

Gwénaëlle DELOS

Directrice du bureau Atout France à Londres







BABY JOY FOR BORIS AND CARRIE TO RESIDENCE TO THE PROPERTY HOLD T

...and the happy couple are engaged too

Mr Johnson and Ms Symonds's "baby joy" makes the front of the Sunday Express too. The paper says the news ends "weeks of speculation". Also on the front page is the latest on the government's plans to resist the spread of coronavirus in the UK. The government is setting up a "war room" to battle the virus, the paper says.





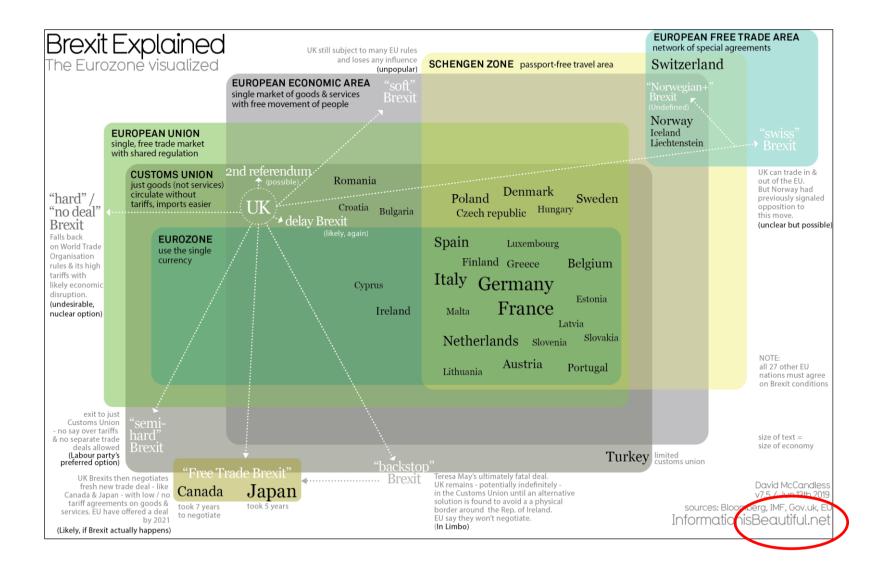
our Patrick Samer BETTIBEL doctors and unreses could be called bard into service to help at MSS tackle the coreasirus spidensis as part of an suprast Testifoplam beirs dictus su payt the Goovernanest. Ministers are considering allowing the control of the cont	discourage unnecessary travel as part of a woold distancing 'strategy to de- lay the outbreak's peak to the summer. "The disclosure come as forcis John- , som prepares to insuch as action plain go un steps the Concernment will take if the consustriate outbreak becomes a "austrated Via Fagdemat." "Re Sanday Tedgraph' understated "and the strategy of the strategy	◆The Prime Minister personally regred the country to bree official advice on stepping the speed of the viral, including "the importance of washing our hards with scape", «The Insulal Telayush learn that Eishi Sunak, the new Chancellor, in polecul in rewrite parts of the Euliger and concerns the outbreak country with the outbreak country. We will be concerned amounted that "the Geogramment amounted that."	ficer, to update the public, following criticism of the Government's response so for:	Whitty revealed. Mr Johnson has allocated a minister in each government department he lead its response to the outbreak, for example by overneeing the action taken by schools and businesses. An updated action plan to be published this week will outline the steps that the Government will take to man.	the virus by transferring isolated cases to hospital and carrying out detailed tracing work to establish how Covid-III
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		tacked the European Court of Human		has catalogued up to 50 examples of al-	the refusal of Mr Johnson's official
By Edward Malnick SUNGAY POLITICAL EDITOR	human rights laws once the country becomes fully independent, The Sun-	Rights in Strasbourg for judgments.	Jy Edward Malnick	leged hustile briefings against him.	application to enforce him on Monday
	becomes fully independent, The Sun- day Telegraph can disclose. U. This newspaper understands that British negotiators will refuse to accept a returned chauses in a rout-freelit trade	Rights in Strasbourg for judgments, based on the ECHR, requiring the UK to give prisoners the right to vote, and blocking the deportation of 'danger- one' furnish retainals.	CIVIL servants have turned on Sie Mark Sedwill, the Government's most senior official, after the resignation of an embattled mandarin over a seriou of	leged handle briefings against him. Yesteolay's announcement followed more than a week of reports about rows between Sir Philip and Ms Patsl, with allies of the Home Secretary	spokesmin to endorse him on Monday despite saying the Frime Minister had "Indi contidence" in Ma Parel. A senior official said civil servants were concerned that Sir Mark has
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SCHOOL POLITICAL ROPPOR BRITAIN is preporing to reject E decrands to guarantee that the UK wi continue to be bound by Europea	becomes fully independent, The flue day Telegrapic can disclaim. If this newspaper understands that British negatistative will refuse to accept a proposed clauses in a post Persit trade agreement that would require the US to remain signed up to the European Correction of Rimans Rights (ECRIC— leaving the door open to head away from the travely as used as need year.	Bights in Stanbourg for judgments, based on the EEBR, requiring the US, to give prisoners the right to vote, and blocking the deportation of "dauger- ous" foreign retaining. Writing to SON, Mr. Cummings said: "HI gat involved to politics again, then a referendam on the ECIR should be high on the agenda—and bear in mind must excelle conshibit think we're il-	CIVIL servants have turned on Sie Mark Serbeill, the Government's most sensier official, after the resignation of an esthatifed mandarin over a series of roses with Full Buel. Officials claimed that Sir Mark, the Cabbast Secretary, but "gove native" having falled pedicky to lock Sir Philip Extrans list week, after Enris Sobraco.	leged hoselie briefings against him. Vestrolay's anneancrement followed more than a week of reports about rows between Sir Philip and Ms Patel, with allies of the Home Scoretary claiming he had attempted to block an-	speakensian to endone him on Morado, despote saying the Prime Microster had "full contildence" in Mc Parid. A sensire official said circl nevrance were concerted that Sir Mark had gome native, having failed to insue his own statement backing Sir Philip. "Who is group to be noted on the hill list?" the official said, "I don't know it Mark in strying to suspect circle serv-
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The Sunday Telegraph's main story and picture focuses entirely









Brexit

2020 : Transition & Status quo

2021:

?

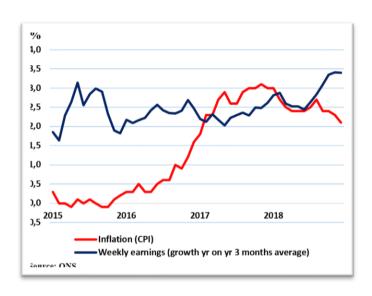


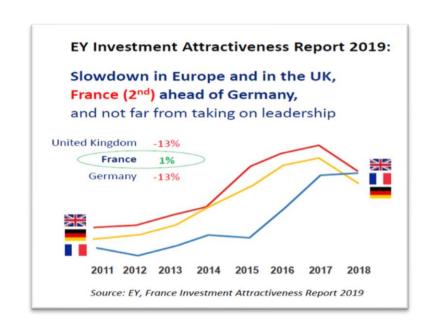


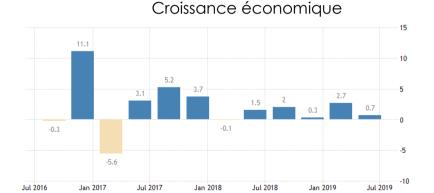
Une situation ambivalente

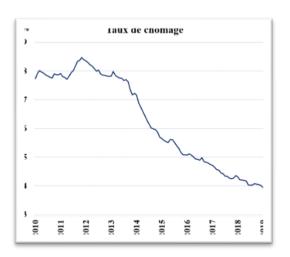
(hors impact du covid-19 à ce jour)

- •une certitude politique
- un ralentissement des investissements publics depuis 2010
- un report de certains investissements privés depuis 2016
- une relative bonne santé de l'économie britannique
- un taux de chômage historiquement bas (4%)
- une hausse des salaires légèrement supérieure à l'inflation
- un ralentissement de la consommation début 2019 avant la date du 29 mars
- L'unité fragilisée du Royaume-Uni









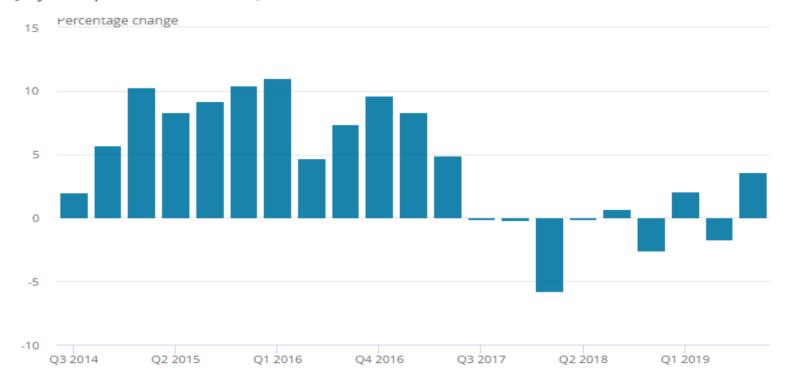




Un marché très impacté par le calendrier politique en 2019 (2020 : quid du covid-19?)

Figure 3: Visits overseas by UK residents increased by 4% in Quarter 3 2019 compared with the same period a year earlier

Quarterly change from a year earlier in visits abroad by UK residents, Quarter 3 (July to September) 2014 to Quarter 3 2019

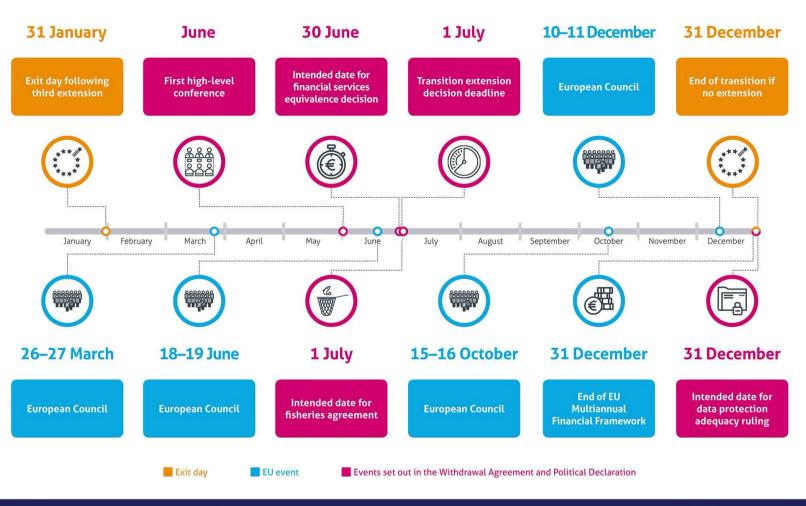






Key Brexit milestones in 2020





- Fin juin / début juillet : demande d'extension pour les négociations ?
- octobre : sky agreement ?





Le vrai du faux

- Pas de visa (sauf si séjour > 90 jours)
- Modalités commerciales a priori identiques de roaming
- le transport (ferry, train, tunnel, avion) ne serait pas bloqué
- Les passeports devront être valables au moins 6 mois
- les formalités et contrôles supplémentaires pour les animaux de compagnie
- les lignes de contrôle « hors EU » (fluidité du trafic ?)

Si les négociations n'aboutissent pas, points à éclaircir :

- les douanes
- La carte de couverture maladie européenne
- La validité du permis de conduire britannique en fonction des pays traversés

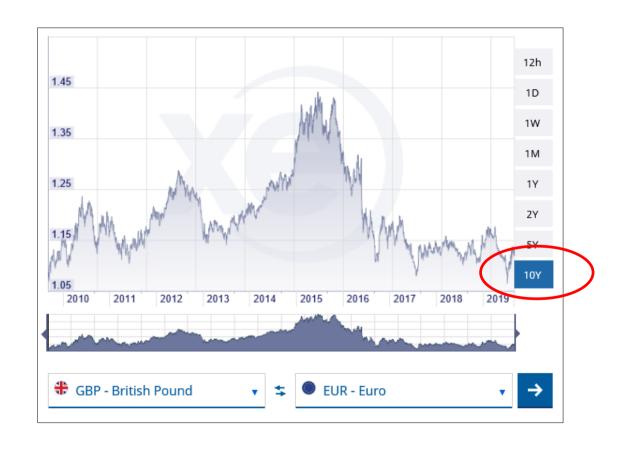


A surveiller!

- L'évolution du contexte politique, économique et social (et dorénavant de l'épidémie de Covid-19)
- L'indice de confiance des consommateurs (stable à ce stade)
- Aucune data sur la crainte d'être mal accueilli en France
- L'accessibilité, les ouvertures de lignes aériennes, et la capacité / surcapacité aérienne vs yield
- L'évolution éventuelle du staycation encouragé par Visit Britain
- le besoin constant de rassurer la clientèle britannique sur la facilité de se rendre en France
- la sensibilité du consommateur au rapport prix / qualité de l'offre et des services



Une variable importante : le taux de change









Analyse de la presse : le Brexit est un des éléments

BRFXIT



Grèves / transports

France strike: Rail misery as three-month action tests Macron

BBC News UK (2018) Link

Eurostar delays: passengers warned not to travel as French strikes spark mass disruption

The Independent Link

Link

France air traffic control issues leave Britons stranded in Europe with flight delays

The Express



Gilets igunes

At least we're not France The Sun

Link

Is it safe to travel to French capital during the Gilets Jaunes protests?

The Express Link

France's tourism sector takes a hit from Yellow Vest violence

France24 (UK) Link



Canicule

European heatwave: France hits record temperature of 45.9C

BBC News UK Link

How I survived 5 weeks in a campervan during a French heatwave

The Telegraph Link

Link

Heatwave 'hell' claims first lives as temperatures soar above 40 degrees Celsius The Telegraph



Overtourisme

Hell is other people The Sunday Times Link

Link

After 22 seconds I was told to move on' - what it's like to see the Mona Lisa The Telegraph Link

Overcrowded Paris to ban tourist buses The Times



Qualité d'accueil

Nobody seems to want to talk to us there. Nobody even looks at us Coach ban, no toilets, arim faces - The Times, July 2019 Link

So what if the French are rubbish at speaking English? The Daily Telegraph Link

Terrorisme

Strasboura Christmas market shooting: Fourth victim dies **BBC News UK** Link

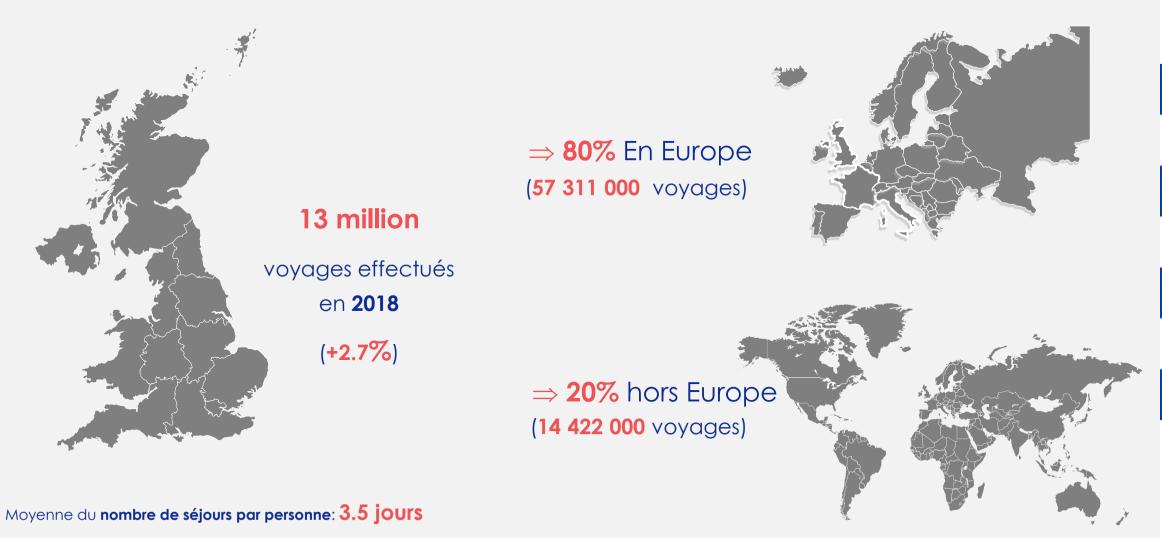
Toulouse shooting: One dead and several injured in bar attack The Express Link

+ COVID - 19





Le tourisme « outbound » des Britanniques



Sources: ONS, Expedia, ABTA reports, House of commons Library, Finder

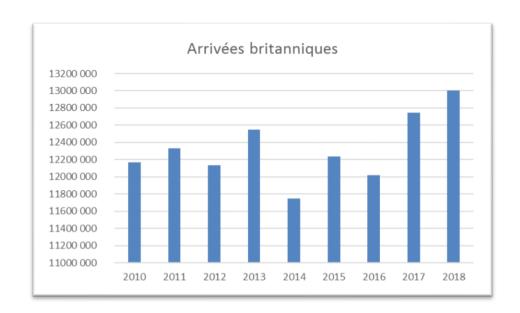
UK: un poids lourd du tourisme français

1ère clientèle internationale en France (13 millions d'arrivées - +2.4% vs 2017) + excursionnistes (environ 3 millions)

- = 84.1 millions de nuitées (+1.7% vs 2017)
- = 5.65 milliards € de recettes internationales

France: 13% de part de marché au UK (2ème destination au global)

1ère destination ski 1ère destination courts séjours 2_{de} destination MICE







Où se rendent les Britanniques?

Lot et Garonne

Elsewhere in the South West Elsewhere in the North West

Elsewhere in the South Fast Midi Pyrenees Burgundy

Picardy Loire Corsica Brittany Languedoc Elsewhere in the North East

Alps Champagne

Bordeaux/Gironde Paris Normandy Poitou-Charente

Rhone/Lyon Cote d'Azur _ Elsewhere in the Centre

Alsace-Lorraine Dordogne Provence Mid-Atlantic coast/La Rochelle

North Atlantic coast/Vendee/Nantes

Nord-Pas-de-Calais

Franche-Comte/Jura

South Atlantic coast/Biarritz

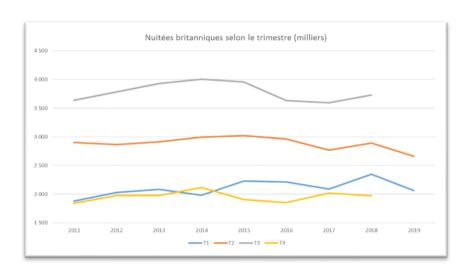
Auvergne/Limousin/Massif Central

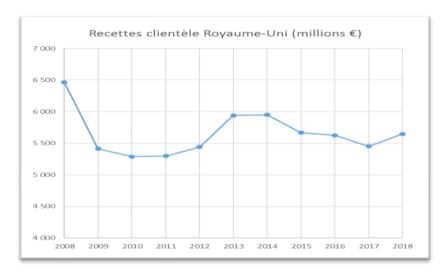
Source: ©Lightspeed GMI/Mintel 2018

Evolution contrastée depuis 2014

- + 11% des nuitées hôtelières et camping
 - 31% du nombre d'excursionnistes
 - 5% des recettes depuis 2014
- + 5% des recettes en 2018, avec une évolution positive sur les premiers mois de l'année 2019 par rapport à 2018 (+8% janv-sept 2019).

Un taux d'intermédiation en baisse (17%), sauf sur les niches Des réservations plus tardives en fonction du contexte (transport très concurrentiel)









Evolution des nuitées hôtelières internationales

A mettre en perspective!
Hausse de 4% des recettes entre
2017 et 2018 qui se poursuit sur
2019 : une évolution positive de 8%
de janvier à septembre 2019 par
rapport à 2018.

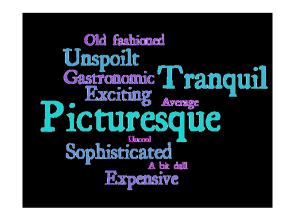
EUROPE	Nuitées des non- résidents	Nuitées Royaume- Uni	Nuitées Allemagne	Nuitées Belgique	Nuitées Italie	Nuitées Espagne	Nuitées Suisse	Nuitées Pays-Bas	Nuitées Russie	Nuitées Autres pays d'Europe
Année 2019	76 427	9 862	7 142	5 417	5 055	5 366	3 402	3 273	1 561	9 090
Evol. 2019/2018	-0,1%	-10,6%	-0,8%	-0,6%	-0,9%	-2,1%	1,6%	-1,8%	6,0%	-1,3%
Evolution 4ème trimestre 2019	-4,7%	-12,1%	-1,7%	-4,6%	-9,0%	-11,6%	-1,8%	-1,2%	14,1%	-5,2%
Poids année 2019	100%	13%	9%	7%	7%	7%	4%	4%	2%	12%

HORS EUROPE	Nuitées Etats-Unis	Nuitées Canada	Nuitées Amérique centrale et du Sud	Nuitées Chine	Nuitées Japon	Nuitées Australie	Nuitées Autres pays d'Asie, Océanie	Nuitées Proche et Moyen- Orient	Nuitées Afrique
Année 2019	9 615	1 082	2 939	2 963	1 640	948	2 544	2 800	1 728
Evol. 2019/2018	2,5%	-1,6%	-1,3%	-6,5%	8,0%	-8,5%	0,8%	-12,1%	-0,1%
Evolution 4ème trimestre 2019	-0,7%	-2,4%	-7,3%	-8,9%	-3,8%	-20,3%	2,3%	5,6%	2,9%
Poids année 2019	13%	1%	4%	4%	2%	1%	3%	4%	2%

Source : INSEE (février 2020, en attente du bilan définitif complet a priori en juin 2020)

La Normandie et le Grand Ouest : perceptions de la clientèle britannique

Food & drinks
The French way of life
(relaxed)
Slow (food, travel)
Unplugged, real experience
Take your own car (less likely
for younger generations)



Facilities (food, restaurants, shops)
Products and services, catering for younger generations
Access to information
Language barrier
Price perception





La Normandie et le Grand Ouest : profil général de la clientèle britannique

39 % sur la côte (21% à la campagne) Couple

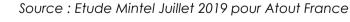
Séjour de 4 à 6 nuits, hôtellerie, saison estivale

Transport et hébergement réservés séparément (sauf pour les familles) via OTA ou transporteur (34% avion, 29% ferry, 24% shuttle)

Hôtellerie **** (43%), location (22%), camping (19%)

Intérêts: Culture, visite de villes, randonnée/cyclotourisme, plage/côte

PERCEIVED COMPETITORS TO WESTERN FRANCE, JULY 2019, %								
	Nord-pas- de-Calais/ Picardy	Normandy	Brittany	Pays de la Loire	Bordeaux /Mid- Atlantic coast/La Rochelle/ Dordogne	South Atlantic coast/ Biarritz		
West of Ireland (eg Galway, Donegal)	11	13	14	8	10	9		
West of Scotland/Scottish islands	6	7	6	7	7	5		
Welsh coast (eg Pembrokeshire, North Wales)	12	17	17	14	10	11		
South West of England (eg Devon & Cornwall)	19	27	29	16	18	16		
South coast of England (eg Kent, Sussex)	13	21	16	15	14	11		
Northern Spanish coast (eg Basque Country, Galicia)	11	18	13	16	19	19		
The Spanish Costas (eg Costa Brava, Costa del Sol)	9	7	6	9	9	17		
Spanish Balearic Islands (eg Mallorca, Ibiza)	5	3	9	10	10	15		
Portuguese Algarve	7	5	7	11	12	15		
West coast of Portugal (eg Lisbon)	9	7	9	12	14	17		
None of these	37	.23	24	33	29	22		





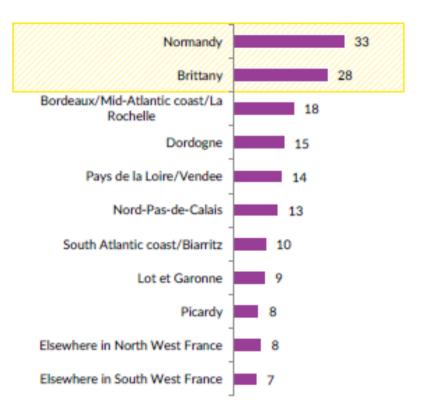
La Normandie et le Grand Ouest : Principales raisons de non visite

34% "I don't know much about what the region has to offer"

30% "I've never really thought of visiting for a holiday"

23% "Not speaking French puts me off"

REGIONS VISITED ON LAST TOURING HOLIDAY IN WESTERN FRANCE, JULY 2019, %







Potentiel de développement

41% des personnes interviewées, interessées par des vacances itinérantes (Normandie 33% et Bretagne 29%)

Strong interest in independent DIY touring holidays where people plan their own itinerary and make all their own arrangements. But there is a greater opportunity for pre-packaged products such as 'regional highlights', foodie and history tours.

INTEREST IN TYPES OF TOURING HOLIDAY PACKAGE IN WESTERN FRANCE, JULY 2019, %



Focussed on history (incl. itinerary, all accommodation, trips to places of historical interest etc)



An escorted touring holiday (eg by coach, led by tour guide, including all accommodation etc)



Focussed on food (incl. itinerary, all accommodation. trips to restaurants, markets etc)



Focussed on 'regional highlights' (incl. itinerary, all accommodation, trips to key places of interest etc)



A self-drive touring holiday own itinerary, accommodation trips to vineyards, tastings etc) etc



Focussed on wine (incl. where I plan and arrange my itinerary, all accommodation.







La Normandie et le Grand Ouest : potentiel de développement





Nature/ wildlife

Food and wine

More experiential activities

Focus 25-38 ans Walking/cycling has also risen in popularity, as have cruises/boat trips, water sports, theme/amusement parks, live events and health & wellbeing activities.



























ALSACE ET LORRAINE

AUVERGINE

BIARRITZ-PAYS BASQUE

BORDEAUX

BOURGOGNE

BRETAGNE

CORSICA

CÔTE D'AZUR

HAUTS-DE-FRANCE





















BOURGOGNE

BRETAGNE

CORSICA

CÔTE D'AZUR

HAUTS-DE-FRANCE

LA CHAMPAGNE

LYON

MASSIF DES VOSGES

MONTAGNES DU JURA

NORMANDIE

Merci

gwenaelle.delos@atout-france.fr



