Tourism in the Mediterranean

Focus on France

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ATOUT France
2nd UNWTO Conference on Destination Management in the Mediterranean Quality – The Key Driver for Success in the Mediterranean”
Budva, Montenegro, 22-24 June 2015
Promoting brands and international French destinations

Support to key industry clusters

Management of accommodation ratings and classification

Management of quality labels

Promotion

Quality

Engineering

Stimulation of investments and development of offers

Forecasting and monitoring of competition
International Network

→ Strong international network through **31 offices** in **29 countries** worldwide,
→ The area of intervention extends on **70 markets** thanks to the activities conducted in cooperation with services provided by French Embassies.
France: The First World Tourism Destination

The first world tourism destination - Objective:
100 millions of tourists by 2030

83.7 millions of foreign visitors in 2014 vs 62 millions of inhabitants.

Diversified offer (sea, countryside, towns, overseas departments and territories of France,…)

France
Tourism=7.4% GNP in 2013
Consumption of over 150 bill. € p.a., of which 2/3 of domestic production

Coastal tourism: the first tourist destination of France:
31% of overnight stays, 24% of tourist consumption including Overseas Departments (2013)
Seaside – Still a Attractive Holiday Destination

Opinion poll: Where do you plan to spend your summer holidays?

(answers are for the summer 2014)

Source: IPSOS Europ Assistance – Holiday Barometer for Europeans – 2014
However... France challenged by strong competition

Spain: 2013 - record year of tourist visits

The number of tourists in Spain reached a new record in 2013, 60.6 millions of visits, bringing Spain to the third place in the world, in front of China.

Bathing areas in Catalonia (15.5 millions of tourist entries), Balearic Islands (11.1 millions) and Canary Islands (10.6 millions) were the most visited last year.

Although the majority of tourists visiting Spain continue to come from the UK (23.6% of the total number), Germany (16.2%) and France (15.7%), the number of Russian tourists continues to grow, marking an increase of 31.6% in 2013.
French Coast: the Most Important French Destination

The Channel – North Sea
- 904,761 beds
- 959,045 inhabitants
- 0.9 bed per inhabitant
- 2,697 km²
- 200,000 full-time job positions in 2012
- 1/3 of state investments in tourism
  (= 3.1 million € in average in 2012 per coastal municipality)

Atlantic Sea + West Coast
- 3,4 million beds
- 2 million inhabitants
- 1.7 bed per inhabitant
- 10,212 km²

The Mediterranean
- 3.4 million beds
- 3.1 million inhabitants
- 1 bed per inhabitant
- 8,704 km²

Source: Panorama du tourisme littoral – Atout France
Uneven Distribution of Hotel Beds on the French Coast

Distribution per zone and per region in 2012

40% of hotel beds in France

7 817 818 of hotel beds (commercial and non-commercial)

3 /4 are non-commercial

1 / 4 commercial

The Mediterranean Zone
44% of the offer

3 455 800 beds

North - The Channel Zone
12% of the offer
904 700 beds

West Zone
27% of the offer
2 076 300 beds

Atlantic Sea Zone
18% of the offer
1 038 850 beds

Source: Atout France Database – National Institute for Sea and Coastal Area (Observateur National de la mer et du littoral) – INSEE - 2012
## Predominantly Non-commercial Offer…

### Non-commercial beds

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>French Coast</td>
<td>76%</td>
</tr>
<tr>
<td>North Zone</td>
<td>80%</td>
</tr>
<tr>
<td>North Zone - Nord-Pas-de-Region</td>
<td>78%</td>
</tr>
<tr>
<td>North Zone - Calais</td>
<td>68%</td>
</tr>
<tr>
<td>North Zone - Picardy</td>
<td>75%</td>
</tr>
<tr>
<td>North Zone - Upper Normandy</td>
<td>83%</td>
</tr>
<tr>
<td>North Zone - Lower-Normandy</td>
<td>83%</td>
</tr>
<tr>
<td>West Zone</td>
<td>75%</td>
</tr>
<tr>
<td>West Zone - Brittany</td>
<td>75%</td>
</tr>
<tr>
<td>West Zone - Pays de la Loire</td>
<td>76%</td>
</tr>
<tr>
<td>Atlantic Sea Zone</td>
<td>68%</td>
</tr>
<tr>
<td>Atlantic Sea Zone - Poitou-Charentes</td>
<td>71%</td>
</tr>
<tr>
<td>Atlantic Sea Zone - Aquitaine</td>
<td>67%</td>
</tr>
<tr>
<td>The Mediterranean Zone</td>
<td>79%</td>
</tr>
<tr>
<td>Mediterranean Zone - Languedoc-Roussillon</td>
<td>77%</td>
</tr>
<tr>
<td>Mediterranean Zone - PACA</td>
<td>82%</td>
</tr>
<tr>
<td>Mediterranean Zone - Corsica</td>
<td>71%</td>
</tr>
</tbody>
</table>

Source: Atout France Database – National Institute for Sea and Coastal Area (Observateur National de la mer et du littoral) – INSEE - 2010
Types of Commercial Accommodation

Structure of Commercial Hotel Beds on the French Coast

- Commercial beds: 1 bed out of 4 on the French Coast
- 47% The Mediterranean
- 33% The Mediterranean
- 56% The Mediterranean

Source: Atout France Database – National Institute for Sea and Coastal Area (Observateur National de la mer et du littoral) – INSEE - 2012
Change in Choice of Destination

- Younger population

- to the benefit of over 50's

- Reduced presence of families

- Less visits of inhabitants of Paris and surrounding areas:
  The first source of revenues

Goes to:
Ibiza, Costa Blanca, Costa Dorada, Croatia, Greece…
International Clientele

Vast majority of Europeans

Origin of overnight stays:

71% France
29% Others

80% of international overnight stays

50% = Italy + Belgium + Germany + UK

Origin of overnight stays:

80% France
20% Others

99.8% of international overnight stays

82% = Italy + Belgium + Germany + UK
### Overnight Stays and Clients in the Mediterranean

<table>
<thead>
<tr>
<th></th>
<th>Total number of overnight stays</th>
<th>Overnight stay in hotels</th>
<th>Overnight stays in camps</th>
</tr>
</thead>
<tbody>
<tr>
<td>French Coast Total</td>
<td>140 334 710</td>
<td>34 652 375</td>
<td>105 682 335</td>
</tr>
<tr>
<td>%</td>
<td></td>
<td>25%</td>
<td>75%</td>
</tr>
<tr>
<td>The Mediterranean</td>
<td>54 862 207</td>
<td>17 928 078</td>
<td>36 934 128</td>
</tr>
<tr>
<td>%</td>
<td></td>
<td>33%</td>
<td>67%</td>
</tr>
</tbody>
</table>

39% of the total number of overnight stays on the French Coast is on the Mediterranean

- 40% of overnight stays in hotels in the Mediterranean on the French Riviera
- 18% overnight stays in outdoor facilities in the region Languedoc Roussillon
- The smallest number of overnight stays in Corsica

<table>
<thead>
<tr>
<th>Region</th>
<th>Total number of overnight</th>
<th>Hotels</th>
<th>Camps</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Mediterranean</td>
<td>39%</td>
<td>52%</td>
<td>35%</td>
</tr>
<tr>
<td>Languedoc Roussillon</td>
<td>15%</td>
<td>5%</td>
<td>18%</td>
</tr>
<tr>
<td>Provence Alps French Riviera</td>
<td>20%</td>
<td>40%</td>
<td>14%</td>
</tr>
<tr>
<td>Corsica</td>
<td>4%</td>
<td>7%</td>
<td>3%</td>
</tr>
</tbody>
</table>
Overnight Stays and Clients in the Mediterranean

<table>
<thead>
<tr>
<th></th>
<th>Camps +hotels</th>
<th>% of international overnight stays</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>International overnight stays</td>
<td>French overnight stays</td>
</tr>
<tr>
<td>Languedoc Roussillon</td>
<td>6 016 141</td>
<td>14 441 725</td>
</tr>
<tr>
<td>Provence French Riviera</td>
<td>11 907 552</td>
<td>16 679 920</td>
</tr>
<tr>
<td>Corsica</td>
<td>1 847 076</td>
<td>3 969 793</td>
</tr>
<tr>
<td>Total in the Mediterranean</td>
<td>19 770 769</td>
<td>35 091 438</td>
</tr>
<tr>
<td>Total Coast</td>
<td>45 532 030</td>
<td>94 802 681</td>
</tr>
</tbody>
</table>

The Mediterranean has more commercial international overnight stays than any other coastal area in France

The region Provence Alps French Riviera has the biggest number of international commercial overnight stays in hotels

Languedoc Roussillon and Corsica have more international stays in camp grounds.
The Mediterranean: Different Development Models

**Provence Alps French Riviera**
- International historical development from the XIX century (Saint Tropez, Riviera..)
- Significant urbanization (Marseilles, Nice, Cannes...)
- Real estate prices and access
- Residentials

**Corsica**
- Preserved environment, 60% of natural coasts
- Strong identity
- Stronger resistance to tourism development
- Strong valuation of local resources and assets (culture, agriculture...)

**Languedoc Roussillon**
- Proactive planning and spatial planning conducted by the French state
- High flows of tourists
- Model of integrated settlements
- Predominant renting and camping sites, Willingness to adapt and reinvest through public policies
Quality Challenge: Keeping Residentials Under Control

- Change of accommodation use into permanent residence
- The area affected the most is the Mediterranean (78% of secondary residences out of which 20% are owned by foreigners)
- Satisfying needs of these new “annual” residents
- Urbanization of landscapes
  - Urban nuisance (pollution, difficult traffic conditions,
  - Less real estates available...
  - Conflicts of habits between residents and tourists

- Entertainment industry which keeps developing, with an increasingly wide public
- Increasing protection of the environment
  - (Institute for Coastal Area, Great French Locations, Protected Maritime Areas…)
- Increased attractiveness all year long, short stays (Marseille, Nice..)
  - Creation of service and cultural offers
  - (museums, festivals) : MUCEM in MArseille...

Quality of public spaces!
Mobility in towns and settlements (alternatives to cars, slower traffic, walking, cycling, walkways for pedestrians),
Development of additional activities, less seaside and more cultural (festivals, events, sport competitions...)
Quality Challenge: Quality of Beaches and Bathing

- Risk of erosion, pollution, overcrowding, presence of jellyfish, excessive urbanization...
- Absence of concessions or anarchy in giving concession to use of beaches
- Problems related to cleanliness and access (parking, global development)
- In Europe, tragedy linked to massive immigrants arrivals in Greece and Italy

- Predominant “sun/beach” holiday remains the first motivation of Europeans in 2013 (28 countries).

Space for nautical activities

- Raising of awareness and promotion of beaches in past couple of years.
- Extended animation offer:
  - “Blue Huts” for book lending in Nice, Reading on the sea in Languedoc Roussillon

EU Directive(2006) guaranteeing the quality of bathing waters
2006 Decree on beach concessions
European private brand “Pavillon Bleu”
Law on Coasts (French unique Loi Littoral)
LES PLAGES

Vous cherchez une plage sauvage, une plage familiale ou encore une plage à proximité des restaurants et commerces ? Alors vous trouverez votre bonheur sur l'une des belles plages de sable de La Grande Motte.

CHOISISSEZ LA PLAGE À VOTRE IMAGE

Les pentes douces pour rentrer dans l'eau conviennent parfaitement aux petits enfants. En cas de selles, 4 postes de sauvetage assurent une surveillance quotidienne des 7 km de plage de la ville.

La plage du Coucher est la plage des familles et des amateurs des loisirs nautiques. A mi-parcours de la plage, des dunes séparent une aile d'une autre.

Une petite partie de cette plage est autorisée aux chiens, accès n°60.

La plage du Centre-Ville se trouve la promenade du front de mer avec les restaurants, glaciers et boutiques. Aucune route ne longe cette promenade. Vous pouvez donc flâner, bronzer et vous baigner en toute quiétude.
Quality Challenge: Diversification of Clientele

Relative retreat of specific European Clientele (especially Brits, Germans...)
- Great competition in the Mediterranean (Spain, Greece)
- Value for money of the French offer compared to the rest of Europe
- Lower interest of young people in favor of older people

- Attractiveness of French Riviera to Chinese, Brazilian and Russian tourists thanks to its international reputation and top of the range facilities, year-round animation and business tourism
- Dynamic domestic market and return of Europeans after the crisis, specialized niche markets (cycling, boating...)
- Support to family tourism: plan of modernization of tourist villages dedicated to social and associative tourism
- Strengthening of role of ANCV (holiday vouchers) to ensure the access to holidays to everyone, especially to coastal areas during the summer season

Return of European clientele, less seasonnal
Promotion of short stays offer for Europeans who live less than ¾ hour from the coast
Better exploitation of maritime and cultural activities versus “bathing only”
Strengthening of “Incentives” and MICE offers
Quality Challenge: Preserving Natural Areas and Coastal Landscapes

Beach/accommodation: destination with common offers, interchangeable with any other in France or Europe – diversification is a must

- Need to maintain or regain ecological balance in each locality at the level of coastal areas
- Fight against degradation of ecosystems, considering that certain qualities such as water transparency or the diversity of fish stock have an impact on the perception of quality (Corsica)
- Interest of tourists to discover natural sites

The end of “bathing only” philosophy
- Extension of territory of stay to experience larger number of activities
- Diversification of experiences (rural, local gastronomy, markets, sites, villages, etc…)
- Better distribution of stays throughout the year,
- Richness of French and Mediterranean hinterland (cultural and historical offer, Wine tourism… )
- Change of management (inter-municipal management, urbanistic schemes, SCOT…)
L'ensemble du personnel d’ÉQUITÉ OUTRE-FRANCE en France et à l'étranger, reste à votre écoute.

MERCI

Thank you for your attention

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