

CÔTE D'AZUR
OBSERVATOIRE DU TOURISME

2013 Edition

Key Figures

CÔTE D'AZUR TOURISM

The dataset focuses on the Côte d'Azur (French Riviera), defined as the department of the Alpes-Maritimes and the Principality of Monaco.

CÔTE D'AZUR TOURISM – KEY FIGURES

TOTAL COMMERCIAL ACCOMMODATION CAPACITY:

150 000 beds

46% of hotel capacity is ranked 4* or 5*.

170,000 secondary residences, of which 48,000 are foreign.

8 convention and exhibition centers, and 250,000 convention attendees (air travelers) per year; 1 out of 5 visitors travelling "on business or for a conference".

15 ski resorts provide almost 700 km of slopes and 96 lifts; 600,000 stays (not counting Riviera residents) in the high country.

5 million entries to the tourist attractions with 3.2 in 101 museums and monuments.

934 288 cruise passengers in 6 harbors, 18,402 dock spaces in 35 harbors.



CÔTE D'AZUR TOURISM – KEY FIGURES

11 millions

TOURISTS STAY AN AVERAGE OF 6.2 NIGHTS, I.E. OVER 67 MILLION OVERNIGHT STAYS

8% of foreign overnight stays in French hotels.

4,3% of the total number of French and foreign overnight stays in France.

27% of tourists arrive by plane and 56% by car or bike.

Nice: 2nd airport in France with 11.2 million passengers.

Nice-Cannes is the 3rd European hub of business aviation.

200,000 : the average number of tourists present, ranging from 50,000 in mid-January to 600,000 during the August 15th weekend.

MORE THAN 1 OUT OF 2 STAYS TAKES PLACE OUTSIDE THE SUMMER MONTHS

The peak month - August - represents only 14% of annual stays.

FOREIGN VISITORS: 48% OF STAYS AND

52% of overnight stays

19% of foreign tourists come from Italy, 18% from Great Britain-Ireland, and 8% from Germany.

CÔTE D'AZUR TOURISM – KEY FIGURES



72% of tourists have already stayed in the region, and 92% are very satisfied.

TOURISTIC EXPENSES RELATED TO STAYS:

5 billion

GENERATING A TOTAL REVENUE OF €10 BILLION

63% of the expenditure comes from foreign clientele, and one quarter is generated by business clientele.

The average expenditure (2011/12) for visitors travelling by air is **€57** per day for French people and **€90** for foreigners. The business clientele spends €163 per day and even **€220** for conference attendees.

Average price of a hotel room: **€138** all taxes included (RevPAR: €82) in 2011.

17 casinos (5 of which are in Monaco), for a gross profit of €400 million in 2011/2012.

75 000 jobs

in « TOURISM »

Or about **16%** of total employment; seasonal employment accounts for only 17.5% of the annual total. Together with indirect employment, the total number of jobs generated by tourism could reach 150,000.

CÔTE D'AZUR TOURISM – KEY FIGURES

THE GREAT FRENCH RIVIERA:

1 %

OF INTERNATIONAL TOURISTS IN THE WORLD!

The French Riviera, as a tourist destination, actually extends over three territories: the French departments of the Alpes-Maritimes and the Var, and the Principality of Monaco. It is the **"Great French Riviera", 1st tourist destination in France after Paris**, with 20 million tourists generating 130 million overnight stays, as well as over 1.2 million cruise passengers.

The Great French Riviera constitutes the 1st French tourist destination, in front of the city of Paris, for domestic clientele with 3.9% of total trips and 5.5% of overnight stays (2010-12 average). For foreign clientele, the region is ranked second, with **nearly one out of 10 foreign stays in France**, and a remarkable 1% share of the global market.

The Great French Riviera's share of secondary residences in mainland France is 11%, and 24% for sole foreign secondary residences.

It is also the **second hub of touristic investment** in France, after the Savoie-Mont-Blanc mountain range.

TRANSPORTATION

■ NICE CÔTE D'AZUR :

2nd airport

IN FRANCE AFTER PARIS

It is directly connected to 103 destinations in 35 countries through 58 airlines. In 2012, its total traffic reached 11,189,896 passengers. Visitors staying in the Alpes-Maritimes or in Monaco represent 53.4% of the total traffic.

■ THE 3rd EUROPEAN HUB FOR BUSINESS AVIATION

Nice Côte d'Azur is the 2nd business airport in France after Le Bourget, with 32,922 aircraft movements in 2012.

Cannes-Mandelieu is the 3rd, with 11,172 movements (2011). The Nice-Cannes hub places 3rd in Europe, behind London and Le Bourget.



■ NEARLY

one million

CRUISE PASSENGERS

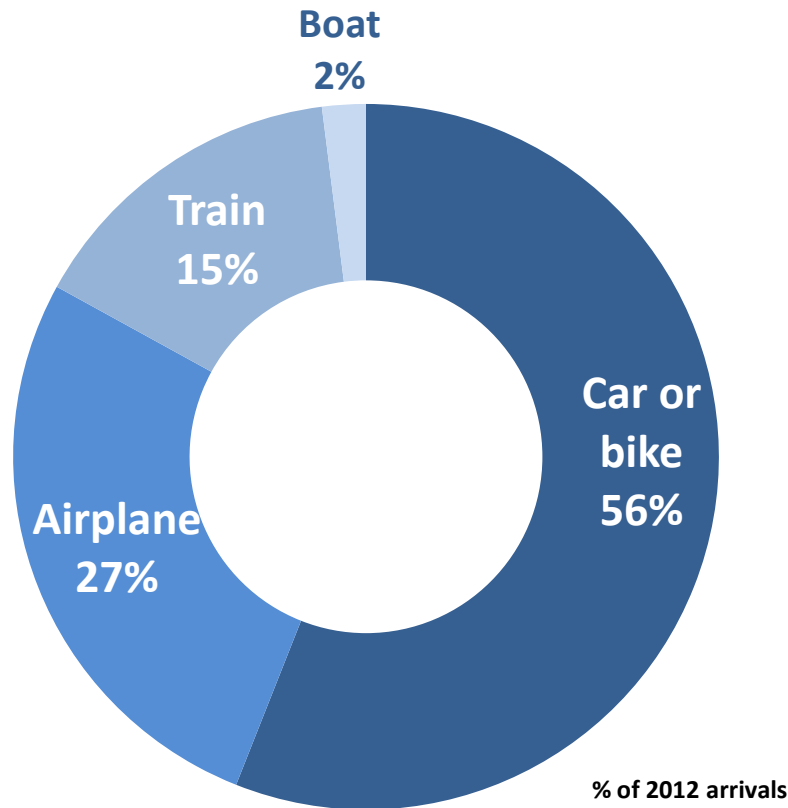


In the harbors of Nice, Villefranche, Monaco, Cannes, Antibes, and Golfe-Juan: 572 cruise stopovers in 2012 and a total of 934,288 cruise passengers. 93% of passengers are stopping over. 35 marinas provide 18,402 dock spaces.

TRANSPORTATION

TOURISTS PRIMARILY ARRIVE BY CAR

Airplanes are used by 15% of French people and 37% of foreigners.



ACCOMMODATION

150,000 BEDS IN COMMERCIAL ACCOMMODATION

Capacity by accommodation type

on 1/01/2013

	ESTABLISHMENTS	BEDS
Ranked hotels*	646	59,024
Ranked according to NS	503	52,378
Tourism residences*	67	28,394
Ranked according to NS	50	22,114
Ranked Campsites*	89	23,211
Ranked holiday villages and "family homes"	9	2,178
Youth accommodation centers	13	1,094
Country house lodges**	547	2,449
Total ranked accommodation excluding furnished rentals	1 371	116 350
Residential hotels	29	5 618
Other residences	37	2 973
Private vacation centres** and holiday centres	28	6 624
Shelters and stopover lodges	54	1 474
Bed and breakfasts**	386	2 158
Unranked campsites	6	264
Total unranked accommodation	540	19 111

Bed capacity in registered commercial accommodations, excluding unranked hotels, furnished rentals, time shares, children's centres, student residences or language schools, boats, and caravans.

*Including hotels and residences ranked according to previous standards; NS: new standards.

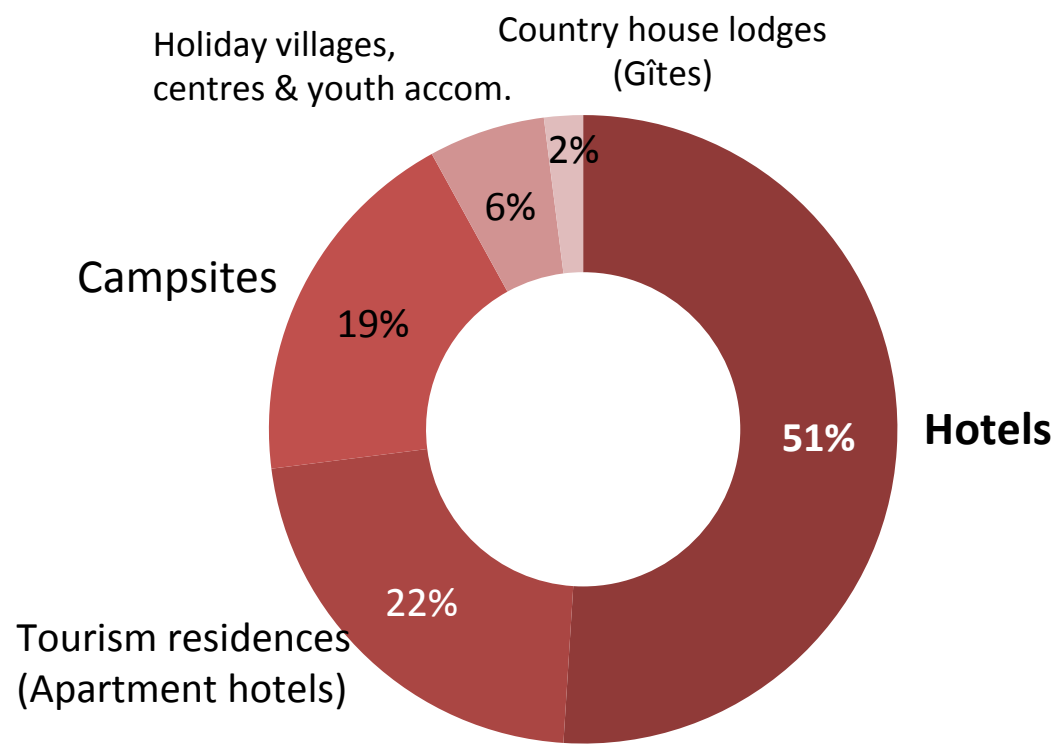
**Country house lodges certified "Gîtes de France" only; a portion of the bed and breakfasts are certified "Gîtes de France".

ACCOMMODATION

HOTELS REPRESENT

1 out of 2 ranked beds

Distribution of ranked capacity



% des lits 2013

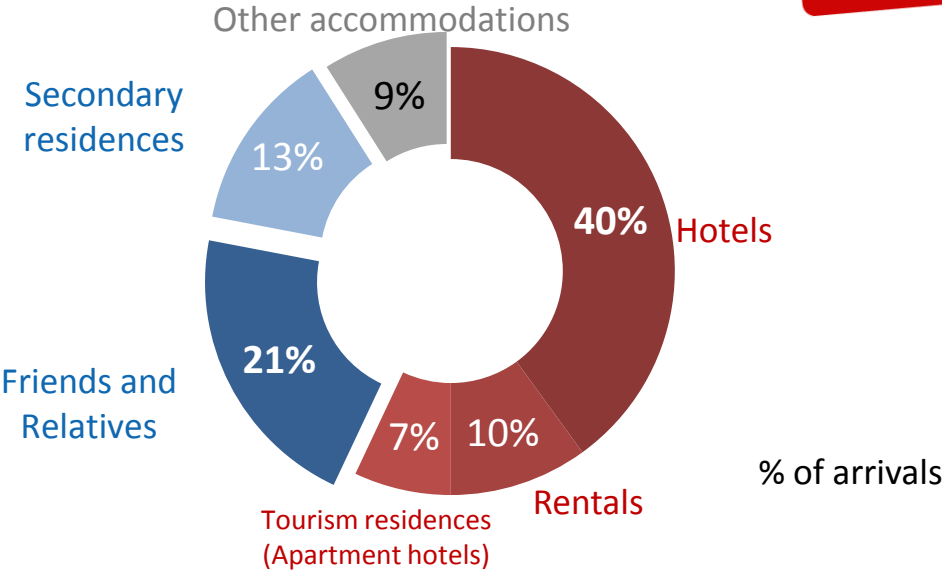
86% of beds in hotels and residences are reclassified according to the new standards.

ACCOMMODATION

NEARLY 1 OUT OF 2 HOTEL ROOMS HAS A 4-5* RANK

CATEGORY	HOTELS	% Hotels	Rooms	% Ro
5*	32	5%	3 544	12%
4*	102	16%	9 907	33%
3*	218	34%	9 104	31%
2*	224	34%	5 539	19%
1*	37	6%	943	3%
0*	33	5%	475	2%
Total	646	100%	29 512	100%

HOTELS : 4 OUT OF 10 STAYS,



15% of overnight stays

For overnight stays, the portion of accommodations is reversed due to different lengths of stays: non-commercial accommodations (secondary residences and friends or relatives) generate almost one out of two overnight stays, and the hotel industry only generates 15%.

ACCOMMODATION

OCCUPANCY AND STAYS



Ranked hotels annually receive 4.2 million stays and 9.7 million overnight stays;
Tourism residences receive 0.8 million stays and 3.6 million overnight stays.

2012	OCCUPANCY RATE	ARRIVALS	OVERNIGHT STAYS	AVERAGE LENGTH
HOTELS	60	4 158 000	9 679 000	2.3
0*/1*	57	245 000	484 000	2.0
2*	55	825 000	1 641 000	2.0
3*	63	1 247 000	2 961 000	2.4
4*/5*	61	1 549 000	3 791 000	2.4
Monaco	63	292 000	802 000	2.7
TOURISME RES.	62	750 000	3 613 000	4.8
CAMPSITES	45	176 000	1 057 000	6.0

SECONDARY RESIDENCES:

1 out of 4 overnight stays

Over 170,000 secondary residences in the Alpes-Maritimes, including Monaco (i.e. 852,000 beds), of which 48,000 are owned by foreigners (ranked 1st in France with 15.8% of the national total). 5.4% of the registered secondary residences in France are in the Alpes-Maritimes. 13% of stays and 24% of overnight stays occur in secondary residences.

ACCOMMODATION

THE NICE CÔTE D'AZUR METROPOLIS INCORPORATES ONE THIRD OF ACCOMODATION CAPACITY

Of the total number of beds in commercial accommodation and in secondary residences, 33% are located in the Nice Metropolis, 26% in the Cannes-Mandelieu hub, and 20% in the Antibes-Sophia Antipolis hub.

AREA	HOTELS		TOURISM RES		SECOND RES	
	Nb	LITS	Nb	LITS	Nb	LITS
CANNES MANDELIEU	130	13 354	37	15 529	42 971	214 857
CASA ANTIBES SOPHIA ANTIPOLIS	119	8 636	19	7 034	32 906	164 529
<i>Including Antibes</i>	74	5 336	14	4 764	23 387	116 937
<i>Including Villeneuve Valbonne</i>	45	3 300	5	2 270	9 518	47 592
Total METROPOLE NICE CÔTE D'AZUR	288	26 650	30	8 361	56 278	281 389
<i>Including Métropole littoral Ouest</i>	44	2 344	5	1 659	9 317	46 583
<i>Including Nice ville</i>	170	20 190	13	2 668	28 567	142 834
<i>Including Métropole littoral Est</i>	40	2 720	4	1 145	6 471	32 357
<i>Including Métropole Montagne</i>	34	1 396	8	2 889	11 923	59 614
MENTON - FRENCH RIVIERA	42	3 048	8	2 406	19 769	98 843
REGION OF GRASSE	20	1 400	1	216	4 161	20 804
MOUNTAINS OUTSIDE METROPOLE	34	980	1	466	13 631	68 156
MOUNTAINS, TOTAL	68	2 376	9	3 355	25 554	127 770
MONACO	13	4 956	0	0	696	3 480
TOTAL	646	59 024	96	34 012	170 412	852 058

OTHER FACILITIES

A VERY DIVERSE TOURISTIC PROPOSITION

- 8** convention centres, providing 114 meeting rooms
- 5,233** restaurants (excluding Monaco), 36 of which are Michelin-starred
- 19** golf courses, 10 of which are "18-hole" courses
- 17** casinos, including 5 in Monaco and 3 in Cannes
- 200** beaches under concession agreements
- 14** thalassotherapy centres

MANY PROTECTED AREAS :

Mercantour National Park, the Préalpes d'Azur Regional Natural Park, 15 natural departmental parks.



VISITOR NUMBERS

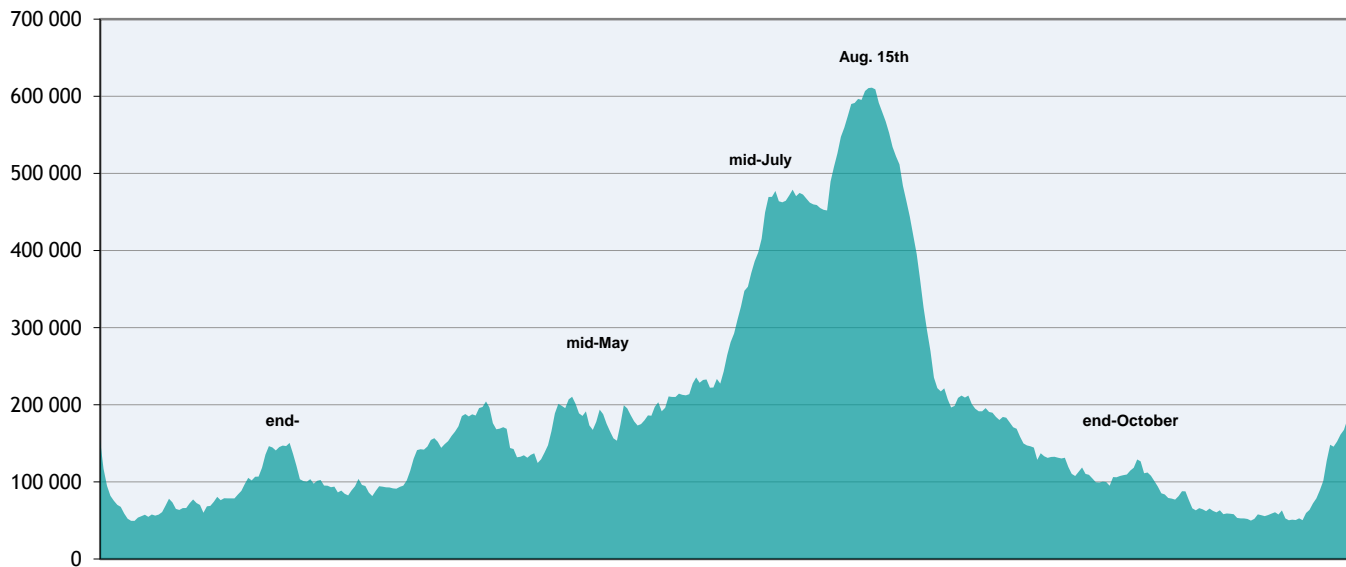
11 million

TOURISTS, 1 MILLION CRUISE PASSENGERS

Tourists stay an average of 6.2 nights, a total of over 67 million overnight stays throughout the year. Excursionists (i.e. day trippers) number in the multimillions each year. These figures do not take Riviera resident stays into account.

AN AVERAGE OF 200,000 VISITORS A DAY

Depending on the day, there are between 50,000 and 600,000 tourists on the Côte d'Azur; the lowest level is in mid-January, and the peak of each year is the August 15th weekend. These figures do not take excursionists into account.



2010/2011/2012 Average

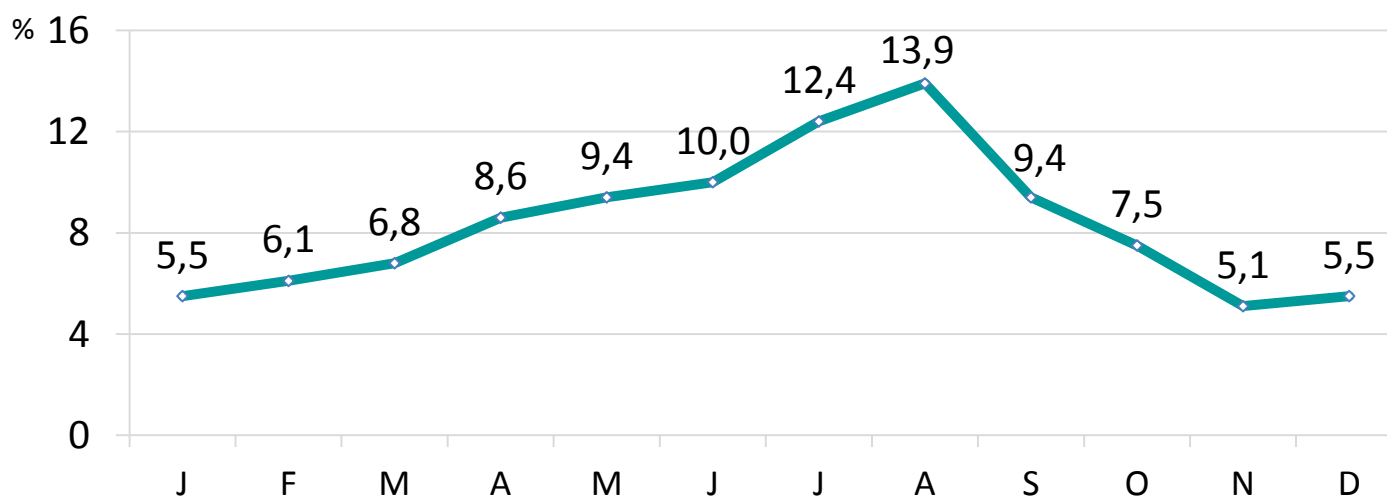
VISITOR NUMBERS

The summer season

: FEWER THAN 1 OUT OF 2 ARRIVALS, BUT 6 OUT OF 10 OVERNIGHT STAYS

June to September comprises 45% of arrivals and - due to longer stays during vacation periods - 60% of the total annual overnight stays.

Distribution of arrivals throughout the year



Occupancy rate by month (%)

2012	J	F	M	A	M	J	J	A	S	O	N	D	Year
Hotels	37	39	48	59	67	76	82	87	76	60	41	36	60
Tourism Res.	43	51	55	59	64	70	82	89	80	59	42	41	62

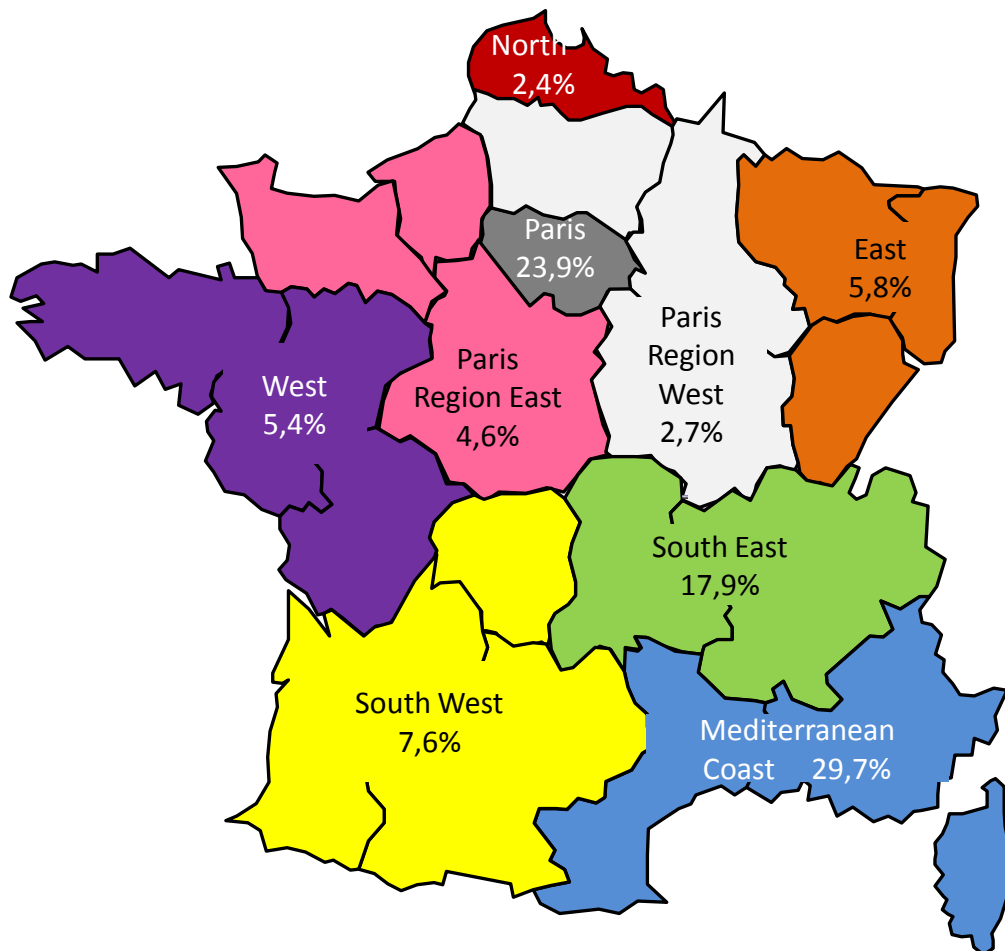


NEARLY 3 OUT OF 10 FRENCH TOURISTS ARE FROM

Paris

French visitors: 5.7 million stays, 32 million overnight stays (2010-12 average)

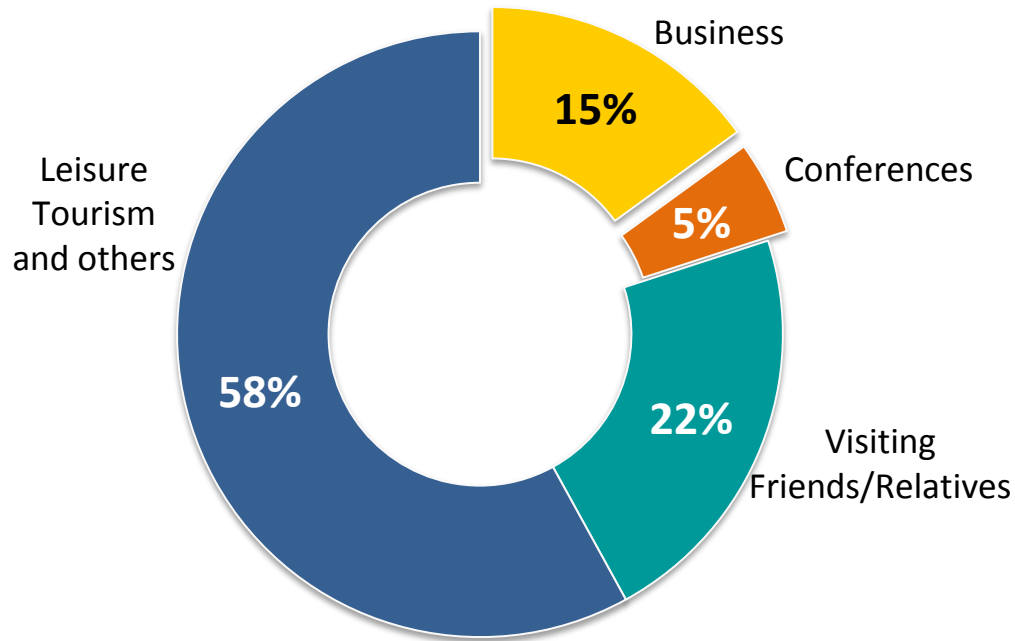
Area of origin (from mainland France)



VISITOR NUMBERS

PURPOSE OF STAY: 1 OUT OF 5 VISITORS

travelling on business




On average, business stays last 4.5 nights, and leisure stays last 6.5 nights.

45% : rate of business trips (among air travel visitors) carried out for connectionsmeetings-appointments (32% for conferences-seminars, 10% for exhibitions-trade fairs, 3% for education-training, and 10% for other professional reasons).

250,000 convention attendees (air travel visitors) who spend €220 per day (2011-12 average).

VISITOR NUMBERS

Les étrangers : HALF OF TOURISM ATTENDANCE

Principal markets in 2012 	Stays (in thousands)	%	Including Hotels/Resid. (in thousands)	%
1 Italy	976	18.6	309	12.6
2 Great Britain/Ireland	942	18.0	418	17.0
3 Germany	429	8.2	203	8.3
4 USA	383	7.3	234	9.5
5 Scandinavia	338	6.5	152	6.2
6 Russia	307	5.9	190	7.7
7 East. Europe, excl. Russia	267	5.1	125	5.1
8 Switzerland	254	4.8	121	4.9
9 Belgium	200	3.8	85	3.5
10 Spain	182	3.5	93	3.8
11 Netherlands	156	3.0	58	2.4
12 Middle East	104	2.0	61	2.5
13 Africa	101	1.9	26	1.0
14 Oceania	99	1.9	65	2.6
15 Latin America	94	1.8	64	2.6
16 China	76	1.4	52	2.1
17 Asia, excluding Japan/China	74	1.4	47	1.9
18 Canada	74	1.4	46	1.9
19 Japan	55	1.0	42	1.7
20 Others*	132	2.5	67	2.7
TOTAL	5 243	100	2 458	100

* In order : Austria, Turkey, Greece, Portugal

VISITOR NUMBERS

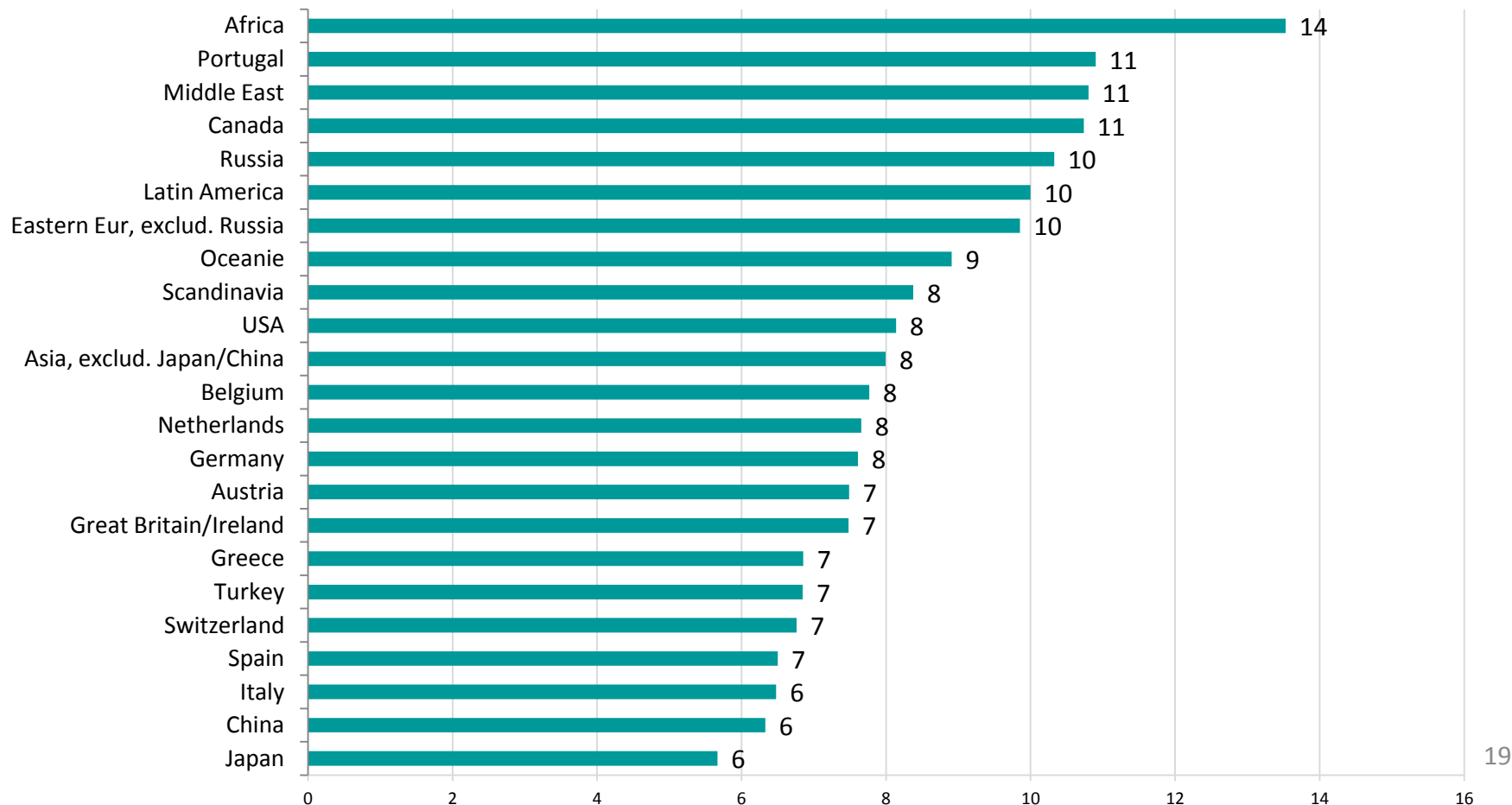
Foreigners : HALF OF TOURISM ATTENDANCE

48% : rate of foreign clientele out of total stays

26% : rate of non-European clientele out of total foreign stays



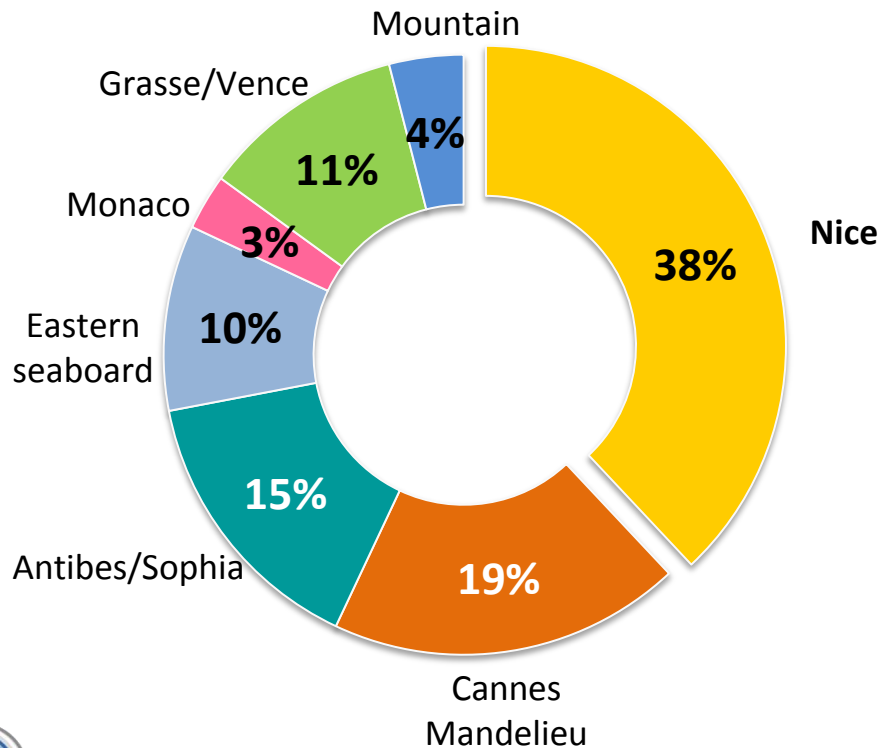
Average duration (nights) of stay (by air travel)



VISITOR NUMBERS

NEARLY 4 OUT OF 10 TOURIST STAYS ARE IN

Nice



BUT 3 OUT OF 4 TOURISTS ALSO VISIT OTHER PLACES

The primary destination for day tripper tourist excursions is the **Principality of Monaco, which welcomes 7.5 million visitors. The most popular tourist attraction is Marineland**, which welcomes 1.2 million visitors.

Among the other top attractions for day trips, most notable are: the Old Town, the Promenade des Anglais, and the Old Harbour in Nice, La Croisette in Cannes, the Cape and Old Town in Antibes, the villages of St. Paul, Eze, and Gourdon, the perfume shops in Grasse, the glassware in Biot, the potters' village in Vallauris, the Villefrance-sur-Mer citadel, the Mercantour National Park, and the Lérins Islands.

VISITOR NUMBERS

5 million

ENTRIES TO THE TOURIST ATTRACTIONS

Principal museums and sites	Visitors 2012
Oceanographic Museum - Monaco	669 267
Parc floral Phoenix - Nice	467 763
Chagall National Museum - Nice	161 227
Rothschild Foundation - St. Jean Cap Ferrat	154 842
Matisse Museum - Nice	152 382
Maeght Foundation - St. Paul	142 821
Jardin exotique - Eze	141 470
MAMAC – Nice	135 715
Jardin exotique – Monaco	133 587
Picasso Museum - Antibes	123 040
French Riviera Racecourse - Cagnes-sur-Mer	98 424
International Perfume Museum - Grasse	96 505
Palais Lascaris – Nice	95 341
Cocteau Museum - Menton	81 320
Museum of the Sea - Cannes	80 036
Palais Masséna – Nice	71 548
Asian Art Museum - Nice	69 027
Ecoparc – Mougins	58 798
Villa Kérylos – Beaulieu	56 647



57% : proportion of the total number of entries recorded at the 10 principal museums and monuments (out of 101 museums and monuments, totalling 3,183,000 entries in 2012).

600,000 TOURISTS IN THE HIGH COUNTRY

The mountains, the "other" Côte d'Azur, receive 5% of the tourists (excluding French Riviera residents), and 7% of the total overnight stays due to longer lengths of stays.

There are 150,000 beds in the mountains, including 130,000 in secondary residences and 20,000 in commercial accommodations.

The Mercantour National Park attracts around 400,000 visitors.

15 stations

PROVIDING NEARLY 700 KM OF SLOPES

Overall, the resorts provide 233 downhill ski runs, 29 cross country ski trails, and 96 lifts. Lodging capacity amounts to nearly 10,000 beds.

The resorts receive around 300,000 non-Riviera tourists in the winter, and 120,000 in the summer.

200,000 TOURIST STAYS IN the summer

During the summer of 2009, the average length of mountain tourist stays (excluding the Préalpes d'Azur area) was 9.3 nights. One third of the clientele was foreign.

Visits to the principal cultural sites in the mountains

Visitors 2012

Alpha le Temps du Loup - <i>St Martin Vésubie</i>	53 886
Merveilles Museum- <i>Tende</i>	33 460
Monts d'Azur Reserve- <i>Haut Thorenc - Andon</i>	21 000
Mercantour National Park- <i>Tende</i>	14 704
Notre Dame des Fontaines Church- <i>La Brigue</i>	9 109
Monastery - <i>Saorge</i>	7 561
Marcel Kroenlein Arboretum - <i>Roure</i>	7 227

(excluding natural sites and recreation centres)



ECONOMY

TOURISTS DIRECTLY SPEND €5 BILLION, GENERATING €10 BILLION IN

revenue

Tourism expenditures are reported by tourists and associated with their stay, without taking transportation to destination into account. Expenditures reach €5 billion a year (2010-12 average). This doesn't include proceeds from casino games, which reached €400 million in 2011/12 (47% of which came from Monaco).

Because of the multiplier effect, unreported intermediate tourist expenditures, and day tripper expenditures, the total revenue generated by tourism is estimated at €10 billion.

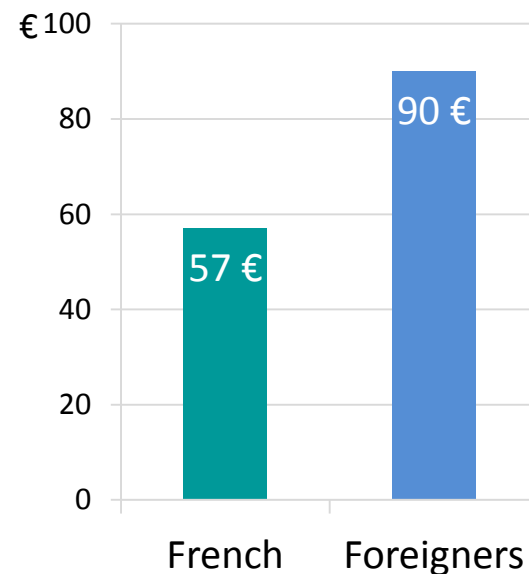
The tourist tax, collected by 47 municipalities in the Alpes-Maritimes in 2011, generated a total revenue of €11 million. Visitor expenditure (air travel): **€617** per stay, i.e. **€82** per person per day (2011-12 average).

25% : proportion of total expenditures resulting from business travel

63% : proportion of expenditures resulting from foreign tourists

Average expense/day (visitors travelling by air)

Short stay (1-3 nights)	173 €
Long stay (4 nights-4 months)	72 €
Commercial accommodation	125 €
Non-commercial accommodation	51 €
Staying at home of Friends/Relatives	39 €
Secondary residences	65 €
Business travel	163 €
Leisure travel	72 €
1st stay	90 €
Previously visited	79 €



Hotel Industry: average room revenue and RevPar

2011	Average Revenue	RevPAR
4-5* hotels	233	140
3* hotels	93	57
2* hotels	63	36
0-1* hotels	55	33
Average for all hotels	138	82

(€ all taxes included, excludes restaurant expenses)



75,000 **jobs** **DIRECT in TOURISM**

In the summer of 2007, INSEE estimated that 52,494 salaried jobs and 10,000 nonsalaried jobs in the Alpes-Maritimes (excluding Monaco) were directly related to tourism. Seasonal employment accounted for only 17.5% of total salaried employment.

Together with indirect employment, the total number of jobs generated by tourism could reach 150,000.

THE CÔTE D'AZUR TOURISM OBSERVATORY

Tourism is a complex market, with multiple products, clienteles, and rapid changes. Measuring it requires the establishment of a system of tourism statistics (STS).

The Côte d'Azur Tourism Observatory - a hub of the Côte d'Azur Regional Tourism Committee - developed the STS Touriscope in 1984. The Observatory is bound by conventions to the Provence-Alpes-Côte d'Azur Region, to the Alpes-Maritimes Departmental Council, to the Nice Tourist Office, and to the Principality of Monaco.

On the technical front, it collaborates with INSEE, the CCI Nice-Côte d'Azur, the trade unions, and specialized consultants, and develops the methodology and statistical databases on tourism supply and demand.

The Côte d'Azur TOURISCOPE system

It consists of all the surveys that enable the statistical monitoring of supply and demand as well as an innovative data operating system based on the systematic cross-referencing of information and the exploitation of sources according to their respective relevance.

The statistical results are integrated into the Côte d'Azur Touriscope database. This signature guarantees the official source and the consistency of the numeric information concerning Côte d'Azur tourism.

The principal on-going surveys

- | Hotels (CRT-INSEE-Ministry of Tourism)
- | Tourism residences and holiday residences (CRT)
- | Campsites (CRT-INSEE)
- | SDT French Visitors (TNS Sofres-Ministry of Tourism)
- | Visetran Foreign Visitors (CRT-OTSI)
- | Visavion Air Travel Visitors (CRT-MTA)
- | Museums and sites (CRT)
- | Tourist Offices (CRT-OTSI)

Documents for dissemination

- | The Touriscope (binder including files and thematic factsheets)
- | The Observatory's website: www.cotedazur-touriscope.com
- | The annual "key figures" leaflet
- | The dossiers (annual reports by topic)
- | The Tourism Barometer (monthly conditions and annual trends)

COMITÉ RÉGIONAL DU **TOURISME**
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