

# Tourism in the Mediterranean



## Focus on France



**Corinne LESPINASSE TARABA**  
Deputy Manager Tourism Engineering  
and Development

**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



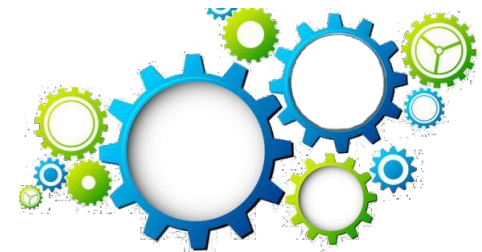
# ATOOUT France - French National Tourism Development Agency

Promoting brands and international French destinations



Support to key industry clusters

PROMOTION



Management of accommodation ratings and classification

Management of quality labels

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)



+5% WORLD

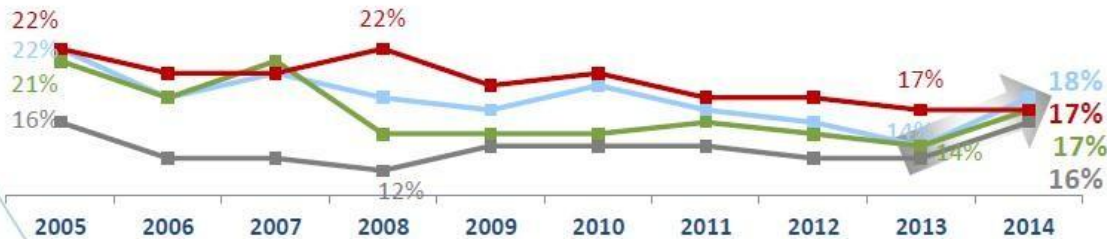
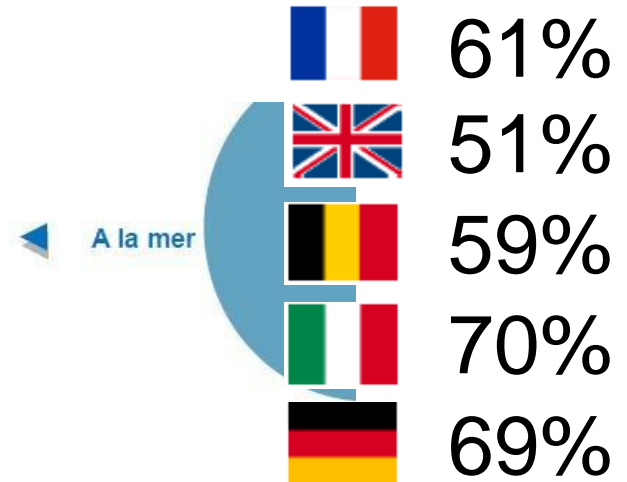


# Seaside – Still a Attractive Holiday Destination

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

(answers are for the summer 2014)

Plusieurs réponses possibles



- En voyage itinérant, à la découverte
- A la montagne
- A la campagne
- En ville

# 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.

**canaries | fuerteventura**

- Un rêve pour les amateurs de farniente
- L'ambiance agréable de Corralejo
- Une météo clémente toute l'année

**durée du séjour :** 7 nuits  
**prochain dép. à ce tarif :** Paris, le 10/10/2014  
**départ de :** Plusieurs villes de départ  
**pension :** Tout compris

**économie de 47%** → 479 au lieu de 900

Très bien

Info et réservation au 0 892 68 61 00  
 Réf. : 71206

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.

**Best Club Le Village Président 3\***

**tunisie | hammamet**

- A deux pas de Nabeul
- Une exclusivité lastminute.com
- Idéalement situé

**durée du séjour :** 7 nuits / 14 nuits  
**prochain dép. à ce tarif :** Paris, le 09/10/2014  
**départ de :** Paris/ Nantes/ Lyon  
**pension :** Tout compris

**économie de 43%** → 339 au lieu de 590

Très bien

Info et réservation au 0 892 68 61 00  
 Réf. : 71734

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.

**Best Club Vasia Beach and Spa 4\* sup**

**grece | crète**

- Aux abords du ravissant village de Sissi
- Petit paradis pour les vacances
- Idéal pour petits et grands

**durée du séjour :** 7 nuits  
**prochain dép. à ce tarif :** Paris, le 13/10/2014  
**départ de :** Paris/ Nantes/ Lyon

**économie de 45%** → 559 au lieu de 1018

Très bien, 4.0

Info et réservation au 0 892 68 61 00 (1)  
 Réf. : 112991

OFFRE IMBATTABLE ! afficher



# French Coast: the Most Important French Destination

## The Channel – North Sea

904 761 beds  
959 045 inhabitants  
0,9 bed per inhabitant  
2 697 km<sup>2</sup>

-) 200 000 full-time job positions in 2012  
-) 1/3 of state investments in tourism  
(= 3,1 mil. € in average in 2012 per coastal municipality)

## Atlantic Sea + West Coast

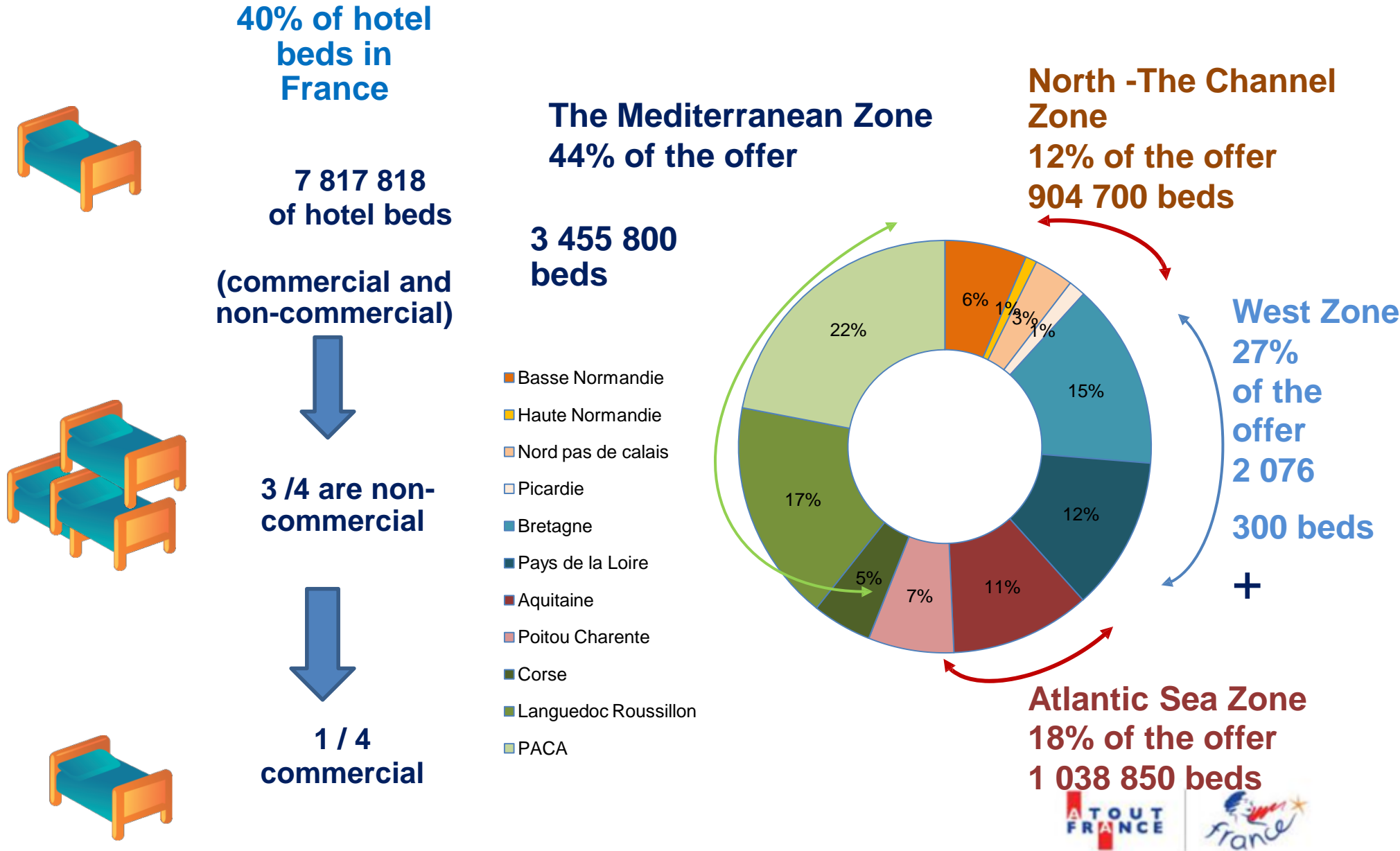
3,4 millions of beds  
2 millions of inhabitants  
1,7 bed per inhabitant  
10 212 km<sup>2</sup>

## The Mediterranean

3,4 millions of beds  
3,1 millions of inhabitants  
1 bed per inhabitant  
8 704 km<sup>2</sup>

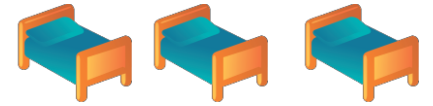
# Uneven Distribution of Hotel Beds on the French Coast

*Distribution per zone and per region in 2012*

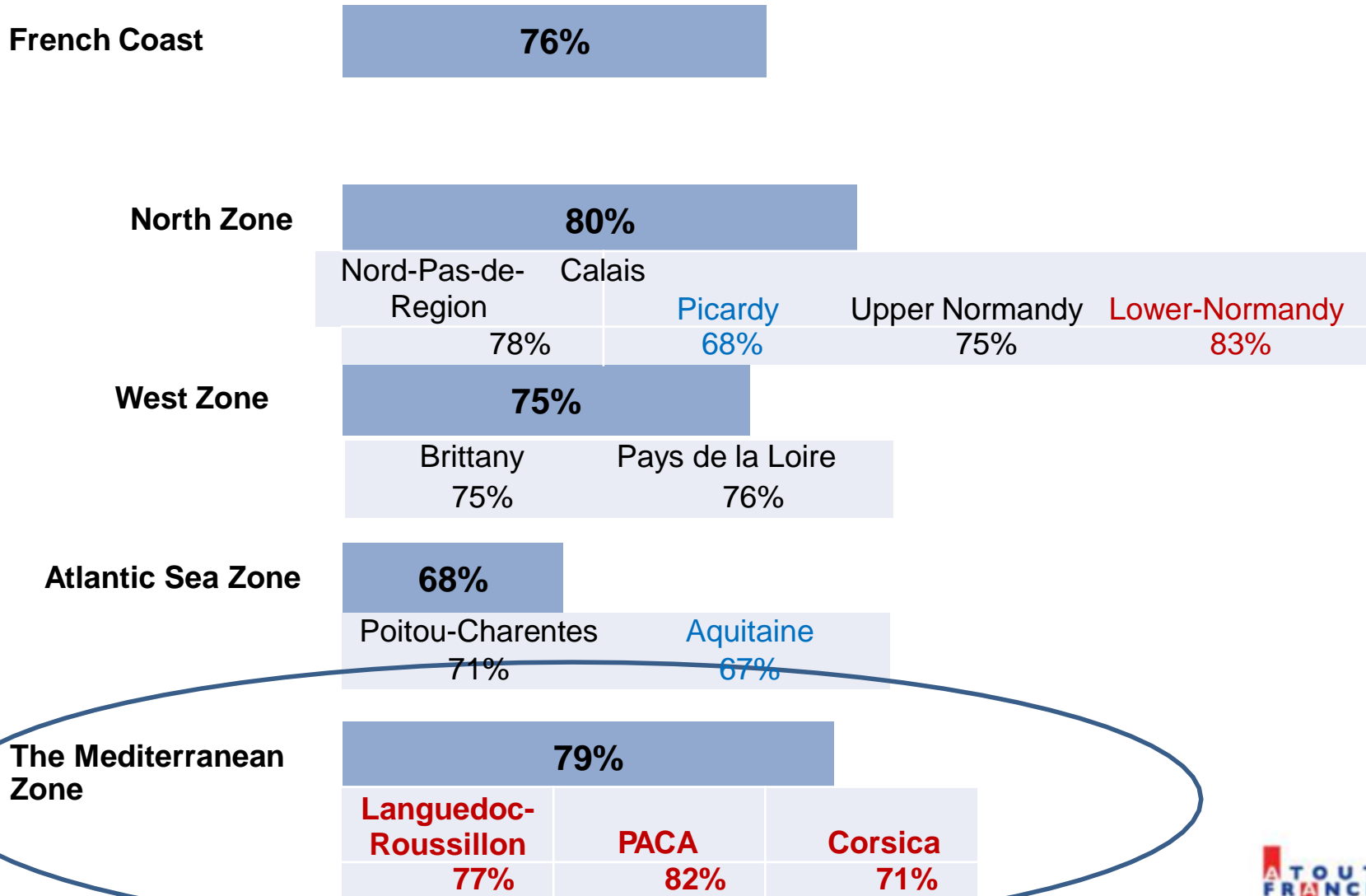




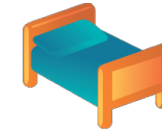
# Predominantly Non-commercial Offer...



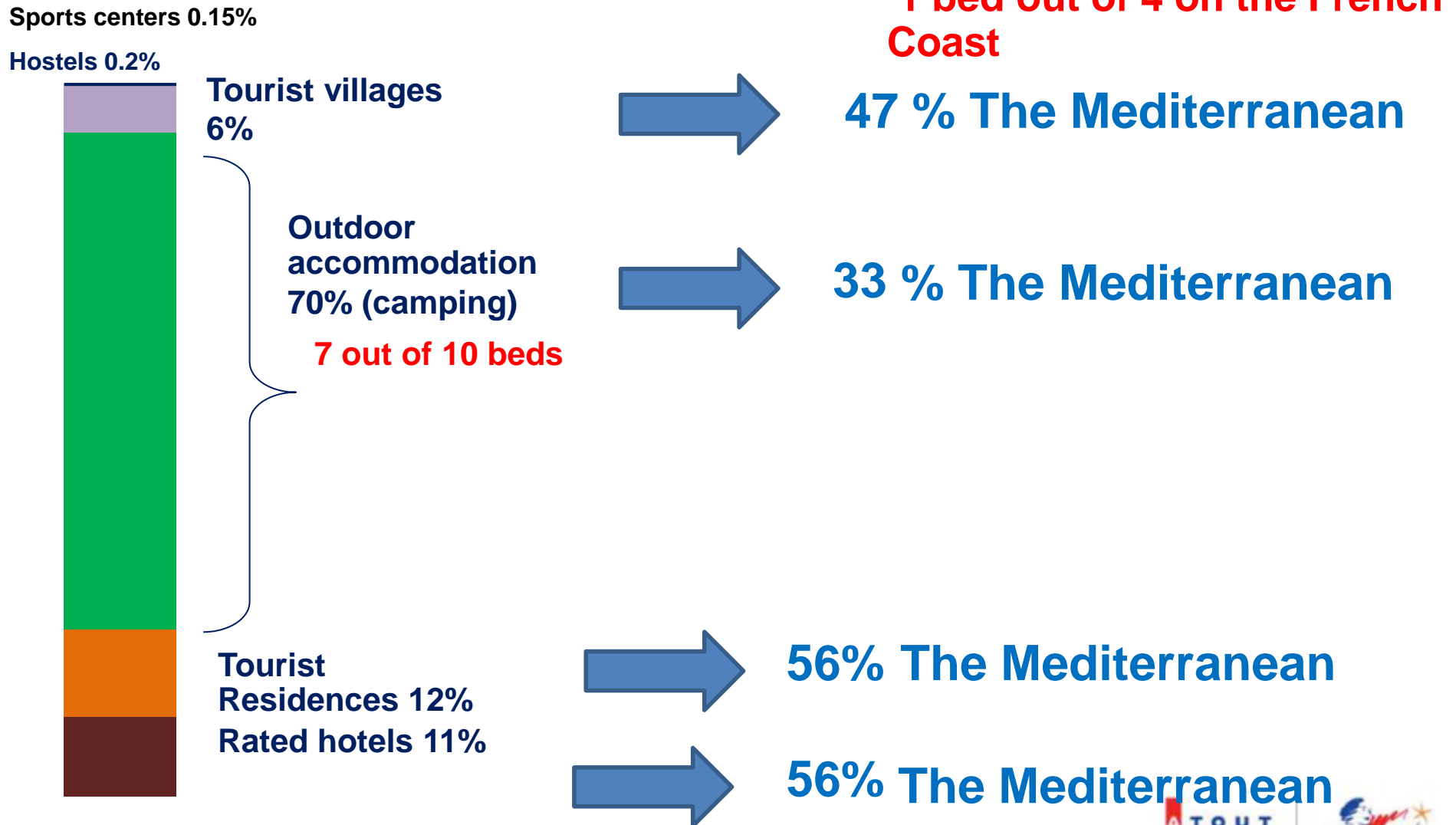
## Non-commercial beds



# Types of Commercial Accommodation



## Structure of Commercial Hotel Beds on the French Coast



# Change in Choice of Destination



→ Younger population



Goes to:  
*Ibiza, Costa Blanca, Costa Dorada, Croatia, Greece...*

→ to the benefit of over 50's



→ Reduced presence of families

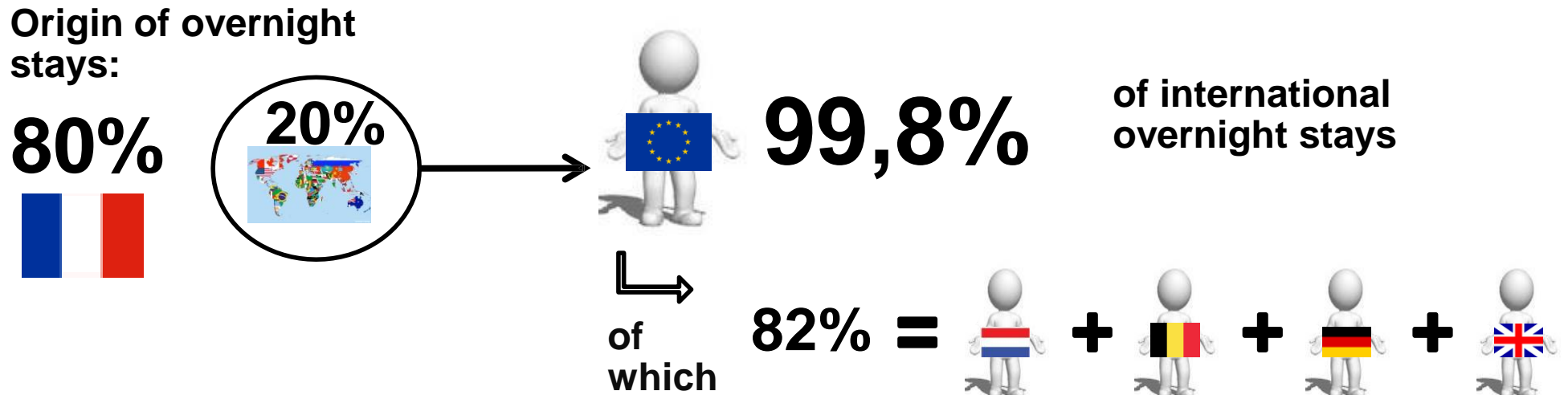
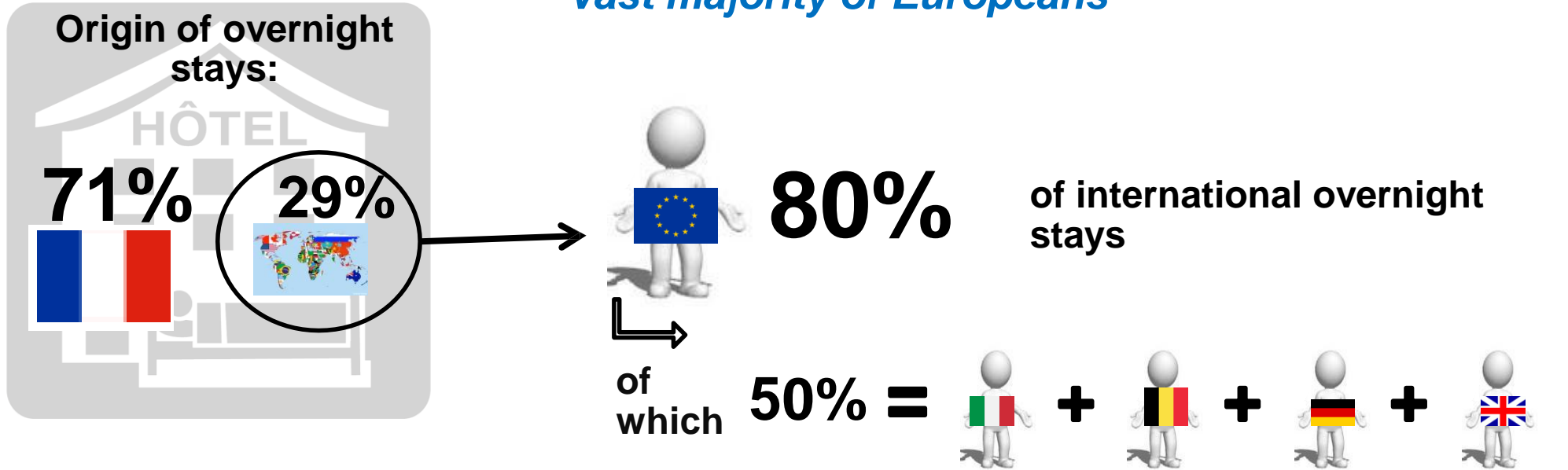


→ Less visits of inhabitants of Paris and surrounding areas:  
The first source of revenues



# International Clientele

*Vast majority of Europeans*



## Overnight Stays and Clients in the Mediterranean

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

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

	Total number of overnight	Hotels	Camps
The Mediterranean	39%	52%	35%
Languedoc Roussillon	15%	5%	18%
Provence Alps French Riviera	20%	40%	14%
Corsica	4%	7%	3%

↓

- 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

## Overnight Stays and Clients in the Mediterranean

	Camps +hotels		% of international overnight stays		
	International overnight stays	French overnight stays	Commercial	Hotel	Camps
<b>Languedoc Roussillon</b>	6 016 141	14 441 725	<b>29%</b>	<b>14%</b>	<b>31%</b>
<b>Provence French Riviera</b>	11 907 552	16 679 920	<b>42%</b>	<b>44%</b>	<b>40% Alps</b>
<b>Corsica</b>	1 847 076	3 969 793	<b>32%</b>	<b>25%</b>	<b>37%</b>
<b>Total in the Mediterranean</b>	19 770 769	35 091 438	<b>36%</b>	<b>38%</b>	<b>35%</b>
<b>Total Coast</b>	45 532 030	94 802 681	<b>32%</b>	<b>29%</b>	<b>34%</b>



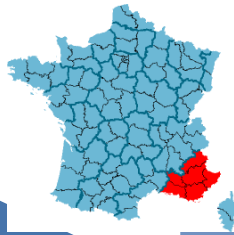
The Mediterranean has more commercial international overnight stays than any other coastal area in France

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... )

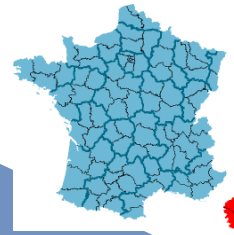
Real estate prices and access

Residentials

•



Provence  
Alpes  
Côte\_d'Azur

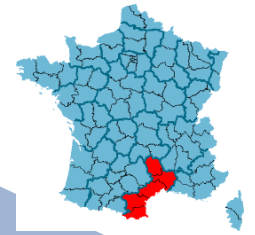


## Corsica

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



Collectivité Territoriale de  
**CORSE**  
Cullettività Territoriale di  
**CORSICA**



## 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



la Région  
Languedoc  
Roussillon

TE





## 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.*

Grand angle



### CHOISISSEZ LA PLAGE À VOTRE IMAGE

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

**La plage du Couchant** est la plage des familles et des amoureux des loisirs nautiques. A mi-parcours de la

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

Le long de **la plage du Centre-Ville** se trouve la promenade du front de mer avec ces restaurants, glaciers et boutiques. Aucune route ne longe cette promenade. Vous pouvez donc flâner, bronzer et vous baigner en toute quiétude.

Des dunes séparent une allée piétonne de la plage du Point Zéro.



## 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 seasonal**

**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...)

### Coastal Protection Agency (Conservatoire du Littoral)

Balance between the use of natural environment involved in tourist visits and its protection (carrying capacity and breaking point)

Thank you for your attention



*rendezvousenfrance.com*