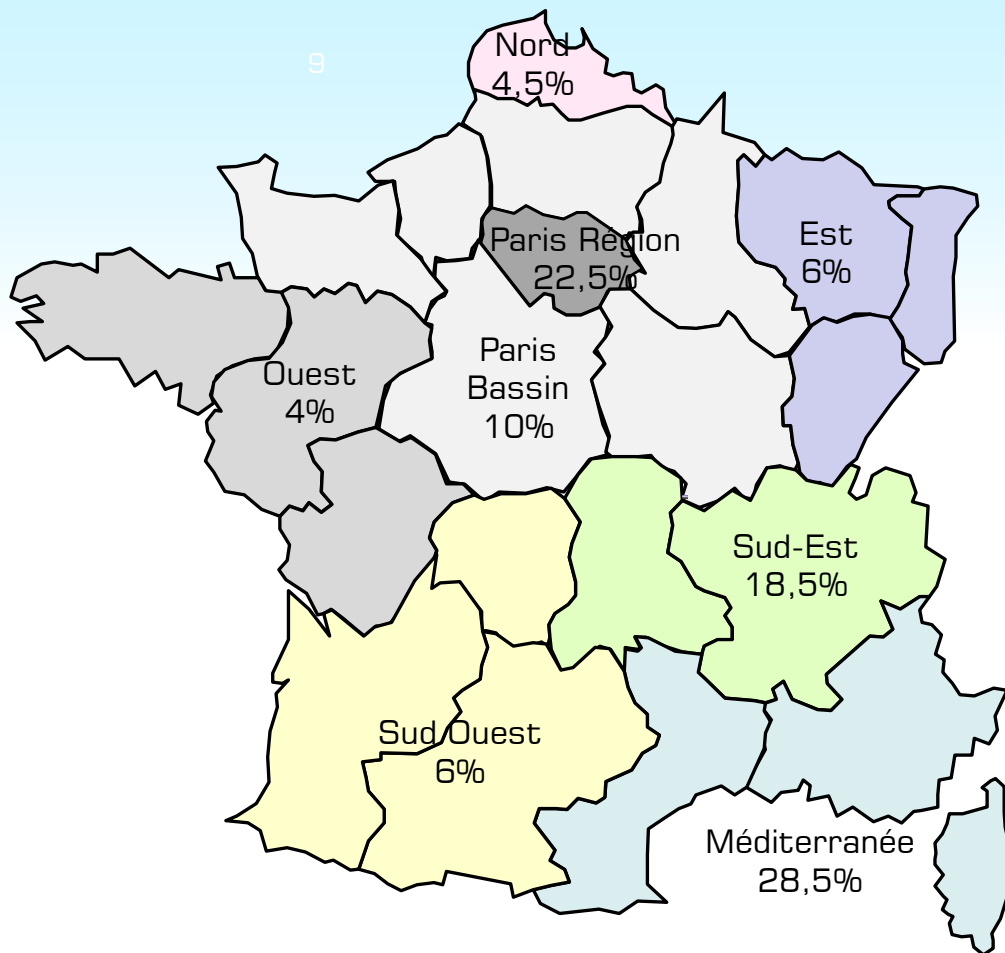
Previsional data

FOREIGNERS RATE (% of stays)

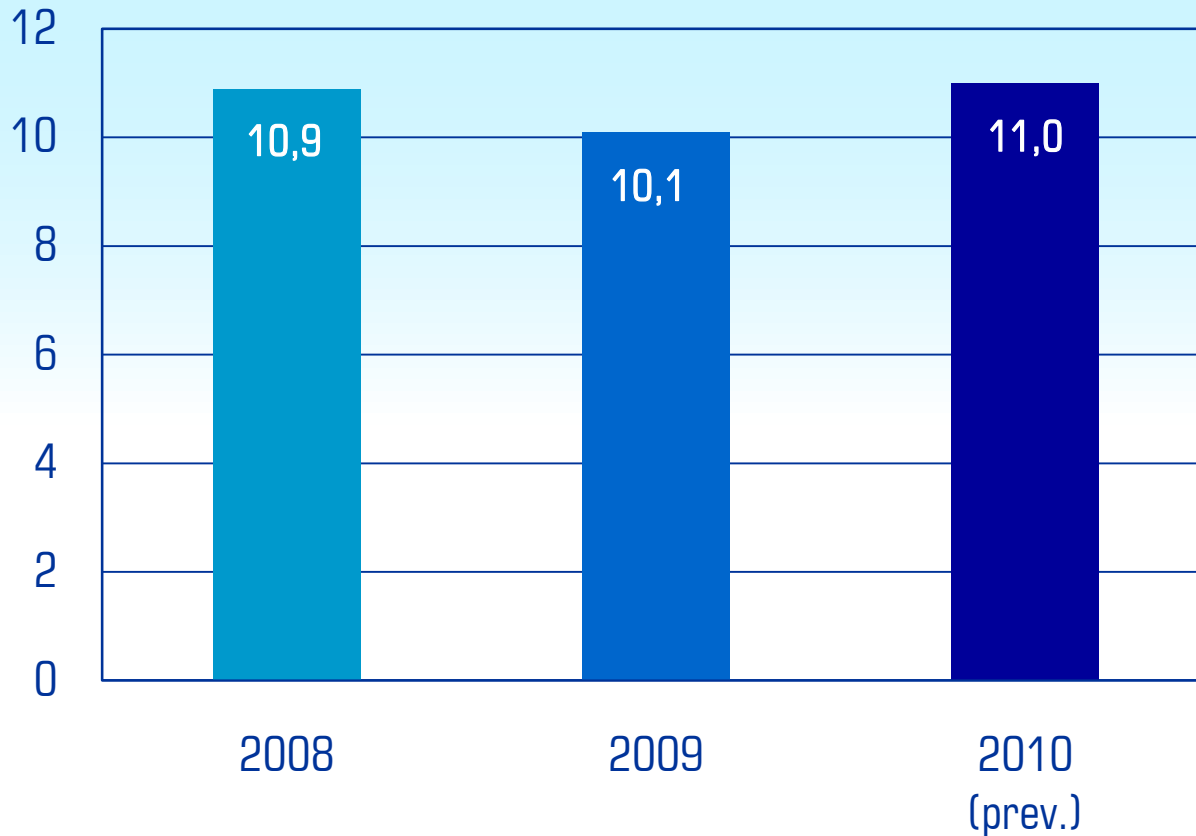
Hotels 0 star	22 %
Campsites	40 %
Tourism Residences	46 %
Hotels 4-5 stars	60 %
Hotels in Monaco	78 %

1/3 OF THE FRENCH ARE FROM PARIS

Over 5.8 french stays, with the following breakdown by region of origin (UDA Regions, 2008-09, excluding french overseas territories)



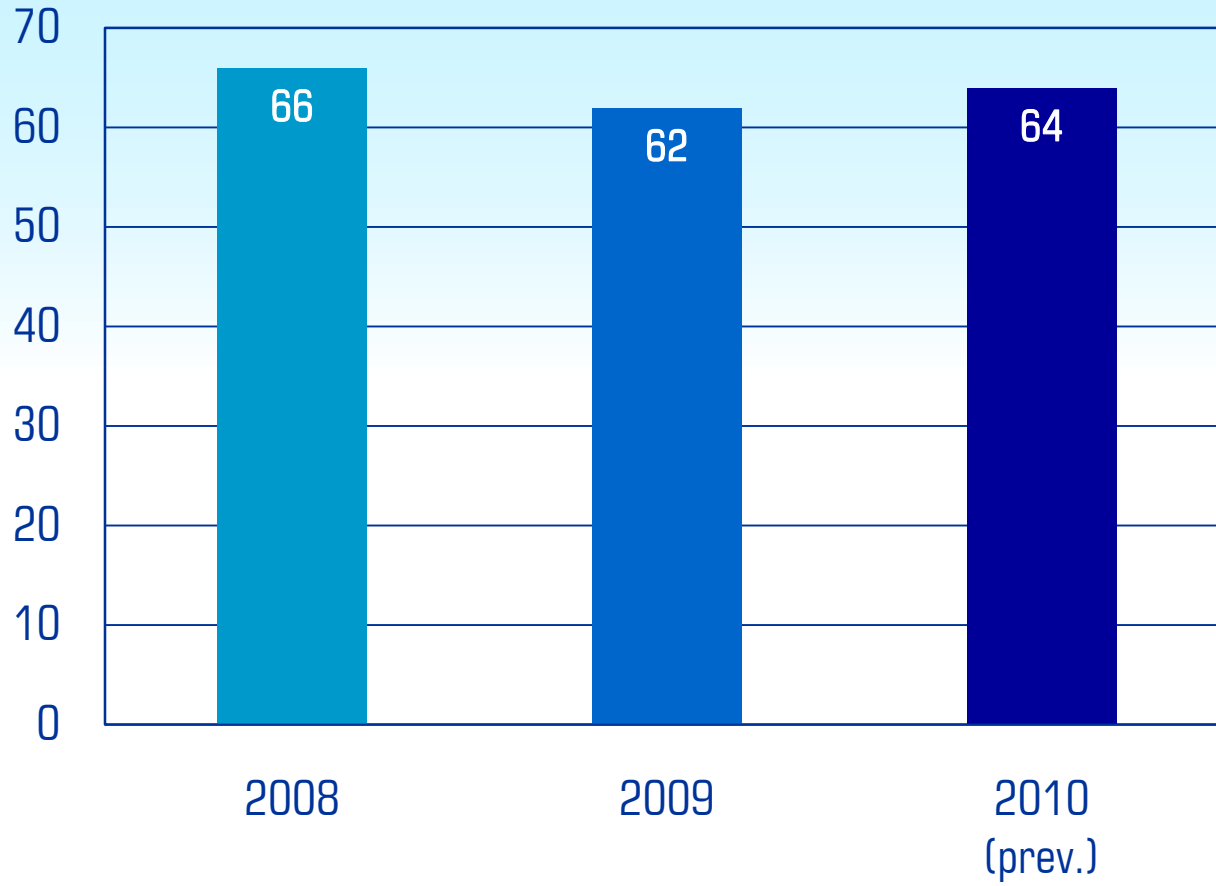
12 MILLION TOURISTS AND CRUISE PASSENGERS



These figures do not include
same-day visitors
(not staying overnight)
and stays made by the
county residents

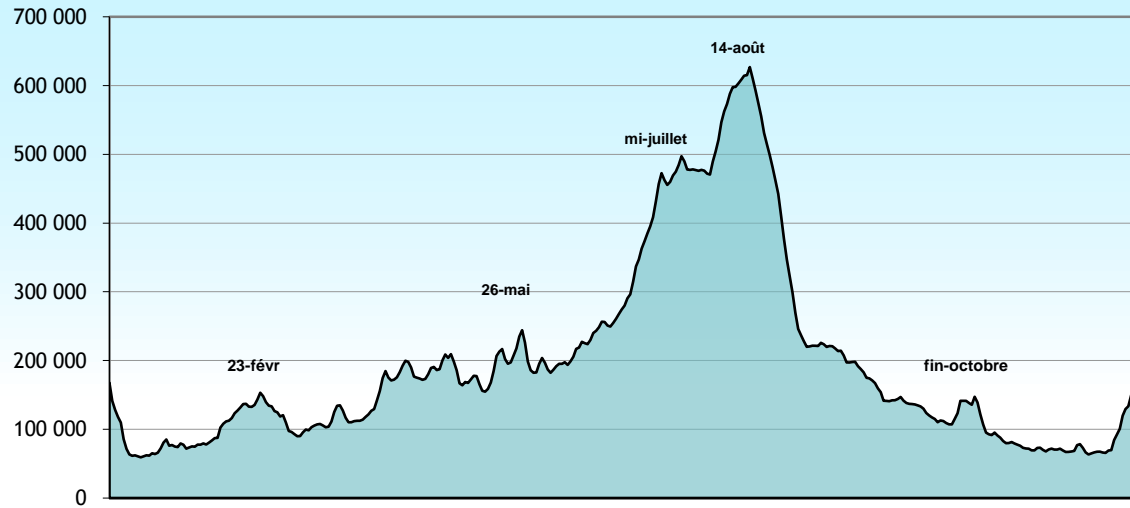
11 million tourists and 1 million cruise passengers in 2010

64 MILLION OVERNIGHT STAYS



AVERAGE LENGTH OF
STAY : 5.9 nights

TOURIST POPULATION



Over the year and depending on the day, 60 000 to 650 000 touristes are present on the French Riviera. The minimum is observed in mi-January and the peak is reached each year during the week end close to August 15th. Excursionnists are not included in these figures.

THE FRENCH RIVIERA TOURISM OBSERVATORY

Tourism is a complex market, with multiple products and mixed clienteles, and its evolution is rapid. The measurement of tourism flows requires setting up a system of tourism statistics (STS).

On the French Riviera, the STS Touriscope has been implemented since 1984 by the French Riviera Tourism Observatory, a department of the French Riviera Tourism Board (CRT). On an institutional level the Observatory has signed agreements with the State, the Provence-Alpes-Côte d'Azur Region, the County of Alpes-Maritimes, the Principality of Monaco, the Mercantour national park and the Tourist Office and Convention Bureau in Nice.

On a technical level, the Observatory cooperates with the national Institute for Statistics INSEE, the Nice-Côte d'Azur chamber of commerce, professional corporations and specialized consultants, and it develops the methodology and statistical databases on tourism supply and demand.

THE TOURISCOPE CÔTE D'AZUR SYSTEM

Is the survey system set up to measure tourism supply and demand, as well as the processing system, by means of innovative methods based on systematic crossed analysis of the information. The statistical results are integrated into the Touriscope Côte d'Azur database. This signature is the guarantee for official data and coherence of statistical information on tourism on the French Riviera.

Main ongoing surveys

- Hotels (CRT-INSEE-Ministère du Tourisme)
- Tourism Residences (CRT)
- Campsites (CRT-INSEE-SHPA)
- Holiday villages and centres, accommodation for young people (CRT)
- SDT French Visitors (Sofres-Ministère du Tourisme)
- Visetran Visitors from foreign countries (CRT)
- Visavion Visitors by plane (CRT-BVA)
- Museums and sites (CRT)
- Tourist Offices (CRT)

Information processing

Touriscope Côte d'Azur processing methodology and database

Output and dissemination

- Le Touriscope (file including reports and thematic synthesis)
- The Observatory website : www.cotedazur-touriscope.com
- The annual flyer "Key figures"
- The Reports (annual reports by theme)
- The Tourism Barometer (monthly results and annual trend)