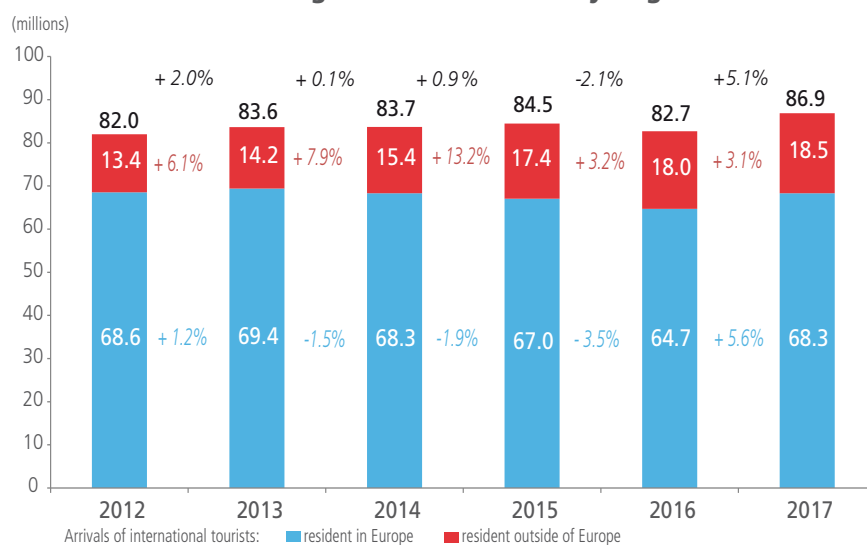


87 million foreign tourists in France¹ in 2017

In 2017, France was once again the world's most popular tourist destination, welcoming a record 87 million foreign tourists to metropolitan France, up 5.1% from 2016. The rebound came after a decline in arrivals in 2016 and was driven by the large-scale return of European tourists. Growth in the number of non-European tourists was a more moderate 3.1%, despite a spike in arrivals from the Americas. The 3.3% gain in Asian tourists only partly offset the downturn recorded in 2016. Rising by 3.9%, the number of nights spent in France by foreign tourists grew at a slightly lower rate than arrivals, owing to a slight decline in average stay length, from 6.8 nights in 2016 to 6.7 nights in 2017. The number of nights international tourists spent in commercial accommodation rose twice as fast – by 8% – as the total number of foreign tourist nights, which climbed 3.9%. This trend resulted in an increase of 30 million nights in commercial accommodation compared with 2016.

Chart 1: Arrivals of foreign tourists in France by origin



How to read this chart: In 2017, metropolitan France welcomed 68.3 million European tourists and 18.5 million non-European tourists. The percentage changes from the year before were +5.6% and +3.1%, respectively. All told, metropolitan France received 86.9 million international tourists in 2017, 5.1% more than in 2016.

Source : DGE and Banque de France, EVE survey of visitors from abroad.

Metropolitan France welcomed 86.9 million foreign tourists in 2017 (Chart 1), according to the EVE survey of visitors from abroad conducted by the DGE and the Banque de France (Box 1). International arrivals were 5.1% higher than in 2016, a year that saw arrivals decline sharply to 82.7 million following the terror attacks in Paris in November 2015 and Nice in July 2016. The number of arrivals in 2017 was 2.9% higher than the record set in 2015. France continues to rank as the world's leading tourist destination, ahead of Spain (81.8 million foreign tourists, Box 2), which has overtaken the United States (73 million). The gap in international tourist arrivals between Spain and France has narrowed.

Return of European tourists

Rising international arrivals in 2017 were largely driven by the rebound in European tourists, increasing by 5.6%, or 3.6 million arrivals (Table 1). European tourists accounted for 79% of

international arrivals and contributed 4.4 points to the 5.1% rise. The increase in European arrivals put an end to four straight years of decline. Tourists from the United Kingdom remain the biggest overall group, with 12.7 million arrivals in 2017, up 6% on 2016, widening the gap with German tourists, whose numbers were unchanged at 11.8 million. Tourist arrivals from Spain (up 17.3%), Switzerland (up 10.7%), Belgium and Luxembourg (up 9.6%) and the Netherlands (up 7.4%) all recorded sharp gains. There were 4.6% fewer tourists from Italy in 2017, adding to the 7.9% fall in 2016. Tourists from Russia, while still at a modest level, reached the 2013 record of 0.8 million arrivals, after contracting for three consecutive years.

¹ Persons habitually residing abroad and arriving in metropolitan France for a stay of at least one night and less than a year.

Non-European tourist numbers grow more moderately

The rise in non-European tourists was a more moderate 3.1%, or an increase of 0.6 million arrivals. Contrasting trends were observed across continents of residence. Tourists from the Americas were again the fastest-growing group (up 6.7%), fuelled by a 5.6% rise in tourist numbers from the United States and a strong return of travellers from Brazil (up 17.9%). Tourists from Asia increased by 3.3% in 2017, only partly offsetting the 5.8% decline in arrivals in 2016. This trend varied according to the country of residence. Japanese tourists rose by 17.8% after declining in 2015 and 2016. The Japanese are particularly concerned about safety and security and appeared to show renewed confidence in France, although they did not travel in the same record numbers as in 2014. Tourists from China grew by 4.9% in 2017, only partly making up for the 8.5% drop in 2016. The number of tourists from India fell slightly by 5.6% despite growth in previous years. Once again, there were fewer arrivals from Oceania in 2017 (down 4.7%), although the drop was not as sharp as in 2016 (down 19.5%). There were also fewer tourists from Africa in 2017 (down 4.2%) after highs in recent years, notably a 5.5% increase in 2016.

France – a destination for both short and long stays

In 2017, 37 million international tourists came to France for stays of one, two or three nights. Short stays thus accounted for 43% of the total. France's accessibility and central position in Europe makes it an attractive destination both for short stays, especially for bordering countries, and as a stage on journeys to other destinations. The proportion of short stays varies by continent of residence (*Chart 2a*). For European tourists as a whole, short stays accounted for 44% of all stays. Half of tourists from Spain, Italy and Switzerland had short stays (*Chart 2b*). A smaller proportion of travellers from Belgium and Luxembourg, the United Kingdom, Germany and the Netherlands had short stays, but their numbers were still higher than 40%. Non-European tourists also travelled to France for short stays. Nearly half (49%) of Asian tourists came to France for stays of one to three nights, typically as part of a tour of multiple European cities. Tourists from the Americas also had a high percentage of short stays (38%).

France is not solely a destination for tourists passing through to another country, or for short stays. Fifty million tourists came to France for long stays (more than three nights) in 2017, accounting for 57% of the total number of stays. The number of long stays increased by 13% between 2016 and 2017, due to higher numbers of tourists from Europe, the Americas, Asia and Oceania staying from four to six nights and fewer tourists staying one to two nights.

Slight decline in average length of stay

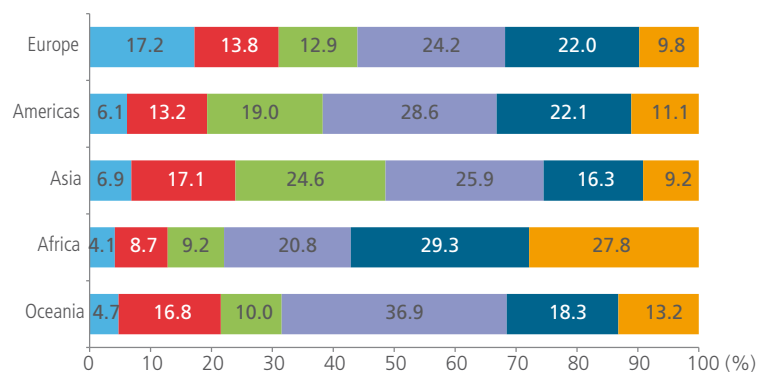
Despite the percentage of long stays increasing from 53% in 2016 to 57% in 2017, the average stay length of a foreign tourist in France in 2017 was 6.7 days (*Table 2*), which was slightly lower than the past three years (6.8 days). The higher proportion of long stays comprised a significant increase in shorter stays of four to six nights and a slight decline in the proportion of the longest stays (14 nights or more). The average long stay length therefore contracted, offsetting the higher proportion of long stays overall. By contrast, the average short stay length rose, but since there were

Table 1: Arrivals of foreign tourists in France by region of residence

| | Number of tourists in 2017 (millions) | Percentage of total in 2017 (%) | Change in arrivals 2017/2016 (millions) | Percentage change 2017/2016 (%) | Contribution to change 2017/2016 (percentage points) |
|---------------------|---------------------------------------|---------------------------------|---|---------------------------------|--|
| Europe | 68.3 | 78.7 | 3.6 | 5.6 | 4.4 |
| United Kingdom | 12.7 | 14.7 | 0.7 | 6.0 | 0.9 |
| Germany | 11.8 | 13.6 | 0.1 | 0.6 | 0.1 |
| Belgium, Luxembourg | 11.3 | 13.0 | 1.0 | 9.6 | 1.2 |
| Switzerland | 7.0 | 8.1 | 0.7 | 10.7 | 0.8 |
| Spain | 6.8 | 7.8 | 1.0 | 17.3 | 1.2 |
| Italy | 6.7 | 7.7 | -0.3 | -4.6 | -0.4 |
| Netherlands | 4.4 | 5.0 | 0.3 | 7.4 | 0.4 |
| Russia | 0.8 | 1.0 | 0.3 | 43.4 | 0.3 |
| Americas | 8.7 | 10.0 | 0.5 | 6.7 | 0.7 |
| United States | 4.4 | 5.1 | 0.2 | 5.6 | 0.3 |
| Canada | 1.0 | 1.2 | -0.1 | -11.5 | -0.2 |
| Brazil | 1.2 | 1.4 | 0.2 | 17.9 | 0.2 |
| Asia | 5.9 | 6.8 | 0.2 | 3.3 | 0.2 |
| China | 2.1 | 2.4 | 0.1 | 4.9 | 0.1 |
| Middle East | 1.3 | 1.5 | 0.1 | 7.0 | 0.1 |
| India | 0.5 | 0.6 | 0.0 | -5.6 | 0.0 |
| Japan | 0.5 | 0.6 | 0.1 | 17.8 | 0.1 |
| Africa | 2.8 | 3.2 | -0.1 | -4.2 | -0.1 |
| North Africa | 2.0 | 2.3 | -0.1 | -5.4 | -0.1 |
| Oceania | 1.1 | 1.3 | -0.1 | -4.7 | -0.1 |
| Total | 86.9 | 100 | 4.2 | 5.1 | 5.1 |

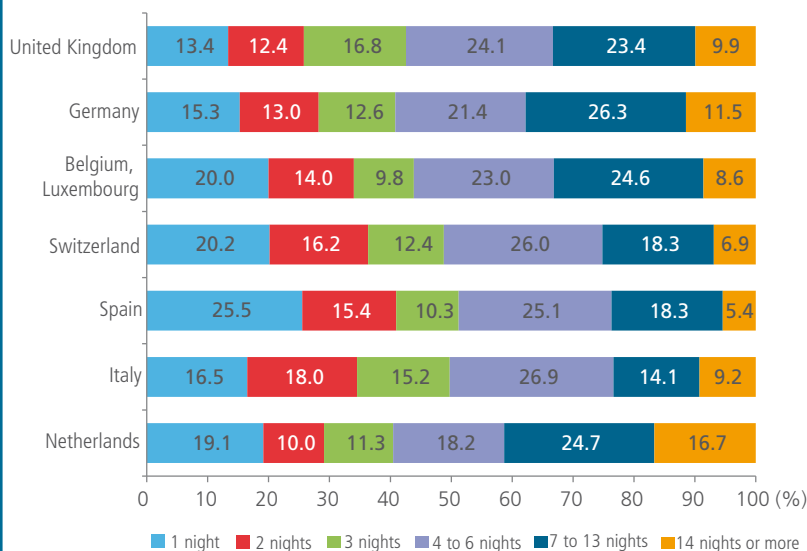
Source: DGE and Banque de France, EVE survey of visitors from abroad.

Chart 2a: Arrivals of foreign tourists in France by length of stay and continent of residence



How to read this chart: In 2017, 17.2% of European tourists arriving in France stayed one night, 13.8% stayed two nights and 12.9% stayed three nights.

Chart 2b: Arrivals of foreign tourists in France by length of stay and country of residence



How to read this chart: In 2017, 13.4% of UK residents arriving in France stayed one night, 12.4% stayed two nights and 16.8% stayed three nights.

Source: DGE and Banque de France, EVE survey of visitors from abroad.

■ Box 1: The EVE survey of visitors from abroad

The EVE survey of visitors from abroad is conducted by the Directorate General for Enterprise (DGE) and the Banque de France. It tracks activity by foreign tourists in France by surveying tourists as they leave metropolitan France, irrespective of their form of transportation – whether by road, air, rail or sea. The survey counts outbound flows, distinguishing between residents and non-residents. In particular, over a million vehicles are observed at border crossing points and more than 135,000 airline passengers are questioned when they embark. The survey is also administered to 60,000 non-residents to identify key characteristics of their stays, such as length, reason and expenditures. Air, rail and maritime passenger counts are based on data from carriers, while inbound and outbound flows on roads are counted at over 150 border crossing points.

fewer short stays on the whole, a reduction was seen in the average stay length for all lengths combined. The average stay length therefore decreased by 1.1% between 2016 and 2017, which helped to explain why the number of nights spent in France by foreign tourists in 2017 (up 3.9%) did not increase as fast as the number of arrivals (up 5.1%). The growth in foreign tourist nights in metropolitan France in 2017 – up by 21.9 million, reaching 583 million – was therefore driven by rising international arrivals.

Breaking down the data by continent of residence reveals contrasting trends. The number of nights spent by European tourists rose marginally higher than European arrivals in France (up 5.9% and 5.6%, respectively), owing to a slightly longer average stay length (6.3 days in 2017, compared with 6.2 days in 2016). By contrast, the average stay length declined significantly for all non-European tourists, except for tourists from Oceania. Despite a 3.7% fall in the average stay length of tourists from the Americas, this group recorded a 2.7% increase in the number of nights due to the rise in their arrivals. However, the further 5.9% drop in the average stay length of tourists from Asia, especially from the Middle East, was not offset by rising arrivals and led to a 2.8% contraction in the number of nights.

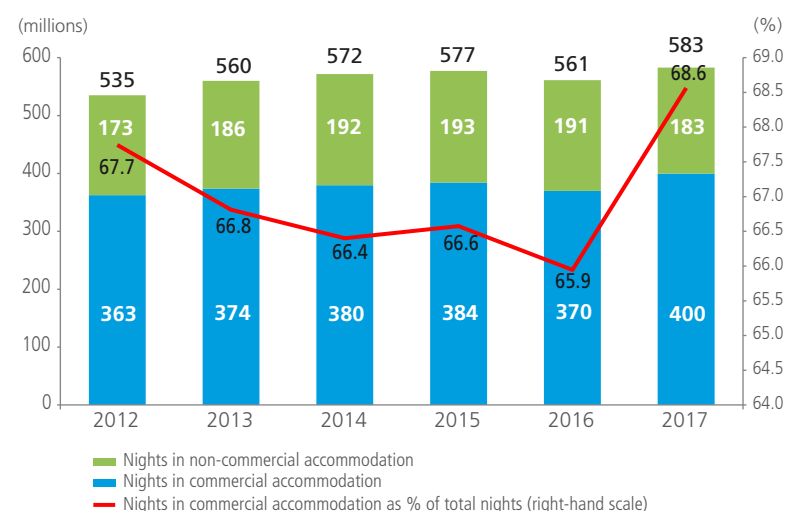
European tourists drive the increase in nights spent in commercial accommodation

More than two-thirds of the nights spent in France by foreign tourists in 2017 (68.6%, or 400 million nights) were in commercial accommodation (*Chart 3 and Table 3*). This proportion was higher than with 2016 (65.9%). The number of nights spent in commercial accommodation rose twice as fast as the total number of nights (up 8% and 3.9%, respectively). In 2017, tourists spent 29.7 million more nights in commercial accommodation than in 2016, a year which had witnessed a 3.7% decline. In 2017, the number of nights spent in non-commercial accommodation fell by 7.8 million compared with 2016. This trend varied according to the type of accommodation. The number of nights spent with family or friends rose marginally, accounting for two-thirds (66.4%) of nights in non-commercial accommodation.

European tourists were largely responsible for the increase in nights in commercial accommodation, notching up 27.6 million additional nights in 2017. The number of nights spent in commercial accommodation by European tourists climbed nearly twice as fast as the total number of nights (up 10.2% and 5.9%, respectively). In 2017, all the major groups of tourists from Europe increasingly turned to commercial accommodation (up nearly 13% for tourists from the United Kingdom, Belgium and Luxembourg), apart from travellers from Germany. A 34.3% increase was even observed for Russian tourists, mirroring the growth in arrivals numbers.

While the number of nights spent in commercial

Chart 3: Nights spent by foreign tourists in France, by type of accommodation



How to read this chart: In 2017, foreign tourists spent 400 million nights in commercial accommodation and 183 million nights in non-commercial accommodation. Just over two-thirds (68.6%) of foreign tourists' nights were spent in commercial accommodation in 2017.

Source: DGE and Banque de France, EVE survey of visitors from abroad.

Table 2: Nights and average length of stay of foreign tourists in France, by region of residence

| | Number of nights in 2017 (millions) | Percentage of total in 2017 (%) | Percentage change in number of nights 2017/2016 (%) | Average length of stay in 2017 (nights) | Percentage change in average length of stay 2017/2016 (%) |
|---------------------|-------------------------------------|---------------------------------|---|---|---|
| Europe | 428.2 | 73.5 | 5.9 | 6.3 | 0.3 |
| United Kingdom | 82.8 | 14.2 | 6.1 | 6.5 | 0.1 |
| Germany | 77.9 | 13.4 | 1.1 | 6.6 | 0.5 |
| Belgium, Luxembourg | 68.2 | 11.7 | 14.9 | 6.0 | 4.9 |
| Switzerland | 37.1 | 6.4 | 12.0 | 5.3 | 1.2 |
| Spain | 34.1 | 5.9 | 16.2 | 5.0 | -0.9 |
| Italy | 39.0 | 6.7 | -2.3 | 5.8 | 2.4 |
| Netherlands | 30.7 | 5.3 | 4.3 | 7.0 | -2.9 |
| Russia | 6.9 | 1.2 | 42.3 | 8.1 | -0.7 |
| Americas | 68.9 | 11.8 | 2.7 | 7.9 | -3.7 |
| United States | 35.2 | 6.0 | 2.3 | 8.0 | -3.1 |
| Canada | 9.9 | 1.7 | -13.6 | 10.0 | -2.4 |
| Brazil | 9.3 | 1.6 | 12.6 | 7.6 | -4.5 |
| Asia | 40.5 | 7.0 | -2.8 | 6.8 | -5.9 |
| China | 11.4 | 2.0 | 0.4 | 5.4 | -4.2 |
| Middle East | 11.5 | 2.0 | -2.0 | 8.6 | -8.4 |
| India | 3.6 | 0.6 | -3.8 | 6.9 | 1.9 |
| Japan | 3.2 | 0.5 | 21.3 | 6.6 | 3.0 |
| Africa | 36.7 | 6.3 | -5.8 | 13.1 | -1.6 |
| North Africa | 25.1 | 4.3 | -7.3 | 12.7 | -2.0 |
| Oceania | 8.6 | 1.5 | -5.0 | 7.8 | -0.3 |
| Total | 583.0 | 100 | 3.9 | 6.7 | -1.1 |

Source: DGE and Banque de France, EVE survey of visitors from abroad.

accommodation by tourists from Asia and the Americas grew more marginally (up 4.7% and 4%, respectively), tourists from Brazil (up 20.3%), Japan (up 16.6%) and, to a lesser extent, China (up 6.8%) all spent significantly more nights in commercial accommodation. Tourists from Oceania spent only 2% more nights in commercial accommodation, a figure albeit higher than for non-commercial accommodation. The 7.9% fall in nights spent in commercial accommodation by tourists from Africa was consistent with the 4.2% decline in arrivals.

Stagnating number of nights in collective accommodation, despite an upswing in 2017

Commercial accommodation² includes collective tourist accommodation and rentals by private individuals. The number of nights spent by foreign tourists in collective tourist accommodation in 2017 jumped by 6.8%³, which was slightly lower than the 8% increase in the total number of nights in commercial accommodation. In 2016, nights spent in collective tourist accommodation declined more sharply than the total number of nights in commercial accommodation (down 5.2% and 3.7%, respectively).

For several years, the numbers of foreign tourists staying in commercial accommodation has stagnated (Chart 4): the figure for 2017 (132.7 million nights) was marginally lower than the figure for 2013 (133.1 million). On the other hand, since 2013 the overall number of nights spent by foreign tourists in commercial accommodation has been growing at a higher rate. Private rental properties appear to have been responsible for the increase in nights in commercial accommodation in recent years. Websites have made it easier for private individuals to find this type of accommodation.

Laetitia CUIGNET, DGE

² Hotels, campsites, tourist residences, holiday villages and other collective tourist accommodation.

³ Sources: French National Institute of Statistics and Economic Studies (INSEE), in partnership with the DGE and regional tourism commissions, hotel occupancy survey (EFH), outdoor accommodation occupancy survey (EFHPA) and other collective tourist accommodation occupancy survey (EFAHCT) (nights in collective tourist accommodation).

Find out more:

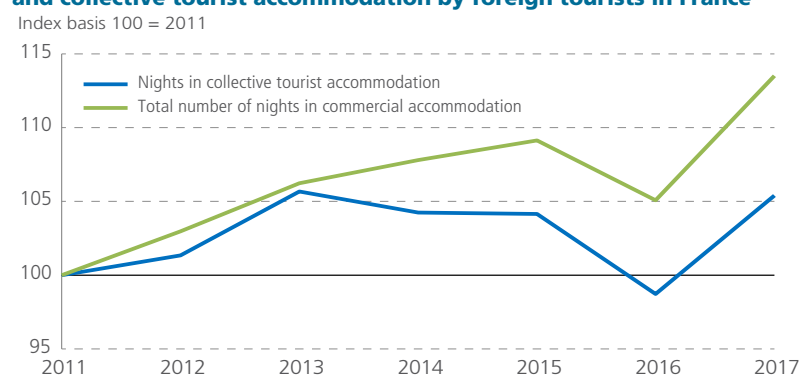
- Go to the "Studies and Statistics" section of the www.entreprises.gouv.fr website
- Go to the "World Tourism Barometer" section of the www2.unwto.org website

Table 3: Nights spent in commercial accommodation by foreign tourists in France, by region of residence

| | Number of nights in commercial accommodation in 2017 | Percentage of total in 2017 | Nights in commercial accommodation as percentage of total nights in 2017 | Change in number of nights in commercial accommodation 2017/2016 | Percentage change in number of nights in commercial accommodation 2017/2016 | Contribution to change 2017/2016 |
|---------------------|--|-----------------------------|--|--|---|----------------------------------|
| | (millions) | (%) | (%) | (millions) | (%) | (percentage points) |
| Europe | 298.6 | 74.7 | 69.7 | 27.6 | 10.2 | 7.5 |
| United Kingdom | 55.9 | 14.0 | 67.5 | 6.6 | 13.3 | 1.8 |
| Germany | 59.6 | 14.9 | 76.5 | 1.3 | 2.2 | 0.3 |
| Belgium, Luxembourg | 45.6 | 11.4 | 66.9 | 5.3 | 13.2 | 1.4 |
| Switzerland | 22.9 | 5.7 | 61.8 | 3.4 | 17.6 | 0.9 |
| Spain | 24.4 | 6.1 | 71.5 | 4.7 | 23.6 | 1.3 |
| Italy | 26.4 | 6.6 | 67.7 | 2.1 | 8.5 | 0.6 |
| Netherlands | 24.8 | 6.2 | 80.7 | 2.1 | 9.3 | 0.6 |
| Russia | 4.5 | 1.1 | 64.5 | 1.1 | 34.3 | 0.3 |
| Americas | 50.6 | 12.7 | 73.5 | 1.9 | 4.0 | 0.5 |
| United States | 27.2 | 6.8 | 77.3 | 1.4 | 5.6 | 0.4 |
| Canada | 6.5 | 1.6 | 65.0 | -1.0 | -13.8 | -0.3 |
| Brazil | 7.7 | 1.9 | 82.4 | 1.3 | 20.3 | 0.3 |
| Asia | 29.0 | 7.2 | 71.5 | 1.3 | 4.7 | 0.4 |
| China | 9.6 | 2.4 | 83.9 | 0.6 | 6.8 | 0.2 |
| Middle East | 6.1 | 1.5 | 53.2 | 0.3 | 4.5 | 0.1 |
| India | 3.2 | 0.8 | 89.4 | 0.1 | 1.9 | 0.0 |
| Japan | 2.5 | 0.6 | 78.8 | 0.4 | 16.6 | 0.1 |
| Africa | 14.3 | 3.6 | 38.8 | -1.2 | -7.9 | -0.3 |
| North Africa | 10.2 | 2.6 | 40.8 | -1.1 | -9.5 | -0.3 |
| Oceania | 7.3 | 1.8 | 83.9 | 0.1 | 2.0 | 0.0 |
| Total | 399.7 | 100 | 68.6 | 29.7 | 8.0 | 8.0 |

Source: DGE and Banque de France, EVE survey of visitors from abroad.

Chart 4: Change in total number of nights spent in commercial accommodation and collective tourist accommodation by foreign tourists in France



Sources: DGE (nights in commercial accommodation) and French National Institute of Statistics and Economic Studies (INSEE), in partnership with the DGE and regional tourism commissions, EFH, EFHPA and EFAHCT surveys (nights in collective tourist accommodation).

Box 2: International tourism continued to grow in 2017

The World Tourism Organization (UNWTO) reports that international tourist arrivals totalled 1.323 billion in 2017, up 6.8% from 2016. This marked the eighth straight year of growth in international tourism. Africa saw the largest growth in international tourist arrivals in 2017, with the 9% increase fuelled by the tourism drawcard of the Mediterranean Basin. Europe was in second position with arrivals up 8%. Asia (up 6%), the Middle East (up 4%) and the Americas (up 3%) all trended upwards, with the Middle East recording significantly higher tourist numbers in some destinations.

Table 4: Top ten international tourism destinations

| Rank | Country | Number of tourists in 2017 (millions) | Percentage change 2017/2016 (%) |
|------|----------------|---------------------------------------|---------------------------------|
| 1 | France | 86.9 | 5.1 |
| 2 | Spain | 81.8 | 8.6 |
| 3 | United States | 73.0 | -3.8 |
| 4 | China | 60.7 | 2.5 |
| 5 | Italy | 57.5 | 9.8 |
| 6 | Mexico | 39.3 | 12.0 |
| 7 | Turkey | 37.6 | 24.1 |
| 8 | Germany | 37.5 | 5.2 |
| 9 | United Kingdom | 37.0 | 3.4 |
| 10 | Thailand | 35.4 | 8.6 |

Sources: DGE and Banque de France, EVE survey of visitors from abroad; UNWTO, provisional 2017 figures.

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Editor-in-chief: François Magnien

Editorial assistants: Martine Automme, Nicole Merle-Lamoot

Layout: Hélène Allias-Denis, Brigitte Baroin, Jacqueline Solitude

ISSN : 2269-3092 – Copyright: 2018

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