PANORAMA OF THE TOURIST ECONOMY

The English version of this panorama is a summary of a larger document illustrating the importance of the tourist economy in the Provence-Alpes-Cote d’Azur region.

With the support of:
Introduction

Locate the Provence-Alpes-Cote d’Azur french region

In Europe...

... in the latin mediterranean area
Introduction

Methodological approach

What is the tourist economy?

The tourist economy deals with all the topics that are directly or indirectly involved in tourism, from the prospect of what is available in the region. This panorama is a snapshot of the organisation and size of those businesses engaged in strengthening the tourist attractiveness of a defined region.

In order to cover the full scope of the subject, we shall use the following definition of tourism:

“This includes the businesses used by people during travel and stays in places outside their usual surroundings for a consecutive period of less than a year, but more than 24 hours, for leisure, for business or other reasons unconnected with performing paid work in the place being visited.”

This wide definition of tourism makes economic measurement of all the businesses connected with tourism complex. This is because businesses such as restaurants or transport, used by tourists, are also patronised by local customers. There is nothing that can help to distinguish between people using the business since the impact of tourism on some businesses is hardly quantifiable or not at all.

Tourism is a cross-sectoral sphere par excellence, comprising different kinds of business which provide services for tourism. Therefore it is not covered by sector analyses. The businesses that make it up belong to numerous sectors and are not always clearly identified in statistical surveys.

The length of stay distinguishes two categories of visitor: tourists who spend at least one night away from their usual surroundings and the day-trippers, who don't spend any. Cruise passengers on a stop-over behave like day-trippers: they use the region's facilities without using the accommodation.

This work will deal with tourists, and with day-trippers who are cruise passengers.

We will start by dealing with the subject by sector and then with a cross-sectoral analysis.

The information comes from participants and regional bodies (CRT-CDT, etc.) and also from INSEE, the Marseille Provence CCI, other data providers and/or any other intermediary in our region with contacts in some or all of the topics being treated.

Employment in the tourist sector is difficult to assess. This has several causes, including high staff turnover because of temporary employment, part-time working, seasonal workers, lower than average wages and the lax requirements for qualifications or experience.

In this document, we have decided to isolate “cruise and ferries” from the rest of the “Services connected with sea transport” category, in order to give a better illustration of this subject of growing importance in the region. It should also be noted, that “cruise and ferries” caters mainly for tourists while “Services connected with sea transport” caters for other kinds of customers as well.

A list of the professions included in the area of investigation for this work can be found in introduction to the “Training” part.
Introduction

Area of investigation

Sectors typically associated with tourism

- Accommodation
- Catering
- Other shops
- Cruises, ferries
- Information and advice
- Travel organisations
- Health and beauty, recreational and leisure businesses
- Sport activities
- Cultural, heritage and events activities
- Artistic professions
- Services connected with sea transport
- Other air, road and rail transport

Infrastructures

- For transport
- For Information and advice

Seals of approval and markets

- Types of tourism
- Seals of approval
Introduction

Context of tourism
► Summary: World / Europe / France / Mediterranean countries/ Provence-Alpes-Côted’Azur
► Benchmark France / Provence-Alpes-Côte d’Azur

Presentation by business
► Accommodation
► Catering
► Cruises
► Activities: Health and beauty businesses, Cultural, recreational and leisure businesses, Sport businesses
► Specific local features: Life style, Traditional crafts and artistic professions
► Facilities / Information
► Travel organisations
► Transport

Networks, cross-business activities
► Public domain
Public policy
Main public bodies
Regional clusters
► Services connected with tourism
Introduction
Innovation and new technologies
Sustainable tourism and environmental concepts
Services complementary to tourism
► Events
General points and key data
Trade fair and conference industry
Marseille Provence 2013: European capital of culture
Heritage
► Summary / Key data
► Maps
Seals of approval and markets
► Tourism markets
► Seals of approval
► Tourist aeras
Training in the tourism professions
Introduction

Summary (1/4)

Provence-Alpes-Côte d’Azur: a heavyweight in tourism at the European level

► In spite of the vagaries of the international situation, tourism should continue to grow in the long term (1.5 billion tourists in 2020 compared with 1 billion today), with the majority coming from Asia. But visitors from Europe will still reign supreme accounting for almost half of the market. The Mediterranean as a whole will represent 30% of the total.

► With the neighbouring regions (Rhône-Alpes, Catalonia, etc.) Provence-Alpes-Côte d’Azur is at the core of European tourism, which, with the southern Alps – Mediterranean region, is itself one of the world’s major centres.

Tourism, a complex alchemy of many ingredients

► Sunshine of course, but also the sea, the mountains, the unspoilt natural areas, towns and landscape, monuments and history, museums, events, festivals and also the cultural, sport and leisure businesses etc. all the subjects dealt with in this panorama: a multi-faceted alliance that brings together the geographic features of the region’s natural assets and human activity.

► This alchemy brings up the question of balance, in particular when it comes to the environment. Which also involves the interactions and interferences that tourism has with many business sectors that it directly affects to a greater or lesser extent. As you read this panorama, the intensity of these interrelationships will become rather more apparent.

► Cross-business activities also appear: innovation, heritage, shared infrastructures (ports for example), and sustainable development.

The town: a concentration of many tourist venues and businesses

► Museums, monuments, historic centres, festivals, urban tourism etc. result in towns and cities being strongly connected with tourism. A large number of cultural, catering, transport, sport and leisure businesses simultaneously harness resident and tourist customers (with the exception of some very popular tourist or natural attractions).

► Finally, the large towns, with their facilities and transport infrastructures, are also access points to other forms of tourism (natural spaces, mountains, rural areas). A significant proportion of tourists also live in the region and have holiday homes here. This pairing of residents / permanent assets on the one hand and tourists from outside the region on the other, makes the question of public transport in our region critical.

Tourism, a means for regional balance and area planning

► In many spheres, Bouches-du-Rhône and Alpes-Maritimes represent almost two thirds of the regional economy while the two Alpine departments account for less than 10% of it. When tourism is counted, their share rises significantly: for example, rural and mountain areas represent a third of jobs in tourism, 25% of the communal holiday accommodation, 17% of businesses providing sport facilities etc. But this does not prevent Alpes-Maritimes having the lion’s share of many tourist activities.

► Tourism represents about 50% of the GDP in the Alpine departments. So, the panorama is teeming with many examples and circumstances that show that tourism can create a better balance of the disparities in the region.

A major impact on employment

► The core of the tourism industry provides 90 to 105 thousand jobs, with summer peaks up to 152,000. Hotels and catering occupy a major place.

► With employment in the other tourism categories (transport, health and beauty, leisure, culture, sport etc.) being also affected, there are up to 210,000 jobs involved.

► Tourism is a labour-intensive industry, which encourages job creation. This should be seen in relation to the total of 1.98 million jobs in the region.

► The question of seasonal working is significant: too few tourist customers outside the summer and winter peaks. Why? A supply problem? Low demand? Resorts/towns catering too exclusively for tourists? This question concerns the coast more than the Southern Alps.

► 6,000 students in professional training in 2005. More than 1,000 training courses on offer in the region, with the emergence of e-tourism and sustainable development.
Introduction

Summary (2/4)

Turnover, consumption, expenditure, investments: high numbers
These show businesses that contribute greatly to the regional economy over a wide area (transport, construction industry for example).

- It is generally accepted that the tourist economy represents 11% of PACA’s GDP.
- A few examples from the last few years, some figures are duplicated, but the orders of magnitude are interesting:
  - 10 billion euros spent by domestic tourists (expenditure in France by resident and non-resident tourists in businesses associated with tourism).
  - Turnover of 2.35 billion for accommodation, including 1.7 in hotels. How much would it be if the 24 groups or chains that operate 214 hotels were counted?
  - 1.1 billion investment expenditure in 2008 (978 million in 2009), including 57% for holiday homes, a driving force behind tourist investment (2nd largest region in France for the number of holiday homes).
  - 3 billion expenditure for cultural heritage tourism and 2.1 billion for sailing.
  - Effect of the Nice Côte d’Azur airport: 6.7 billion, and France’s leading hub for car hire.

Tourist businesses, are they being very (too) reticent?
- Businesses (independent hotels, businesses belonging to chains, tour operators, service providers, accommodation providers etc.) are said to be relatively isolated, with little contact among themselves (it would seem) compared with other professional sectors (telecoms, multimedia, power etc.).
- Thus we find that Aix - Marseille has a concentration of about ten major privately-owned tourist businesses (Vacances Héliades, Diffusion Tourisme, Ingénierie Loisirs Développement etc.).
- Where professional associations exist, local / regional involvement of these businesses remains modest compared with that observed – or sought by public bodies? – in other business sectors.
- Should these participants be integrated to a greater extent in the regional economic system, as in other clusters?

Specific local features
The risk is to fall into the trap of excess or caricature. But local variations emerge:

- Alpes-Maritimes: an excessive concentration of all kinds of tourism businesses. Where will this end? Are there any limits? What about sustainable development and environmental impact?
- Bouches-du-Rhône: proportionally less tourism than the others, because of its size and multiplicity of economic activity? The raw figures in the panorama confirm this.

Paradoxically, this department also appears to be a service provider (examples: 1/ Wide range of training opportunities, even though often this is at company head offices, which does not rule out establishments in other regions. 2/ Concentration of travel agents and organisations).

The cruise industry and Marseille Provence being nominated European capital of culture for 2013 will open up new opportunities.
- Vaucluse: the figures and data show few highlights (except for the sale of products on farms).
- Var: an area for average mass tourism – its luxury end needs encouraging (into different kinds of tourism?). A region where opportunities are still (relatively?) available, with the full challenge of sustainable development.

- Southern Alps: sunshine and mountains: assets to be preserved, businesses connected with tourism to be invented and linked in some cases (rope access work, sustainable housing projects, software connected with mountains, light aviation, partnerships with Italy etc.).

Cruises and sailing
- Cruises: market share to be won in the Mediterranean, with favourable prospects for Marseille (1 million passengers in 2012), taking into consideration its seafaring and port assets. Intense pressure on port capacity in the Alpes-Maritimes is encouraging innovation in associated tourist products.
- Pleasure boating: confronted with pressure on space and the scarcity of unspoilt coast and the need to preserve it, issues relating to the environment and the quality of the urban environment must lead to the invention of alternative solutions (off-shore ports, dry ports etc.). Any initiatives and role models need to be looked at with great attention.
Introduction

Role of airports and infrastructures: airports and high-speed rail stations are a deciding factor for the international tourism of the region.

► Even if we do not know how many tourists use the transport system, it is a key factor, since it influences access and the travel of tourists / passengers.
► Once within PACA: even if the car is always widely used, the other means of transport (air, rail and sea) are crucial, and become more so with increased numbers of tourists. With regard to the general development of the region and the influence of its cities, the issue of transport infrastructures is a major challenge for sustainable development, in the medium-long term.
► New services: e.g. Arwe, a German company, set up at Nice airport (60 jobs) – provides car hire (up to 1,200 vehicles hired each day in summer).

Knock-on effect from business tourism (Trade fair and conference industries)

► This is very dependent on airports, especially in the Côte d’Azur, where its contribution to the tourist economy is of major importance. Business tourism has a knock-on effect and has high economic benefits.
► It plays a significant part in the Côte d’Azur’s international influence (e.g: the Cannes Festival). The two large investment projects in Nice and Cannes are aimed at keeping it competitive at the international level. Setting up the Eco Valley - Plaine du Var project should highlight the sustainable development that adds commercial appeal for the trade fairs. With its plans for investment, Marseille is also going to move upmarket.
► The overall strategy is supported by the Business tourism and Conferences PRIDES within the region.

Off the beaten track, recreational and leisure businesses, social life

► In rural and mountain areas, we see more dispersed tourism, as opposed to mass tourism: green tourism and responsible tourism. The income generated, while relatively modest, contributes towards supporting people and businesses in rural areas. Public bodies give wide support to these initiatives.
► Sport, recreational and leisure activities play a part in the social life of the resident population and also for people on low incomes. Some kinds of tourism make an important contribution to maintaining social cohesion. This is another essential strand of tourism to be taken into consideration.

Innovation and tourism – an opportunity for PACA

► The public policy described in the panorama maintains a very active presence, in aiming to promote a professional approach among the participants, to promote what's on offer, to improve the quality of tourist products and to work towards sustainable development (see SRDT - Regional Development Plan for Tourism and Leisure). There are pockets where diversification and related engineering services already exist or are in progress.
► The PRIDES are fairly specialised (Business tourism, CaracTerre, Yachting etc.). How can cross-disciplinary activities be constructed between them to cover a very wide field? Interclusters is an arena to be explored.
► An opportunity is emerging for the region: that of becoming a key participant at a worldwide level, in the application of the new ICT and Internet technologies to the tourist sector. PACA operates at both ends of the spectrum with businesses specialising in these technologies and the availability of many participants, professionals, clusters and service providers for the tourist industry. Plans for applied research are emerging. Interface bodies are being created. Everything is coming together to make more progress – on one condition, developing relevant higher education.
► Tourism generally normally gives little scope for R and D. Is this an opportunity to be seized for the region?
Introduction

Summary (4/4)

The demands of sustainable development

► This is and will become a major issue for tourism in our region. The heavy congestion on the coast in summer must be increasingly taken into consideration. But this is a difficult subject since it is seen by some as being a restraint on economic activity.

► In the long term, with the necessary upmarket trend in tourist services and innovation in products, this will have a salutary effect, especially with regard to competition. Tourism in the countryside and mountains appears to have already moved in this direction.

► The ring of regional parks that cross the region is, in a way, a “green” structural focus to confront the congested coast.

► Some tourists are also changing their requirements with increasing insistence on quality.

► The Regional Development Plan for Tourism and Leisure and the PRIDES are making a contribution to opening up new arenas in these subjects.

► What will be the impact of the high-speed railway line on sustainable development on the coast? Influx of tourists?

► The “Investment in the Future” programmes in Nice and Marseille (sustainable cities, public transport) also involve tourism.
Introduction

► Relative size of tourism businesses in Provence-Alpes-Côte d’Azur

It should be noted that between the high number recorded (66,000 establishments and 210,000 jobs potentially affected) and the core number for tourism (30,900 establishments and 94,000 jobs), a compromise number should be used. It is also necessary to include variations caused by seasonal working (see diagram on the right of this page). In order to achieve a more realistic number, between now and late 2011, PACA’s Regional Tourism Committee will be able to provide more accurate figures.

The facts given below are to be read with the more detailed diagram on page 13.

Tourism
66,000 establishments* - 210,000 jobs potentially affected

Access, transport, travel
6,500 establishments
35,000 jobs

Core of tourism
30,900 establishments
94,000 jobs

Activities strongly related to tourism
28,500 establishments
82,000 jobs

* Establishment = business, body, organisation
Context of tourism

Interesting facts

“Tourism has become a phenomenon of civilisation. The scale that it has achieved has transformed it from the limited level of pleasure for the elite to a commonplace of social and economic life.” Source: World Tourism Organisation– WTO, General Meeting, 1980

World - Europe

► Almost 935 million tourists in the world, in 2010, ...
► … for more than 611 billion € incomes, in 2009.
► Europe alone accounts for half, both in numbers and in income.
► Worldwide projections (for 2010 to 2020):
  Growth in the number of tourists: from 1 billion to 1.5 billion.
  Europe will lose some ground, 48% of market share (instead of 53% in 2010).
  … mainly to the Southeast Asia, climbing to 26.4% (currently 19.5%).
► European heavyweights: France and Spain (which is ahead of us in terms of income), followed by Italy, Great Britain and Germany.

France

► World leader, in 2009, for the number of tourists: 74 million (9% of arrivals worldwide).
► In 3rd position for income, rather behind the United States, and close behind Spain.
► In 2020, China is expected to be in 1st place.
► Tourist businesses employ almost 900,000 people, mainly in cafés, hotels and restaurants (CHR).
► This shows the importance of this labour-intensive industry in our country, which represents 6.2% of the national GDP (2007) and for which the trade balance is well in the black.
► Tourist consumption: 65% are French tourists and 35% foreign (up to 80% European).

► Although the hotel, café and catering professions (CHR) are not exclusively for tourists, they nevertheless represent 58% of the 90 billion € annual turnover that tourist businesses take in France.
► These figures are well ahead of accommodation at 18% (68% of tourist accommodation for personal reasons is not for business use) and travel agents account for 15%. These provide few jobs, but have a substantial turnover – almost 14 billion €.

Provence-Alpes-Côte d'Azur in the Latin Arc

► Almost 280 million visitors in the Mediterranean (30 % of worldwide tourism) …
► … with 80 % concentrated on the coast (the Latin Arc accounts for a good third of the tourists in the Mediterranean).
► Provence-Alpes-Côte d'Azur is in 3rd position in this area, for the number of stays in hotels, just behind Andalusia and Catalonia.
► The region is also 3rd for campsites, after Languedoc-Roussillon and Catalonia.
► Cruises: it is lagging well behind Italy and Spain.
► Yacht harbours: the region with Languedoc-Roussillon offers a continuous string of harbours all along this coast.
► Domestic tourism consumption: 10 billion € (2008), which is significant.

Sources: World Tourism Organisation, 2009
Context of tourism

Provence-Alpes-Côte d’Azur

Interesting facts

General points

The Provence-Alpes-Côte d’Azur region (PACA) ranks high in tourist figures for Europe.

► Whatever the tourist-related field, the region is always within the top few:
  2nd European region for tourist facilities, after Catalonia.
  Leading destination for French tourists.
  Leading French region for leisure and business tourism.
  2nd French region for foreign tourists: with 7 million foreign tourists (2008), the region welcomes as many people as Tunisia, and only slightly fewer than Morocco or Croatia.

► 34 million visitors in 2008.
► 10 billion € of tourist consumption in PACA, in 2008.
► Although domestic tourists account for 59% of hotel customers, our European neighbours are still very attracted, especially the British, Italians, Germans and Belgians.
► Because of its size, climate and the availability of sea and mountains, PACA is a versatile region for tourism.

Businesses

► 25,000 Businesses in the region: tourism is a labour-intensive industry.
► In total, businesses, the self-employed, organisations and public bodies, represent 65,000 establishments.
► 45% of them have no employees, compared with the regional average of 59% (2008) and this reveals a labour-intensive industry.
► High rate of business creation, in particular for the self-employed.
► Apart from the international hotel chains, several tour operators show high business figures, between 50 and 100 M€ (with proportionally fewer jobs than hotels). It is the large independent hotels that have the highest numbers.

Jobs created

► A significant number of jobs, about 105,000 in the core of tourism (including 31% only slightly connected), in a range between 82,000 in the low season and 152,000 in the high season. This is more than in the construction industry, with 113,000 jobs.
► At its lowest level, tourism represents 7% of regional paid employment, or 3% more than the national average.
► If the other businesses involved are included (transport, cruises, health and beauty, sport and leisure, cultural events, etc.), almost 211,000 jobs are involved, tourism being widespread in the regional economy.

► Hotels and catering predominate, with almost half the jobs, but 20,000 are also created by shops and supermarkets.
► Although the coast is vitally important, it does not overwhelm everything, and rural and mountain areas represent one third of jobs. This gives them relative uniformity, important for the region’s balance.
► Employment in tourism is important in Alpes-Maritimes, and the two Alpine departments, where it represents 10% or more of total employment.
► A key aspect: high proportion of young people, with less training and lower pay than the regional average.

Investment

NB: This data needs to be put into perspective, since it refers only to a single year.

► Significant amount of investment in 2008, excluding catering: 1.1 billion €, reducing slightly to 978 M € in 2009.
► PACA 2nd region for the amount of investment, slightly behind Rhône-Alpes.
► Regional feature: 57% of these investments were made in holiday homes in 2008 and more than 50% in 2009 (493 M€): a driving force for tourist investment.
General points – Structure of tourist businesses: 66,000 establishments* with 210,000 potential jobs.

According to recent data (2007) of the INSEE (National Institute for Statistics and Economic Studies) published in 2012 for the CRT (Regional Tourism Committee) in “Outcomes of the survey on the tourist clientele in PACA”, 148,000 jobs on an annual average, are directly connected to the tourist attendance.

The core of tourism
30,900 establishments with 93,000 jobs

Accommodation
7,900 Establishments
36,000 Jobs
(+ 37,500 in commercial accommodation – furnished)

Catering, Cafés, Licensed tobacco shops
21,000 Establishments
28,000 Jobs

Businesses with strong connections to tourism
28,500 establishments with 82,000 jobs

Tourism rate applied to the business sectors (info not available for all)

<table>
<thead>
<tr>
<th>Business Sector</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cafés, licensed tobacco shops</td>
<td>51%</td>
</tr>
<tr>
<td>Sport and recreational businesses</td>
<td>25%</td>
</tr>
<tr>
<td>Shops, supermarkets</td>
<td>17%</td>
</tr>
<tr>
<td>Hotels, Other accommodation, Theme parks, Casinos, Ski-lifts and cable cars, Tourist information offices, Spas and Seawater treatment, Heritage</td>
<td>100%</td>
</tr>
<tr>
<td>Catering</td>
<td>59%</td>
</tr>
</tbody>
</table>

Source: INSEE / Altarès, data 2009
Context of tourism

Benchmark PACA / France
Interesting facts

Provence-Alpes-Côte d’Azur: the gap behind the two leading French regions has narrowed.

When economics are discussed three French regions - Île-de-France, Rhône-Alpes and Provence-Alpes-Côte d’Azur – head the list. Although this is also true of tourism, the gaps are now being narrowed.

► There is almost an equal number of hotels in the three regions, but Rhône-Alpes and PACA must be taken together to give the same number of rooms as Île-de-France.
► Île-de-France is widening the gap for the number of overnight stays.
► PACA is the 2nd French region for the number of foreign visitors, only slightly behind the Île-de-France.
► This shows the importance of international tourism in Provence-Alpes-Côte d’Azur, when we also know that it is the 2nd European region for tourist facilities.

A unique balance between sea, mountains, rural and urban areas.

The number of luxury hotels in PACA is very close to that in the Île-de-France, mainly because of its geographic diversity.

► There is a remarkable distribution of tourist infrastructures between both the coast and the mountains, and between rural and urban areas.
► No other region – even in Europe – can offer such a wide range.
► What is offered in Rhône-Alpes corresponds to what we have on the coast, but PACA also has its mountain regions in the Southern Alps.
► Holiday flats: Rhône-Alpes, the leader, is ahead of PACA, both being far ahead of Languedoc-Roussillon and Aquitaine.
► Camp sites: Rhône-Alpes leader in front of the coastal regions of Languedoc-Roussillon, PACA and Brittany. However, PACA remains the leader for 4-star camp sites.
► Top of the range, for all kinds of accommodation, is still Provence-Alpes-Côte d’Azur.

Interesting facts

Capacity
► Accommodation is the spearhead for tourist business.
► Provence-Alpes-Côte d’Azur represents 14% of the total national provision of accommodation.
► 2nd French region, with almost 3 million beds, of which two-thirds are in holiday homes.
► 2nd French region for the number of holiday homes, 15% of the national total.
► Size of the number of holiday flats: 26% of the national total, which has doubled in number over the last ten years.
► The various kinds of accommodation are fairly evenly spread, one third being holiday homes, and the rest as hotels, holiday flats and camp sites.

The regions, where tourism goes together with balance in area planning
► Features of the Côte d’Azur, include forging an international brand image, and luxury hotels, increasing rapidly in Marseille (with 40 five-star hotels including 1 with the Palace seal of approval) should not obscure the large proportion of middle of the range establishments.
24 out of the 40 five-star hotels are in Alpes-Maritimes (including the Hotel “Palace”, the Grand Hotel du Cap, in St-Jean-Cap-Ferrat) and in Monaco.
For example - Hotel Negresco, Nice: one of the most famous and listed as a Historic Monument. 200 M € invested over 10 years was needed for it to remain one of the most iconic.
► Distribution of accommodation: Var is level pegging with Alpes-Maritimes. Between them, they provide more than two thirds of what’s available in the region.
► The Alpine departments, which specialise in communal holiday accommodation, also enjoy the benefits, and represent 65% of the regional sector (in numbers of communal holiday accommodation facilities).
► Var concentrates on camp sites, which represented almost half of its tourist facilities.

Turnover and jobs
► The Altarès 2009 data show a sector turnover of 2.35 billion €, including 1.7 billion € for hotels.
► 7 hotel groups, with 119 establishments in the region, and each showing more than 100 M € in consolidated turnover.
► Ten establishments have a turnover higher than 20 M €.
► We should also mention special cases such as hotels and catering in “hostile territory” in some sensitive localities and areas. In general these businesses are locally based, with 90% of them having their head office within the region, but how does their turnover compare with the large groups?

► Still using the same source, paid employment is estimated at about 36,000 people, forming a significant sector that includes:
24,400 jobs in hotels.
13 establishments account for more than 100 employees.
Accommodation

Geographic distribution of the major accommodation providers, with more than 20 jobs

List of establishments:

▶ Hotels and similar accommodation:
  1. Hotel Carlton, Cannes
  2. Hotel Martinez, Cannes
  3. Hotel Jesta Fontainebleau (Palais Stéphanie), Cannes
  4. Hotel Majestic Barrière, Cannes
  5. Sofitel Luxury, Marseille
  6. Hotel Royal Scandinavia, Radisson Blu, Nice
  7. Négresco, Nice
  8. Hotel Le Méridien Lehwood, Nice
  9. Hotel Palais Méditerranée, Nice
  10. Hotel Gray d’Albion, Cannes
  11. Hotel Pullman Royal Casino, Cannes Mandelieu
  12. Hotel Dolce Fregate, Saint Cyr sur Mer
  13. Société d’hôtellerie d’exploitation Marseillaise, Marseille

▶ Tourist accommodation:
  14. Club Méditerranée, Serre Chevalier
  15. Village Vacances (Club Med), Opio
  16. Villages clubs du soleil, Orcières
  17. Pierre et Vacances Maëva Tourisme, Arles
  18. Pierre et Vacances Maëva Tourisme, Mallemort
  19. Office départemental éducation loisir Var, Draguignan

▶ Camp, caravan and motor home sites:
  20. Camping Favière, Bormes les Mimosas
  21. Camping, La Londe les Maures
  22. Camping Marina Plage, Vitrolles
  23. Camping Bagatelle, Avignon
  24. Camping Lac du Verdon, Régusse
  25. Camping Les Oliviers, La Ciotat
  26. Camping Tournels, Ramatuelle
  27. Camping Prairie de la mer, Grimaud
  28. Club et Villages de vacances, Six Fours les Plages

Number of employees (in categories)

- Hotels: No. 500 to 999
- Camp sites: No. 250 to 499
- Tourist accommodation: No. 200 to 249
- No. 100 to 199
- No. 20 to 99

Sources: Data Altarès 2009, Map MDER 2010.
Interesting facts

Outline of the sector

► An INSEE study in 2003 shows the tourism rates that can be applied to jobs in cafés and restaurants in tourist areas. This rate is 59% for restaurants and 51% for cafés and licensed tobacco shops: a high rate.

► This means that in total almost 28,000 jobs and more than 21,000 establishments have been included in the study.

► In fact for the whole tourist industry, hotels are the major supplier of jobs and catering comes second.

A sector in growth

► Sectors that are still growing.

► Numbers of traditional catering firms and function organisers have grown by 50% in 10 years.

► Catering is said to have created 11,000 new jobs in 8 years.

► Geographic distribution of jobs in catering: Alpes-Maritimes is far and away the leader of the departments, with 41% of jobs in the region. The much higher tourism rate makes all the difference for Alpes-Maritimes.

► There are 121 establishments with more than 50 employees, including 6 with more than 250.

Training

► 2008: More than 7,000 people in training, half of them in catering.

► The main spheres are cooking (almost half), table service, and management of hotels and restaurants (even more if we count trainees).

► Availability is greatest in Bouches-du-Rhône, ahead of Var and Alpes-Maritimes, which, nevertheless provides the highest number of jobs. However these jobs may be the result of the presence of company head offices, which does not rule out employees in other regions.
Interesting facts

Overall, for both cruises and hotels, investments made in the West (mainly in Marseille), should strengthen the position of the region within the Mediterranean area. But more importantly than the East/West competition, the ability to offer 2 or 3 ports for cruises in the region is a real plus compared with the competition. Nor should we forget the passenger and tourist crossings to North Africa (showing the region’s Euro-Mediterranean role) and Corsica.

Regular services and cruises

► **Mediterranean**: 2nd worldwide tourist destination for cruises, after the West Indies.
► **Côte d’Azur**: Leading French destination, but increasingly in competition with Marseille.
► When regular services (Corsica, Algeria, etc.), pure ocean cruises and shuttle services (to islands close to cities) are taken together, more than 5 million passengers were carried in 2009.
► 3.7 million used the ports of Nice, Toulon and Marseille.
► 1.49 million were cruise passengers (Marseille is expecting 1 million in 2012).
► Their number has more than doubled in 8 years, with a big rise in the number of stop-overs in Marseille. Its berthing facilities mean that there is a fine future for cruises.
► **The number of establishments** (149) and **jobs** (more than 2,000), is small. Two explanations:
  Many jobs were not counted because their company head offices are not in the region (large international cruise operators: Corsica Ferries, etc.) and nor were the economic benefits (influence of cruise passengers’ expenditure on employment) counted.
► According to a CCIMP study (Marseille Provence), in 2009: cruises create one job for every 1,215 passengers, which would create about 1,230 jobs per year.
► Apart from the SNCM – Société Nationale Corse Méditerranée, many small local operators exist for coastal transport (E.g. Trans Côte d’Azur in Cannes, Excursions Maritimes Côtières in Sainte-Maxime, etc.) or trips to the islands.

► It should be noted that for high-end cruises, the Compagnie des Îles du Ponant shows a turnover of 34 M €.
► **Economic benefits of ferries**, in 2009 (expenditure per passenger), estimated at **55.5 M €** and **146 M €** for cruises.
► Since cruises are considered to be of strategic importance by the Regional Council, **substantial investments are planned to strengthen the industry**.
► River cruises are still being developed.

Services connected with sea tourism

Since no tourism rate is available for these businesses, the data for this sector are totals.

► Pleasure boating, naval maintenance work and ancillary services are a part of the sector even though the tourists are not the only users.
► **5,000 jobs** involved in **1,250 establishments**, 10% are dedicated to tourism.
► Naval maintenance work and ancillary services dominate, with a noticeable difference in the number of establishments, most naval repair and maintenance work (more than 1,000). For the ancillary services, the GPMM – Grand Port Maritime de Marseille, alone accounts for more than two-thirds of the 1,500 jobs. These are businesses that have little to do with tourism.
► **Finally, there will be more than 7,000 jobs** in services connected with sea tourism which will have an involvement with the two kinds of cruises.
Cruises

Ocean cruises

► Number of cruise passengers in PACA ports, in 2009
About 1.5 million passengers.

► Number of cruise passengers in PACA ports, in 2008

Source: Data CRT PACA/Riviera, CDT 06, 13, 83 – Map: MDER 2010

* Includes data for the port of Toulon only

► Increase in the number of cruise passengers in PACA ports between 2008 and 2009
Marseille: + 90,000 cruise passengers.
Toulon: + 50,000 cruise passengers.
Nice / Cannes / Villefranche/Monaco: + 33,000 cruise passengers.

Source: Zoom Eco CCIMP, "Le marché de la croisière à Marseille", March 2010

► Benefit of having several arrival and/or stop-over ports on the same coast.
Activities

Health and beauty businesses (data 2009)
Since no tourism rate is available for these businesses, the data for this sector are global.
► Almost 5,400 establishments and 6,700 jobs found for both kinds of health and beauty business
  Beauty care.
  Body treatments (including spas and seawater treatment).
► The largest establishments are spas, including: Chaîne Thermale du Soleil, Compagnies Fermières des Grands Bains – Le Monetier les Bains, SNC Thalassaintes – Les Saintes-Maries de la Mer, etc. For beauty care there are: Domicile Beauté in Nice, Anti Aging in Villeneuve Loubet, la Margeride Services in Bandol, etc.

Cultural activities
Cultural events have a big impact on the tourist business. Although cultural education and many activities are involved in local and regional social life, many others, in particular those surrounding the big festivals, concerts and heritage, come within the scope of tourism.
So, the region is in the first rank of French cultural activities.
Performing arts
► 2nd French region for the number of its festivals.
► More than 400 festivals, including several of international renown.
► 1,700 troupes.
► About 30,000 employees, including 20,000 performers on temporary contracts and more than 1,000 professional artistes.
► Some events have a big impact on tourist activity, such as: the Cannes International Film Festival, the Nice jazz Festival, the Avignon theatre Festival, the Aix-en-Provence Opera Festival, the Orange Opera Festival, and very soon Marseille Provence 2013 European capital of culture, etc.
► Being strongly associated with the town in which they take place, they contribute towards the brand image and the appeal of the region.

Recreational and leisure activities (data 2009)
These include parks and zoos, theme parks, casinos and also services offered in the mountains and at the seaside, such as: hire of leisure equipment, operation of ski resorts (apart from ski-lifts and cable cars), beaches, pleasure boating, etc.
► 2,400 establishments and more than 7,600 jobs.
► Few casinos but they alone create 3,000 jobs. Most of them provide more than 50 jobs each.
► Other recreational businesses are mostly self-employed, with no employees. Even so they provide 3,400 jobs (almost half of the total in this business).
► There are about fifty parks and other protected open spaces (national parks), which employ about 800 people.
► Examples:
Marineland in Antibes: Europe’s leading marine life zoo. There are several others in the region.
Zoo de La Barben in Salon de Provence, welcomes 300,000 visitors per year.
OK Corral in Cuges les Pins: leading theme park in the region with almost 500,000 visitors per year.
New Casino in Cagnes sur Mer.
Royal Casino de Mandelieu la Napoule, combined with a four-star hotel with over 200 rooms.
Sport activities (data 2009)

What's available
Open-air sports
► There is an unending range of open-air sport in the region.
► It covers
  Water sports (9 kinds of sport).
  Land sports (10 kinds).
  Aerial sports (4 kinds).
  Winter sports (5 kinds).
► A wide and varied range, including
  63 natural climbing sites in the Alpes de Haute-Provence.
  72 golf courses, mainly near the coast.
  47 winter sports resorts.
Aerial sports in the Hautes-Alpes, e.g. in Tallard (exceptional atmospheric conditions at these sites) and the Alpes de Haute-Provence.
Motor racing, with the Monaco Formula 1 Grand Prix, one round of the Andros Trophy in Serre Chevalier (racing on ice) and the Paul Ricard Tour in Le Castelet.
Several famous racing tracks.
132 yacht harbours, with 57,000 berths (39% of the national total).

This rich and varied range which is a result of the region’s outstanding natural features, clearly affects the number of operators which account for 19,500 jobs.

Ski-lifts and cable cars
► Sixty or so establishments provide employment more than 1,400 people, with much seasonal work.

Sailing
This sector is treated in its own right and separated from cruises since it consists of complementary businesses differentiated from the naval maintenance and shipbuilding referred to in the “Cruise” chapter (pages 93 and 94), this sector also includes service industries).

► 9,000 jobs in 2,100 establishments.
► In 2006, these businesses had a turnover of 2.1 billion €, which is quite high compared with other tourist businesses.
► The turnover for sailing is provided equally by local customers and visitors to the region: this mix is interesting.
► Professional boat companies account for one third of the total turnover and jobs and remain concentrated in the Côte d’Azur (45% of jobs).
► Other traditional boating businesses are also significant (with between 75 and 100 employees):
  Fitting out and mechanical services: Moteurs Baudouin – Weichai (China), Accastillage Bernard, H2X Yachts & Ships, France Hélices.
  Boating businesses: Beuchat International, La Spirotechnique.
  Groupe Monaco Marine (170 people with a 40 M € turnover): 9 establishments in the region in shipbuilding, marinas and over-wintering sheds.
► PRIDES Ocean-going Yachts – Riviera Yachting Network: this network brings together all relevant business in order to capture for the region a growing share of the substantial market in boat repair and maintenance in the Mediterranean.
Activities

Sport activities (2009 data)

The operators

These are businesses for sports and leisure equipment hire, those offering sports training, management of sports facilities or sports clubs.

► Almost 13,000 establishments with about 19,500 jobs, mostly self-employed.
► Sports clubs predominate, with more than half of the total number of establishments and almost 11,300 jobs.
► Sports training is also important: 38% and 5,300 jobs.
► It is estimated that there are 9,500 sport trainers in the region.

As with sports clubs it is local customers who provide most of the business ahead of tourists (up to 60,000 spectators per event).

Large clubs may have several dozen employees, e.g. some professional clubs such as: OGC Nice, Olympique de Marseille, Rugby Club de Toulon, Cercle des Nageurs de Marseille, Monte Carlo Country Club, etc. The spin-offs for tourism are substantial.

We should also mention organisers of sporting events whose economic importance is growing and on which the impact of tourism should not be ignored. Examples of sporting events: Marseille and Monte Carlo Open Tennis tournaments, marathons, half marathons (Marseille – Cassis), triathlons, etc.

Source: DRJSCS, 2010

The usual differences between the regions are less pronounced when it comes to participation in sport. E.g. Hautes-Alpes accounts for 17% (ski instructors).

Riding stables: 2 centres employ more than 35 people, the Société d’Entrainement des Chevaux de Course in Cabriès and the Centre Equestre Pastré – Marseille.

Management of sport and leisure facilities: 630 establishments with 2,000 jobs.

Race tracks and casinos, mainly in the Côte d’Azur, make gambling part of the leisure business which should be taken into consideration.

Examples of companies that create employment: Excelis, for the Tour Paul Ricard in Castelet and the Société des Courses de la Côte d’Azur.

Training

These professions (especially sports training) attract many young people into sports training and the youth sector.

Also of note: about a hundred training courses for playing and coaching sports available in PACA:

The *Futuroscud apprentice training centre*, which has 55 branches in the region.
The *CREPS for the South-East* (Centre for sports resources, skills and performance), is on 4 sites: Aix-en-Provence (head office), Antibes, Saint-Raphaël Boulouris (covering 82 hectares) and Vallon – Pont d’ Arc (national resources centre for outdoor sports). It offers about fifty training courses for sport and coaching professions.

University training courses: UFRSTAPS (Training and Research Unit for the Science and Techniques of Physical and Sporting Activities) at Marseille Luminy, Nice and Toulon (scientific and technical university studies diploma, Degrees and Masters Degrees

Source: DRJSCS, 2011

Training courses can be consulted on [www.paca.drjscs.gouv.fr](http://www.paca.drjscs.gouv.fr)
Activities

Recreational and leisure activities

Casinos and gambling in Provence-Alpes-Côte d'Azur

Gross income from gambling per local government area

In 2006/2007

24 casinos in PACA

- Alpes de Haute-Provence
  - Gréoux-les-Bains Casino
- Hautes-Alpes
  - Briançon Casino
- Alpes-Maritimes
  - Carlton Casino, Cannes
  - Casino de Mandelieu
  - Casino Croisette, Cannes
  - Casino de Grasse, Grasse
  - Casino de Menton, Menton
  - Casino La Siesta, Antibes
  - Casino Palais Méditerranée, Nice
  - Casino Ruhl, Nice
  - Casino Terrazur, Cagnes-sur-Mer
  - Eden Casino, Juan-les-Pins
  - Grand Casino de Beaulieu, Beaulieu-sur-Mer
  - Palm Beach Casino, Cannes
- Bouches-du-Rhône
  - Casino de Carry Le Rouet, Carry-le-Rouet
  - Casino de Cassis, Cassis
  - Casino Flots Bleus, La Ciotat
  - Pasino, Aix-en-Provence
- Var
  - Casino de Ste Maxime, Sainte-Maxime
  - Casino des Palmiers, Hyères
  - Casino des Sablettes, la Seyne-sur-Mer
  - Casino du Golfe, Cavalaire-sur-Mer
  - Grand Casino, Saint-Raphael
  - Grand Casino de Bandol, Bandol

Source: CRE - CCIMP d'après www.lescasinos.org
© CCI Marseille Provence - Ressources Economiques - 2009
© Basic map : IGN
Activities

18-hole golf courses
Alpes de Haute-Provence
1 - Lavandes (Digne-les-Bains)
2 - du Luberon (Pierrevert)

Hautes-Alpes
3 - Bayard (Gap)

Alpes-Maritimes
4 - de Biot (Biot)
5 - Old Course (Mandelieu)
6 - Riviera - Golf de Barbossi (Mandelieu)
7 - Cannes Mougins (Mougins)
8 - Royal Mougins (Mougins)
9 - Grande Bastide (Chateauneuf)
10 - Claux-Amic (Grasse)
11 - Monte-Carlo Golf Club (Monte-Carlo)
12 - Opio Valbonne (Opio)
13 - Saint-Donat (Grasse)

Bouches-du-Rhône
14 - Aix-Marseille (Les Milles)
15 - Sainte-Victoire (Fuveau)
16 - Ecole de l’Air (Salon)
17 - La Salette (Marseille)
18 - Golf Club (Miramas)
19 - Pont Royal (Malmort)
20 - Servanes (Mouriès)
21 - de la Cabre d’Or (Cabières)
22 - Set Golf (Aix-en-Provence)

Var
23 - Barbaroux (Brignoles)
24 - Beauvallon (St-Maxime)
25 - Terre Blanche (Tourrettes)
26 - Frégate (St-Cur-sur-M.)
27 - L’Estérel (St-Raphaël)
28 - Valescure (St-Raphaël)
29 - de Sainte-Maxime (Ste-Maxime)
30 - St-Endréol (La Motte)
31 - Ste-Baume (Nans-les-Pins)
32 - Taulane (La Martre)
33 - Valcros Hyères (La-Londe-les-Maures)
34 - Valagarde (La Garde)
35 - de Roquebrune (Roquebrune)

Vaucluse
36 - Garden Golf d’Avignon (Morières-lès-A.)
37 - Grand Avignon (Vedène)
38 - Provence Country Club (Saumane-de-V.)

Zoos – Safari parks
1 - Alpha the Le Mercantour wolf park (Saint-Martin-Vésubie)
2 - Aquarium of the Paul Ricard oceanographic Institute (Ile des Embiez - Le Brusc)
3 - Fauverie du Faron (Toulon)
4 - Tropical Bird Gardens (La-Londe-les-Maures)
5 - The butterfly garden (Digne-les-Bains)
6 - The tortoise village (Gonfaron)
7 - Marineland (Antibes)
8 - Monaco oceanographic Museum (Monaco)
9 - Animal Park (Gréoux-les-Bains)
10 - Phoenix Floral Park (Nice)
11 - Le Pont de Gau Ornithological Park (Saintes-Marie-de-la-Mer)
12 - Safari Park (Fréjus)
13 - Zoological Gardens (Saint-Cannat)
14 - Zoo and exotic garden (Sanary-sur-Mer)

Amusement Parks
1 - Aventure Parc (La Salle)
2 - Antibes land (Antibes)
3 - Aqua Splash (Antibes)
4 - La ferme du Far-West (Antibes)
5 - Astrorama (Eze)
6 - Koalant (Menton)
7 - Le village des automates (Saint-Cannat)
8 - Aqualynx (Les-Pennes-Mirabeau)
9 - OK Corral (Cuges-les-Pins)
10 - Magic Park Land (Ensues-la-Redonne)
11 - Aqualand (Fréjus)
12 - Kiddy Parc (Hyères)
13 - Magic World (Hyères)
14 - Niagara (La Mole)
15 - Aqualand (Saint-Cyr-Sur-Mer)
16 - Aqualand (Sainte-Maxime)
Good living

Good living is a cross-sectoral complement to the tourist business. By convention, we have chosen to define “good living” in Provence-Alpes-Côte d’Azur as the following categories: gourmet catering, farms awarded “Bienvenue à la Ferme” status, “Bistrots de Pays” (local cafés/bars), wine tasting cellars, and the artistic professions.

► Tourism that is dispersed, rooted in the local area and helps to develop rural areas. This differentiates it from the mass tourism along the coastal strip.

► Apart from individual action by some restaurant owners, departmental initiatives are being made to help professionals to network with each other, raise their profile and attract visitors:
  The region is richly endowed with 2- and 3- star restaurants - 15 in all
  Network of 370 “Bienvenue à la Ferme”, of which 279 sell local produce (127 are in the Vaucluse).
  Network of 55 Bistrots de Pays, including 20 in Alpes de Haute-Provence, the department where this seal of approval originated.
  Almost 200 wine tasting cellars.
  8 Wine tourist trails.

► Vaucluse has a large number of places selling farm products on site.

► Artistic professions are also a part of the broader tourist industry.

PACA is the leading French region with 16,500 craft workers, covering 20 fields (flower arranging, goldsmithing and silversmithing, working in stone, instrument making, etc.) bringing together 217 artistic professions.

Traditional crafts help to maintain local expertise and traditions. This undeniably attracts tourists and brings in money: Moustiers earthenware, Cogolin tobacco pipes, the Apt ochre quarries, etc.

► 3 PRIDES (Regional clusters for innovation and mutually supportive economic development) link up to help support participants and professionals:
  - Provence, good living businesses.
  - Carac’Terres (socially aware, fair trade tourism).
  - Ceramic arts, trades and industries.
Interesting facts

► **360 tourist information offices** (“syndicats d’initiative” and “offices de tourisme”) (with 280 offices employing 1,600 people and 80 other tourist information offices in the Alpes-Maritimes employing 312 people) welcome more than 10 million visitors to our region each year (to be compared with the 34 million tourists).

► There are **fifteen** 4-star tourist information offices and **49** with 3 stars with **a high level of service offered** to suit their targeted upmarket customers.

► Their **consolidated budget** was said to be **47 M €** (2008). It is thought that a 4-star office has a budget of about **2 M €**.

► **Information professions always need to adapt to the big changes brought about by the Internet.** But irrespective of these changes in travel behaviour, these bodies remain the mainstay of tourist facilities and tourist information especially in towns.
Tourist facilities and information

General points

► Tourist information and holiday representatives/ tour guides are the major employment, with 40% of employees in this profession.
► Tourist information, communication, promotion and holiday representatives/ tour guides are the main cross-disciplinary jobs (filled by a multi-skilled person).
► More than one quarter of staff are multi-skilled.

► Tourist information offices welcome and advise more than 10 million visitors each year, or more than twice the regional population.

Key data

► Tourist information offices (“syndicats d’initiative” and “offices de tourisme”): 360 bodies.
► Total employment: almost 1,900 people (full time and part time taken together), of whom
  1,155 people are full time.
  742 people are part time.
  1,159 full-time equivalent people – FTE.
► 37 Tourist information offices have, in addition, a commercial role and sell PACA as a destination (hors 80 Tourist information offices des Alpes-Maritimes, for which information is not available).

Status (except for 80 Tourist Information offices in the Alpes-Maritimes, for which information is not available)

► Six out of 10 are voluntary organisations, in particular the 1- and 2-star offices, in Var and Vaucluse.
► One quarter of these bodies are EPICs (Publicly owned) or under local government control.

Classifications

► “Offices de tourisme” (TO) may apply for a 1* to four-star rating depending on the services they are able to supply to both visitors and travel companies.
► “syndicats d’initiative” (SI) are not classified. (For more details See Art. D. 133-20 et seq. of the tourism code – Order dated 12 January 1999)
► Distribution of the classification of the offices

Offices with 1 and 2 stars* make up half of the bodies (46%).
► This shows a higher rate than the national average of Tourist information offices
► The 4-star offices are in the coastal departments.
► Note: on an order dated 12 November 2010, the classification of Tourist information offices will be reduced to 3 categories, from 1st January 2014.

Source: FROTSI, 2010 / CRT Riviera 2011
Interesting facts

This business, by its very nature, is very closely involved in tourism, even though some travel is for business (a special kind of activity which nevertheless is part of tourism) which provide reservation services (sale of theatre tickets, etc.), which may also be used by people who are permanently resident in the region.

► Almost **1,400 establishments, providing 5,300 jobs.**
Some, with the highest turnover in the region (Vacances Héliades, Exotisme, Distribution Tourisme, Tourisport, etc.), operate from Aix and Marseille.
A good few are members of groups whose head offices are not in the region: Fram Travel, Nouvelles Frontières Distribution, Carrefour Travel, American Express Travel, etc.

► **There are 900 travel agents providing almost 3,000 jobs.**

► **Other reservation services and similar businesses** are not inconsiderable either, with **334 organisation and 1,700 jobs.**
The majority of these establishments are in the Bouches-du-Rhône followed by Alpes-Maritimes.

► Almost **400 Booking agencies trade in the region,** most of them in Alpes-Maritimes and Hautes-Alpes. They can call on a range of services: coach companies, hire, excursions, foreign language guides, etc.

► These establishments, which necessarily concentrate on tourism, deserve closer attention (if they haven’t already received it), for their links to changes in tourist behaviour that might be proposed by some clusters/PRIDES.
Aspects of travel agent and tour operator businesses

- Compared with other business sectors, a feature of these businesses is that they are part of large groups whose head offices are not in PACA.
- E.g.: Fram Voyage, Nouvelles Frontières Distribution, Carrefour Voyage, American Express Voyage, etc.
- Only 50% are company head offices.
- Finally only 50% are sole traders.

Kinds of business involved

- **Travel agent**: sells tours or stays offered by tours operators. Ticketing services (air, rail etc.) are their major resource.
- **Tour operators**: provide travel arrangements, they organise and offer packages (all-inclusive holidays including a range of services).
- **Other reservation services and related activities**: reservations for transport, hotels, restaurants, vehicle hire, performances and sporting events, timeshare exchange services, ticket sales for the performances, sporting events and any other entertainments and tourist information offices.

Note: establishments dealing with both out-going and in-coming tourists to PACA are included.

Key data for the sector

- **Number of establishments of the sector in PACA, in 2009**: 1,380.
  - 34% of these establishments are in Bouches-du-Rhône.
  - 27% in Alpes-Maritimes.
  - 19% in Var.
- **Number of jobs, on average, in the sector in PACA, in 2009**: 5,300.
- Travel agents form a larger part of the sector than tour operators and other reservation services.

Details by business

- **Travel agents**
  - 915 travel agents.
  - 2,990 jobs, on average.
- **Tour operators**
  - 131 tour operators.
  - 650 jobs, on average.
- **Other reservation services and related businesses**
  - 334 other booking services.
  - 1,700 jobs, on average.

Aspects of travel agent and tour operator businesses

- Compared with other business sectors, a feature of these businesses is that they are part of large groups whose head offices are not in PACA.
- E.g.: Fram Voyage, Nouvelles Frontières Distribution, Carrefour Voyage, American Express Voyage, etc.
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- Finally only 50% are sole traders

Status

- **Travel agents**
  - 57% are limited liability companies (521).
  - 20% are voluntary bodies under the 1901 Act (185).
- **Tour operators**
  - 42% are limited liability companies (55).
- **Other reservation services**
  - 12% are limited liability companies (41).
  - 22 are self-employed (Other individual).

Source: Fichier INSEE, 2009
Passenger transport

Presentation by business > Passenger transport > General points

General points

Interesting facts
(excluding sea transport, treated in the cruises section)

Note however, the share relating to tourism is not available for this sector.

The data for the median number of jobs in the rail sector must be put into perspective. This data overestimates the number of SNCF regional jobs: 8,000 actual compared with the estimated 12,000.

► A large business sector, with almost 5,300 establishments and more than 34,000 jobs estimated in the region, or 30,000 actual.
► Presence of major national transport companies: Air France, SNCF, Veolia Transport, etc. These major companies provide almost 2,000 jobs for Air France, 8,000 for the SNCF, etc.
► Since Alpes-Maritimes relies strongly on foreign tourists, transport is a determining factor: taxis, vehicle hire, excursions, etc., naturally cluster round the airport.
► The administration and selling of tourism and transport (on-board guides, technicians, etc.) remain the only ones directly linked to tourism. In 1999, it was believed that they accounted for 10% of the total of jobs in transport.
► Distribution of jobs between the land, rail and air sectors:
  
  **Land**: 16,200 jobs. The largest, offering a wide range of services: Taxis, car hire, bus services whether regular or not.
  
  **Rail**: 12,400 jobs (8,000 actual), but data skewed by the SNCF figures.
  
  **Air**: almost 5,700 jobs.

► Two-thirds of tourists arrive by car, 18% by train and more than 12% by air (2003 data).
► The importance of high-speed train and air travel is to be assessed. Their huge dedicated infrastructures make a significant contribution to the development of tourism, especially international, in the region.

Summary of the number of establishments and jobs in passenger transport in PACA

<table>
<thead>
<tr>
<th>Sectors</th>
<th>No. establishments</th>
<th>Median no. jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air</td>
<td>110</td>
<td>2,900</td>
</tr>
<tr>
<td>Ancillary services: air</td>
<td>65</td>
<td>2,800</td>
</tr>
<tr>
<td>Rail</td>
<td>170</td>
<td>12,400</td>
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<tr>
<td>Land*</td>
<td>4,550</td>
<td>11,850</td>
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<tr>
<td>Ancillary services for land transport</td>
<td>400</td>
<td>4,300</td>
</tr>
<tr>
<td>Sea and river**</td>
<td>160</td>
<td>2,100</td>
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<tr>
<td>TOTAL</td>
<td>5,295</td>
<td>34,250</td>
</tr>
</tbody>
</table>

(Actual: 8,000)

(Note, not counted here)

* Includes the categories: “Transport of travellers by taxi”, “Regular road passenger transport”, “Other road passenger transport” and “Short-term hire of cars and light vehicles”.

** See the detail for this category in the “Cruises” section.
Passenger transport

General points

Interesting facts

Air transport

► Nice: 2nd largest airport in France*, with 60% of its traffic being international.
► Marseille: 4th largest airport in France*
► Air France alone provides more than two-thirds of the 2,900 jobs in the sector. The rest are divided between a hundred businesses, mainly in the Alpes-Maritimes.

► Reasons for travel (passenger numbers) in the airports: tourism is the main reason given (44% in Nice and 41% in Marseille), followed by business reasons and visits to family and friends with 28% each.

► Under development, in Nice: Construction of a new business centre for car hire. Note: the new car-hire services offered by the German company Arwe (60 jobs created).

► Marseille: 45% of leisure tourists use the low cost airport. They come for both the seaside and for the towns.

► Ancillary air services: these are mainly the ICCs for the two cities and their dedicated staff, who manage Nice and Marseille airports, and the two Aviapartner offices which provide airport assistance to passengers (250 employees each).

Road passenger transport services

This has almost 4,600 establishments with 12,000 jobs (11,850), plus 420 establishments and 4,350 jobs in ancillary services for land transport.

► Number of cumulated transactions for motorway tolls in PACA in 2009: 300 million, but how much is the result of tourism is not measurable.

► There are about 3,600 jobs in taxi services, of whom 80% are self-employed.
► The passenger numbers for the Regional Express Lines (LER) are growing fast.
► Regular passenger transport: 305 establishments employing almost 4,600 people.

Note: 8 of these establishments have more than 100 employees.

Apart from the large companies and those managed by the departments or cities (Bouches-du-Rhône, Var, Avignon area, etc.), there are other companies such as: Sud-Est Mobilité in Avignon, Autobus Aixois SARL, Suma in Rognac, Société des Coaches Sabardu, etc. Some have more than 100 employees.

► Other road passenger transport services:
These complement those mentioned above, and are mainly focused on tourism (excursions, tours, coach hire, etc.).

There are almost 330 small establishments, employing more than 1,700 people.
As with the other transport sectors, Alpes-Maritimes predominates with almost half of the establishments.

► Vehicle hire provides almost 600 establishments and 1,900 jobs.

Significant companies: Avis, Europcar and Hertz some offices which provide more than 50 jobs each, especially near the region’s airports.

* In number of passengers
Public policy

► Public bodies at every level are developing support for this major sector of the French economy.

► Given its major importance in Provence-Alpes-Côte d’Azur, public policy here is particularly advanced.

► The most current forms of public support are:

- Introduction of proactive policies.
- Financial assistance and support.
- Establishment and development of public / quasi-public bodies aimed at professionals in the industry and/or tourists themselves.
- Development of specific action linked with the local area.

► Local authorities and the government support this sector at the national, regional, départemantal, inter-commune and commune levels and even over more original areas of collaboration. They provide policies, financial support, services, specifically dedicated bodies, and diversification in the PRIDES – the regional clusters for innovation and joint economic development of the regional economy. Six of these are involved in tourism.

► The Regional Development Plan for Tourism and Leisure 2006 / 2011 defines the major features of regional tourist policy. It is currently being updated for the period 2012 / 2016.
Main public bodies

An institutional network across the region.

DIRECCTE (the regional office for business, competition, consumption, work and employment)
Under the authority of the regional Prefect, DIRECCTE carries out the government’s national policy, in particular in the field of tourism. www.tourisme.gouv.fr

The PACA Regional Council
Office for Regional Economy, Innovation and Higher education, Tourism department.
► This office defines the medium-term objectives of tourist development in the region, as part of its planning role.
► The Regional Development Plan for Tourism and Leisure determines resources and how they are to be applied, in particular as regards finance, by agreements with the local authorities involved.
► The Regional Council centralises data on tourist activities and coordinates public and private initiatives in the field. www.regionpaca.fr

The Regional Tourism Committee – CRT PACA
The Regional Council’s practical wing in tourism:
Main public bodies

The Regional Network for Tourist Expertise and Engineering: a network of all the bodies in the region, active in tourism.

The départemental tourist bodies

Six Départemental Tourism Committees (sometimes known as ADTs – Tourist Development Agencies – or by other names):

► ADT for Alpes de Haute-Provence (04), www.alpes-haute-provence.com
► CDT for Hautes-Alpes (05), www.hautes-alpes.net
► CRT Riviera Côte d’Azur, (06) www.cotedazur-tourisme.com and its observatory: www.cotedazur-touriscope.com
► CDT for the Bouches-du-Rhône (13), www.visitprovence.com / www.visitprovence.org: a new communication under the name of TEMA, a professional website for tourism in the department.
► ADT for the Var (83), www.visitvar.fr
► CDT for the Vaucluse (84), www.provenceguide.com

The Conseils Généraux (equivalent of county councils)

► Each works out a départemental tourist development scheme, taking into account the directions defined by the Tourist Regional Development scheme.

Assets France, Mediterranean branch

► This tourist development agency for France was founded in May 2009, by the merger of two other French institutions:
  Odit France (Tourist Observation Development and Engineering).
  The Maison de la France.
► Role: to promote France abroad as a tourist destination.
► The agency also takes on the functions of tourist engineering, economic observation and promotion previously exercised by Maison de la France and Odit France.

www.atout-france.fr

Other bodies with links to tourism and a region-wide scope

► Préfecture for the region, General Secretariat for Regional Affairs.
► Regional Chamber of trade and industry, Tourism section.
► FROTSI (Regional federation of tourist advice bureaux), Provence-Alpes-Côte d’Azur.
► Union of Professionals in the Hotel Industry Provence-Alpes-Côte d’Azur.
► National Union of open-air tourism associations Provence-Alpes-Côte d’Azur.
► Regional Chamber of Agriculture Provence-Alpes-Côte d’Azur.
► Regional Chamber of trades and traditional crafts Provence-Alpes-Côte d’Azur.
Regional clusters for innovation and joint economic development - PRIDES

- **Seal of approval** given by the Regional Council Provence-Alpes-Côte d'Azur to 29 groups of economic participants in the region (businesses – particularly SMEs / research laboratories and training centres), aiming at developing joint action on the subjects of innovation, international development, the optimum use of new technologies, social and environmental responsibility and staff training.

- Note: the PRIDES do not cover all the categories, nor certain markets.

- Relative positions of the six PRIDES linked together on the principal markets and categories of tourism. *Note that the PRIDES do not cover the categories “Facilities, Information”, “Travel organisations” and “Cruises”, nor certain markets.*

**Position on the tourist markets**

**Position on the categories of tourism**

**Sources:** Regional Council PACA, 2011 and bodies involved
Introduction: main services and cross-business activities affecting the tourist sector

► In Provence-Alpes-Côte d’Azur, where this sector is so preponderant, the need to innovate, to retain its lead, is key. The participants are grouped in the Regional Innovation Network (RRI), using the “PACA Innovation” website (www.pacainnovation.com). Some of them work directly on tourism.

► Thus innovation takes various forms:
  
  * Innovation of use.
  * Technological innovation.

  Each time, both the user and the professional making the offer stand to gain.

► In addition, the tourist, as well as the professional he meets, are both responsible for and aware of the environment of home and destination. They take account of new dimensions in how they approach and organise their travel/stays/offers: they see environmental constraints as part of the world around them.

► Though this approach is still in the process of development, both visitors and their hosts must now reconsider how they operate and factor in the environmental risk that they pose. A challenge on which the Provence-Alpes-Côte d’Azur region wishes to take a position and make a stand.

► Finally, so as to offer the widest possible range of services to their guests, the tourist services in our region must strengthen themselves with related services (and therefore the appropriate professionals).

► Without going too deeply into this matter, which remains marginal to our area of investigation, we will here try to illustrate these services, which may offer real added value for the clients of our region and single us out from the rest.
In recent years, world tourism has seen two major revolutions: low-cost travel and the Internet. The latter, with the advent of the Web 2.0 (participative web) has profoundly altered the behaviour of tourists themselves, and also professionals.

Tourism, in the sense of “travelling”, is changing. Now the innovatory forms of tourism need to be thought about in the form of “leisure” and “discovery”.

We would like to work on the topic of innovation from several angles: Internet 2.0 / Bodies at the cutting edge of tourist innovation / Examples of new uses in Provence-Alpes-Côte d’Azur / Government call for proposals on “tourist innovation in rural areas”.

Internet 2.0: the participative web (general context, not specific to the PACA)

- Over these last ten years the tourist sector has experienced a radical makeover. The Internet has revolutionised the way we buy and consume travel.
- Changes in the value chain of the tourism industry

Old “mediated” model

Service providers
(airlines, accommodation, coach companies, etc.)

Producers
(Tour operators assembling packaged services)

Physical distribution
(Travel agents retailing the tour operators’ products in shops)

NEW USER

New model: the direct channel

Service providers

Producers

On-line agencies

News media

Physical distribution

END USER

- Inter-relationships which allow the client to choose “à la carte”.
- Decisions to buy are taken later and stays are shorter.

Source: Special feature on "Transport", Les Echos, September 2010
Innovations and cross-business activities > Services connected with tourism > Innovation

Organizations at the cutting edge of tourist innovation

In the diversification of the tourism network related to innovation, there are:

► The SCS Competitiveness Cluster – Secure Communicating Solutions

A cluster dealing with new technologies and aiming to use the most promising industries (multimedia, microelectronics, software and telecommunications), to provide innovative tools (traceability, connectivity, identity, security, convergence and mobility), to meet the needs of fast-growing markets: tourism, health, security, mobile communications, risks and digital identity.

► The PRIDES related to tourism.

► The Telecom Valley Association in Sophia-Antipolis, the telecoms component of the SCS PRIDES (Secure Communicating Solutions). This professional association plays an active role in the subject of mobile travel apps.

Website: www.telecom-valley.fr

► All the bodies in charge of tourist development form part of the “Regional Network for Tourist Engineering and Expertise”, under the initiative of the PACA Regional Council and with government departments (regional Internet portal project in progress).

► Events:

- Tourism@, on the Côte d’Azur. Now consists of two annual events: Rencontres du Tourisme 2011 (previously known as Tourism@), a technology conference for professionals in new technologies as applied to tourism.

International competition “Tourism@ Awards”, awarded for tourism and technologies.

- Voyage en multimedia, Saint Raphael (Var), a conference on innovation related to tourism. The event also aims to develop a social network (community of participants) for e-Tourism: the French trade fair for e-Tourism.

Examples of new practice in PACA

► Tactile screens: indoor or outdoor, these are available to the general public to:

Obtain information by direct use.

Download information by contactless exchanges between the screen and the smartphone of the person approaching it.

► Innovation in the design of hotels: example Hi Hôtel, Nice.

► Innovation in catering services: new services, furniture design.

► Innovation in products: molecular gastronomy / haute cuisine in general, which is in a permanent state of innovation.

► Innovation in procedures: maintenance and improvement of maintenance ratios on golf courses.

► Sailing: new boats offering underwater viewing / new antifouling treatments for hulls, avoiding pollution to the marine environment.

► Air transport: new ergonomic seating on board offering greater comfort.

► Health and beauty: new individual spa cubicles, for greater relaxation.

► Towns of the future / contactless towns: experiments (Nice, for example, given seal of approval in 2010 as “NFC Town”, and Marseille in 2011) with contactless objects throughout the town, of immediate benefit to pedestrians.

► Musetrek.com, an intelligent tour of the Musée Calvet in Avignon by the use of smartphones.

► “Virtual Market Place”, scope: business tourism. A system which enables participants at an event (seminar or conference) to extend the networking they have begun during the event, using virtual means. Producer: Groupe Be in Beyond, Cannes.

Principal centres of IT innovation and tourism in the Alpes-Maritimes

► Accenture, Air France, Amadeus and IBM.

► Others with their headquarters in this area: Air France / KLM (computing), Rodriguez (backup plan).

► Customer relation centres: American Express, AB Cruise.

Source: Dev Help, e-tourism 2010/2011

* NFC: Near Field Communications / contactless technologies
Sustainable tourism: the environmental concepts (not specific to PACA)
How can we develop tourism sustainably?

What is “sustainable” tourism?

► Sustainability applied to tourism: the term sustainable tourism is a relatively recent one. It appeared in the early 1990s after the Rio summit of 1992 and Agenda 21.
► Its definition came from the Brundtland report written for the UN in 1987 by the World Commission on Environment and Development: "Sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs."
► The notion of sustainable tourism echoes the three principles of sustainable development: “it must be ecologically supportable in the long term, economically viable and ethically and socially equitable for the local population” (clause 1 of the Charter for sustainable tourism of the OMT adopted in 1995).

Responsible local development on three levels:

► Environmental
The “ecological milieu” to be protected and enhanced is understood as a shared household: it includes countryside and wildlife, the historic and architectural landscape (including vernacular architecture), as well as “living heritage”, (ethnological and cultural). The environment, in its broadest sense, is the raw material of sustainable tourism.

► Economic
The notions of development and progress must be defined by tempering the traditional quantitative indicators of the tourist economy (number of visitors, financial multiplier, jobs created, income in foreign currency, etc.) and by taking into account all of the costs (environmental, cultural and social) of the business over the long term, the distribution of the wealth earned and the quality of life of the people involved.

► Society
This means adopting another method of governance with the idea that the success of a project is based on social cohesion – what Jean Viard called “making wealth together”. This system respects the social and cultural authenticity of the local community, preserves their cultural assets, buildings and traditions and their traditional values and contributes to intercultural understanding and tolerance..

An example of certified sustainable tourism

► The regional natural parks of Les Alpilles and Le Verdon: their actions reconcile the development of business and its integration into the environment.
► Certified by the European Charter for Sustainable tourism in unspoilt natural protected areas. Certification valid 5 years.
► In PACA the five PNRs undertake, with the help of the Regional Council, to meet the demand for sustainable tourism in agreement with the professionals of the sector in these regions.
Sustainable tourism: the environmental concepts contd.)

Responsible local development (contd.)
In what is known as “sustainable” or “responsible” tourism, there is:

► Equitable tourism: this means fair pay for service providers and financial support to development projects which benefit local people. Equitable tourism is equivalent to Fairtrade shops; it is subject to the same rules.

► Ecotourism: this is a very powerful way to encourage biodiversity, unlike mass tourism which can degrade natural sites. Ecotourism includes a component of education and interpretation. It is generally organised for small groups, by small specialist local bodies. It is accompanied by limited impact on the natural and socio-cultural environment and encourages the protection of natural sites.

► Ecotourism compared with other forms of tourism.

Environmental seal of approval, sustainable tourism
► Green Globe 21: Green Globe is an international seal of approval for sustainable travel and tourism

Regional policy of PRIDES
► One of the five major themes of development specified by the Regional clusters for innovation and mutually supportive economic development, in awarding the seal of approval relates to respecting and developing sustainable environmental and social action.
Sustainable tourism: the environmental concepts (contd.)

How can tourist development be made more sustainable?

► A tourist service should form part of a global vision for the sustainable development of the regions.

By its impact across many businesses, tourism disrupts the general organisation of an area during the peak tourist season. To cope with these changes, it is necessary to aim at integrating this project into the broader activities of the host area. An overall vision is required to connect and balance tourist development with all the services it needs.

By planning this development in advance, the growth of this business can be controlled to integrate it harmoniously into the region.

► Tourist facilities related to the specific features of the region.

On the social and environmental level, as a “contact” business, tourism brings new functions capable of producing social changes, overwhelming local communities and homogenising cultures and lifestyles. The sustainable development of tourism must strive to counter this rounding-down of specific local features, based on the assets of the regions to power its appeal.

Considered as an economic activity, tourism is a factor for local development.

In the broader sense, this concept refers back to the right of future generations to discover and know a naturally and culturally rich planet.

► Sustainable tourism through training and education.

Tourists should not be mere consumers of landscapes and tourist products. An exchange should take place with the local people, with both parties benefiting so as to minimise conflicts of use. Encouraging tourists needs to be matched with teaching them to be aware of the fragility of the place around them.

Whatever region is involved (mountain, coast, rural or urban) sustainable tourism needs mediators and interpreters of lifestyle.

Conclusion

► Although green tourism is emerging in the region, with a few applications in rural areas and in some towns, the mass tourism on the coast with its summer peaks is today in contradiction with sustainable objectives.

► The question needs to be raised with some of the PRIDES, how to make professionals more aware of these issues, which may be an advantage to them later.
Services connected with tourism

Principal sub-sectors of business which offer services to complement tourism

Some very varied business sectors. Numerous businesses in our region, because of its tourist appeal. A professional response to numerous and varied needs.

It remains to be seen and/or discovered how some of these professions could use the innovations presented above more advantageously, while still respecting environmental standards.

Trends

► Mostly small businesses, offering personalised services.
► One exception in terms of size of business: the sector of services connected with cleaning, which includes some big national / international leaders. For example the ONET Group.
► Businesses with high added value, often in the luxury and prestige market.

Events

► Creation of ready-made events: events organisers
► De luxe concierge services: luxury for individuals and businesses.
E.g: Partners Concept (06), No Soucy Service and Concierge and Co (13), Aladinoo (84) and Genie-Plus (06 and 83)
► Ticket agencies

Coaching / sport / assistance

► Coaching: sports, beauty and fashion makeovers, slimming, lifestyle, careers, yoga, education, cooking, weddings, interior decor, dancing, and furnishing
► recreational diving services
► Golf services
► Skilled and qualified guides for consumer’s safety: nature and adventure.
► Beach services

Transport

► Chauffeur
► Limousine service (luxury car with driver)
► Helicopter transport

Hire

► Hire of sports equipment
► Miscellaneous hire services

Various personal services

► Personal service companies
► Security and caretaking companies
► Garden maintenance companies
► Home delivery companies
► Home catering companies.
► Provision of domestic staff
► Tourist health services / Home nursing
► Tourist assistance services
► Cleaning services: laundry, industrial cleaning, ironing, etc.

Source: Standard ISO 2006 / INSEE 2008
Interesting facts

► With 535 events recorded, PACA is the 2nd most important region in France for the number of festivals, events and shows. Some are famous worldwide: Nice Carnival, Cannes film festival, MIDEM, Avignon Theatre Festival, Aix Opera Festival etc.

► For professional trade fairs, PACA is also the 2nd most important region in France:

- 27 conference centres and a hundred event venues.
- Almost 60,000 conference-goers recorded at 78 conferences.

► 1,000 establishments are listed providing 1,800 jobs:
Two companies have more than 100 staff, including the SEMEC (a semi-public company running events in Cannes) with 254 jobs.
These establishments are mainly located in the Alpes-Maritimes, closely followed in numbers by those in the Bouches-du-Rhône.

► Municipal conference centres are continually investing to maintain and develop their appeal: this is the case in Cannes, famous worldwide, and in the Parc Chanot in Marseille, not to mention the Acropolis in Nice, Avignon Expo and Neptune in Toulon. Among major projects there are the extension of the Palais des Festivals in Cannes, the construction of a major Palais des Conference on the Mole of Arenc in Marseille and a new Conference Centre in Nice. Two operations come within the category of OINs – Operations of National Interest – in these two cities.

► Currently graded as facilities for international medium-sized events (max 30,000 people), some conference centres, with the proposed investments, especially on the Côte d’Azur, should be able once more to bear comparison with the great European and world capitals. For example the Mobile World Congress in Barcelona with 50,000 visitors, which used to be the 3GSM in Cannes.

► Conference-goers are major contributors to businesses related to tourism with a total average expenditure of 638 €, or 152 € spent daily. This is much more than a cruise passenger or an “average” tourist.

► Importance of this sector in the regional economy: this is because it is strategic, in particular for the Côte d’Azur, and the authorities have encouraged networking among participants, in particular in the PRIDES Provence Côte d’Azur Events. Note also the same type of diversification in the private sector in Provence Méditerranée Congrès.

► Naturally, Marseille-Provence 2013, European capital of culture, will be an exceptional and unique lever to develop the tourism and fame of Marseille and the whole of Provence.
Events

General points and key data

Position

► PACA: 2nd most important region in France for the number of festivals, events and shows (2007).
► 11,560 shows recorded (with almost 23,300 performances).
Including 1,848 musical concerts excluding classical music.
Forty classical music concerts (in 2009).
60% of the musical programme takes place in the mid-seasons – spring and autumn.

► 535 events listed
Including nearly 400 festivals.
Performing arts (music, dance, theatre): almost 220 events in 2009.

Organisation of events: some outstanding examples

Some outstanding businesses in terms of jobs

► SEMEC - the semi-public company running events in Cannes: 254 staff in 2010.
► The European Society of Cardiology, Biot: almost 120 staff in 2010.
► Marseille international ITS Fair: between 20 and 49 staff.
► Comexposium, Aubagne: between 20 and 49 staff.
► MCO Marseille (conference organiser): between 20 and 49 staff.
► Geser Center, Sorgues: between 20 and 49 staff.

Examples of events combining tourism and culture

► Tourist and cultural tour on the theme of Picasso, across the region in 2009, passing through Sorgues, Ménerbes and Avignon (84), Les Baux de Provence, Vauvenargues and Aix-en-Provence (13), Antibes, Vallauris and Cannes (06).

► Exhibition: “Caesar, the Rhone for memory”, Arles, 200,000 visitors in 8 months, closed in January 2011.

► Operation “Bienvenue chez vous”, by the PACA Regional Council: 15 days, from 30 October to 21 November 2010. Opening 250 sites of historic regional interest to the tourist public, presenting them and bringing them to life. Operation based on cultural and traditional subjects, life style, nature, economic and scientific discovery.

References

► Business Tourism Trade fair, Parc Chanot – Marseille
Mediterranean Business Events Seminar, 3rd year.
Aim: to put businesses organising seminars in touch with the operators involved (reception venues, caterers, equipment hirers, etc.).

► Mahana - Tourism and travel Trade fair, Marseille
17 to 19 February 2012
Trade fair for travellers, travel companies, tour operators and other organisers of trips.

► Rencontres du Tourisme, Nice
Annual, consists of 2 events:
Rencontres du Tourisme: bringing together innovative European companies in e-tourism. Formerly called “Rencontres Tourism@”.
Concours Tourism@ Award: for companies with the most innovatory products or services in the application of ICT to tourism.

Events

**ICT (General)**
1. WIMA (ICT)
2. TM Forum Management World
3. PV Technical conference - Thin Film 2010
4. Smart Event
5. Rencontres Scientifiques & Animation CIM PACA
6. OCOVA Forum
7. SAME
8. Journées Micropackaging & Animation CIM PACA
9. MIPTV / MILIA (Audiovisual/Multimedia)
10. MIPCOM (Audiovisual)
11. MIDEIM (Audiovisual/Multimedia)
12. Interactive Digital Entertainment Festival (Audiovisual/Multimedia)
13. Salon Techa (ICT/Heritage)

**Environment**
14. Clean Equity Monaco (Energy)
15. Batimed (Energy)
16. EVER show (Energy)
17. Regional environment meetings (Energy)
18. Positiv’Agora (sustainable development)
19. New raw materials symposium (Energy)
20. ENR Agora (Energy)
21. Enerbat show (Energy)
22. Ecobat (Energy)
23. Rencontres Technologiques MIEC (Energy)
24. Mempro IV (Eco-technologies)
25. New raw materials (Waste)

**Life Sciences**
26. MIFFEL (Agrifood)
27. Preventica (Health)
28. World Perfumery Congress (Cosmetology)

**Tourism**
29. Week-end ideas show
30. Rendez-vous France
31. International luxury travel market

**Sea**
32. Antibes Yacht Show
33. 1st Expobeach
34. 12th Cannes Water Symposium
35. International yachting festival
36. Monaco Yacht Show
37. Seatrade Med Cannes (Marseille in 2012)

**Multi-sector**
38. Professional restructuring skills forum forum (HR)
39. RSE (HR)
40. Salon des Masters (HR)
41. Export class forum
42. Cadres & Co (HR)
43. Top reprise

**Fashions and Textiles**
44. International Festival of fashion & photography
45. Med in Mode
46. 7th conference of the Euro-Mediterranean fashion city

**Aeronautics**
47. EUR-AVIA Cannes

**Logistics**
48. Top Transport Europe

**Real estate**
49. MIPIM
50. MAPIC

**Heritage**
51. Urban Mediterranean Heritage
52. Ecological restoration & sustainable development
Events

General points and key data

International recognition
Some recurrent cultural events, of international renown

► Nice Carnival (06)
  Annual, in February/March.
  Popular culture, street entertainment.
  Audience: international.

► Festival of Sacred Music (06)
  Nice.
  Annual, in June.
  Religious music.

► Cannes international film festival (06)
  Annual, in May.
  Cinema and audiovisual.
  200,000 participants, 36% of spectators from abroad.
  20 M € budget.
  16,000 jobs involved for an estimated 180 M € in economic benefits.

► Festival “Jazz à Juan”
  Antibes Juan-les-Pins (06).
  Annual, in July.
  International Jazz Forum.

► Nice Jazz Festival (06)
  Annual, in July.
  Audience: international.
  Attendance 2008: 55,000 spectators.

► MIDEM Trade fair
  Cannes (06).
  Annual, in January.
  International forum for disks, musical publishing and video.
  Attendance 2009: 8,000 visitors from 80 countries.
  International song competition during this trade fair: “NRJ Music Awards”.

► Festival d’Art Lyrique in Aix-en-Provence (13)
  Annual, in June/July.
  Audience: international.
  75,500 spectators in 2008.
  Budget: 19.2 M €

► International Piano Festival at La Roque d’Anthéron (13)
  Annual, in July/August.
  Piano, music.
  Attendance 2008: more than 80,000 spectators and 400 performers.

► Avignon Festival (84)
  Annual, in July.
  Theatre.
  Audience: international.
  100,000 spectators in 2008.

► Chorégies in Orange (84)
  Annual, in July.
  Festival of operatic music.
  Audience: international.
  60,000 spectators in 2008.

► Rencontres d’Arles – International photography event (13)
  Annual, from July to September.
  52 exhibitions in 2008.
  60,000 visitors and 4,600 professionals in 2008.
Assets of PACA

► 2nd most important region in France, after the Ile-de-France, for this activity.
► A region offering all-purpose conference facilities.
► Conference centres and exhibition parks: 10.5 M € of investment in 2008, or 6.7% of the national investment.
► A tried and tested commitment and expertise, to which are added:
  Suitcase exhibition and conference venues.
  Transport infrastructures: international airports, railway stations, high-speed train access.
  A very full range of hotels and catering at every level – including the very upmarket.
► International recognition and famous events already in place, in particular on the Côte d’Azur.
► A rapid rise in facilities for medium-sized events has been seen in the Aix-Marseille area.
► Four towns, in PACA, host the majority of international events: Avignon, Cannes, Marseille and Nice.

► Economic benefits (2007/08)
  Cannes Festival: 160 M €
  Festival of Avignon: 23 M €

► 27 conference centres and seminar venues with 150 to 2500 places and 96 venues for events. Prominent among them are:
  Festival and Conference Hall in Cannes, mainly aimed at B to B on the world market.
  SAFIM (Parc Chanot, Marseille), B to C niche on the European market.
  The others operate more on the national or regional level.

Focus Côte d’Azur

► 500,000 conference-goers.
► 400 national and international events a year.
► 1 stay out of 5 on the Côte d’Azur is for “business” reasons in the broad sense of the word.
► 27 million euros of investment in modernising the Acropolis (Nice).

Focus Marseille (2008)

► 9 venues for professional meetings.
► 325 events, spread over 885 days.
► 97,338 participants.
► the average event lasts 2.7 days.
► 462 € of added value per participant.

Specialist organisations

► PRIDES Provence Côte d’Azur Events - business and conference tourism: a regional cluster created to heighten quality and competitiveness and to improve the competitive strength of the region in the field of business and event tourism. Target: to attract conferences of less than 300 people.
► Provence Méditerranée Conference: the leading association for conference towns in the south-east of France, 11 conference centres are members.

Mid-2011: project to bring these two bodies into the study.

Source: Analyse de l’activité congrès, mars à octobre 2009, en région PACA - PRIDES Events
### Conference centres

1. Auditorium Rainier III - Monaco
2. The Airport Business Centre - Nice
3. AGORA Conference centre - Aubagne
4. Citadelle Conference centre - Villefranche-sur-Mer
5. Aix-en-Provence Conference centre
6. Le Parc Chanot Conference centre - Marseille
7. International Conference Centre of the Palais des Papes - Avignon
8. Circuit Paul Ricard HTTT – Le Castellet
9. Club Med Affaires - Opio
10. International Meeting Centre - Monaco
11. Mediterranean University Centre - Nice
12. Espace Fontvielle - Monaco
13. Forum of the Casino des Palmiers - Hyères
14. Grand Casino of Beaulieu
15. Grimaldi Forum Monaco
16. La Halle - Martigues
17. Le Palestre – Le Cannet
18. The Exhibition and Conference Centre – Mandelieu-la-Napoule
19. Industrial Development centre of Marseille
20. Maison Européenne of Le Coeur - Valbonne
21. Conference centre – Saintes-Maries-de-la-Mer
22. Oustau Calendal - Cassis
23. Palais de la Méditerranée - Nice
24. Palais de l’Europe - Menton
25. Industrial Centre - Grasse
26. Acropolis Conference centre - Nice
27. Conference centre of Arles
28. Conference centre of Saint-Raphaël
29. Conference and Festival Centre - Cannes
30. Neptune Conference centre - Toulon
31. Palais du Pharo - Marseille
32. André-Malraux Hall – Pierrefeu-du-Var
33. Salle du Canton - Monaco
34. World Trade Centre - Marseille

* Source: 2011 - MDER

---

**Events**

**Networks and cross-business activities > Events > Professional meetings**

* Conference centres with more than 1,000 seats *

**Table:**

<table>
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<tr>
<th>N°</th>
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<th>Indoor exhibition area (m²)</th>
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**Map:**

- **MDER – Panorama of the PACA regional economy – June 2011**
- **Events - Panorama of the PACA regional economy – June 2011**

*48*
Events

Networks and cross-business activities > Events > Marseille - Provence 2013

Objectives

► To establish the region sustainably as a centre for hosting creative people from Europe and the Mediterranean to produce and distribute their work in all disciplines of art and thought. The key idea is intercultural dialogue within Mediterranean Europe. The seal of approval gives the area an additional asset for its appeal to tourists.

► To develop artistic and cultural activities as a force for renewal in the city by combining four aspects:

  The quality of public space.
  Outreach throughout the region.
  Citizens’ participation.
  Appeal of the metropolis.

Content

► 4 seasons of events for the Capital of Culture year:

  Inaugural events.
  The celebration of otherness.
  Voyages by water.
  Sails of fashion.

► 11 exhibitions.

► 25 major structural events, including two new festivals:

  “InterMed”: domains of contemporary creative arts and young people.
  “Via Marseille”: European conference on art and the city.

► 250 EuroMediterranean workshops: hands-on projects in clubs, schools, cultural establishments, businesses, etc.

► 6 existing summer festivals in Aix-en-Provence, Arles, La Roque d’Anthéron and Marseille will be mobilised for the occasion.

Area covered by the event

Source: Source: Association "Marseille-Provence 2013: capitale européenne de la culture", 2010

NB: Toulon has left the area since...
Heritage

Interesting facts

► The tourist appeal of the region is first and foremost the sea and the mountains, but – and in equal measure - it is also related to its exceptional heritage: its historic buildings, landscape, archaeology and museums.

► Revealing figures:
  2,207 historic monuments.
  29,000 archaeological sites and exhibits.
  More than 400 museums.
  10 regional and national parks.
  7 artistic and historical towns and neighbourhoods.
  Almost 200 remarkable or protected gardens.
  5 sites classified as World Heritage, etc.

► Unspoilt protected natural areas:
  In France: 0.8% of the total area of the country.
  In PACA: between 15 and 20% of the total area of the region

► 5 “PRIDES” – Regional clusters for innovation and mutually supportive economic development, apply to this heritage, bringing the participants together in a network and boosting the businesses that they constituent.

► More than 300 companies are involved in renovation, traditional crafts, and maintaining landscapes and plants.

► 261 others, providing 1,600 jobs, relate to the management of museums, botanical gardens, and historic sites and monuments.

► Heritage provides about 50,000 jobs in the region. Among them there are:
  3,000 direct jobs.
  28,000 indirect.
  18,000 induced.

► The income from heritage tourism represented almost 3 billion euros in 2006. This is a very high figure (for comparison, the turnover from hotels = 1.7 billion in 2009).

► History and heritage account for more than 1/4 of the reasons why tourists visit the region. Some 6.5 million people visit sites and monuments each year.

► The heritage tourist is a great consumer of commercial accommodation and restaurants. He spends on average 57€ per day.

► Finally, nine sites welcome more than 100,000 visitors a year.

Heritage

Monuments, museums, religious sites, curiosities and festivals with more than 30,000 visitors/year

Source: 2011 Observatoire Régional du Tourisme PACA

International festivals

1 - Avignon Festival (Theatre - Dance)
2 - Chorégies d’Orange (Opera)
3 - Cannes Festival (Cinema)
4 - Marques Festival (Dance - Music)
5 - Opera Festival (Aix-en-Provence)
6 - International jazz festival (Antibes)
7 - International piano festival (La Roque d’Anthéron)
8 - International Festival of Photography (Arles)

More than 500,000 visitors/year

1 - Gorges du Verdon Prehistory Museum (Quinson)
2 - Salagon Museum (Mane)
3 - Oceanography Museum (Monaco)
4 - Maeght Foundation (St-Paul de V.)
5 - MAMAC (Nice)
6 - National Chagall Museum (Nice)
7 - Ephrussi de Rothschild Foundation (Saint-Jean Cap Ferrat)
8 - Matisse Museum (Nice)
9 - Picasso Museum (Antibes)
10 - Maritime Museum (Cannes)
11 - International Museum of Perfume (Grasse)
12 - Museum of Asian Art (Nice)
13 - Palais Masséna Museum (Nice)
14 - Jules Cheret Fine Art Museum (Nice)
15 - Museum Renoir (Cagnes-sur-Mer)
16 - Cimiez Archaeological Museum (Nice)
17 - Henri Clews Foundation (Mandelieu)
18 - Fernand Léger Museum (Biot)
19 - National Naval Museum (Toulon)
20 - Ancien Hôtel de Ville (Antibes)
21 - Museum of Aromas and Perfume (Graveson)
22 - History of Marseille Museum (Marseille)
23 - Réattu Museum (Arles)
24 - Vasarely Foundation (Aix-en-P.)
25 - Castle of the Popes (Avignon)
26 - Petit Palais Museum (Avignon)
27 - Art Museum (Toulon)
28 - Provence-Alpes-Côte d’Azur

Historic Monuments - sites

1 - Citadel (Sisteron)
2 - Sanctuary of Our Lady of Laus (Saint Etienne le Laus)
3 - Boscodon Abbey (Crots)
4 - Russian church (Nice)
5 - Palais Lascaris (Nice)
6 - Villa Kerylos (Beaulieu)
7 - Chapel of the Rosary – Matisse interior (Vence)
8 - Notre-Dame de la Garde Basilica (Marseille)
9 - Roman arenas and theatre (Arles)
10 - Les Baux castle (Les-Baux-de-Provence)
11 - Church terrace (Stes-Maries-de-la-Mer)
12 - Saint Trophime cloisters (Arles)
13 - If Castle (Marseille)
14 - Glanum (St-Rémy-de-Provence)
15 - Tarascon Castle (Tarascon)
16 - Saint Paul de Mausole cloister (St-Rémy-de-Provence)
17 - Montauriol Abbey (Arles)
18 - The Alyscamps (Arles)
19 - Silvera Abbey (La-Roque-d’Antéron)
20 - La Barben Castle (La Barben)
21 - Sanctuary of ND de Grâces (Cotignac)
22 - Le Thoriert Abbey (Le Thoronet)
23 - Amphiitheatre (Fréjus)
24 - Popes’ Palace (Avignon)
25 - Pont Saint Bénédet (Avignon)
26 - Roman theatre (Orange)
27 - Sénanque Abbey (Gordes)
28 - The Bories Village (Gordes)
29 - Loumarin Castle (Loumarin)
30 - Tarascon Museum (Tarascon)
31 - Natural History Museum (Aix-en-P.)
32 - Museum of Aromas and Perfume (Graveson)
33 - History of Marseille Museum (Marseille)
34 - Réattu Museum (Arles)
35 - Vasarely Foundation (Aix-en-P.)
36 - Citadel Museum (Saint-Tropez)
37 - Museum of the Annunciation (Saint-Tropez)
38 - Cap Garonne Mine Museum (Le Pradet)
39 - National Naval Museum (Toulon)
40 - Archaeological Museum (Vaison-la-Romaine)
41 - Municipal Museum (Orange)
42 - Palais Malraux (Aix-en-P.)
43 - Lambert Collection (Avignon)
44 - Lavender Museum (Coustellet)
45 - Anglada Museum (Avignon)

Gardens, crafts, curiosities

1 - Ecrins National Park (Briançon)
2 - Serre-Ponson Lake (Rousset)
3 - Montagne aux Marmottes (Le Sauze)
4 - The Pré de Madame Carie (Pelvoux)
5 - Domaine de Charence (Gap)
6 - Lautaret Alpine Botanical Garden (Villa d’Arène)
7 - Biot Glass Factory (Biot)
8 - Phoenix Flora Park (Nice)
9 - Exotic garden (Monaco)
10 - Exotic garden (Eze)
11 - Hippodrome (Cagnes-sur-M.)
12 - Alpha Wolf Park (St-Martin-Vésubie)
13 - Grottos (St-Cézaire)
14 - Glanum (St-Rémy-de-Provence)
15 - Theatre of Photography and the Image (Nice)
16 - The little world of Marcel Pagnol (Aubagne)
17 - Tortoise Village (Gonfaron)
18 - Zoo (Sanary)
19 - Domaine du Rayol botanical garden (Rayol-Canadel)
20 - Conservatoire des Ocres (inch factory) (Roussillon)
21 - Phoenix Flora Park (Nice)
22 - Exotic garden (Monaco)
23 - Exotic garden (Eze)
24 - Hippodrome (Cagnes-sur-M.)
25 - Alpha Wolf Park (St-Martin-Vésubie)
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33 - Conservatoire des Ocres (inch factory) (Roussillon)
A string of natural regional parks running from east to west, inland from the coast
Types of tourism

Principal types
Different types of tourism exist in the region. Three are characteristic:

► The Trade fair and conference industry (business tourism).
► Cultural tourism.
► Ecotourism.

There are however other types, notable for the number of seals of approval issued:

► Social, group and club tourism.
► Wine tourism.

Others

► In parallel there are quality tourist services covered by numerous seals of approval.
► Also in the region there exist industrial tourism and religious tourism (with a section of one of the pilgrimage routes to Santiago de Compostela), but there is no quantitative data to show this. But note for example that GDF Suez opens its hydro-electric sites to the public. These reservoirs are also used for leisure activities (e.g. artificial lakes of the upper Var and the Alpes de Haute-Provence: lakes of Sainte-Croix, Quinson, Esparron de Verdon, etc.).

Areas of activity

Principal areas of activity covered

► Tourism and quality.
► Social, group and club tourism.
► Ecotourism.

Activity-related tourism

► The Trade fair and conference industry (business tourism).
► Cultural tourism.
► Wine tourism (see wine routes CAR).
► Spas and water therapy.

Source: Data compiled from the network of regional and departmental tourist committees in PACA, 2010
Introduction

► This part lists the main trade names and seals of approval corresponding to the markets identified in the previous pages. This list does not claim to be exhaustive, and only the brands and seals of approval most commonly developed in our region will be listed here.

► Provence-Alpes-Côte d’Azur is the leading region in France for the number of businesses with tourist seals of approval.

► Note: The Chambers of Commerce and Industry in the Euro-region are working together to make seals of approval more rational and bring them into harmony with each other.

► Warning to the reader

Do not try to add up totals of approved establishments or localities because one establishment may hold several seals of approval.

“The Trade fair and conference industry” (business tourism) has already been dealt with, and so that subject is not covered again in this part.

► Eight categories were looked at:

- Tourism and quality (12 seals of approval).
- Social, group and club tourism (3 seals of approval).
- Ecotourism (8 seals of approval).
- Agri-tourism (2 seals of approval).
- Cultural tourism (3 seals of approval).
- Wine tourism activities.
- Health and beauty activities.
- Trade fair and conference industries – Business tourism.

Note: some commentators have cast doubt on the (excessive?) number of seals of approval, which detract from legibility.
Seals of approval

Main brands and markets dealt with in the following pages:

Tourism and quality
The brand name: “Qualité Tourisme™”, including:
- Destination Entreprise
- Logis de France
- Camping quality

and the following seals of approval:
- Tables et Auberges de France
- Clé Vacances
- Ports Propres
- Gîtes de France
- Les Plus Beaux Villages de France
- Villages et Cités de Caractère
- Restaurateurs de France

Social, group and club tourism
- Loisirs de France
- Famille Plus
- Tourisme et Handicap

Ecotourism
- Gîte Panda
- Eco-Gîte
- Pavillon Bleu
- Villes et villages fleuris
- Station Verte
- La Clé Verte
- Chouette Nature
- Green Globe 21
- Ecolabel européen

Agri-tourism
- Accueil Paysan
- Bienvenue à la Ferme

Cultural tourism
- UNESCO World Heritage
- Grands Sites de France
- Villes et Pays d’Art et d’Histoire

Wine tourism activities

Health and beauty activities

Trade fair and conference industries

Source: Data compiled from the network of CRTs and CDTs in PACA, 2010
Interesting facts

► As well as their key role in the regional tourist economy, the mountains and the coastal strip are major challenges for rural planning and the protection of the environment.

► There is a strong contrast between the mountain which represents 2/3 of the region’s land area, 12% of the population and 8% of the employment (26% of tourism jobs) and the coastal strip where the situation is the reverse: 11% of the land area (with almost 690 km of coast) but about 50% of the population and 70% of the jobs in tourism.

► There are 47 main winter sports resorts and 15 coastal resorts. The tourist pressure is extremely high on the mountain region, in comparison with its permanent population. The 10 national and regional parks in PACA are therefore very important for the protection of the environment and the sustainable development of these regions.

► Appeal of the region: very great extent of unspoilt protected natural areas (national and regional parks, Coastal Conservatory, major sites, national nature reserves and protected marine areas), which cover almost a quarter of the regional land area (against 0.8% as a national average).

► Sailing (light yachting, boat hire, marine sports, excursions) and professional yachting represent 2,100 businesses and more than 9,000 jobs on the coastal strip.

► Leisure facilities concentrate mainly on diving and underwater fishing, rather than pleasure boating and light yachting. In fact Marseille and the Calanques are major tourist destinations worldwide for diving.

► Riding project: The Coeur du Var joint local authorities have decided to set up a horse centre, to offer a large range of riding activities. The project, backed by the Conseil Général, is hoping to win PER (Pole of Rural Excellence) approval.

► With 127 ports, PACA is the leading area for boating in France, with 60,000 moorings. This is 40% of the national total. But the demand for places remains very high, which is bound to raise problems for the environment to which the Region is very attentive in the programmes Ports Propres and Pavillon Bleu.

► 6,000 additional places are under consideration, including a major project in La Seyne-sur-Mer (600 - 700 places).

► 72 golf courses in Provence-Alpes-Côte d’Azur affiliated to the PACA Golf League in 2011. These include:

Alpes de Haute-Provence: 3 golf courses - Lavandes (18 holes), Luberon (18) and Bois Chenu (9).

Hautes-Alpes: 3 golf courses – 3 golf courses – Gap Bayard (18 holes), Montgenèvre (9) and Serre-Chevalier (practice).

Alpes-Maritimes: 22 golf courses – Biot (18 holes), Cannes Mandelieu (18+9), Cannes Mougins (18), Claux Amic (18), Grande Bastide (18), Mont Carlo (18), Opio Valbonne (18), Riviera Golf in Barbossi (18), Royal Mougins (18), Saint-Donat (18+9), Vieville (18), Le Provençal Golf (9), Vallauris Golf Club (9), Victoria Golf Club (9), Villeneuve de Loubet (9), Académie Autié (Compact), Nice CC (Compact), La Tour d’Opio (Compact), Auron (Practice), Grasse (Practice), Practice Golf Center (Practice) and Sophia Country Club (Practice).

Bouches-du-Rhône: 20 golf courses – Aix-Marseille (18 holes), Ecole de l’Air (18), La Cabre d’Or (18), La Salette (18), Miramas (18), Pont Royal (18), Sainte-Victoire (18), Servanes (18), Set Golf (18), Allauch (11), Les Baux de Provence (9), Sainte-Martinois (9), Golf Green City (Pitch & Putt), Aix Golf (Compact), Côte Bleue (Compact), Barbatene (Compact), La Durance (Compact), Maeva Camargue (Compact), Marseille Golf Club (Compact) and Tousainte (Compact).

Var: 20 golf courses – Terre Blanche (36 holes), Dolce Frégate (18+9), Estérel (18+9), Barbaroux (18), Beauvallon (18), Cassis CC (18), Roquebrune (18), Sainte-Baume (18), Sainte Maxime (18), Saint-Endréol (18), Taulane (18), Valcros (18), Valescure (18), Valgarde (18), Vidauban (18), Cap Estérel (9), Le Castellet (Compact), Grand Jardin (Compact), St-Raphael Valescure (Compact) and Oustau (Practice).

Vaucluse: 4 golf courses – Garden Golf Avignon (18+9 holes), Grand Avignon (18), Provence Country Club (18) and Orange (9).

Source: Ligue de Golf PACA, 2011
Tourist areas: Sea / Mountain

The only region in mainland France which has both a sea-coast and significant mountain areas.

► Two types of landscape in the region are outstanding for their character marked by tourism

The mountains
The coastal strip

The mountains

► Cover 65% of the region’s land area.
► Concentrate 12% of the region's population and 8% de l'emploi.
► PACA : 47 winter sport resorts
► The Southern Alps are characterised by Attendance in 2010: 8.3 million skier days Source: www.domaines-skiables.fr
A rate of tourist employment of more than 26% of the total employment 26%.
Double seasonal working, the graph of paid jobs rises in two peaks: July/August and February/March.
► Suffer from high tourist pressure, measured by the tourist pressure indicator, which shows the theoretical ability, in terms of tourist facilities, of an area to increase its population.
► Communities must, in terms of tourist accommodation, be able to multiply their population between 7 and 46-fold in high season.
► Environmental protections: Parc National des Ecrins, le Parc Natural Regional du Queyras, Parc National du Mercantour and the Parc Natural Regional du Verdon
► Major crossings of the Alps: Sentinelles des Alpes (a network of fortifications) / GR 5 / Via Alpina (5 sets of waymarked walking paths - over 5,000 km - across the Alps and eight European countries. Those that cross PACA are: Red route: 161 stages across eight countries: Italy, Slovenia, Austria, Germany, Liechtenstein, Switzerland, France and Monaco. Blue route: 61 stages – 3 countries crossed: Switzerland, Italy and France).
► Parc National du Mercantour:
Attendance: 500,000 visitors a year.
In association with the Parco Naturale Alpi Maritime, its Italian counterpart, Le Mercantour offers 56 walks at all levels, to explore the exceptional landscapes, wildlife and plants of the region: Grand Tour Alpi Maritime – Mercantour
Balcons du Mercantour: these are hiking routes that cross passes and summits linking the six valleys of Le Mercantour (mountain refuges being upgraded).

► Note also: the “Route des Grandes Alpes”, the “Chemins du Soleil” (for mountain bikes), and the “Routes de la Lavande”.

Coastal strip

► 687 km long: which is 14.5% of the total coastline of mainland France.
► Covers 11% of the region’s land area.
► Concentrates 49% of the region's population (2.4 million inhabitants) and 70% of the tourist employment.
► Can cope with more than 1.5 million tourists at the peak of the season.
► Population density can exceed 1,000 inhabitants per km².
► 15 seaside resorts
► Environmental protection: Parc Natural Regional de Camargue, Parc National de Port-Cros and creation of the Parc National des Calanques. Also the “Protected Marine Areas”, like that of the “Côte Bleue” west of Marseille.

Statistics on the two types of regions

Regional importance of tourist resorts at risk

<table>
<thead>
<tr>
<th>Criteria</th>
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<th>Proportion of the region’s population</th>
<th>Jobs in tourism</th>
<th>Ratio tourist employment / total employment</th>
<th>Tourist pressure *</th>
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<td>Mountain</td>
<td>65%</td>
<td>12%</td>
<td>8%</td>
<td>&gt; 26%</td>
<td>Between (x 7) and (x 46)</td>
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<tr>
<td>Coast</td>
<td>11%</td>
<td>49%</td>
<td>70%</td>
<td>&lt; 26%</td>
<td>&lt; (x 4)</td>
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</table>

* Multiplication of the population by etc., in each local government area.
Tourist aeras

The Sea / Sailing

Capacity of leisure ports in Provence-Alpes-Côte d’Azur

Source: EUROPAPEAL@ - 2007
© CCI Marseille Provence - Ressources Economiques - 2009
© Fond IGN
Training

General points

“Improvement of the general level of training is essential in order to raise the competitiveness of tourist businesses. Training, developing and keeping a qualified workforce therefore becomes one of the major challenges in the tourist sector.”

Source: quoted from Arlette Franco, member of parliament for the Pyrénées-Orientales, report on diplomas and training in the tourism professions, 2003.

► Note: one of the explanations for the relative scarcity of training courses related to tourism lies in the fact that this sector is very open to unqualified young people. In a number of cases these jobs are simply a first contact with the labour market.

► The absence of a complete official list of the professions and training courses in tourism makes them hard to survey. There is initial and continuing training on offer, and it is even abundant and varied, but uncoordinated and little-known. Tourism encompasses more than thirty different professions, but they are inconsistent in the extent to which their training policies cater for the tourist dimension.

► This is a non-exhaustive list of the training courses for activities featuring in this panorama.

► In 2005, the profession took 7th place in the regional classification for Provence-Alpes-Côte d’Azur, of approved courses of professional training.

► In initial training, tourism accounted for almost 6,000 students in 2004-2005.

Summary

► Almost 6,000 students in professional training (levels III, IV and V), in 2004 – 2005.

► 1,000 training courses listed in PACA, for 14 categories of tourism, including

325 training courses for Hotels and Catering (hospitality and catering represent half of the total jobs).
246 general tourist training courses, including 11 Masters’, of which two offered e-learning.

► Note: the emergence of new training courses, related to e-tourism and the environment / sustainable development.
Training

Professions covered

Area of investigation of professions included in the 14 categories used for this work on the tourist economy – (1/2)

Note the nouveaux professions related to e-tourism and sustainable development.

Hotel professions
► Hotel manager
► Receptionist
► Hotel superintendent
► Hall porter
► Housekeeper
► Domestic staff
► Barman
► Linen-keeper
► Night watchman

Hotel professions

Café professions
► Café, bar or brasserie manager
► Café waiter, soft drink attendant

Catering professions
► Caterer, reception organiser

Discothèque Professions
► Disc jockey

Hydrotherapy Professions
► Spa manager
► Hydrotherapy technician
► Spa receptionist

Travel professions
► Travel agency manager
► Ticket booking agent
► Product manager

Catering professions
► Counter staff
► Chef
► Canteen manager
► Commis chef
► Cook
► Dietician
► Catering employee
► Catering manager
► Maître d’hôtel
► Pastry chef
► Pizza chef
► Plongeur
► Waiter
► Sous-chef
► Wine waiter

Sources: Fiches métiers www.tourisme.gouv.fr / PACA Regional Council, 2011
Training

Professions covered

Area of investigation of professions included in the 14 categories used in this work on the tourist economy – (2/2)

Note the new professions related to e-tourism and sustainable development.

**Travel professions (contd.)**
- Travel adviser
- Packager

**Casino Professions**
- Member of the Casino Management Committee
- Casino Cashier
- Croupier
- Pit manager / Chef de partie

**Mountain professions**
- Hillwalking guide
- Mountain guide
- Mountain refuge warden
- Ski-lift cashier (no specific training)
- Ski-lift operator
- Ski instructor

**Activity Professions**
- Theme park attendant
- Holiday camp entertainer
- Beach attendant
- Leisure and sport facility manager
- Nature guide

**Hire professions**
- Boat hirer
- Skipper
- Coach-hire agent

**Guides**
- National lecturer
- National expert guide
- Regional expert guide
- Lecture guide to towns and areas of art and history

**Professions in tourist development, promotion and reception**
- Local development and tourism agent
- Local tourism guide
- Head of local tourism promotion
- Tourist receptionist – guide option
- Hostess
- Director of tourist advice bureau
- Development and creation of tourist businesses
- Tourism project officer
- Conference organisation, management of organisations running events
- Consultant in tourist engineering

**New professions related to e-tourism**
- Web marketing
- Mobile travel apps
- Using ICT to organise and plan tourist projects
- Using ICT to develop and market tourist products
- Administering tourist businesses using NICT
- Winning customer loyalty by the web

**Cultural tourism professions**
- Art gallery directors
- Cultural and artistic project officers
- Programming officer for festivals, exhibitions or museums
- Cultural press officer, cultural mediator

Sources: Fiches métiers www.tourisme.gouv.fr / PACA Regional Council, 2011
Details of training courses

Data compiled of specific training courses by category (14)

In all, 1,006 training courses related to tourism were listed, in 2011, in Provence-Alpes-Côte d’Azur. They fall into the different categories detailed below.

Two major groups dominate: “Hotels and Catering” and “general tourism training courses”.

► Hotels and Catering – CHR: training courses, including
60 BTS / 58 CQP / 60 Qualifications / 3 Diplomas / 44 BP / 72 CAP / 1 DUT / 1 Master / 1 Bachelor / 10 Licences / 15 Vocational courses

► Casino Businesses: 1 training course (CQP)

► Passenger Transport: 6 training courses, including 1 MC and 5 Vocational courses

► Nautical activities: 5 training courses (Brevets)

► Tourism and NICT: 6 training courses, including 2 Masters and 4 Vocational courses

► Traditional crafts: 162 training courses, including
27 Professional Bacs / 3 introductory courses / 9 Vocational courses / 1 Diploma / 1 Qualification / 94 CAP / 14 BEP / 5 BP / 5 BMA / 1 BTS / 1 BTM / 1 DMA

► Performing arts: 106 training courses, including
1 DEUST / 1 DU / 1 BEP / 1 CAP / 1 MC / 1 BT / 1 DUT / 1 DMA / 3 Licences / 5 Masters / 6 introductory courses / 72 Vocational courses / 2 Diplomas / 2 Study Certificates / 8 General Bacs

► Cultural Mediation, Institution and Administration: 36 training courses, including
1 Certificate / 7 Licences / 14 Masters / 14 Vocational courses

► Heritage: 38 training courses, including
6 Licences / 10 Masters / 3 Professional Bacs / 2 BEPA / 2 CAPA / 1 introductory course / 3 BTS / 7 Vocational courses / 2 Diplomas / 1 CS / 1 BP

► Mountain activities: 20 training courses, including
4 Diplomas / 1 CAP / 15 Professional Bacs

► Sport activities: 11 training courses, including
5 Licences / 2 CQP / 3 Professional Brevets / 1 Vocational course

► Environment / Sustainable development: 17 training courses, including
2 Licences / 15 Vocational courses

► Rural environment: 27 training courses, including
1 Training course / 2 Specialist Certificates / 12 CAPA / 12 Professional Bacs

► General tourism training courses: 246 training courses, including
1 Magistère / 5 Licences / 10 Masters / 1 MBA / 112 BTS / 3 CQP / 1 Certificate of Competence / 3 Diplomas / 56 Professional Bacs / 8 Professional Qualifications / 46 Vocational courses

Sources: Cf. « Notes au lecteur », page 225
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