

FRANCE TOURISM REPORT 2008

ANNUAL TOURISM REPORTING TEMPLATE

Testing exercise (31 July – 30 Sept 2008)

1. INTRODUCTION

Council Decision 86/664/EEC of 22 December 1986¹ establishing a consultation and cooperation procedure in the field of tourism foresees that “*each Member State shall send the Commission, once a year, a report on the most significant measures it has taken and, as far as possible, on measures it is considering taking in the provision of services for tourists which could have consequences for travellers from the other Member States*”.

With the publication of the Communication “*Agenda for a sustainable and competitive European tourism*”, thereafter referred to as “*Agenda*”, the Commission announced that “in order to strengthen the collaboration with and among Member States, their current annual reporting through the Tourism Advisory Committee (TAC) will be used to facilitate the exchange and the dissemination of information about how their policies and actions safeguard the sustainability of tourism”. The Communication also recognised that sustainability and competitiveness are integral parts of a comprehensive approach towards tourism management and development.

This Communication was welcomed by the Competitiveness Council conclusions (22nd-23rd November 2007) and by the Presidency Conclusions of the Brussels European Council of 14th December 2007.

The main aims for the reporting process are to:

- be able to monitor the level of implementation of the “*Agenda for a sustainable and competitive European tourism*” by Member States;
- provide an opportunity for Member States to make visible at European level the ideas and initiatives that they have developed or are developing regarding tourism issues;
- facilitate the exchange of experiences among Member States with regard to how they tackle issues which are important for the competitiveness and sustainability of European tourism.

MS reports referring to year n shall be sent to the European Commission by the end of February of year $n+1$.

If the reports are sent in English, the deadline can be moved to the end of April.

An update of tourism data will be provided by EUROSTAT in the month of September of year $n+1$ (before the European Tourism Forum).

In order to reduce the length of the report, it is recommended to provide links to relevant websites where further details can be found (so that those interested on a specific issue can find out more about i.e. the leading organisation, details of a scheme) and to introduce these links with a brief introduction summarising the most relevant info.

¹ Official Journal L 384, 31/12/1986 P. 0052 – 0053.

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2. ORGANISATIONAL STRUCTURE

This section should provide an overview of the main organisational structure to illustrate how tourism is organised and managed, to identify linkages and to identify the engagement of other organisations/stakeholders.

The information required will only need to be prepared fully in year 1 as it will subsequently only be necessary to provide details of any changes.

2.1 Please identify the national bodies responsible for tourism (Ministry and also any separate/related National Tourism Organisation), including their mission and spheres of competence, and their connection to other national bodies with direct or indirect influence in tourism. (maximum of 1.000 characters)

Responsibility for tourism is divided between the state and the regional authorities as follows:

The state defines and implements national tourism policy. It regulates, approves and classifies tourist facilities, bodies and activities; it promotes French tourism on foreign markets, sets international cooperation policy guidelines and implements them, particularly within the relevant international organisations. Finally, it promotes the coordination of public and private initiatives in the field of tourism, and provides assistance for tourism development measures by local authorities. The following state bodies work together to implement national policy under the authority of the Ministry of Tourism: the sub-directorate for tourism of the Directorate-General for Industry and Services (DGCIS) of the Ministry of Economic Affairs, Industry and Employment, set up by Decree of 12 January 2009 - Maison de la France, an economic interest grouping which is the national French body for the promotion of tourism, ODIT France, a public interest group responsible for consultancy work with tourist operators on development and planning matters, and ANCV, a public industrial establishment and national commercial agency responsible for issuing and circulating holiday vouchers and aid for the social tourism sector. A merger between Maison de la France and ODIT-France, forming the Agency for Tourism Development, is under preparation as part of the general revision of public policies undertaken by the French government in 2007 (Tourism Bill under examination).

The Region (Regional Council) draws up medium-term objectives for regional tourism development as part of a regional scheme for tourism and leisure development. The Regional Council set up a regional tourism committee responsible for promoting tourism and while the rules on its composition and main duties regarding promotion are laid down by law, the Regional Assembly lays down the statutes and determines its composition. *Law No 2002-276 of 27 February 2002 on local democracy* states that the Regional Council is responsible for collecting, processing and disseminating data on tourism in the region and that it coordinates, within the region, public and private initiatives in the field of tourism development, promotion and information. The regional authorities of Corsica have broader competence in tourism matters (Law of 22 January 2002).

The Department (conseil général) may set up a departmental tourism committee. The departmental assembly freely chooses the legal system for the committee. The rules on its composition and duties are determined by law so that it can act in harmony with the regional authorities and bodies involved in tourism development in the department. Finally, the *conseil général* can draw up a development plan which takes into account the guidelines set by the regional plan.

The Commune (municipal council) may set up a tourist office responsible for welcoming tourists, providing information and promoting local tourism. For this, the Commune freely chooses the tourist

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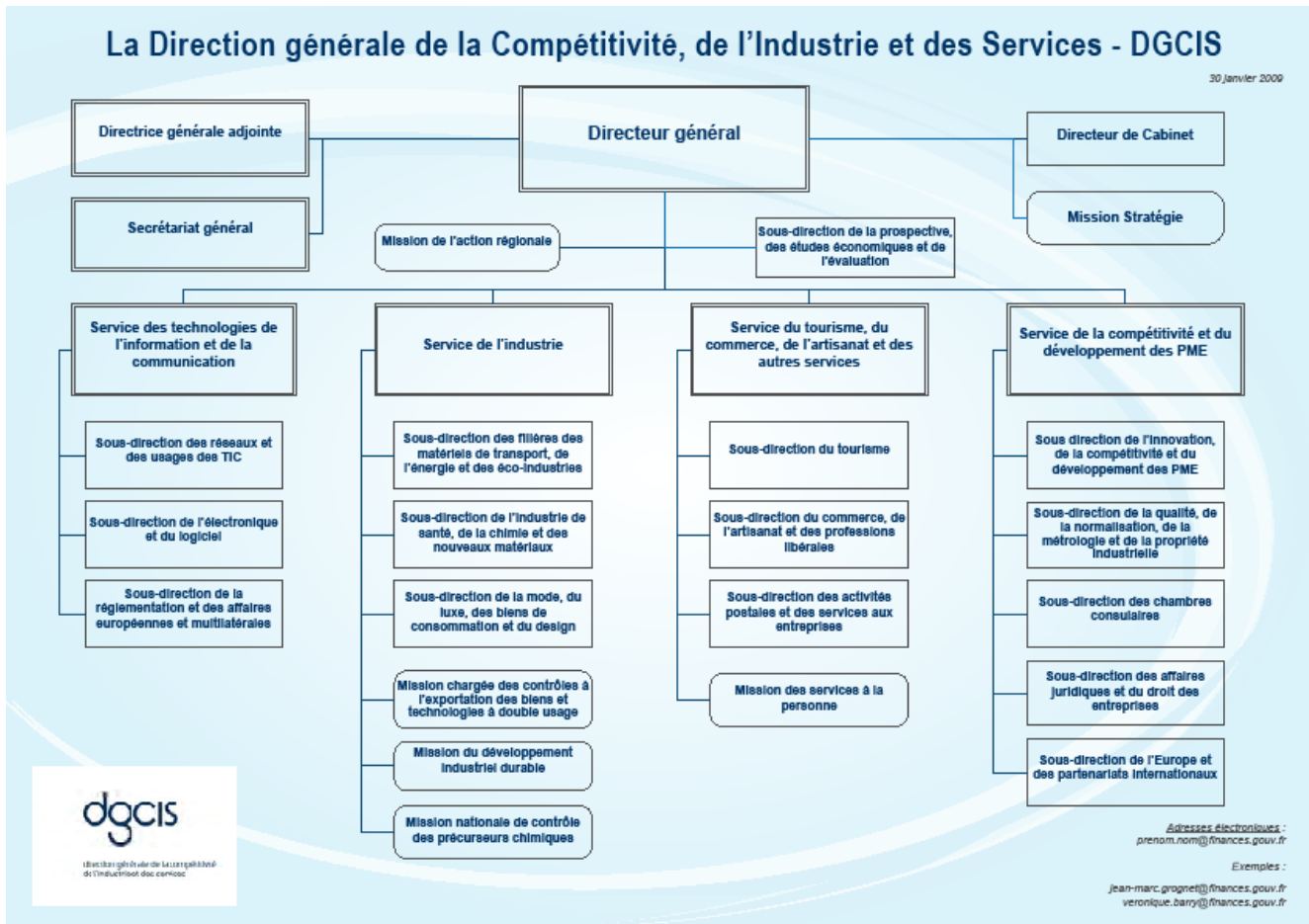
office's legal system. Finally, the law allows the creation of inter-communal tourist offices by groups of communes. Communes can be classified at their request as tourism communes and resorts by state decision.

There are special arrangements for French overseas collectivities. In the case of overseas departments and regions (Article 73 of the French Constitution), the consolidated Law of 23 December 1992 (Articles L. 161-3 of the Tourism Code) gave these mono-departmental authorities the opportunity to opt for a single tourism body or regional and departmental bodies. This category of collectivity is governed by the principle of legal identity, and ordinary law applies to tourism matters (Guadeloupe, French Guiana, Martinique and Réunion). The organisation of tourism in Saint Pierre and Miquelon and Mayotte falls under ordinary law with adaptations to their particular circumstances. As for overseas collectivities (Article 74 of the French Constitution), competence for tourism lies entirely with the territories concerned, notably in French Polynesia and New Caledonia. Likewise, Organic Law No 2007-223 of 21 February 2007 transfers state competence for tourism to the new collectivities of Saint-Barthélemy and Saint-Martin.

2.2 Please provide a *diagram/organigram of the organisational structure for tourism* identifying the connection between national, regional and local bodies. Provide also a short description of the core

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responsibilities and competencies of each of the organisations. Include also information about mechanisms of decision making process and participation (e.g. forums, advisory committees, other existing coordination mechanisms) from outsider organisations (e.g. other departments, stakeholder organisations and unions). (maximum 2 pages)



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2.3 Please provide information about *financial data*, including tourism budget as a percentage of overall government budget, the amount of national funding support for tourism marketing, the amount of EU funding support made available for tourism and data concerning the support to SMEs and destinations. (1000 characters)

According to an annual study on public funding for tourism in France, departmental appropriations for tourism in 2007 amounted to €94 million. This accounts for 0.17% of the state budget (payment appropriations).

Within this amount, the budget of the directorate responsible for tourism (dependent on the Ministry for Economic Affairs, Industry and Employment) amounted to €2 million.

Maison de la France, an economic interest grouping (EIG), bears the main responsibility for marketing France as a tourist destination nationally. Its budget (which is not entirely state funded) amounted to €63 million in 2007.

Structural funds for tourism projects in the various French territories amounted to €257 million in 2007.

3. POLICIES AND STRATEGIES

3.1 Is there a current *National Strategy for tourism*? Yes No

If yes, please, provide information in bullet point format about the *key aims, objectives and priorities* of the strategy highlighting those that are designed to address sustainability issues in economic, environmental and social terms in particular those related in the six aims included in the Agenda. In the *formulation process of the tourism strategy*, briefly explain whether and how consideration has been given to the 9 principles set out in the Agenda (para2.3 p5) and given in the appendix. (maximum 2000 characters)

Tourism in France accounts for 6.3% of Gross Domestic Product (GDP) and provides 1.8 million jobs. France, which has been the top international destination in terms of volume for 15 years, is faced with a new international situation. This is related to world growth, which is driven by flows out of Europe and the emergence of new competition.

A strategic, multi-faceted plan for French tourism was drawn up in 2008. This led to four major strategic choices, which form the political focus for 2009 and following years:

1- The facets chosen were: promotion, accessibility, hospitality and adapting to demand.

2- The strategic choices are:

- to conquer growth segments: this means winning market share in new sending countries - emerging countries such as China, India, Brazil and Mexico - and winning over new customers from eastern Europe and Russia and seniors from western Europe and France;

- to increase tourist expenditure: France is in only sixth position in terms of spending by tourists. The quality of what is on offer has to be developed. For this, emphasis should be placed on developing business tourism, an activity with high added value, and also on building customer loyalty to France as a destination;

- to develop sustainable tourism which respects the balance of nature and the French living environment: Customer demand is shifting towards a sustainable, balanced form of tourism. France must therefore be able to offer an appropriate infrastructure and a wide variety of activities in order to

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be able to propose four-season tourism throughout the country. In this way, France will pursue harmonious tourism development whilst preserving its many natural attractions and heritage.

- to make tourism a priority for everyone: Tourism, which cuts across many areas of activity, has an impact on very many sectors. Each of these should therefore be involved, which can be done by bringing into play the relay function of regional authorities, not to mention private bodies by working through their unions and federations.

3.2 Who was the *initiator* and who is *responsible* for its implementation? (maximum 500 characters)

The Ministry for Economic Affairs, Industry and Employment initiated the creation of this strategic plan at the “Assises nationales du tourisme” in May 2008. It will be implemented by the public authorities, i.e. government departments and regional authorities. The current economic situation also requires an effort by everyone to develop tourism, a major item of our national income.

3.3 How is the strategy *monitored* and how often? (maximum 1000 characters)

The strategy is monitored essentially through the approval of the Finance Act at the end of each year.

3.4 What *national legislation* exists which is specific for tourism or which has a major impact on the sector? (maximum 2000 characters)

The rules applicable to the tourism sector are contained in the Tourism Code.

The Code comprises four books:

- Book I describes the general organisation of tourism, in particular the breakdown of competencies between the state, the regional authorities, and inter-communal public bodies.
- Book II governs tourism activities and professions.
- Book III deals with accommodation and tourist facilities and amenities.
- Book IV groups together provisions on financing access to holidays and tourism taxation.

Tourism is the subject of three successive, complementary laws:

- Law No 87-10 of 3 January 1987 as amended, on the regional organisation of tourism;
- Law No 92-645 of 13 July 1992 as amended, which lays down the conditions for carrying out activities regarding the organisation and sale of travel and holidays;
- Law No 92-1341 of 23 December 1992 as amended, laying down the division of responsibilities in the field of tourism.

These provisions were consolidated in the Tourism Code.

Other legal documents have since changed the legal framework within which tourism activities are carried out, for instance:

- Law No 99-584 of 12 July 1999 amending the Order of 26 March 1982 establishing holiday vouchers;
- Law No 2000-1208 of 13 December 2000 on solidarity and urban renewal (sets the legal framework for the renovation of leisure facilities);

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- Law No 2001-616 of 11 July 2001 concerning the collectivity of Mayotte;
- Law No 2002-92 of 22 January 2002 on Corsica (specifies and extends the authority of this territorial collectivity in tourism matters);
- Law No 2004-809 of 13 August 2004 on local freedoms and responsibilities (includes several provisions concerning tourism, in particular tourist offices).
- Law No 2006-437 of 14 April 2006 containing various provisions relating to tourism. This law is one of the most recent reforms in the field of tourism and covers many subjects: the reform of the system of resorts and the enhancement of action by tourist communes, the organisation of the sale of travel and holidays, the extension to Mayotte of tourism regulations, the legal recognition of bed and breakfast accommodation and the development of mountain tourism.

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4. MEASURES AND INITIATIVES

This section provides Member States with an opportunity to outline *specific initiatives and policies* that are or are going to be adopted to manage and develop tourism activity in ways which respond to the key challenges referred to in the “*Agenda*” and which fall within the six main aims of the “*Agenda*” itself.

These initiatives could for instance fall into the following types of policy instruments: command and control instruments (legislation, regulation and licensing, land use planning and development control), voluntary instruments (guidelines and codes of conduct, reporting and auditing, certification, eco-labels, awards, voluntary contributions), economic instruments (taxes and charges, financial incentives and agreements), supporting instruments (infrastructure provision and management, capacity building, awareness raising, marketing and information services), measurement instruments (benchmarking, assessments on optimal use levels, carrying capacity).

1 Economic prosperity

- a. To ensure the long term competitiveness, viability and prosperity of tourism enterprises and destinations.
- b. To provide quality employment opportunities, offering fair pay and conditions for all employees and avoiding all forms of discrimination.

2 Social equity and cohesion

- a. To enhance the quality of life of local communities through tourism, and engage them in its planning and management
- b. To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, religion, disability or in other ways.

3 Environmental and cultural protection

- a. To minimise pollution and degradation of the global and local environment and the use of scarce resources by tourism activities.
- b. To maintain and strengthen cultural richness and biodiversity and contribute to their appreciation and conservation.

4.1 Please set out, briefly, the **steps** which have been or will be taken, if any, **to address the 7 key challenges** for the delivery of sustainable and competitive tourism, covered in the TSG report and referred to in the ‘Agenda’.

4.1.1 Reducing the seasonality of demand. (maximum 1000 characters)

Particularly in mountain, coastal and rural areas:

- extension of tourism periods is one of the criteria required for a commune or “public establishment of inter-communal cooperation” to gain the status of “tourism resort” (law of 14 April 2006);
- ODIT France published the guide “le tourisme estival de montagne” (summer mountain tourism) in January 2008;

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- research is under way to increase the stock of secondary residences offered for rent in coastal and mountain resorts, to limit the "closed shutter" phenomenon, which is apparent for too much of the year.

4.1.2 Addressing the impact of tourism transport. (maximum 1000 characters)

The most significant recent initiatives are those taken by tour operators (proposal that customers compensate for their greenhouse gas emissions), transport companies (purchase of the most recent, least-polluting aircraft) or customers themselves (reduction in travel by aeroplane or car because of the increase in fuel prices). The French state promotes less polluting forms of transport (train: e.g. construction of the Lyon – Turin high-speed train; public transport in towns) or soft transport (cycling, including in towns, and hiking).

4.1.3 Improving the quality of tourism jobs. (maximum 1000 characters)

- Planned 5.5% VAT rate for the HORECA sector, to allow pay increases and recruitment.
- Participation in employment observatories (HORECA sector, travel retail sector), support for seasonal work (creation of houses for seasonal workers, seasonal worker employment charter for employers).
- Large-scale study being launched on matching higher training in tourism to customer needs and the labour market (submitted mid-2009).
- Ongoing study on the professions of interpreter guide and public speaker to bring recruitment and employment conditions into line with the requirements of customers and employers (submitted end 2008).

4.1.4 Maintaining and enhancing community prosperity and the quality of life, in the face of change. (maximum 1000 characters)

- State approval for social tourism associations is based on the benefits brought by the accommodation establishments to the local economy (local spending, possibility for local people to use sport and leisure centres, jobs for local people, etc.).
- Measures to assist seasonal workers include promoting the employment of local workers in areas of seasonal tourism.

4.1.5 Minimising resource use and the production of waste. (maximum 1000 characters)

- A large number of initiatives by chains, associations, networks, establishments, e.g. the countryside charter of the "Camping Qualité" network; the "Chouette nature" (lovely nature) label for social tourism by associations; the Parcs (parks) label; the Clé Verte (green key) label; the spread (admittedly slow) of the European eco-label for tourist accommodation; the inclusion in future of ecological criteria for classifying hotels, etc.
- The French Committee for the sustainable development of tourism (cf. PNUE - Marrakech

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process) is carrying out a cost-benefit analysis of environmental investment in tourist accommodation with the aim of producing a guide for proprietors and their financial backers.

4.1.6 Conserving and giving value to natural and cultural heritage. (maximum 1000 characters)

The partnership between the different ministries responsible for tourism, culture, and nature and heritage sites is increasingly close on issues concerning the responsible development of monuments and sites. The national quality mark "Qualité Tourisme", which recognises the quality of the hospitality of an establishment, has now been extended to include tourist attractions (museums, parks, sites, castles, etc.).

4.1.7 Making holidays available to all. (maximum 1000 characters)

The national Holiday Voucher Agency is a major instrument under the access-to-holidays policy. The aim is to encourage the maximum number of families and under-privileged young people to go on holiday, and, more generally, anyone unable to exercise the right to a holiday. The Agency also participates in the social tourism policy by transferring management surpluses to the renovation of tourist amenities (€15 m released in 2007) and by developing the new programme "Vacances des Séniors" (senior holidays).

Created in 2001, the Tourism and Handicap label, which is awarded to tourism professionals, provides customers with reliable, uniform and objective information on the accessibility of tourist sites and amenities. By mid-June 2008, some 2 811 sites had received the label, 380 of which were for the four handicaps – visual, auditory, physical and mental.

4.2 As key challenges may change over time, please identify any other areas that are **becoming a new challenge**. (maximum 1000 characters)

- Study under way on "the impact of climate change on tourism, adapting to it and the costs involved" (planned delivery end 2008/beginning 2009)
- Greater emphasis on tourism and seniors (help with transport and accommodation, maintaining the social connection, help with improving health) and on tourism and young people (help with learning to be independent, opening to the world, awareness of the importance of languages, improved employability and mobility, extension of social support).

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4.3 Please identify and describe one **SPECIFIC INITIATIVE** (i.e. how it worked, difficulties and problems encountered, solutions and success factors), which is related to the 7 key challenges, that is **INNOVATIVE/SUCCESSFUL** and which would be of interest to or of help to other Member States. (maximum 2 pages)

The development of cycling tourism

Developing "France by bike" could be of great economic benefit to many regions and bolster the sustainable tourism aspect of France as a destination.

Cycling tourism may revive the discovery of many destinations and allows a form of sustainable tourism accessible to many.

Cycling tourism is basically practised in two forms: centre-based and moving-on tours. The first type is the most widely known, because of well-established destinations, such as the Ile de Ré, the coastline of Les Landes or the Baie de Somme. However, there are not many such destinations. The second type, which involves moving on from place to place, is not widespread, but it has greater economic impact and is therefore the more promising market. Some major French cycling routes have considerable potential on several foreign markets already familiar with this type of tourism (Germany, Belgium, the Netherlands, etc.).

The discovery of cultural and natural heritage is this consumer group's main expectation. For families or small groups, cycling 30km/day at 10km/h, this is activity tourism as much as cultural. It meets the growing concerns of tourists regarding well-being and ecology.

- An economically profitable form of tourism: examples in operation demonstrate the value for the regions of developing cycling tourism. The "Danube by bike" generates annual returns equal to the initial investment (€45 million). The "Loire by bike", although not yet complete, is receiving a considerable number of visitors (over 100 000 visits in rural areas in summer 2007). A touring clientele is developing, with an average basket per cycling tourist of €67 per day, compared with €47 for tourists travelling by car. Sales by the tour-operator Randovélo rose by over 40% in 2007.
- Ecological tourism: in the medium term, tourist travel and holidays will need to produce fewer greenhouse gas emissions. Holidays will have to be closer to home, longer and slower. These are features of cycling tourism, which is therefore a relevant alternative and in keeping with tourist demand. By using former railway lines, canal paths or existing roads, the cycling network uses little extra land. The discovery of natural areas and the countryside also increases the public's attachment to them, which is beneficial to their protection.
- Tourism for all: cycling tourism can be broken down into a wide selection of products of all categories, accessible to a broad public. For one single destination, depending on whether the trip has been put together by the individual or is a package, week-long stays are available for between €300 and over €5 000, according to the range of services provided. Activity-based tourism is also beneficial to health and well-being. Relatively flat routes are also key to the accessibility of a destination for various disabled groups. "Greenways" could even be given a "tourism and handicap" label.

To develop the market, the creation of France by bike

The organisation of cycling tours justifies inter-regional coordination of the structure of supply and hence national organisation. We now have to move on from the policy of infrastructure (bike routes and Greenways) to one of developing the tourist economy, which could take the following form:

- Promoting destinations for cycle tours which are safe, easy, family-friendly, for all ages and accessible immediately (e.g. the Loire by bike, Tour de Bourgogne, Rhine, Nantes-Brest canal, etc.) to stimulate demand and create public awareness of the concept.

● Planning tomorrow's destinations:

○giving priority to getting a few well-known destinations operational in the short term (2010-2011) (Atlantic coast, canal du midi, Rhône, etc.); see map;

○in the longer term, the other destinations in the national programme for cycling routes and Greenways.

Rough outline of France by bike (short term)



The role at national level (state and public or private partners) is to support, facilitate and multiply action taken by the industry, the departments and the regions to organise this type of tourism and thus overcome any administrative restrictions.

To organise these destinations, the structure of cycling tourism must be coordinated at national level. It is also at national level that this type of tourism should be publicised and promoted.

ODIT France has been asked by the inter-ministerial coordinator to lead discussions on how to develop "France by bike". By the end of 2008, a group of experts is to put forward a plan to bring the project to life: coordination of routes, communication and promotion, impact assessment.

Alongside this, from March to December 2008, ODIT France is to carry out a study on the economic importance of cycling in France on behalf of the inter-ministerial coordinator for cycling. The study will provide indicators on current activity and prospects.

5. MECHANISMS FOR IMPLEMENTATION

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The "Agenda" identified three mechanisms for its implementation: sustainable destinations, sustainable businesses and responsible tourists.

5.1 Sustainable destinations: What support is given to strengthen destination management at the regional/destination level (supportive policy environment, knowledge networks, training programmes, establishment of measures/indicators for benchmarking, etc.)? (maximum 1000 characters)

The Ministry responsible for tourism provides financial support for networks of destinations which have made sustainable tourism one of their priorities. Natural parks, Grands sites de France, Chouette Nature network of holiday villages, Ethic Etapes network of youth hostels, etc.

The extension of tourism seasons is also one of the criteria for a commune or public establishment of inter-communal cooperation to obtain classification as a "tourist resort" (law of 14 April 2006).

The contracts for projects signed between the state and 13 French regions for the 2007 – 2013 period apply a number of national priorities in accordance with the Lisbon Agenda, one of which is sustainable development. The main measures financed are the development of the Greenways cycling routes and the renovation of tourist accommodation, which take account of sustainability.

In addition to the regional elements, there are also inter-regional agreements for which the criteria regarding the development of sustainable tourism are a priority. These include the inter-regional agreement of the Massif Central and the Loire, Rhône and Lot plans.

The partnership which has existed for several years with the national tourism federations focuses particularly on improving the quality of the activities of network members and raising awareness of sustainable development.

5.2 Sustainable businesses: What support is given to strengthen the sustainability and competitiveness of businesses (supportive policy environment, orientation of business support services to sustainability, training, financial incentives, etc.)? (maximum 1000 characters)

The French committee on the sustainable development of tourism (cf. UNEP – Marrakech process) is studying the cost/benefit of ecological investment in tourist accommodation in order to produce a guide for proprietors and their financial backers.

The Tourism Quality Plan has the objective for 2009 of integrating its commitments regarding sustainable development into its framework commitments for each sector of activity covered by the Quality Tourism mark (accommodation, visits, tourist offices, congress centres and seminars, and catering).

Criteria regarding sustainable development appear in the draft reform of the classification grid for hotels.

In addition, the French state is promoting the European ecolabel for tourist accommodation.

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5.3 Responsible tourists: What support is given to promote responsible choices by tourists (e.g. sustainability in education, national marketing and media campaigns, promotion of certification schemes)? (maximum 1000 characters)

Campaign among travellers against sex tourism.

Financial support for the networks and tourism professionals which adopt a sustainable approach includes measures for communicating with the public.

- The Ministry responsible for tourism participates in the organisation of the Forum International du Tourisme Solidaire (FITS – the International Forum for fair tourism), which is a French initiative under the Marrakech process. Its aim is to bring together all the public and private players and associations which wish to implement forms of sustainable tourism that respect local populations and their environment and promote redistribution at local level of the resources resulting from tourism. The purpose of FITS is to exchange good practices and – a new feature this year – to create networks in order to unify supply and promote its commercialisation.

- The Association pour le Tourisme Équitable et Solidaire (ATES), the leading French network for responsible tourism, groups together tour operators and associations which see tourism as an instrument for development in the host regions. The network's main objective is to highlight this type of tourism and raise the awareness of the general public by allowing more structured communication about the planned destinations.

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6. DATA AND INDICATORS

Eurostat will provide, as an annex, the key statistical data required to support the reporting process covering around 20 indicators² (see appendix for a provisional list). These are mainly related to the aim of 'economic prosperity'.

Please, identify indicators that are being used or developed at national / regional level which could add to the range of information being provided by Eurostat, particularly in relation to social and environmental issues (e.g. other indicators from the TSG report, visitors/ residents satisfaction). (maximum 1000 characters)

With reference to the "TSG report":

Challenge 1: reducing the seasonality of demand

Ratio of the number of overnight stays by tourists in the third quarter against the annual total.

Challenge 2: addressing the impact of transport linked to tourism

Breakdown of travel according to the type of transport used and the distance covered, maybe in terms of broad distance classes [adding the indicator 14a*, to take account of the distance covered, rather than just the distinction "by destination (domestic; outbound)"].

Challenge 3: improving the quality of tourism jobs

Indicators 16a, 17a and 18a appear a good compromise between relevance and feasibility.

Challenge 7: holidays for all

Rate of departures on holiday (at least one night) and longer stays (at least four nights) for personal reasons, annual data,

- . by sex,
- . by age group (according to the detail of indicator 12b),
- . by social category [to be defined, as there is no European classification; for France, the nomenclature for professions and socio-professional categories would be used (PCS-level**), grouped together where necessary].

(*) with a correction: "by main means of **transport** used" instead of "by main means of accommodation used".

(**) French SPC Nomenclature (level 1)

These indicators have been selected from the 50 TSG indicators on the basis of the possibility of calculating them for the EU Member States via existing statistics.

7. COMPLEMENTARY ADDITIONAL INFORMATION

If necessary use the following box to provide additional complementary information that has not already been covered.

Government measures to promote tourism in response to the crisis:

General measures:

² These indicators have been selected from the 50 TSG indicators on the basis of the possibility to calculate them for the EU Member States via existing statistics.

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In December 2008, the French Government adopted an economic recovery plan comprising various measures to assist businesses:

- To alleviate financial constraints on businesses, particularly SMEs, the state has undertaken to immediately honour their tax claims: this accelerated repayment has been available to all businesses since 1 January 2009 and concerns research tax credit, corporation tax surpluses, VAT credit and loss carry-backs.
- With the approval of the European Commission, the de minimis aid ceiling has been temporarily raised: in the Finance Act 2009, the ceiling was raised from €200 000 over three years to €500 000 over two years.
- With the agreement of the European Commission, a system of bank guarantees, which could cover up to 90% of loans, will be accessible to SMEs and mid-cap companies. OSEO, the public bank for small and medium-sized companies, will guarantee these loans so that these companies can continue to have access to the funding they need to continue and develop their activities.
- To help small businesses recruit staff in 2009, exceptional aid exempts them totally from employers' contributions for any recruitment at minimum wage level since 4 December 2008. The aid is then degressive up to 1.6 times the minimum wage.

Measures to assist tourism

- Measures are being studied to help travel agencies affected by the crisis: OSEO will provide two types of financial aid: it will cover between 50% and 70% of their bank overdrafts and it will allow an overdraft to be turned into short-term credit.
- Reduced-level VAT for catering services remains an objective for the French Government.

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APPENDIX

PRINCIPLES FOR THE SUSTAINABILITY OF TOURISM:

- **Taking a holistic and integrated approach**

All the various impacts of tourism should be taken into account in its planning and development. Furthermore, tourism should be well balanced and integrated with a whole range of activities that affect society and the environment.

- **Planning for the long term**

Sustainable development is about taking care of the needs of future generations as well as our own. Long term planning requires the ability to sustain actions over time.

- **Achieving an appropriate pace and rhythm of development**

The level, pace and shape of development should reflect and respect the character, resources and needs of host communities and destinations.

- **Involving all stakeholders**

A sustainable approach requires widespread and committed participation in decision making and practical implementation by all those implicated in the outcome.

- **Using best available knowledge**

Policies and actions should be informed by the latest and best knowledge available. Information on tourism trends and impacts, and skills and experience, should be shared across Europe.

- **Minimising and managing risk – the precautionary principle**

Where there is uncertainty about outcomes, there should be full evaluation and preventative action should be taken to avoid damage to the environment or society.

- **Reflecting impacts in costs – user and polluter pays**

Prices should reflect the real costs to society of consumption and production activities. This has implications not simply for pollution but for charging for the use of facilities that have significant management costs attached to them.

- **Setting and respecting limits, where appropriate**

The carrying capacity of individual sites and wider areas should be recognised, with a readiness and ability to limit, where and when appropriate, the amount of tourism development and volume of tourist flows.

- **Undertaking continuous monitoring**

Sustainability is all about understanding impacts and being alert to them all the time, so that the necessary changes and improvements can be made.

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LIST OF INDICATORS (these indicators will be calculated by EUROSTAT)

The following list of indicators was presented to the June 2008 TSG meeting by EUROSTAT.

Please note that the list of indicators as presented below is not yet final (some indicators may still be dropped).

- 1a** Annual number of nights spent at collective accommodation establishments, broken down by region (NUTS2)
- 1b** Monthly number of nights spent at collective accommodation establishments
- national level
- 3a** Number of collective accommodation establishments, broken down by region (NUTS3) and by type of establishment (Hotels and similar establishments; Other collective accommodation establishments (total); Tourist campsites; Holiday dwellings; Other collective accommodation not elsewhere specified)
- annual data
- 3b** Number of bedplaces in collective accommodation establishments, broken down by region (NUTS3) and by type of establishment (Hotels and similar establishments; Other collective accommodation establishments (total); Tourist campsites; Holiday dwellings; Other collective accommodation not elsewhere specified)
- annual data
- 4a** Monthly gross occupancy rate of bedplaces in hotels and similar establishments
- national level
- 4b** Monthly net occupancy rate of bedplaces in hotels and similar establishments
- national level
- 5a** Total turnover [or year-on-year growth rate] of selected tourism-related industries, broken down by industry (total horeca; hotels, camping sites, other provision of short-stay accommodation) and by employment size class (1 employee; between 2 and 9; between 10 and 19; between 20 and 49; between 50 and 249; 250 employees or more)
- annual data, national level
- 5b** Total turnover [or year-on-year growth rate] of selected tourism-related industries, broken down by industry (Hotels and restaurants; Hotels, camping sites, other provision of short-stay accommodation; Restaurants, bars, canteens and catering; Activities of travel agencies and tour operators, tourist assistance activities not elsewhere classified)
- annual data, national level
- 6a** Tourism receipts from inbound tourism ('travel item' from the Balance of Payments)
- annual data, national level
- 6b** Ratio tourism receipts from inbound tourism in relation to tourism expenditure on outbound tourism
- annual data, national level
- 6c** Tourist expenditure by residents on holiday trips with at least one overnight stay, broken down by destination (total; domestic trips; outbound trips within the EU; outbound trips outside the EU)
- annual data, national level
- 8a** Variation of the ratio monthly gross versus net occupancy rate of bedplaces in hotels and similar establishments
- national level
- 9a** Ratio of net [or gross] occupancy rate of bedplaces in hotels and similar establishments between the busiest and the least busy month
- national level

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- 10a** Number of bedplaces at collective accommodation establishments per 1000 (local) inhabitants, broken down by region (NUTS3)
– annual data
- 11a** Number of nights spent at collective accommodation establishments per 1000 (local) inhabitants [or in comparison to local inhabitants nights, i.e. number of inhabitants x 365], broken down by country of origin (residents; non-residents) and by region (NUTS2)
– annual data
- 11b** Number of arrivals at collective accommodation establishments per 1000 (local) inhabitants, broken down by country of origin (residents; non-residents) and by region (NUTS2)
– annual data
- 11c** Monthly number of nights spent at collective accommodation establishments per 1000 (local) inhabitants [or in comparison to local inhabitants nights, i.e. number of inhabitants x number of days in the month], broken down by country of origin (residents; non-residents)
– national level
- 11d** Monthly number of arrivals at collective accommodation establishments per 1000 (local) inhabitants, broken down by country of origin (residents; non-residents)
– national level
- 12a** Average length of stay at collective accommodation establishments, broken down by country of origin (residents; non-residents) and by region (NUTS2)
– annual data
- 12b** Number of holiday trips of 4 nights or more by EU residents, broken down by length of stay (From 4 to 7 nights; From 8 to 14 nights; From 15 to 28 nights; From 29 to 91 nights; From 92 to 365 nights) and by destination (domestic; outbound)
– annual data, national level (country of residence of the tourist)
- 12c** Number of tourism trips with overnight stays by EU residents, broken down by length of stay (1 to 3 nights; 4 nights or more), by destination (domestic; outbound) and by purpose of the trip (holidays; business)
- quarterly data, national level (country of residence of the tourist)
- 14a** Number of tourism trips of 4 nights or more by EU residents, broken down by main means of accommodation used (air; sea; land (total); railway; bus, coach; private and hired vehicles; other) and by destination (domestic; outbound)
– annual data, national level (country of residence of the tourist)
- 16a** Number of persons employed in [or share in total employment of] the tourist accommodation sector, broken down by type of contract (fulltime; part-time; permanent; temporary), by age group, by gender, by educational level, by average seniority of work with the same employer
- quarterly data, national level
- 17a** Ratio of the number of persons employed in the tourist accommodation sector in the peak season (quarter) compared to the lowest season (quarter)
- national level
- 18a** Ratio of the mean hourly earnings in the horeca sector compared to the total private sector (local units of enterprises with 10 or more employees), broken down by gender, age, employment contract, educational level, length of service with the enterprise
- 4-yearly data, national level
- 18b** Ratio of the mean hourly labour cost in the horeca sector compared to the total private sector (local units of enterprises with 10 or more employees), broken down by region (NUTS1)
- 4-yearly data

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- 45 a** Share of households that can't afford one week annual holiday away from home
- annual data, national level (country of residence of the household)