



TOURISM

Key Figures 2010

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2010 - Some meaningful figures

INTERNATIONAL TOURISM IN 2010: PICKING UP TO VARYING DEGREES AROUND THE WORLD

According to the World Tourism Organisation, the number of international tourist arrivals increased by almost 7 %, reaching 935 million after falling by 4 % in 2009, the year hardest hit by the worldwide economic crisis. Most destinations around the globe registered positive figures - compensating for recent losses or at least taking them in that direction. The reboot, however, is proceeding at varying speeds. Emerging economies constitute the main drivers: Asia, with + 13 %, was the first region to get back on track, followed by the Middle East (+ 10 %), the Americas (+ 8 %), Africa (+ 6 %) and Europe (+ 3 %).

▶ Turnover in hotels and restaurants in Monaco

Monaco hotel industry sales figures increased by 8.4% totalling 493,472,800 euros excl. VAT, compared to 455,421,462 euros in 2009. These results confirm the upward trend in the Principality's tourism industry. The average hotel occupancy rate increased by 5 %.

▶ Average length of stay

The average length of stay in the Monegasque hotels remained unchanged at 3 nights. The top four tourist nationalities in hotels in the Principality were, in order of importance, French, Italian, British and North American. Together they account for 57 % of all hotel nights.

▶ Tourism without accommodation

i.e. day-trippers to Monaco: estimated to total between 4.5 and 5 million tourists each year. This figure will be updated and will rise in light of the results of the 2010 Satisfaction Survey.

▶ Hotel capacity

It totalled 2,535 rooms. Luxury hotels now account for 96% of all tourist accommodation on sale in the Principality.

▶ Leisure tourism

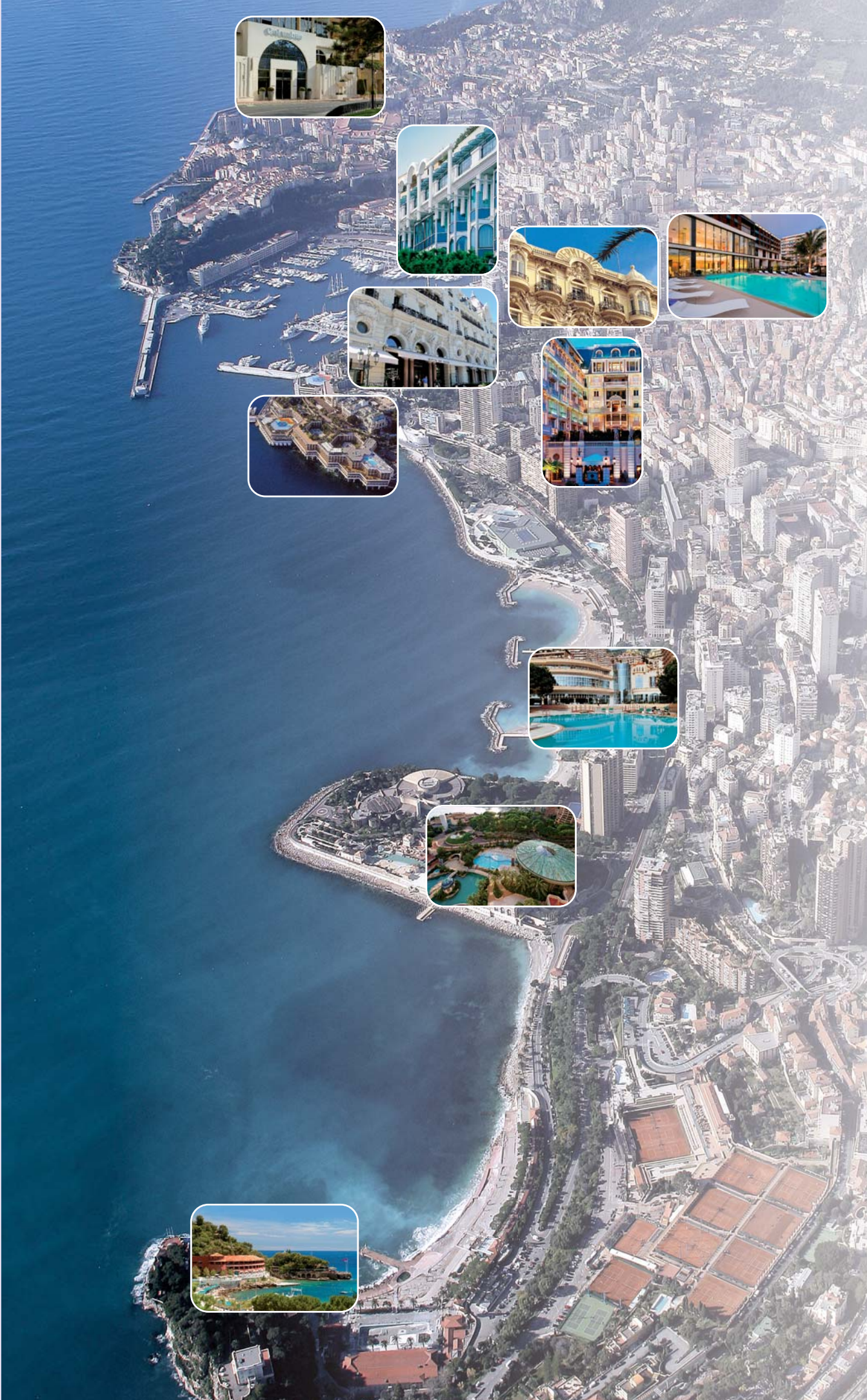
Leisure tourism accounted for 80 % of hotel nights (81 % in 2009).

▶ Cruises

235 cruise stopovers brought almost 321,820 passengers to the Principality, representing increases of 24 % and 36 % respectively. Passengers mainly came from the European Union (53 %) and North America (36 %).

▶ Business tourism

Business tourism accounted for 20 % of Monaco's tourism with accommodation. 564 business tourism events (congresses, conferences, trade shows, etc) were held in the Principality. New clients, or new contracts, accounted for 53 % of all of the events hosted in the Principality. The main type of event was congresses. France and Great Britain accounted for 47 % of total hotel nights in the business segment. 84 % of these nights were in the following sectors: medicine, IT, finance, sport and cars.



Tourist traffic and trends

Monaco hotels capacity

Every year, the Principality manages to innovate in the field of hotel infrastructures, satisfying the expectations of the most demanding international clientele. Tribute was paid to Destination Monaco on the occasion of many award ceremonies. Here are a few examples:

The **Méridien Beach Plaza** was awarded a “Green Key” in October 2010, plus prizes in the “Head Sommelier” and “Maître d’Hôtel” categories in June 2010.

The **Fairmont Monte Carlo** featured in Tripadvisor’s list of the “Top 10 Hotels in Southern Europe” in January 2010, and was voted “Best Hotel in the Best Destination in the World” in June 2010. In October 2010, its Willow Stream Spa won the 2010 Villegiature Award for the “Best Hotel Spa in Europe”.

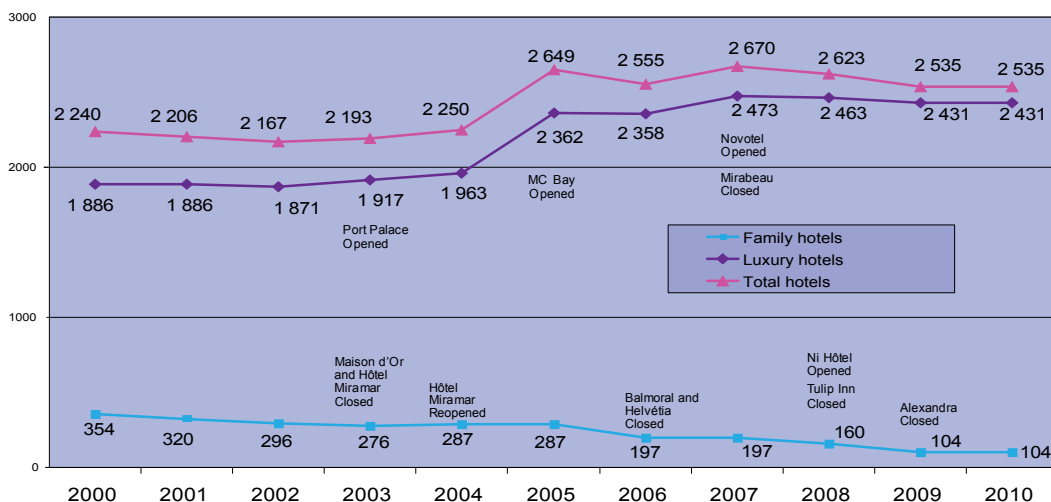
The **Hôtel Métropole** Monte-Carlo was voted “Best Hotel in the World 2010”, and its General Manager “Best Hotel Manager 2010”, at the annual Leading Hotels of the World Convention in November 2010.

The **Hôtel de Paris** received the highest distinction from Leading Hotels of the World: its “Leaders Club Guest Recognition Award of Excellence”. The hotel’s General Manager was elected “Best Hotel Manager 2010” (November 2010).

The **Monte-Carlo Bay Hotel & Resort Monaco** was awarded the “Victoire d’Argent for Landscaping 2010” in December.

The **Hôtel Hermitage** won the “Romantic Hotel Award” at the World Luxury Hotel Awards 2010 (October 2010).

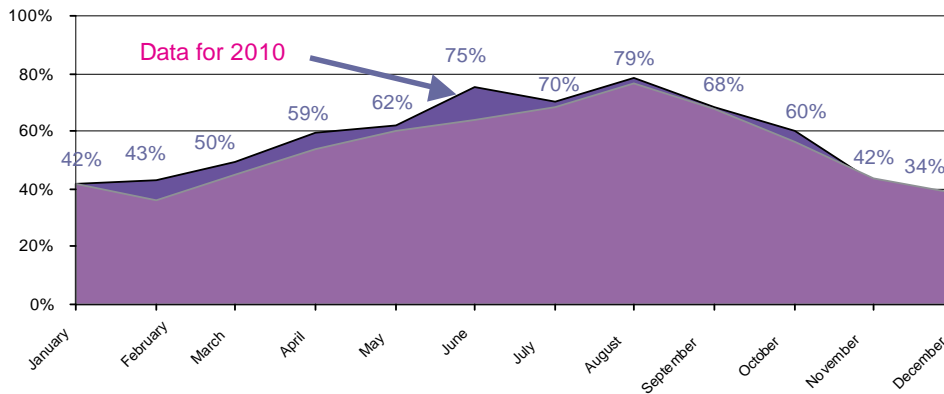
The **Monte Carlo Beach** won the Villegiature Award’s “Grand Prix for the Best Charming Hotel in Europe 2010” in October.



Source : DTC

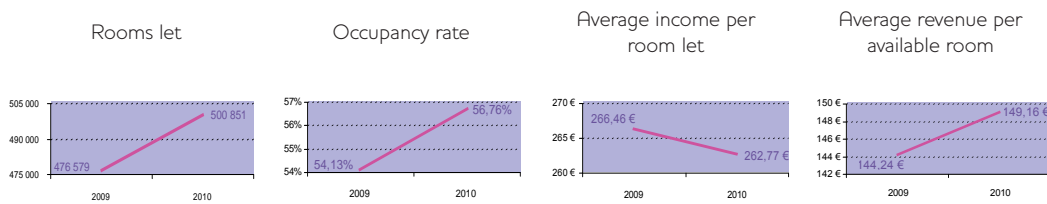
Monaco hotel industry occupancy rate

A priority objective of the DTC (Monaco's Tourism and Congress Board) is to smooth out hotel occupancy rates throughout the year. The graph below illustrates the substantial upturn in the hotel industry as a whole.



Source : DTC

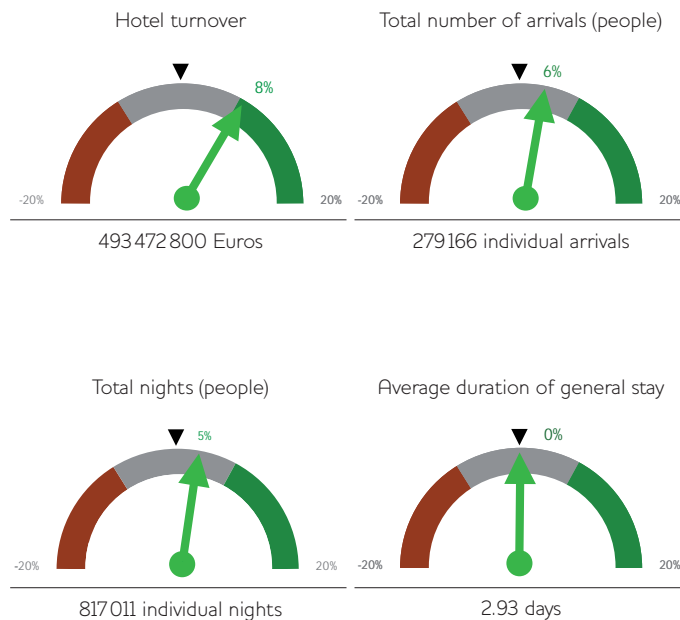
The occupancy rate for Luxury Hotels increased by 5% with an average room price comparable to that of the previous year. The average revenue per available room went up by 3%.



Tourism overview

An analysis of client arrivals and hotel nights gives a clearer picture of the hotel business in so far as it takes into account the duration of client stays. Such an analysis reveals increases of 6% and 5% respectively.

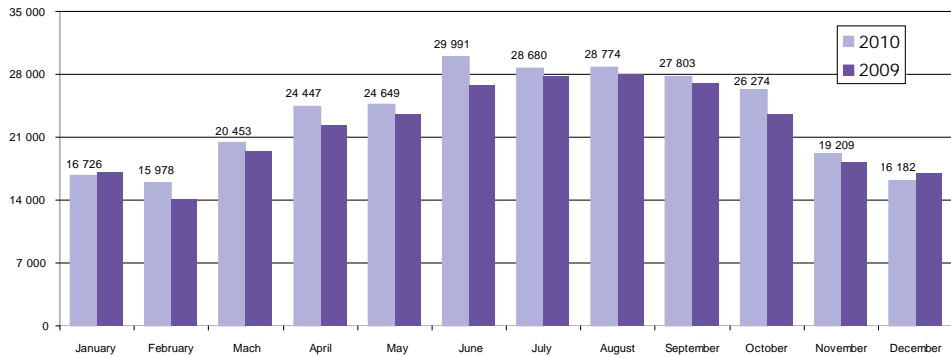
Despite the 2008-2009 crisis, tourism in Monaco remained ambitious; it did not alter its positioning in the sector of luxury and excellence.



Source : DTC

Monthly arrivals

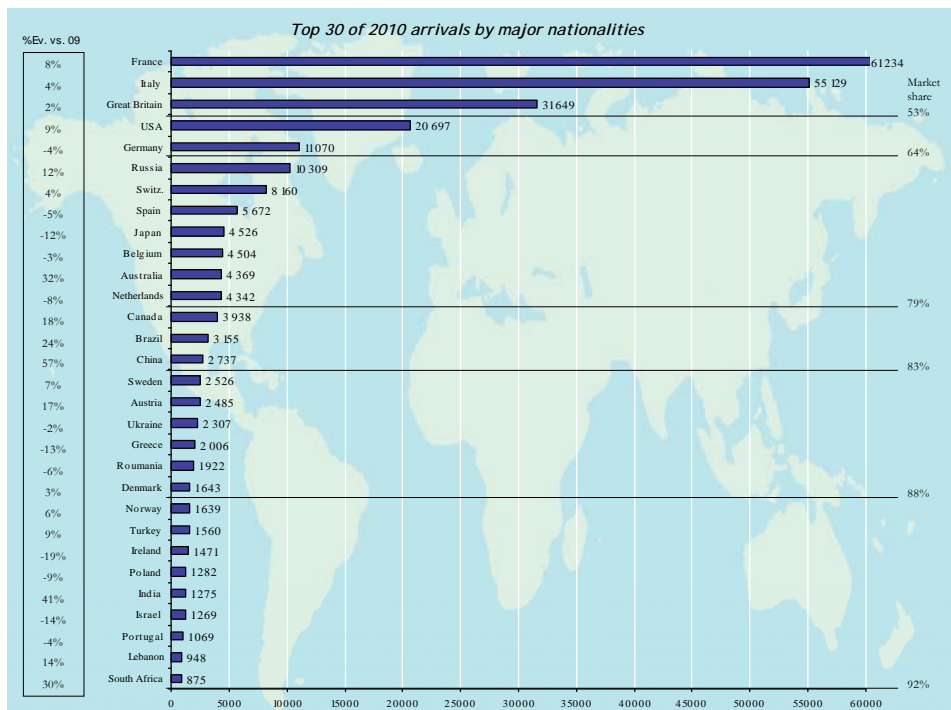
International tourists accounted for 279,166 hotel arrivals, representing an increase of 6% compared to the previous year. This rise echoes the consecutive monthly increases observed between February 2010 and November 2010. The results for the month of April were positive despite international air traffic being paralysed due to the eruption of the Icelandic volcano, Eyjafjöll.



Source : DTC

Top 30 of 2010 arrivals by major nationalities

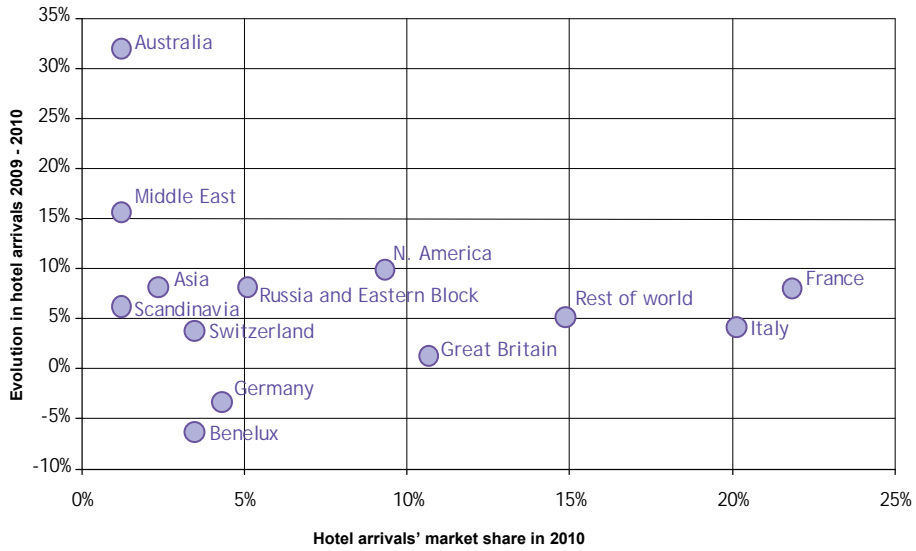
Traditional European markets such as Italy, France and Great Britain constituted the mainstay of the Principality’s tourism with a 53 % market share. Following behind the USA and Germany, a multitude of “micromarkets” that are highly international and increasingly distant provided 36 % of hotel traffic in Monaco. This diversity is a real plus point for Monaco’s tourism industry. It is the consequence of the Principality’s reputation around the world and confirms the correlation between the guaranteed level of quality in Monaco and the expectations of these demanding travellers.





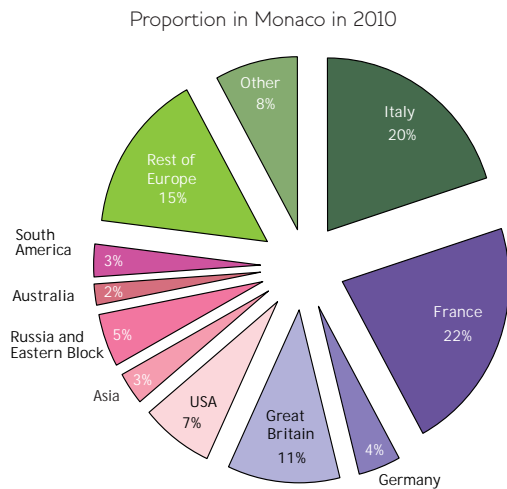
Contribution to major market growth

Overview of the geographic origins of tourists visiting Monaco hotels. Variations compared with 2009.

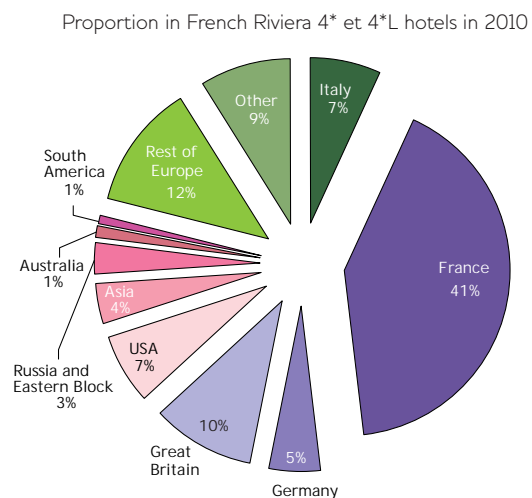


Comparison by geographic origin of hotel arrivals between Monaco and the Côte d'Azur (French Riviera)

European visitors accounted for 72 % of tourists to the Principality. In 2010, and for the second time only, there were more French visitors to Monaco than Italian, traditionally substantially more numerous (22 % French and 20 % Italians). Americans were back in force with a 9% increase compared to 2009. The British, on the other hand, increased only by 2 %. The most impressive growth figures were recorded by Canada (18 %), Mexico (23 %), Brazil (24 %), South Africa (30 %), the Middle East (16 %), Australia (32 %) and China (61 %).



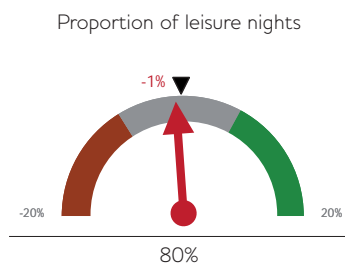
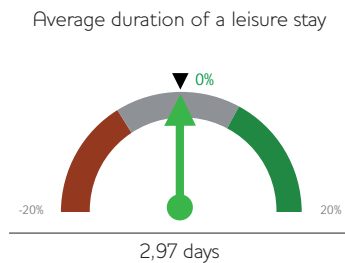
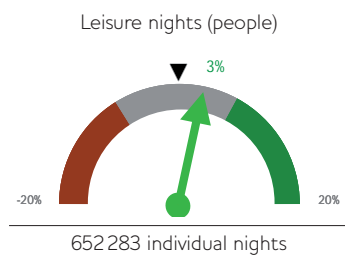
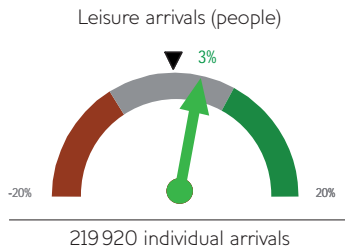
Source : DTC



Source : CRT



Leisure tourism



Source : DTC

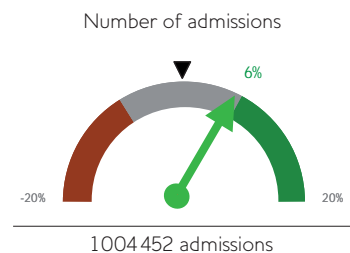
Leisure was by far the leading segment in the tourism sector in the Principality with 80 % of total hotel business compared to 81 % one year ago. This market segment has enjoyed a substantial increase in duration of stay since 2008, reaching an average of 2.97 days. A flourishing sector, it withstood the crisis.

It is interesting to note increases in the numbers of visitors from new markets such as Brazil (+ 24 %), India (+ 41 %) and Mexico (+ 23 %). Australia and New Zealand clocked up excellent results (+ 32 % and + 24 % respectively), overtaking traditional markets such as Japan and Canada.



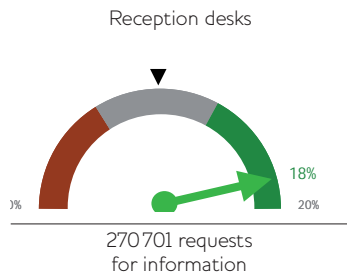
Museums, attraction centers

The number of visitors to museums and tourist attractions climbed back over the one-million mark again. These figures bring 2010 in line with the three record-breaking years of 2006, 2007 and 2008.



Source : attraction centers

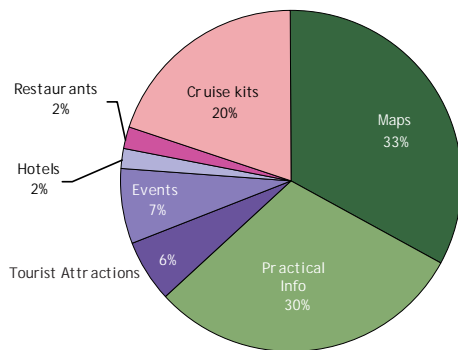
Information offices of the Monaco Tourism Authority



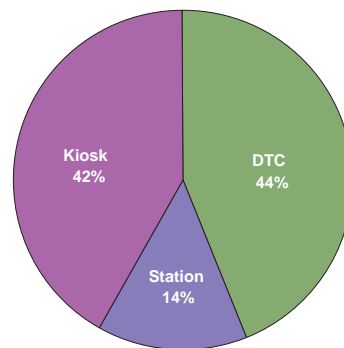
Source : DTC

The DTC (Monaco's Tourism Authority) responded to over 270,000 requests for information at its various information desks (excluding offices abroad), totalling an increase of 18 % compared to 2009. In July 2010, the DTC opened a new tourist information kiosk on Allée Sauvaigo.

Types of information requests



Breakdown of information requests

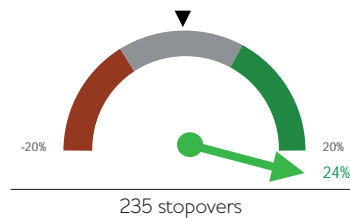


Source : DTC

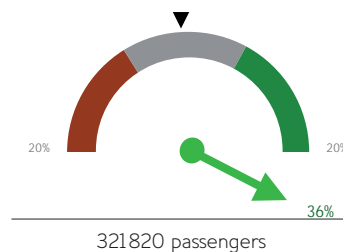
Cruises

Thanks to excellent occupancy rates on boats offering greater capacity, the cruise segment increased by 36 % totalling almost 322,000 passengers. During the year 2010, Monaco managed to consolidate its position as a major starting point for top-of-the-range cruise ships (24 % of all cruises visiting Monaco).

Number of cruise stopovers



Number of cruise passengers



Source : SEPM



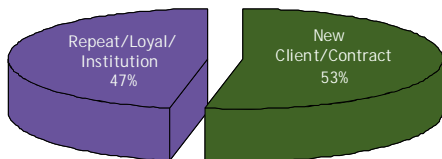
Business tourism

The impact of the crisis was most heavily felt in the business tourism segment. In 2010, it got its confidence back and marked up some very fine scores, mainly due to hosting major events: Biennial Cancer Research Conference, Anti-Aging Congress, Dia Eurometing, Eurogyn, Pfizer, Thomson, Medpi, Tim, Gaim, Damon, Fund Forum, Mary Kay, Hewlett Packard, Avon, Sony Europe, Symantec Solutions, Mont Blanc.



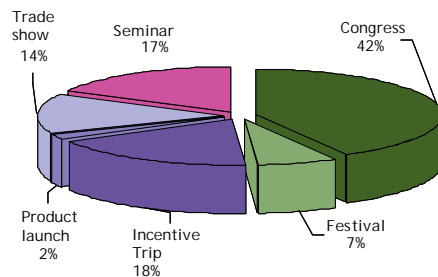
Source : DTC

Type of client



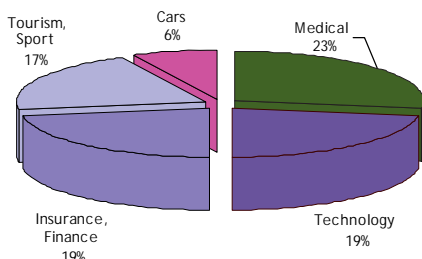
For many years, business tourism has benefitted from the loyalty of con-gresses and other re-curent events.

Nature of the event



Congresses remained the main type of event. This year saw a higher percentage of incentive trips from North America, Asia, Australia and, more recently, China.

Main Business sectors



The main business sectors studied cover 84% of total Business tourism hotel nights. The medical sector predominates. Tourism and sport increased by an impressive 5 points..

Source : Hôtels, GFM, DTC

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