1. Introduction

With vast superficies and some of the most varied geographical and cultural features in Europe, France has become an essential actor in European tourism. First destination in the world by international arrivals, the country has experienced increasing demand from both domestic and international visitors over the years. To cope with this demand, spread over different destinations and various types of products, France has developed organisations and planning initiatives to channel and manage those evolutions. For instance, the French government has been heavily involved in the development of resorts, especially post WW2 with the planning of mass-resorts in the seaside and mountain areas. Policies and organisations have been designed at different levels of the complex French administrative system to manage those planning strategies. Those developments had to take into consideration the incredible geographical, cultural and economical diversity of French regions.

The chapter first presents a few key facts about France as a country; then it reviews its main tourism developments. The past and current planning strategies are then discussed, distinguishing between national tourism planning and regional/local initiatives and organisations. The chapter finishes with a discussion of key issues and trends.

2. France and its tourism sector

2.1 A few key facts about France

France has a territory of 670 922 square meters for a population of 64.5 million inhabitants. In 2008, it was ranked fifth largest economy by nominal GDP (2.8 millions American dollars). It also has several overseas’ territories and islands land covering a surface of 124 000 square meters in the Atlantic, Pacific and Indian oceans, a territory on the South American coast, and several islands in Antarctica.

Mainland France is characterised by a very diversified territory since it extends from the Mediterranean sea to the English Channel and from the Rhine to the Atlantic Ocean. France is divided into 26 administrative regions and 100 departments.
France has a high standard of living with a high level of public education, a renowned health system and one of the highest life expectancy in the world. France has the most extensive railway network in Western Europe, with efficient high speed trains (TGV) linking also France with Belgium, Holland and Great-Britain. Despite its efficiency, the railway network has been conceived as a star system around Paris, as a result it can be difficult to cross France East-West. Other transports systems include air transport with 478 airports and sea transport with ten major ports. To date, there is no national coach network across France as the French Railway system has maintained a monopole on land transport in most regions.

### 2.2 French tourism developments

France is the most visited country in the world, receiving 82 million international tourists annually. However, in terms of receipts, France is fourth in the world because visitors have smaller lengths of stay (a high proportion of northern visitors cross France to reach their holiday destination in southern Europe). The tourism success of France comes from a combination of its geographical diversity (two seas, various range of mountains, an extended rural countryside and renown cities). Beyond those diversified landscapes, France has also a rich cultural heritage. Among its biggest attractions, the Louvre museum attracts about 9 million visitors while the Eiffel Tower welcomes 7.5 million visitors yearly. By comparison, Disneyland Resort Paris welcomes every year 15 million visitors. It also has 7 national parks and 44 regional parks (Rousseau, 2008). Across the whole territory, France offers a wide variety of accommodation (campsites, hotels, self-catering apartments, *gîtes ruraux*, B&B, and integrated resorts such as Center Parks, Club Med and Pierre & Vacances). Each department tends to have specific cultural disparities which means that they can often market themselves as unique tourist destinations.
France also has a dynamic domestic tourism sector which is linked to the fact that the French do not travel much abroad but it is also the result of an active social tourism policy that has subsidised French tourism for years.

2.3 France’ tourism profile

Due to its diversity, France has a varied tourism product, spread over the whole territory. Of course, varying degrees of tourism demand exist across the French territory. By far the destination most sought after is the seaside which concentrates 40 % of tourism demand, followed by the countryside (32 %) then cities (29 %) and mountains (19%) (Rousseau,
2008). Of all those territories, the mountain observes a vast contrast between its attractivity in winter as a leading tourism destination and its weaker demand in summer.

**Figure 1 - Proportion of stays and number of nights according to the destination visited (in percentages)**

![Proportion of stays and number of nights according to the destination visited](image)

**Source: Direction du tourisme (2008)**

**Seaside tourism**

By far the favourite destination in France, the seaside coasts run along 5 500 kilometres with 200 seaside resorts. The seaside coast covers 4.5 % of the French territory and concentrates 32 % of the French population for a density of 245 inhabitants per square meter. The demand for seaside resorts has never decreased and even has been boosted by an increasing demand for sailing. The marinas’ capacity has now reached 90 % with 250 000 rings (Peaudeau and Richebe, 2002). The French coast has been in part sheltered by the littoral law that aims at protecting the coast from extensive building of resorts, houses and holiday accommodation. Nevertheless, 1 000 km of the coast is already built and a further 2 000 km is partially built.

**Rural tourism**
France is also renowned for its rural tourism sector since its long history of farming has left a profuse and unique rural heritage. Due to the decrease in farming, rural territories (which cover 80% of French land) only account for 23% of the population with a density of less than 20 inhabitants per square meter (DIACT, 2009). Rural areas concentrate 32% of tourism demand in France for 20% of tourism receipts. This tourism is essentially non-commercial (78% of visitors stay with friends and relatives or in second homes). So far the tourism offer in rural areas has been very spread out which has been a problem when attempting to commercialise tourism products at territorial level. Rural tourism has a positive image and has often been branded as an economic solution to sustain small agricultural dwellings. However studies show that it is mostly large agricultural farms that have benefited from developing tourism activities (Perret & Marcelpoil, 2001). In reality, the relative proportion of farmers actively engaged into tourism is rather small (around 2.4%).

**City tourism**

Urban tourism is essentially a short-stay tourism and has observed an important rise in the French demand since the mid-1980’s. Cities represent 29% of total number of nights and 36% of total number of stays. For foreigners, cities remain the prime destination with primarily Paris, Nice, Bordeaux, Toulouse, Lyon then Marseille. City tourism is less seasonal and is mostly a short-stay destination: half of the stays take place outside school holidays and mostly over long week-ends (2/3 of the stays last less than four nights). Beyond their cultural attractions, cities are also prime destinations for business tourism. France concentrates 36% of the European congress capacity and welcomes the highest number of congresses in Europe (70% of those take place in Paris).

**Mountain tourism**

Mountains cover 23% of the French territory with a fairly extreme diversity ranging from smaller mountains (Vosges, Auvergne, Jura) to higher ones (Pyrenees and the Alps). France has the biggest skiing surface worldwide: 11 800 square meter for 308 ski resorts concentrating 2 million beds. Globally, mountains attract 19% of the number of nights for 15% of stays.

While it is difficult to really evaluate current trends, skiers ski on average 4 hours per day and 1 tourist out of 5 does not ski. Studies in the southern Alps also indicate that 70% of skiers aspire to undertake other activities than skiing when at the resorts (CRT PACA, 2007). These statistics have gradually motivated resorts to invest into other facilities (spas, water leisure
centres, other snow activities, events, etc.). The winter season attracts 25% of the total
demand while in summer, the mountain only attracts 18% of the number of nights. The
demand in summer has been decreasing for years as it remains difficult to commercialise
holidays in the mountains at that period. The mountain areas have an uncertain weather in the
summer and their image is too strongly associated to that of effort (especially in high altitude
resorts). While still successful with international demand, the French demand for skiing is
stagnating at an average of 8 million skiers, and British visitors represent the first foreign
nationality followed by Belgians and Germans.

3. Planning and organisation of the tourism sector in France

3.1 The present situation

- Current planning strategies

Doctrines of state intervention in tourism planning have undergone significant changes over
the course of the last 65 years. Between 1945 and 1982, the French tourism model was
founded on the development of mass tourism, utility and economic efficiency. During the
period of the “Trente Glorieuses”¹, the French state developed large-scale tourism
infrastructures on the basis of a highly technocratic and hierarchized form of spatial planning
and organization (Missions Languedoc-Roussillon, Côte Aquitaine, Plan Neige): state
intervention was based on functionalist zoning and integrated economic activities in new
resorts:

1. Between 1965 and 1983, the state invested over 2 billion euros in coastal and
   mountain areas, creating an industry that now amounts to 90,000 jobs and 20
   million holidays per year. These policies had a considerable impact on the
   production of second homes (75% of the accommodation stock – an
   investment that now represents 8% of the gross national product). The French
   Ministry of Agriculture encouraged green tourism as a means of generating
   additional income from rural businesses (country gîtes, farms and inns). One
   effect of massive state intervention on spatial planning and organization was
   the increasing specialization of regions in specific kinds of mass tourism. The

¹ The ‘Glorious Thirty’ – the period of economic boom lasting from 1945 to 1975
abuses of tourism urbanization, criticized as early as the 1970s, were addressed by the “Montagne” (1985) and “Littoral” (1986) acts aimed at regulating protection and tourism in fragile environments.

2. By contrast for associations, unions and workers’ councils, the social tourism sector remained during the same period outside the realm of profit-seeking economic activity (2% of tourist beds): conceived on the basis of “family, youth and sport activities for all”, this sector has been heavily subsidized.

3. Finally, in 1970-1975, permanent environmental visitor centres and regional natural parks began to develop the educational and museum dimensions of tourism and to promote the discovery of nature and local cultures. Having long remained marginal and often likened to forms of defence of local cultures and of the natural environment, this movement proved to be a precursor of sustainable tourism, voicing its concerns during local conflicts and controversies related to the protection of endangered species and environments (bears, bearded vultures, humid areas) or to “fights” against large-scale infrastructure projects.

Since 1982, decentralization has radically altered the system of state intervention, which has become the remit of local authorities. A wide range of strategies have been elaborated, each of which is founded on a negotiated dynamics of tourism development: efforts are still directed at property investment (accommodation, large-scale infrastructures) and the transformation of property and land, while operations directed at the structural reorganization of infrastructures, accommodation and ageing public spaces remain poorly funded. Tourism has also been in search of a leader since the disengagement of the state in 1983: legislators have been unable to identify highly differentiated skills at the three levels of local authorities (région, département, communes or groupings of communes). The superposition of competences means that setting-up operations is a highly complex process.

In France, tourism planning and organization has tended to mirror the same general process governing the European regionalization of tourism policies: between 1985 and 2009, nine laws were voted with a view to regulating tourism planning and organization. While the increasingly significant role of regions and departments is made clearly apparent by the level of investment, the tourism industry is not founded on a distribution of competences into different blocks of skills based on the specific features of local authorities. The act of August
13 2004 defines a region as the “leader” of tourism planning within the confines of its territorial remit. Since 1992 departments subsidize tourism development and are involved in the process of classifying infrastructures, accommodation (restaurants, hotels, campsites…) and tourist information centres (*Offices de tourisme*). Finally, the skills of communes have been considerably strengthened and professionalized, spanning the public and private sectors.

3.2 National tourism planning and organization in France

Since 2009, French tourism policy is the remit of the Ministry of Finance, Industry and Employment. The decree of January 12 2009 spelt the disappearance of the ministry of state and of its services, originally created in 1952. Tourism is now governed at a national level by the same principles that regulate companies, business, the craft industry, services and the professions. The disappearance of the *Direction du tourisme et de l’Inspection générale* has not been without consequences. The return to a policy of “autonomous” tourism now appears to be highly unlikely. The assumption is that tourism policy is now the remit of regions and of the private sector. The creation in 2009 of “ATOUT FRANCE”, a partner agency for tourism development located at the crossroads of the public and private sectors, is highly indicative of this trend. “ATOUT FRANCE” brings together the state and local authorities, in addition to tourism professionals and the main sectors of the French economy. Nearly 1300 members – representatives of French tourism supply – use the expertise provided by “ATOUT FRANCE” and take part in operations both in France and on foreign markets. “ATOUT FRANCE” ensures the promotion of France abroad (“Maison de la France”) and provides its members with tourism engineering services (“ODIT France”). The purpose of “ATOUT FRANCE”, a private agency operating under state supervision, is to provide evaluations of regulatory interventions, to act as a development consultant, to provide expertise, studies and research in technological monitoring, and to offer assessments of tourism development in mountain areas. Designed as a platform for economic and strategic intelligence, “ATOUT FRANCE” contributes to the increase of productivity of French supply and to its response to the demands of international tourism through observation and monitoring. It continues to monitor domestic and foreign tourism flows and competition on a permanent basis, but also provides increased benchmarking of competitive destinations with a view to learning more about the environment of international tourism. Finally, it observes French tourism supply and its
evolutions to adapt supply to visitors’ expectations. “ATOUT FRANCE” also promotes and markets French tourism through operations that bring together local authorities and professionals as part of a strategic and operational plan: communication campaigns, press visits to regions, involvement in exhibitions on foreign markets, and the organization of punctual events.

Another role performed by “ATOUT FRANCE” is to ensure the modernization of tourism production (through partnerships between the public and private sectors designed to promote the development and strategic analysis of supply, and the development and diffusion of competence and expertise). “ATOUT FRANCE” provides analyses of clientele in specific industries, supports local authorities in implementing their development strategy, provides support in setting up operations and projects, improves strategies for market entry and implements quality plans for different industries, resorts, towns or companies.

**Structure of French tourism organisation**

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<th>Economy, industry and employment ministry</th>
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<tr>
<td>DGCIS (General Direction of Commerce, Industry and Services)</td>
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<tr>
<td>Tourism, commerce, craft and services’ service</td>
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<td>Tourism Division</td>
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<td>Rural Affaires</td>
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<td>General Secretary (SGAR)</td>
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<td>Préfecture: competitiveness direction</td>
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<td>Maison de la France (promotion)</td>
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<th>Partner organisations (under state supervision)</th>
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<tr>
<td>ATOUT France</td>
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<td>National Tourism Observatory (ONT)</td>
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<td>Engineering (Ex: AFIT)</td>
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**Partner advisory bodies**: National Tourism Council, National council for flowering, etc.
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The French national tourism policy is currently articulated around three basic priorities:

- The first priority – “The promotion of the tourism image of France and of its expertise” – aims to preserve the status of France as the “world’s number one tourist destination” in an increasingly competitive market by ensuring the promotion of “destination France” on foreign and domestic markets and the “promotion of French expertise” abroad.

- The second priority – “The economy of tourism” – is designed to oversee tourism activities and to structure supply by monitoring the economic evolution of the sector, regulating and shaping the norms governing the sector, supporting specific industries and professions, improving quality, developing engineering and expertise, and promoting the attractiveness of local areas.

- The third priority – “Access to holidays” – aims to promote the adaptation of supply to enable access to holidays for all (particularly the disabled, the elderly and the destitute) by federating the energies of different actors and associations operating within the sector.

The policy retained by the state for the 2007-2013 period defines tighter objectives and less ambitious projects than in the past. At a national level, tourism is in receipt of 42.3 million euros of state intervention for the 2007-2013 period. These funds will be chiefly invested in sustainable development, accessibility, quality and tourism monitoring.

3.3 Regional tourism planning and organization in France

Since a law voted in March 1982, tourism planning has become a competence shared and formalized by contract between the state and regional authorities. This has resulted in co-funding, significant lever effects on large-scale investments, increased response of public action plans to fit the specific characteristics of local areas, and new modes of governance between partners based on negotiation.
In this context, regions and departments define the mid-term objectives of tourism development within their area. The regional tourism and leisure development plan (1987 Act) and the departmental tourism development plan (1992 Act) established the details and conditions governing the implementation of the objectives defined by the regional development plan, particularly in financial terms. These plans constitute long-term planning documents designed:

- to outline a long-term tourism development project. Operators are required to take account of the project to obtain funding;
- to secure investment funds for a limited number of priorities;
- to define a spatial planning programme and long-term chronological planning;
- to communicate effectively with partners (communes, operators) on these priorities and to federate the actions of these bodies.

Regions and departments provide funding for tourism committees (Comité du tourisme), i.e. their chief technical instrument for tourism planning and management. Tourism committees include representatives of the regional council (conseil régional), tourism professionals, consular organizations, tourism associations and touristic communes. Regions and departments may entrust all or part of the task of implementing their tourism policy to these structures, this varies from one region to another one. These delegations take place particularly in the following areas: research, planning, development and infrastructures, funding for accommodation, technical assistance for marketing, and professional training. Regional committees have obligatory remits of competence imposed by law. Their role is to monitor the promotion of regional tourism both domestically and abroad. They also monitor
the specific duties that are entrusted to them. Finally, they can federate their energies to initiate actions of regional, national or international interest.

While the objectives of regional tourism policies differ in every region, there are features that are common to all 26 regions of France, particularly in terms of the structural organization of supply:

1. The provision of reliable, relevant, prospective and consolidated data to the actors of the leisure and tourism industry to facilitate the management of their companies and projects (Regional Tourism Observatory and centre of documentary resources).
2. The structural organization and management of action networks within the regional leisure and tourism industry.
3. Support, advice and assistance for structuring projects.
4. Management of areas of expertise on behalf of the regional council.
5. Elaboration of test projects, managing actions, experimental procedures, and unique approaches in the realm of leisure and tourism.
6. More rarely, the promotion of research in tourism and the vulgarization and diffusion of training provision.

In terms of promotion:

1. The definition of tourism supply by supporting the strategy implemented in all markets and the content requirements of communication procedures.
2. Intervention on domestic and foreign markets to support marketing and sales of relating to all aspects of the destination.
3. The management of partnerships with the direct and indirect tourism partners operating within the sector.

In terms of communication:

1. The definition of the editorial and conceptual policy of the tourism brand of the region and its implementation through all media and non-media supports.
2. The support of on-line communication and the optimization of opportunities for accessing contents.
3. The harmonization of the visual strategies used to promote regional destinations through documentation, specification sheets and factual information.

One effect of regional policies is that different areas have tended to be treated very differently.

- when tourism does not appear to be a good solution for a given place or area, it is advisable to seek for other economic levers;
- every type of space is subject to the identification of priority poles of development, which must demonstrate their capacity to pave the way for the development of specific zones of influence;
- the project plans and contracts are budgetary planning documents serving:
  - to block the conditions of access to the regional infrastructure credits by avoiding dispersion and classic thin spreading;
  - to establish hierarchies and networks among areas selected for their potential and for the budgetary efforts which they are prepared to make over a long-term period.

3.4 Local tourism planning and organization in France

In France, local tourism planning and organization is not entirely the remit of the private sector. Communes and groups of communes also contribute to the economic development of their territory. A decree by the Conseil d’Etat of May 10 1985 deemed that the economic mission of tourism constituted what is known in France as a “public service” [art. L.1511, L.3.231-1 and L.4211-1 of the code général des collectivités territoriales – general code of local authorities].

The public tourism service is nonetheless optional: the conseil municipal (the local council) remains the sole judge of the need for such a service if it deems that local interests require it. It must adapt the means allocated to the objectives and to local financial capabilities. The matter must always be subject to a deliberation by the local council. The local council may then create a body designed to promote tourism, i.e. an “office de tourisme” [l. 133-2 to 133-10 of the Code du Tourisme (Code of Tourism)/art.9 L. 23 déc. 1992]
Approximately 3000 *communes* have been granted specific state funds based on the costs incurred as a result of the temporary increase of their population, the specific investment and running costs generated by tourism (local services, festive events, use of infrastructures, etc.), and a higher level of debt. These *communes* must have a classified *Office de tourisme* entrusted with the task of managing the tourism sector.

1. *Communes touristiques* (tourism communes) “implement a local tourism policy and provide accommodation capacities for a non-residential population”. These *communes* are classified for a duration of 5 years by order of the prefect and receive additional subsidies within the framework of the state budget;
2. The 400 *stations classées* or classified resorts (L 133-11 to 22 of the *Code du tourisme*) may receive specific revenues, “capitalize on games” and organize the administration of tourism highly professionally. These *communes* receive additional taxes, taxes on companies with a stake in the prosperity of the resort, a tax on holiday visits, and additional subsidies to cover running and operational costs.

The chief purpose of local tourism policies is “by nature” to carry out specific duties. 70% of tourist information centres perform three basic duties: tourist reception and information, management of the holiday territory, and promotion of the town. In 1/3 of cases, these centres also delegate duties if the commune so decides. These duties may include: development actions, tourism development, management of the local heritage and infrastructures, implementation of a service quality policy, economic monitoring, monitoring of tourist numbers, and performance indicators of resort management. Finally, very few *communes* have been allowed to perform duties by “default” in the event of deficiencies affecting the marketing of tourism products (with state authorization) and the centralized booking system. Approximately 15% of tourist information centres are entitled to market products as a result of insufficient funds.

The challenges of territorial development have served to legitimize a wide and varied range of tourism policies that are still only rarely the responsibility of the *Offices de tourisme*: *communes* have intervened directly within their territorial remit in this area for over 50 years.
to conduct operations aimed at the provision of adequate infrastructures, development, accommodation, and improvements focusing on the provision of tourism activities. At a local level, these investments are deemed to pertain more to a general competence in to the provision of infrastructures and town planning than to a newly autonomous sector, i.e. tourism.

4. Key issues and trends

Sustainable development also concerns tourism in France, especially since the World summit on Sustainable development in Johannesburg (François, 2004). This environmental concern has become important for territories concerned with mass tourism developments. For instance, it is the case of mass ski and seaside resorts that were the result of the large scale planning policy led by the French government in the 60’s and 70’s. While the prime objective was to benefit from the impacts of paid holidays, the historic development and expansion of those resorts was mostly based on a concept of long stay tourism and the development of a very standardised tourism product. However, beyond the optimistic predictions of the World Tourism Organisation (1.6 billion international tourists expected in 2020), customers’ expectations have evolved. Market studies indicate that mostly consuming shorter stays and facing an overabundant offer, tourists have become more sensitive to the discovery of local heritage, to closer encounters with local inhabitants and their culture and they have become more aware of the environment and its protection. However, despite tourists’ supposed increased environmental/cultural awareness, reality tends to show that tourists are still mostly attracted by mass tourism products.

In this context, tourism actors and political figures tend to encourage a better integration of environmental issues in their tourism offer. Over the last few years, this approach has led to the development of a series of initiatives led by individual tourism actors such as enterprises, collective networks or public actors. As a result, the tourism sector has developed various environmental labels and charters. For instance, ski resorts have now engaged into environmental certification procedures in regard to their ski lifts (ISO 14001), by High Environmental Quality initiatives for their buildings, and have developed, at a resort level, the development of Sustainable Development charters (ANMSM, 2007). Whether those initiatives are mostly a « green washing » front or whether they illustrate a real step towards a
deep questioning of tourism developments remains to be demonstrated (François, Marcelpoil, 2009).

Hence if tourism developments in France have integrated sustainable development issues, realities show a large gap between, on one side, the political discourses about sustainable tourism and, on the other side, the realities of concrete programmes and measures.

The perspectives of the current politico-administrative recompositions presented in this chapter and the weaker recognition of the tourism sector do not lead to believe that sustainable tourism issues will be significant. Indeed, tourism is seen as a sector that needs to be conceptualised as close as possible to local realities, which implies a greater role given to local and communal elected representatives in managing this development. Such a proximity as the positive outcome of a better integration of local characteristics and tourism dynamics, but on the other side, it leads to the development of some strategic tourism decisions that might not portray sustainable development as a vital issue.

**Conclusion**

The article has presented the complex French tourism system. Changes in the government over the last few years, has drastically modified the landscape of tourism intervention across the French territory. More decision power has been transferred to the regions and local authorities, thereby questioning the future cohesion of tourism developments. More alarmingly, France has had a long history of state intervention into the planning of large scale tourism developments which is now delegated to regional institutions and the private sector. This lack of cohesion is also characteristic of the attitude towards sustainable development which still lacks concrete actions across the national territory. Globally, one can ascertain that what constitutes the strength of the French tourism offer, among which cultural regional diversity is central, also explains the complexity of its tourism management. Despite its historical prime position in terms of tourism attractivity, its planning strategies and institutions seem to decrease in cohesion at the start of the 21st century.
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