

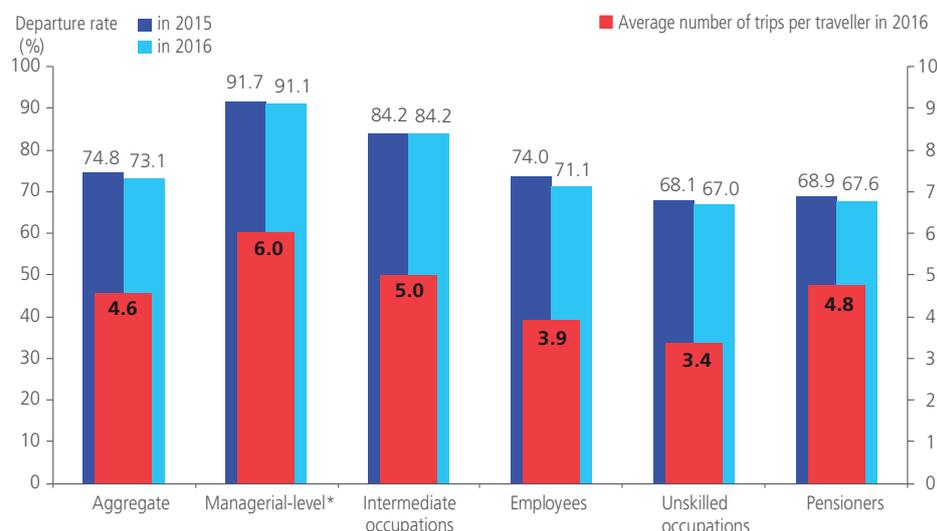
French tourists in 2016: fewer people travelled, but those who did spent more

In 2016, 73.1% of French people took at least one trip for personal reasons. Both the departure rate and the average number of trips per traveller (4.6) were lower than in 2015, translating to a decline in the total number of trips (-2.0%). As the average duration of stays remained virtually unchanged (5.7 days), the number of overnight stays also declined (-1.8%), although there was an increase in the number of overnight stays outside France. The annual results were significantly affected by a highly unfavourable late-spring season particularly in continental France, due to both meteorological conditions and social unrest. The number of overnight stays in non-market accommodations fell, while it rose for commercial tourist accommodations (+1.9%), especially outside France (+5.3%). Spending on personal travel totalled €72.4 billion, of which €45.8 billion in continental France. This overall rise (+1.8%) masks sharply higher spending on travel outside France (+6.3%) including a slight drop-off (-0.7%) on stays in France. Transport expenditure decreased, but spending devoted to packages, accommodations and food/drink were on the rise.

In 2016, 73.1% of French citizens aged 15 and older travelled for personal reasons, against 74.8% in 2015 (*Chart 1*). The departure rate for destinations within continental France fell 2 points to 68.7%; it remained stable at 25.4% for destinations outside France, after reaching its highest rate of the past ten years (25.9%) in 2014. The departure rate was stable among the intermediate occupations, while it fell in other socio-professional categories, particularly lower supervisory and technical occupations (71.1% versus 74.0% in 2015). 40.2% of French residents (*Chart 2*) took both short and long trips,¹ a decrease of 1 point compared with 2015, and 22.9% took only long trips, a drop of 0.9 point. In contrast, 10.0% took only short trips, an increase of 0.2 point.

¹ Long holiday: at least four consecutive overnight stays away from one's usual place of residence.

Chart 1: Departure rate and average number of trips according to occupation and socio-professional category



* and higher intellectual professions.

Scope: personal travel by French residents aged 15 and older.

Key: 71.1% of employees took at least one trip in 2016 (versus 74.0% in 2015). Those who travelled took an average of 3.9 trips.

Source: DGE, SDT surveys, 2015 and 2016.

Bad weather and social unrest had a strong negative impact in spring 2016

At both the beginning and the end of 2016, the monthly departure rates were higher than the year-earlier figures, but lower between May and September with the notable exception of July. The steepest drop was observed in May, with a departure rate of 26.9%, down 5 points from the fairly strong month of May 2015. The meteorological conditions and social climate were particularly unpropitious to tourist travel at that time, especially in continental France (see insert). August remained the biggest travel month for the French, with a departure rate of 43.7%. Nevertheless, the peak summer season was more evenly balanced in 2016 than in earlier years, with a gap of only 9.7 points between the July and August departure rates, versus 12.8 points in 2015 and 14.4 points in 2014 (*Chart 3*).

The decrease in both the departure rate and the number of trips per traveller led to fewer trips overall

The average number of trips per traveller also fell to 4.6 in 2016 against 4.8 in 2015 and 4.9 in 2014. The decline was observed across all socio-professional categories but was the most significant in the intermediate occupations (5.0 down from 5.4 in 2015). Among those who travelled, managerial-level residents continued to take the greatest number of trips, ahead of those in intermediate occupations and pensioners (respectively 6.0, 5.0 and 4.8 trips in 2016 for these three categories).

The combination of lower departure rates and fewer trips per traveller resulted in a decrease in the overall number of trips taken by French people, which stood at 194.8 million (-2.0%) in 2016. The decline in the number of short trips (-1.9%; *Table 1*) was similar to that of long trips (-2.1%). Each of these two categories shed two million trips. Short holidays remained slightly more numerous than long holidays (*Chart 4*).

For destinations within France, the decline in the number of trips was observed for all durations of travel and was clearly apparent for very short trips (one or two nights). For destinations outside France, the decline was apparent for all durations of travel except one-week holidays, which were more numerous following a difficult year in 2015 (more than 4 million trips in 2016, an increase of 200,000 trips).

Little change in the average duration of travel

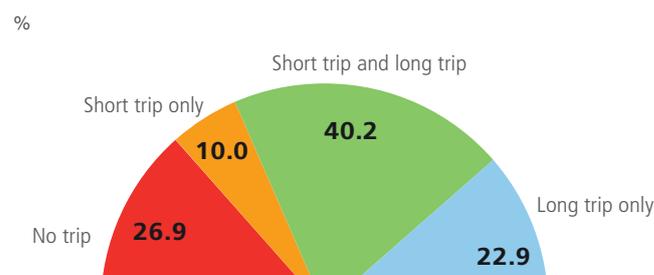
The average duration of travel, which is strongly tied to the destination, remained stable at 5.7 days for the aggregate of all destinations in 2016, unchanged from 2015. It remained virtually stable at 5.2 days for destinations in continental France and rose slightly to 9.2 days (against 9.0 in 2015) for destinations outside France.

In continental France, the average duration of travel was close to nine days in August, slightly more than six days in July and September, and remained below five days for the other months of the year. The shortest durations were observed in November and December. The longest average duration (7.3 days) was observed at the seashore, particularly during the summer holidays, which are the longest holidays. Outside France, the more remote the destination, the longer the duration of travel: 7.4 days on average in Europe, close to 14 days in Africa and the Americas, and 18 days in Asia and Oceania.

Portugal, an increasingly popular destination for French tourists

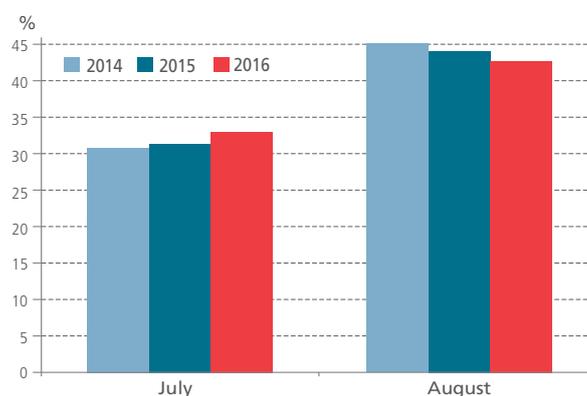
Four out of five French tourists who venture beyond their home borders stay within Europe (*Table 2*). Nevertheless, the share of European destinations chosen by French tourists travelling outside France did slip in 2016 (to 77.0% from 78.2% in 2015). With the exception of the Balearic and Canary Islands, the "prime movers" – Spain and Italy – lost a bit of their market share in 2016 (-360,000 trips after gaining +480,000 trips in 2015). For these two countries, where the most popular tourist destinations are sometimes on the verge of saturation, the downturn came after two years of strong growth. Even still, both countries remain, by far, the preferred destinations of French tourists and account for 39.2% of their European travel holidays. Trips to Portugal increased at an even faster pace than in 2015 (150,000 additional trips in 2016 after 100,000 more in 2015, representing a rise of 22.8% in two years). Portugal (excluding Madeira and the Azores) accounted for 7.7% of the European holiday trips of French tourists. Among the other major European travel destinations chosen by French residents, Germany and the British Isles drew sharply higher numbers of French tourists. In contrast, there were far fewer trips

Chart 2: Breakdown of the French population by type of travel in 2016



Scope: personal travel by French residents aged 15 and older.
Source: DGE, SDT survey 2016.

Chart 3: Departure rates of French residents in July and August



Scope: personal travel by French residents aged 15 and older.
Source: DGE, SDT surveys 2014, 2015 and 2016.

Table 1: Short and long trips by destination

Destination	Short trips		Long trips	
	In 2016 (millions)	Change 2016/2015 (%)	In 2016 (millions)	Change 2016/2015 (%)
Continental France	95.8	-1.7	75.5	-2.7
Outside continental France	5.1	-6.2	18.4	0.6
Total	100.9	-1.9	94.0	-2.1

Scope: personal travel of French residents aged fifteen and older.
Source: DGE, SDT survey 2015 and 2016.

Table 2: Trips, overnight stays and average duration in 2016 in France and outside France

Destination	Trips		Overnight stays		Average duration in 2016 (number of days)
	In 2016 (millions)	Change 2016/2015 (%)	In 2016 (millions)	Change 2016/2015 (%)	
Continental France	171.3	-2.1	887.5	-2.5	5.2
Outside continental France	23.5	-0.9	217.6	1.4	9.2
Europe	18.1	-2.6	133.3	-2.7	7.4
Spain	4.1	-4.9	34.9	-8.1	8.5
Italy	3.0	-4.6	23.6	3.6	7.8
British Isles	1.8	9.5	11.4	13.1	6.2
Belgium	1.5	-12.1	5.3	-13.7	3.5
Portugal	1.4	12.4	13.0	3.0	9.3
Germany	1.3	5.4	6.7	8.0	5.1
Africa	1.5	-8.6	19.9	0.4	13.7
Americas	1.9	12.5	26.5	4.9	13.9
United States	0.8	18.9	11.7	27.8	13.8
Asia and Oceania	1.4	2.7	24.8	12.2	18.3
Total	194.8	-2.0	1 105.1	-1.8	5.7

Scope: personal travel of French residents aged fifteen and older.
Source: DGE, SDT survey 2015 and 2016.

to Belgium in 2016, possibly related to the terrorist attacks in Brussels in March 2016. Finally, after sharp growth in 2015, both Greece and Crete attracted fewer French tourists in 2016.

Remote destinations rebounded

After a dip in popularity in 2015, remote destinations rebounded in 2016. Africa was an exception, with a continuing decline in the number of trips. French tourists have not resumed their former travel habits with respect to the southern Mediterranean basin: destinations in Morocco, Tunisia and Turkey continue to shed hundreds of thousands of holiday stays while Egypt has become a rare choice for holiday travel. Travel to the Americas rose sharply in 2016, especially to the United States, Canada, Cuba and the Dominican Republic. The most remote destinations of Asia and Oceania showed an overall upturn that masked contrasting situations. Thailand registered the strongest growth and became one of the main non-European destinations for French travellers with more than 200,000 trips.

French tourists spend 900 million nights away from home in France

Taking all travel destinations into account, French tourists spent 1.105 billion nights away from home in 2016, of which 887 million were in continental France. This represents a drop of 1.8% year-on-year, after a decline of 3.5% in 2015. With virtually no change in the average duration of travel, the lower aggregate number of overnight stays corresponds to the decrease in the number of trips. The number of overnight stays for all destinations fell by 2.5% in continental France but rose 1.4% outside France as a result of the longer travel durations. (Overnight stays had dropped off sharply in 2015.)

The seashore, where holiday stays were the longest, accounted for nearly one-third of overnight stays but only 23% of the trips taken in continental France (Table 3). Conversely, urban destinations received the highest number of trips but accounted for only 23% of the overnight stays with an average travel duration of 3.8 days. The four regions in the southern half of France were the heavyweights among the tourist destinations of French residents, accounting for an aggregate 56% of their overnight stays in continental France (15.5% in Occitanie, 15.1% in Nouvelle-Aquitaine, 13.6% in Auvergne-Rhône-Alpes and 11.7% in Provence-Alpes-Côte d'Azur).

Upswing in commercial accommodations, particularly outside France

On the whole, overnight stays in commercial accommodations rose in 2016: they were virtually stable in continental France (+0.3%) but increased sharply outside France (+5.3%, Table 4). Overnight stays in non-market accommodations² declined (-4.0% in continental France and -7.8% outside France). The share of commercial accommodations thus followed the upward trend of the past several years to reach 35.5% in continental France (against 33.7% in 2015) and 72.8% outside France (versus 69.6% in 2015).

Fewer French tourists stayed in campsites in 2016, despite a continuing favourable trend for this type of accommodation.

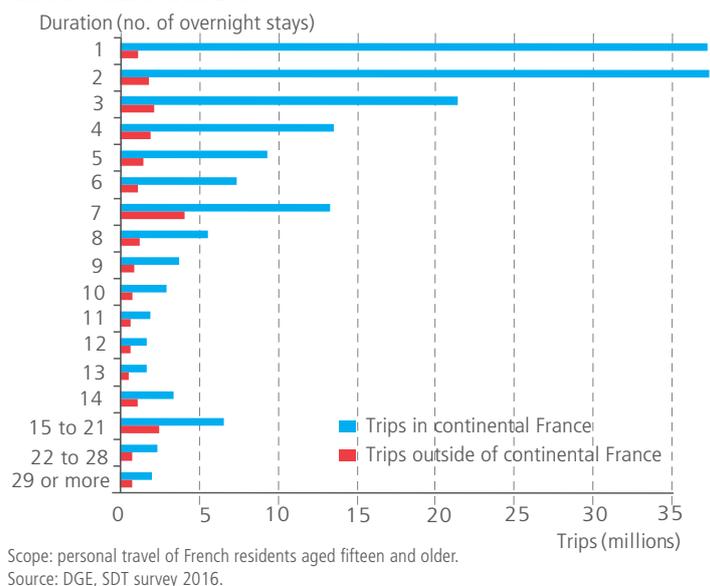
² Friends, family, second homes.

Table 4: Overnight stays according to the destination and type of accommodations

Destination	Commercial accommodations		Non-commercial accommodations		Share of commercial accommodations in 2016 (%)
	Overnight stays in 2016 (millions)	Change 2016/2015 (%)	Overnight stays in 2016 (millions)	Change 2016/2015 (%)	
Continental France	314.8	0.3	572.7	-4.0	35.5
Outside continental France	158.5	5.3	59.2	-7.8	72.8
Total	473.3	1.9	631.9	-4.4	42.8

Scope: personal travel of French residents aged fifteen and older.
Source: DGE, SDT survey 2015 and 2016.

Chart 4: Number of trips by French residents according to duration and destination in 2016



Scope: personal travel of French residents aged fifteen and older.
Source: DGE, SDT survey 2016.

Table 3: Trips, overnight stays and average duration in 2016 according to type of destination in continental France

Type of setting	Trips	Overnight stays	Average duration (number of days)
	Breakdown (%)		
Seashore	23.0	32.5	7.3
Rural	24.7	21.0	4.4
Urban	31.3	23.0	3.8
Ski resort	6.2	8.1	6.7
Mountains other than ski resorts	14.8	15.4	5.4
Total	100.0	100.0	5.2

Scope: personal travel of French residents aged fifteen and older.
Source: DGE, SDT survey 2016.

Most of the decline occurred during the spring season, especially the month of May, when meteorological conditions hardly conducive to outdoor holidays sufficed to push the annual result into the red. In contrast, hotel occupancy rates continued to rise, as did rentals of single-family holiday accommodations. Accommodations with family, which accounted for the largest share of non-market overnight stays, were on the decline (-4.5% for all destinations combined); they totalled fewer than 400 million overnight stays in 2016. Stays in second homes, the other major pillar of non-market tourist travel, fell sharply to below 150,000 overnight stays for the year.

Tourism spending rose due to travel to countries outside France

French tourists spent a total of €72.4 billion on personal travel in 2016 (Table 5) including €45.8 billion in continental France. Despite the drop in the number of trips and overnight stays, spending for all destinations combined exceeded the 2015 level by €1.3 billion (+1.8%) without however matching the 2014 total (€74.4 billion). The increase in overall spending included a sharp rise (+6.3%) for trips outside France but a slight decline (0.7%) for trips within France. After shrinking significantly in 2015, spending on package holidays regained strong momentum (+8.4%) in 2016: the number of holiday packages rose (+1.5%), particularly those that included transport as well as accommodations (+2.4%). The number of overnight stays in connection with these trips climbed +7.5%.

The expenditure items "accommodation" and "food and drink" rose both in France and

Table 5: Tourism spending by French residents

Spending by French tourists	All destinations		Continental France			Outside of continental France		
	2016 amount (in € bn)	Change 2016/2015 (%)	2016 amount (in € bn)	Breakdown by category of spending (%)	Change 2016/2015 (%)	2016 amount (in € bn)	Breakdown by category of spending (%)	Change 2016/2015 (%)
Holiday packages	15.0	8.4	4.3	9.4	2.8	10.7	40.3	10.9
Accommodations (excluding packages)	12.9	2.9	9.3	20.4	1.8	3.6	13.5	5.9
Transport (excluding packages)	13.5	-3.5	9.1	19.9	-4.5	4.4	16.5	-1.3
Food & drink (excluding packages)	10.0	2.7	7.3	16.0	2.1	2.7	10.0	4.5
Other (excluding packages)	20.9	-0.3	15.7	34.3	-2.0	5.2	19.6	5.1
Total	72.4	1.8	45.8	100.0	-0.7	26.6	100.0	6.3

Scope: personal travel of French residents aged fifteen and older.
Source: DGE, SDT survey 2015 and 2016.

■ **Insert: conditions not conducive to tourism in May 2016**

Each of the first four months of 2016 registered a higher number of trips than the year before (Chart 5). The cumulative total for those four months rose by 3.6%, representing 1.850 million more trips than for the same period in 2015. However, the late spring season was highly unfavourable in 2016, with 4.5 million fewer trips in May and 1.2 million fewer in June. Extremely difficult meteorological conditions (extended periods of heavy rains and flooding), as well as labour movements, had a negative impact on leisure travel among the French. The lag that had been accumulated by the end of June (-4% compared to first-half 2015) was not offset by the stable second half (-0.4%). The peak season registered slightly more trips in 2016 than in 2015, with an increase in July and a decrease in August year-on-year. September and October showed declines, but November and December posted growth. Ultimately, the decline in the number of trips observed in May (-18.6%, or 4.2 million fewer trips compared to May 2015) outstripped the cumulative growth of the other eleven months.

Chart 5: Year-on-year change in number of trips (2016-2015)



Key: The number of trips taken in January 2016 exceeds the number of trips taken in January 2015 by 0.5 million (monthly year-on-year change). At the end of April 2016, the number of trips taken over the first four months of the year is higher by 1.8 million (change in year-to-date trips) than the number of trips taken over the same period in 2015.
Scope: personal travel of French residents aged fifteen and older.
Source: DGE, SDT survey 2015 and 2016.

outside France. Transport expenditure continued to decline (-3.5% after the -4.6% drop in 2015). Although the fall in motor fuel prices did not continue in 2016, oil prices remained at low levels and competition was intense. The share of transport expenses in overall tourism spending has been diminishing for several years now.

French tourists spend as much for four nights away from home outside France as for seven in France

Spending varied significantly according to the duration of travel, the type of destination and the type of accommodations: in continental France, the average expenditure (taking all expenditure items into account) was €34 or €84 per overnight stay for non-market or commercial accommodations, respectively. Outside France, those figures were €59 or €146, respectively. Whether staying in non-market or commercial accommodations, French tourists spent about 75% more per night away from home when travelling outside France. Transport spending, which was higher, on average, for a trip outside France, accounted for more than half of this difference.

The gap was more modest for the other expenditure items. For example, the aggregate of all other expenditure items per night away from home was approximately 20% higher for a holiday outside France when the trip involved commercial accommodations not within the framework of a package holiday.

■ **The Tourism Survey (SDT) by DGE**

The SDT survey, co-funded by the Directorate General for Enterprise (DGE) and the Banque de France to monitor tourist demand, is carried out monthly by post among a group of 20,000 individuals aged 15 years and over who are representative of France’s resident population.

The results presented here pertain to personal travel, i.e., all trips taken for reasons other than professional/business. By definition, a trip must include at least one overnight stay away from one’s usual place of residence.

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