

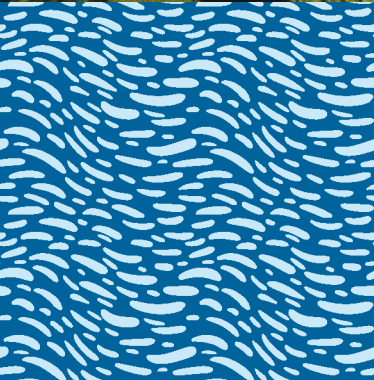
CÔTE d'AZUR

FRANCE

T O U R I S M

Key figures

2020 Edition



CRT Côte d'Azur France editorial

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The President of the CRT Côte d'Azur France

The history of tourism and the Côte d'Azur are intertwined. **Côte d'Azur France** destination and the region's brand, encompassing the Département des Alpes-Maritimes, a part of the Var and the Principality of Monaco, welcome **13 million visitors** every year, half of whom are international, in addition to millions of day-trippers.

Tourism in the region is worth **over €7bn**, contributing double the French average to regional GDP. It is therefore a major economic and social sector.

Tourism and tourism management require **razor-sharp, regular and reliable monitoring**.

With this in mind, the CRT Côte d'Azur France and its tourism Observatory are proud to treat businesses and members of the public to **the latest edition of the Côte d'Azur's Key Figures** document.

In 2020, tourism entered into a new phase, in the unexpected context of the Covid-19 world pandemic, and is **hit by a major shock, as never seen in the past**.

It will be several years before we get back up to the 2019 economic performances. However, Côte d'Azur France tourism has always **shown a strong resistance and resilience**. I have no doubt that, thanks to the assets and innovative talents of every partner, developed and networked around the Côte d'Azur France brand and a coordinated recovery strategy, the destination will emerge among the first **to reap, in due time, the benefits of the international tourism rebound**.

**Let's fight to resist,
then bounce back up !**

David LISNARD

BRAND CONTRACT CÔTE d'AZUR FRANCE

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13 million tourists flock here every year, accounting for a total of 83 million overnight stays in Côte d'Azur France, a destination that includes the Alpes-Maritimes, a part of the Var and the Principality of Monaco.

As the global tourism offer explodes, reaching ever more creative, diverse and innovative heights, Côte d'Azur France reinvents its brand to share its vision of a constantly evolving territory, to improve its visibility, being better identified in order to win back new audiences.

The Côte d'Azur France brand, launched in December 2016, is the result of an unprecedented mobilization and collective impetus from the main institutional and tourism stakeholders. This brand is paving the way for a new era in the region's strategy. The campaign aims to reassert the local pride and prestige that is so central to the Côte d'Azur, showcasing its roots while demonstrating its key role in France's future identity. Its new positioning ('Everything I touch turns to gold') emphasises the Côte d'Azur's strengths: a hub of well-being, a treat for the senses, a treasure trove of new sensations. Its light, colours, beauty and culture touch all those who flock here to experience it for themselves.

Today, the Côte d'Azur France brand is supported by an active network of over 250 public and private partners, more than 90 official ambassadors (artists, athletes, VIPs in media, business leaders, elected officials, etc.) and nearly twenty companies licensed by Côte d'Azur France.

The Côte d'Azur has been the first tourist destination favoured by artists and becoming iconic. Today, it is entering a new golden age, now offering sports activities and cultural experiences that enrich visitors and turn their trips into gilded memories.

Côte d'Azur France is an agile brand, boasting its very own official and timelessly elegant logo featuring colourful patterns evocative of its multi-faceted personality; the brand expresses its unique creative flavour while giving others the freedom to make it their own.

Côte d'Azur France :
everything I touch turns to gold.

We invite you to spread the word and get involved in our ambassador community at www.marque-cotedazurfrance.com

Summary

The dataset focuses on the Côte d'Azur – defined as the French Département des **Alpes-Maritimes and Monaco**, **excluding Côte d'Azur – Var**. Unless indicated otherwise, data refer to 2018-2019 or 2019.

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KEY FIGURES 6

11 million tourists and **70 million** overnight stays.

An average of **200,000** visitors a day.

The summer season: fewer than **1 out of 2** visitors.

14% of stays are for business purposes, including **140,000** convention attendees (air travel visitors).

ACCESS/FACILITIES 8

Nice Côte d'Azur airport:

14.5 millions passengers.

53% of tourists enter by road.

869,575 cruise passengers in the ports.

ACCOMMODATION SUPPLY 9-10

150,000 beds in commercial accommodation.

Hotels represent 1 out of 2 commercial beds.

1 out of 2 hotel rooms has a 4-5* rank.

190,000 secondary residences,

of which 46,000 owned by foreigners.

One third of the accommodation capacity is located in Nice Côte d'Azur Metropolis.

VISITOR NUMBERS 11-12

2 out of 3 stays spent in commercial accommodation.

Hotels: 4 out of 10 stays and **10 million** overnight stays. Average hotel occupancy rate: **63%**.

38% of stays are accommodated in Nice.

8 million visitors in tourist attractions.

CLIENTELE 13

5.3 million French tourist stays.

Foreigners: **53%** of tourism attendance.

25% of tourists are first-timers.

TOURISM ECONOMY 14

5.5 billion € in tourism consumption, generating **10 billion €** in revenue.

75,000 direct jobs in tourism.

Tourism contribution to the economy **exceeds 15%**, vs **7.4%** in France.

TOURISM OBSERVATORY 16

Key figures to keep in mind

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11 million tourists and
70 million overnight stays.

Tourists stays an average of **6.2 nights**

An average
of **200,000** visitors a day.

The tourist population reaches
its peak on the week end
of August 15th with

650,000 tourists.

The summer season:
fewer than 1 out of 2 arrivals.

But **6 out of
10 overnight stays**,
due to longer stays during
the summer.

August is the peak month
and represents **14%**
of annual stays.

14% of tourists are
travelling on business,
including **140,000**
convention attendees
(air travel visitors).

Definitions To know about...

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Tourists

Refer to the number of overnight stays (or arrivals) of persons travelling outside their usual environment (not residing on the territory of Côte d'Azur defined as Alpes-Maritimes and Monaco), staying more than 24 hours and less than a year ; a person staying several times is counted for each overnight stay. Intra-departmental tourism is not included in visitation statistics.

Nights

A tourist staying for more than one day generates several nights, summed to provide this aggregated indicator. Same-day visitors (or excursionists) do not stay overnight and are not counted, except cruise-passengers. The average length of stay of tourists is defined as the number of nights divided by the number of stays.



Commercial/ non commercial

A commercial or market accommodation involves a payment ; non commercial accommodation includes second homes and stays with friends or relatives.

Access mode to Côte d'Azur

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Nice Côte d'Azur Airport:

14.5 million passengers.

2nd busiest airport in France after Paris.

120 destinations served by direct flights to **44 countries**.

Visitors staying in Côte d'Azur represent

49% of the total traffic.

Côte d'Azur airports (Nice, Cannes, Saint-Tropez)

is the **2nd business hub** in Europe.

53% of tourists enter by road.

28% by plane,
17% by train.

869,575 cruise passengers received in the ports of
Cannes, Nice, Villefranche, Monaco and Antibes.

Tourism facilities

- 35 marinas providing 18,400 dock spaces.
- 5,900 restaurants.
- 8 convention centres.
- 17 golf courses .
- **15 ski resorts, 700 km of slopes.**
- 16 casinos.
- 200 beaches under concession agreements.
- 28 spas and thalassotherapy centres.
- 19 Departmental natural parks,
1 regional park, 1 national park.

Accommodation facilities

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150,000 beds in commercial accommodation.

Hotels represent **1 out of 2 commercial beds**.

1 out of 2 hotel rooms has a **4-5* rank**.

CAPACITIES IN HOTELS AND TOURISM RESIDENCES

| 2019 | Establishments | Rooms/Apartments | Beds |
|---------------------------|----------------|------------------|--------|
| Hotels | 607 | 28,528 | 57,056 |
| incl. rated 1* | 16 | 551 | 1,102 |
| incl. rated 2* | 145 | 3,571 | 7,142 |
| incl. rated 3* | 226 | 9,369 | 18,738 |
| incl. rated 4* | 127 | 10,599 | 21,198 |
| incl. rated 5* | 33 | 3,452 | 6,904 |
| Tourism residences | 82 | 5,858 | 22,956 |
| incl. rated | 63 | 5,164 | 20,132 |
| incl. non rated | 19 | 694 | 2,824 |

190,000 secondary residences,
of which **46,000 owned by foreigners.**

Alpes-Maritimes Department **ranks 1st in France** for the number of secondary residences owned by foreigners: **15% of the national total**.

Accommodation facilities by territory

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Nice Côte d'Azur **Metropolis: one third** of the accommodation capacity.

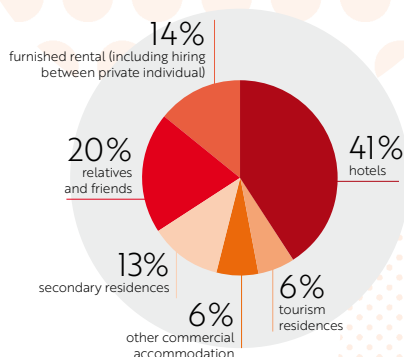
ACCOMMODATION CAPACITIES

| 2019 | Hotels | | Tourism residences | | Secondary residences | |
|---------------------------------|------------|---------------|--------------------|---------------|----------------------|----------------|
| | Establish. | Beds | Establish. | Beds | Establish. | Beds |
| Cannes-Mandelieu | 129 | 13,578 | 27 | 8,772 | 48,780 | 243,900 |
| incl. Cannes | 102 | 11,280 | 14 | 4,778 | 31,433 | 157,165 |
| Antibes - Sophia CASA | 111 | 8,594 | 19 | 5,566 | 38,854 | 194,270 |
| incl. Antibes | 66 | 4,930 | 13 | 3,412 | 28,434 | 142,170 |
| Metropolis Nice CA | 263 | 24,896 | 24 | 5,766 | 61,770 | 308,850 |
| incl. Nice | 156 | 18,678 | 9 | 2,037 | 31,344 | 156,720 |
| incl. coastal area outside Nice | 77 | 5,110 | 8 | 2,027 | 18,055 | 90,275 |
| incl. Mountains | 30 | 1,108 | 7 | 1,702 | 12,371 | 61,855 |
| Menton-CARF | 42 | 3,182 | 9 | 2,315 | 23,647 | 118,235 |
| Pays de Grasse | 19 | 1,196 | 1 | 212 | 4,847 | 24,235 |
| Mountains outside Metropolis | 32 | 902 | 2 | 325 | 14,254 | 71,270 |
| Total Mountains | 62 | 2,010 | 9 | 2,027 | 26,625 | 133,125 |
| Monaco | 11 | 4,708 | 0 | 0 | 788 | 3,940 |
| Total | 607 | 57,056 | 82 | 22,956 | 192,940 | 964,700 |

Accommodation occupancy and stays

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2 out of 3 stays spent in commercial accommodation.



Private home rental websites capture around **16%** of all stays in commercial accommodation and **75%** of all furnished rental stays, that is **1,200,000 stays**.

Hotels: **4 out of 10 stays** and **10 million** overnight stays.
Average hotel occupancy rate: **63%**

OCCUPANCY AND STAYS BY ACCOMMODATION TYPE

| 2019 | Occup. rate % | Arrivals (thousands) | Overnight stays (thousands) | Average length (nights) |
|------------------------|---------------|----------------------|-----------------------------|-------------------------|
| Hotels | 63 | 4,523 | 10,036 | 2.2 |
| incl. 1* | 63 | 112 | 221 | 2 |
| incl. 2* | 58 | 561 | 1,143 | 2 |
| incl. 3* | 64 | 1,481 | 3,190 | 2.2 |
| incl. 4-5* | 65 | 1,885 | 4,328 | 2.3 |
| incl. Monaco | 66 | 377 | 930 | 2.5 |
| T. residences * | 63 | 617 | 2,503 | 4.1 |
| Campsites | 41 | 171 | 796 | 4.7 |

* Tourism residences

MONTHLY OCCUPANCY RATES IN HOTELS AND RESIDENCES - 2019

| % | J | F | M | A | M | J | J | A | S | O | N | D |
|---|----|----|----|----|----|----|----|----|----|----|----|----|
| | 42 | 46 | 52 | 63 | 67 | 78 | 81 | 86 | 82 | 63 | 45 | 43 |

Tourist stays by territory

38% of stays
are accommodated in Nice.

500,000 tourist stays
in the mountains.

TOURIST STAYS BY ACCOMMODATION AREA

(Average 2018-19).

| | Stays (thousands) | % |
|------------------------------|----------------------|------|
| NICE | 4,200 | 37.5 |
| NICE METROPOLIS COASTAL AREA | 1,300 | 11.5 |
| ANTIBES CASA | 2,000 | 18 |
| CANNES MANDELIEU | 1,700 | 15 |
| MENTON | 700 | 6.5 |
| MONACO | 450 | 4 |
| PAYS DE GRASSE | 400 | 3.5 |
| MOUNTAINS/SKI RESORTS | 450 | 4 |

8 million visitors in
tourist attractions.

MAIN TOURIST ATTRACTIONS

(2018, numbers in italics are estimates).

| | Visitors |
|---|----------|
| Parc Marineland - Antibes | 850,000 |
| Parfumerie Fragonard - Grasse, Èze | 800,000 |
| Musée océanographique - Monaco | 656,004 |
| Verrerie - Biot | 580,000 |
| Îles de Lérins - Cannes | 368,731 |
| Parc floral Phoenix - Nice | 364,280 |
| Parfumerie Molinard - Grasse | 300,000 |
| Jardin exotique - Èze | 287,722 |
| Fondation Rothschild - Saint-Jean-Cap-Ferrat | 187,051 |
| Musée national Chagall - Nice | 178,026 |
| Musée Matisse - Nice | 141,230 |
| MAMAC - Nice | 134,939 |
| Fondation Maeght - Saint-Paul | 134,275 |
| Musée Picasso - Antibes | 131,483 |
| Musée international de la Parfumerie - Grasse | 116,886 |
| Jardin exotique - Monaco | 97,578 |
| Hippodrome Côte d'Azur - Cagnes-sur-Mer | 81,653 |
| Musée Palais Masséna - Nice | 79,784 |
| Musée de la Mer - Cannes | 78,393 |
| Vésubia Mountain Park - Saint-Martin-Vésubie | 73,620 |
| Musée national du Sport - Nice | 69,355 |
| Parc Alpha - Saint-Martin-Vésubie | 66,422 |
| Musée départemental Arts asiatiques - Nice | 57,633 |

Tourism clientele

13

5,3 million

French tourist stays.

3 out of 10 French tourists are from **Paris**, 3 out of 10 are from the **Mediterranean coast**.

Foreigners: 53% of all tourist stays

29% of foreign tourism is **inter-continental** (non European).

25% of tourists are first-timers,

e.g. **11%** of French stays and **38%** of foreign stays.

| Main foreign markets 2017/2018 Average | Stays (thousands) | % | incl. in hotels/T. resid. (thousands) | % |
|---|----------------------|------|---|------|
| 1 Italy | 1,012 | 17.0 | 327 | 12.0 |
| 2 UK/Ireland | 871 | 14.7 | 394 | 14.4 |
| 3 USA | 521 | 8.8 | 328 | 12.0 |
| 4 Germany | 485 | 8.2 | 209 | 7.7 |
| 5 Scandinavia | 369 | 6.2 | 160 | 5.9 |
| 6 East. Europe, excl. Russia | 360 | 6.1 | 170 | 6.2 |
| 7 Spain | 275 | 4.6 | 129 | 4.7 |
| 8 Switzerland | 265 | 4.5 | 128 | 4.7 |
| 9 Russia | 239 | 4.0 | 134 | 4.9 |
| 10 Belgium-Lux. | 223 | 3.8 | 82 | 3.0 |
| 11 Netherlands | 179 | 3.0 | 61 | 2.2 |
| 12 Africa | 178 | 3.0 | 41 | 1.5 |
| 13 Near and Middle East | 173 | 2.9 | 103 | 3.8 |
| 14 Asia, excl. Japan/China | 140 | 2.4 | 84 | 3.1 |
| 15 China | 123 | 2.1 | 85 | 3.1 |
| 16 Latin America | 116 | 2.0 | 71 | 2.6 |
| 17 Oceania | 89 | 1.5 | 54 | 2.0 |
| 18 Canada | 82 | 1.4 | 43 | 1.6 |
| 19 Austria | 67 | 1.1 | 35 | 1.3 |
| 20 Japan | 53 | 0.9 | 38 | 1.4 |
| 21 Portugal | 50 | 0.8 | 19 | 0.7 |
| 22 Turkey | 35 | 0.6 | 19 | 0.7 |
| 23 Greece | 33 | 0.6 | 14 | 0.5 |
| TOTAL | 5,939 | | 2,728 | |

Tourism economy

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5,5 billion €

directly spent by tourists
generating **10 billion €**
in revenue.

75,000 direct jobs in tourism,
generating as many indirect jobs.

Tourism contribution
to the economy exceeds
15% vs **7.4%** in France.

The visitor tax brings **20 million €** in annual
income for the communes in the Alpes-Maritimes.

Half a billion in investments every year.

64% of the total expenditure generated
by **foreign tourism**.

20% of the total expenditure generated
by **business tourism**.

Average spend by convention
attendees: **160€** per day.

AVERAGE SPEND PER DAY



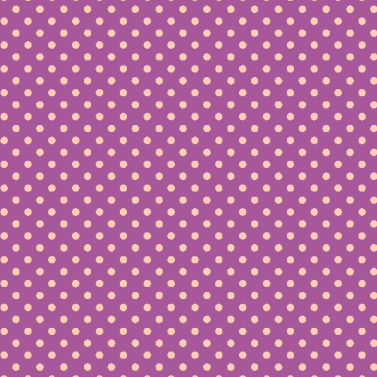
Middle Eastern tourists,
Americans and Russians
Highest spending clientele.



Foreigners



French



TOURISM OBSERVATORY CRT CÔTE D'AZUR FRANCE

Tourism is a **complex market** with rapid changes. It is defined by the demand side, as non-residents activity alone has to be taken into account in a given territory. Measuring it requires the establishment of a system of tourism statistics (STS).

In Côte d'Azur, the **SST Touriscope** has been developed since 1984 by the Tourism Observatory of the Côte d'Azur France Regional Committee (CRT). It is based upon an ongoing investigation mechanism designed for the production of tourism statistics. The monitoring process involves an innovative data operating system based on the systematic cross-referencing of data and the exploitation of sources according to their respective relevance.

Touriscope Côte d'Azur is the **official signature** of **Côte d'Azur France** tourism statistics, which guarantees the consistency, quality and comparability of tourism data.

The main output (Monthly Barometer, Keys figures, Thematic factsheets, Market factsheets, Statistical tables on supply, demand and tourism account) **are available** on the website:

www.cotedazur-touriscope.com