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Hospitality and Regenerative Care In Territories

2026

Introduction

Dear partners,

We are pleased to present, in this dossier, the territories of two HARET project partners: Brittany, home to SPL Destination Fougères, and Pays de la Loire, home to Le Cube Consultants. These two regions offer a particularly rich field of observation for examining contemporary dynamics of territorial development at the European level.

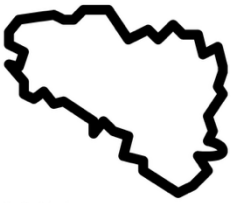
This dossier provides an overview of the main demographic, economic and social characteristics of the regions that you will discover during the Study Visit.

Particular attention is paid to the challenges of hospitality, in the broadest sense, and more specifically to those of tourism and migration dynamics. In both regions, tourism is a major economic driver, generating jobs and attractiveness, while raising key issues of seasonality, working conditions, social acceptability and resource conservation. At the same time, residential mobility and immigration are playing an increasing role in demographic renewal, access to skills and responding to labour market pressures, particularly in sectors in high demand.

By bringing these dimensions together, this document aims to foster exchanges and comparisons between European territories engaged in similar initiatives, and to establish a common framework for understanding the issues addressed throughout the HARET project.

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Fiche d'identité régionale : Bretagne



Population : ~3,5 millions d'habitants

Taux de croissance démographique : +0,6 % / an (2015-2021, solde migratoire positif)

Part des immigrés dans la population : 3,5 %



PIB régional : 115 milliards € (4,4 % du PIB national)

Part de l'emploi dans le tourisme : 7 % (≈ 81 000 emplois)

Structure de l'emploi : ~80 % dans le secteur tertiaire

Principales destinations touristiques :
Golfe du Morbihan
Saint-Malo
Baie du Mont-Saint-Michel

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Brittany, between identity and openness, the path to Europe!



Brittany is structured around several major urban centres that contribute to its economic and cultural dynamism.

- Rennes: The regional capital, it is an administrative, university and technological centre, particularly renowned for its digital hub.
- Brest: A strategic port city, it plays a key role in the military and maritime sectors.
- Lorient: Renowned for its port activities and fishing industry.
- Saint-Malo: Famous for its historical heritage and tourist appeal.
- Vannes: Appreciated for its economic dynamism and quality of life.

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Over the last two decades, Brittany has undergone significant demographic change. In 2005, the region had a population of around 3 million. According to estimates, by 2025 the population is expected to reach around 3.5 million, an increase of around 14% over this period.

This growth is mainly due to positive net migration, i.e. the number of people moving to Brittany exceeds the number leaving. On the other hand, the natural balance (the difference between births and deaths) has been negative since 2015, with more deaths than births each year.

At the same time, the region is experiencing an ageing population. The average age of Bretons rose from 40 in 2005 to 42.7 in 2019, which is 1.3 years higher than the national average. This trend can be explained by a high proportion of people aged 55 to 70 and a relatively low proportion of young adults aged 25 to 34.

In 2022, Brittany's GDP stands at £115 billion, representing 4.4% of national wealth, placing it ninth among French regions.

Over the last 50 years, the Breton economy has undergone significant changes, both in terms of sectoral structure and employment trends.

Evolution of the Breton economy:

- 1970s-1980s: Brittany, historically an agricultural region, saw its primary sector dominate the regional economy. Intensive agriculture, particularly pig and poultry farming, as well as fishing, played a central role. At the same time, gradual industrialisation took place, with the development of the agri-food and shipbuilding industries.
- 1990s-2000s: The region diversified its economy. The tertiary sector, including market and non-market services, experienced significant growth. Information and communication technologies (ICT) emerged, particularly around Rennes, putting Brittany on the map for digital innovation.
- 2010-2020: Brittany strengthened its transition to a knowledge-based economy. Competitiveness clusters in the agri-food, marine biotechnology and ICT sectors developed. Tourism, promoting the region's natural and cultural heritage, also contributed to the regional economy.

Sectoral distribution of employment and trends:

- Primary sector (agriculture and fishing): Employment in this sector has declined over the decades, from 19% in 1975 to around 4% in 2019. This decline is due to mechanisation, the expansion of farms and the rationalisation of production.
- Secondary sector (industry): Industrial employment has also declined, but less sharply. In 1975, it accounted for 28% of total employment, compared with 16% in 2019. Some

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sectors, such as agri-food, shipbuilding and automotive, have fared better, while others, such as textiles, have declined.

- Tertiary sector (services): This sector has experienced the most significant growth. It rose from 53% of total employment in 1975 to around 80% in 2019. Business services, commerce, health, education and tourism were the main drivers of this expansion.

Tourism – a strategic sector undergoing profound change

Tourism is a major sector of the Breton economy, with economic benefits that generate many jobs. It accounts for 81,000 jobs, or 7% of regional employment. 91% of the jobs generated are directly linked to the sector and the presence of tourists in the region (particularly accommodation and catering), compared with 9% upstream of stays (transport, travel preparation). Although the Brittany region has many tourist destinations, the volume and weight of jobs linked to the sector vary from one area to another, depending on the level of attractiveness and the local economic fabric.

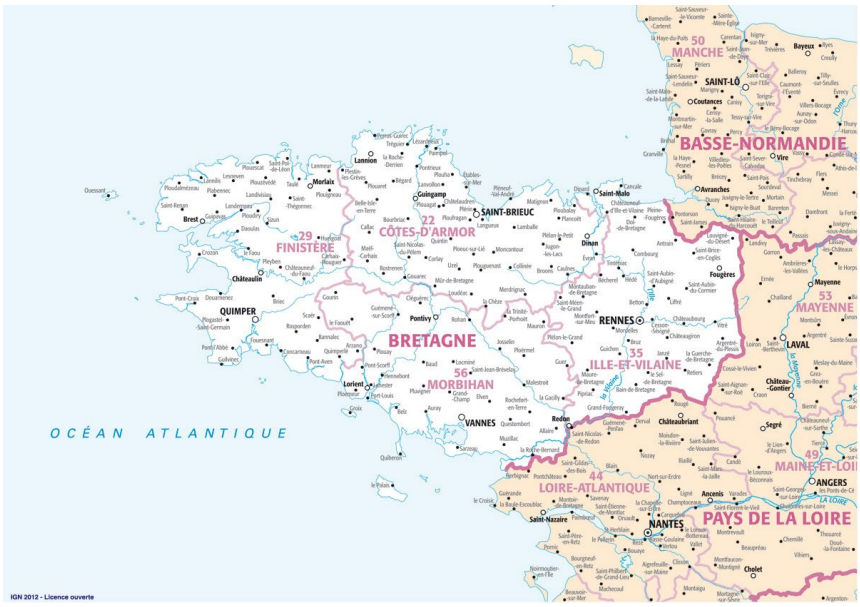
As in Croatia, the sector is also subject to marked seasonality, with the number of jobs doubling between the winter and summer seasons.

The Breton tourism sector rebounded quickly from the Covid crisis from 2021 onwards, an exception compared to other French regions. However, visitor numbers in 2024 are lower than in 2023 (down 3% for the whole of 2024 and 6% for the "tourist season").

The majority of visitors are French, with 75% of visitors coming from within the country. 35% of overnight stays are even from Brittany and the West of France. One in four visitors is foreign, mainly from Germany (30%), the United Kingdom, the Netherlands and Belgium.

Within Brittany, the most popular destinations are the Gulf of Morbihan, Cap Fréhel, Saint-Malo and the Bay of Mont Saint-Michel, accounting for 40% of regional tourist overnight stays.

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Immigration - Migration trends and their impact on society and the economy

Brittany is an attractive region. The number of people moving there has been growing rapidly in recent years. In 2019, the region recorded 71,000 arrivals from other French regions, compared with 49,000 departures. The region's demographic dynamism is therefore driven by these new arrivals, with the natural balance showing a slight deficit. The migration surplus (+0.6% per year between 2015 and 2021) offsets the natural deficit (-0.1% per year).

All of Brittany's departments are benefiting from this dynamic, particularly Morbihan. The majority of new arrivals are young working people and new retirees. Only students are leaving the region in greater numbers than they are settling there.

In 2021, the Brittany region had 138,557 immigrants. The proportion of immigrants in the total regional population (3.5%) is modest and well below the national average (10.2% in 2021). Brittany is the second least popular region in France for immigration, ahead of Corsica.

These new immigrant populations actively participate in the labour market and are a real driving force for the regional economy. These women and men provide support for sectors under pressure and facing labour shortages, particularly in agriculture, industry, construction and personal services, in a context of an ageing population. They also bring new skills and specific qualifications that are beneficial to strategic sectors (particularly health, engineering and technology) and to the region as a whole. The challenge for the region is to support them

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in order to ensure their successful social integration and long-term integration into the labour market.

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Fiche d'identité régionale : Pays de la Loire



Population : ~3,85 millions d'habitants

Taux de croissance démographique : +0,6 % / an (2015-2021)

Part des immigrés dans la population : 5,8 %

PIB régional : 137 milliards €

Emplois salariés dans l'hébergement-restauration : ~55 700

Structure de l'emploi : industrie résiliente (16 %) et tertiaire dominant

Principales destinations touristiques :
Loire-Atlantique
Vendée (campings, littoral)

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Pays de la Loire, a dynamic French region under pressure from social change

The Pays de la Loire region has a population of around 3.8 million and a gross domestic product (GDP) of €137 billion in 2022. In Europe, Croatia has a similar population, with around 3.9 million inhabitants in 2022.

Pays de la Loire is a French region bordered to the west by the Bay of Biscay (Atlantic Ocean). It is bordered to the north by the regions of Brittany and Normandy, to the east by Centre-Val de Loire and to the south by Nouvelle-Aquitaine.

The Pays de la Loire region covers 32,000 km², making it the 7th largest region in metropolitan France in terms of surface area. In Europe, the country with a similar surface area would be Belgium with its 30,688 km².

As of 1 January 2021, the Pays de la Loire region had a population of 3,854,000, representing 5.7% of the French population.

Its population grew by 0.6% per year between 2015 and 2021. This growth rate is higher than the national average and ranks Pays de la Loire third among metropolitan regions after Corsica and Occitanie. Population growth is mainly driven by the departments of Loire-Atlantique (1.1% per year) and Vendée (0.8% per year). Conversely, the departments of Mayenne and Sarthe (-0.1% per year) contribute negatively to the region's population growth. In the Pays de la Loire region, the distribution of the different age groups is comparable to that of France as a whole. In 2020, 35.3% of the population of the Pays de la Loire region is under 30 years of age (35.2% in France), and 27% is aged 60 and over (26.5% in France).

The economy of the Pays de la Loire region has evolved through several key periods. Before the Industrial Revolution, it was based mainly on agriculture and maritime trade, particularly through the port of Nantes. In the 19th century, industrialisation developed with the growth of the agri-food, shipbuilding and textile industries.

After the Second World War, the region diversified its economy with aeronautics (Airbus set up in Nantes), automotive and electronics, while agriculture was modernised. The crises of the 1970s and 1980s led to industrial restructuring and a boom in the tertiary sector, particularly in services, tourism and digital technology.

Today, the region is focusing on a sustainable economy with an emphasis on innovation, energy transition and the circular economy. Thanks to regional policies, the Pays de la Loire has become an attractive hub for businesses and start-ups.

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Historically the leading agricultural region in 1975 (19% of total employment), the Pays de la Loire has gradually seen the share of agriculture decline in the face of land artificialisation. In 2019, agricultural employment accounted for only 4% of total employment, placing the region fourth nationally. Despite this relative decline, the region retains a strong agricultural footprint, characterised by a large agricultural area, wetlands and a diverse 368 km coastline alternating between sandy beaches and rocky shores.

A diverse and resilient industrial sector

Although industry's share of total employment fell from 28% to 16% between 1975 and 2019, the region still has a dense industrial fabric with 9,150 establishments and 250,600 jobs. It stands out for having sectors that have withstood deindustrialisation better than other French regions:

- Agri-food (3.7% of total employment): major players such as LDC, Socopa Viandes and Charal.
- Metallurgy and metal product manufacturing: 33,200 jobs in 2019, a sector that is growing despite national trends.
- Transport equipment manufacturing: major companies such as Airbus, Chantiers de l'Atlantique, Renault, Naval Group and SPBI.
- Textiles and leather goods: after a crisis caused by relocations in the 2000s, the sector has refocused on niche and luxury markets, with Longchamp (Segré-en-Anjou Bleu), Louis Vuitton (Les Herbiers) and the Atelier Nantais de Maroquinerie (Clisson).

Faced with economic and social change, the Pays de la Loire region is focusing on promising sectors and strategic adaptations to maintain its dynamism. Despite the tertiarisation of the economy, industry in the Loire region continues to offer employment opportunities and structure the territory through sectors of excellence.

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Tourism: Increase in visitor numbers and economic impact

In 2023, tourist numbers in the Pays de la Loire region continue to rise, with an increase of 2.7% compared to the record level in 2022, including 21.4 million overnight stays between April and September 2023 in commercial tourist accommodation. Visitor numbers are now higher than their pre-Covid level.

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Despite the rise of the collaborative economy (AirBnB) and private accommodation bookings, the increase in tourist numbers in 2023 in the Pays de la Loire region is mainly driven by campsites. Campsites recorded a record number of overnight stays for the region (14 million overnight stays between April and September 2023), up 5.8% on the previous season, a higher increase than in mainland France (+4.4%). Among foreign visitors, the British are the most represented, followed by the Dutch and Belgians. All departments in the Loire region are benefiting from the increase in visitor numbers, particularly Loire-Atlantique and Vendée (90% of camping overnight stays in the region).

Tourism is a major industry in the region, generating many jobs and significant economic benefits. Despite recruitment problems in tourism businesses, the Pays de la Loire region had 55,700 salaried jobs in accommodation and catering at the end of summer 2023 (+2.8% compared to 2022), a record level of salaried employment. With the exception of Sarthe (-0.9%), all departments in the Loire region recorded an increase in employment in the sector, but this was more pronounced in Vendée (+3.4%) and Maine-et-Loire (+2.7%).

In terms of revenue generated by tourism activities, the increase in visitor numbers coupled with higher prices led to higher turnover for accommodation and catering (+8% and +9% respectively in one year). This increase is higher than that of mainland France.

However, 69% of businesses in the region's catering sector continue to report recruitment difficulties at the end of 2023, mainly due to a shortage of candidates and a mismatch between profiles and the skills required. The most sought-after jobs are café-restaurant waiters, cooks and multi-skilled kitchen staff.

Immigration: Migration trends and their impact on society and the economy

At the regional level, the Pays de la Loire region has benefited from strong migration in recent years. Its population growth (+0.6% per year between 2015 and 2021) is mainly driven by its positive net migration (+0.5% per year).

However, migration dynamics vary between the different areas of the region. Loire-Atlantique (+0.8%) and Vendée (+1.0%) are the two departments welcoming the most new residents. Conversely, Mayenne and Sarthe have a negative net migration balance (-0.1%). More people are leaving than arriving. This trend, coupled with a zero natural balance, is contributing to a decline in the number of inhabitants in both departments (approximately 2,000 fewer inhabitants over the period 2015-2021).

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The urban axis formed by the Nantes-Saint-Nazaire, Angers and Le Mans metropolitan areas is a dynamic area that attracts new populations every year, particularly due to its concentration of jobs and training opportunities.

Immigrants mainly reside in the region's large cities. In 2021, the Pays de la Loire region had 175,000 immigrants, representing 5.8% of the regional population. The leading department in terms of immigration is Loire-Atlantique (70,000), followed by Maine-et-Loire (44,000), Vendée (20,000), Sarthe (17,000) and Mayenne (6,000).

Although the region's main cities are host territories, the proportion of immigrants among the total regional population is below the French average (10.2% in 2021).

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