

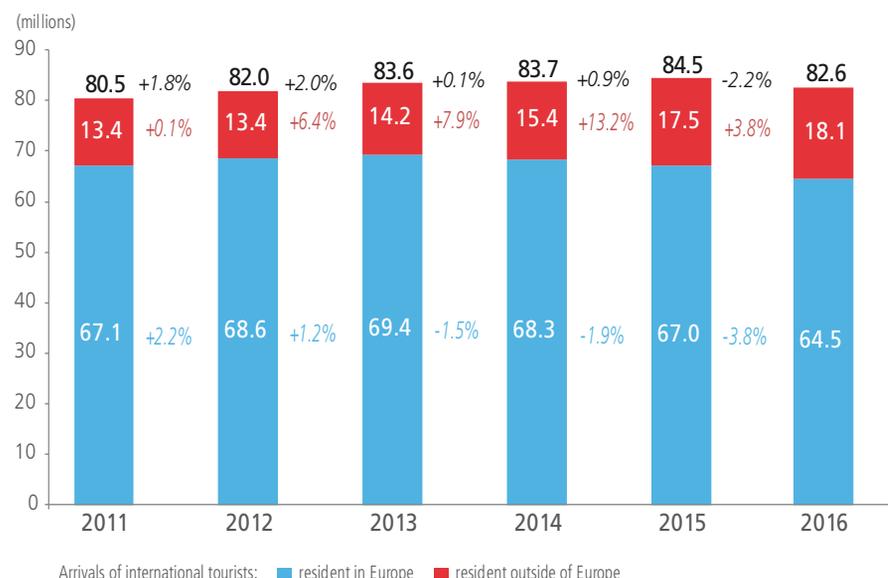
82.6 million foreign tourists in France* in 2016

In 2016, France was again the world's most popular tourist destination, despite a 2.2% decline in arrivals, welcoming 82.6 million foreign tourists to metropolitan France and roughly 400,000 to the overseas *départements* and territories. The numbers were adversely affected by the terrorist events on 13 November 2015, and 14 July 2016, but returned to nearly the same level as previous years in Q4. The 3.8% decline in European visitors was offset by growth in arrivals from other parts of the world. The number of Asian tourists was down only slightly from the record set in 2015, but much higher than in earlier years. U.S. visitors increased in 2016, on the strength of a stronger dollar against the euro, and continue to provide the largest contingent from outside Europe. The average length of stays was virtually unchanged, falling by 0.4%. The number of nights thus declined by 2.7%, roughly proportionate to the decline in arrivals. The hotel sector was particularly affected by the fall in foreign visitors in 2016. Rental of accommodation in private homes is continuing to gain market share against other forms of commercial accommodation, especially among U.S. visitors.

Metropolitan France (including Corsica) welcomed 82.6 million foreign tourists in 2016, or 2.2% fewer than the record set in 2015 (*Chart 1*). Six straight years of rising international arrivals were halted following the terror attacks in Paris in November 2015 and Nice in July 2016. France continues to rank as the world's leading tourism destination, ahead of the United States (75.7 million tourists) and Spain (75.6 million, *Box 2*). The year 2016 also saw a 2.3% decline in inbound tourism to the U.S. By contrast, Spain has registered strong growth in recent years—including a 10.3% rise in 2016—sharply narrowing the gap in international tourists with France.

* Persons habitually residing abroad and arriving in France for a stay of at least one night and less than a year. The statistics discussed in this study are drawn from the EVE survey (*Box 1*).

Chart 1: Arrivals of foreign tourists in France by origin



How to read this chart: In 2016, France welcomed 64.5 million European tourists and 18.1 million non-European tourists. The percentage changes from the year before were -3.8% and +3.8%, respectively. All told, France received 82.6 million international tourists in 2016, or 2.2% fewer than in 2015.

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

Year-end upturn

The decline in international arrivals began in 2015 Q4, particularly in the greater Paris region. The fall in 2016, which was also strongest in greater Paris, and along the Mediterranean coast during the summer, was concentrated during the peak tourist season, with nearly a million fewer arrivals in Q2 and again in Q3. The decline seems to have stopped in Q4, with the 14.3 million arrivals equivalent to the numbers in 2015 and 2014.

Sharp decline in visitors from other European countries

The decline in international tourism is chiefly due to lower arrivals from other European countries. At 64.5 million, the number of European tourists in 2016 was 2.6 million lower than in 2015 and nearly 5 million lower than in 2013. The 2016

drop was particularly sharp for tourists from Italy (0.9 million fewer arrivals, or 11.4% lower than a year before) and the Netherlands (also down 0.9 million, or 18.5% from the previous year, *Table 1*). There were also declines in the number of tourist arrivals from the United Kingdom and Spain (each down by 300,000). European tourists continue to account for a predominant share of international tourists in France (78.1% in 2016) but the percentage has been trending down steadily, from 83.6% in 2012 to 79.4% in 2015. This trend is explained by the decrease in arrivals from other European countries (down 3.8% between 2015 and 2016) and the increase from other continents (up 3.8% between 2015 and 2016).

One million additional tourists from the Americas

Nearly one-tenth of all foreign tourists (9.8%) come from the Americas, and just over half of these 8.1 million visitors are U.S. residents. The strong 15.0% growth in the number of tourists from the U.S. between 2015 and 2016 was boosted by factors including the favorable euro/dollar exchange rate. For the Americas as a whole, the number of tourists was up by nearly one million from 2015, with half of the increase attributable to the U.S. The number of tourists from Canada and Mexico also rose. By contrast, Brazilians, facing severe economic difficulties, reduced their trips for the second year in a row (by 11.3% in 2016).

Fewer arrivals from Asia

For several years, the growth in the number of non-European tourists had been driven by Asians, but that was no longer the case in 2016, when arrivals fell by roughly 6%. Still, at 5.7 million, the number of Asian tourists was not far below the record 6.1 million in 2015, and well above the level in previous years. In five years' time, the number of tourists from Asia has grown from 3.5 million to 5.7 million. Chinese tourists have doubled in five years, from one million in 2011 to two million in 2016. While 8.7% lower than in 2015, the figure remains far higher than earlier levels (1.7 million in 2014, and less in previous years).

The number of tourists from Africa rose by 10.8%, primarily owing to the 300,000 arrivals from North Africa. By contrast, there was a 19.8% decline in tourists from Oceania, primarily Australia. Nevertheless, as a proportion of the region's population, the number of tourists (1.2 million) is high.

France is a destination for short stays

In 2016, 38.5 million international tourists came to France for stays of one, two or three nights. Short stays thus account for 47% of the total, but the proportion varies by country of origin. Over half of tourists from Spain, Switzerland, Italy, Belgium, and Luxembourg had short stays (*Chart 2b*). For European tourists as a whole, the proportion is close to 50% (*Chart 2a*). Because of its accessibility and central position in Europe, France is an attractive destination both for short stays, especially for bordering countries, and as a stage on journeys to other destinations. Europeans are not the only tourists to come to France for short stays. Over half (52%) of Asian tourists come to France for stays of one to three nights, typically as part of a tour of multiple European cities. U.S. and Australian tourists also have a high percentage of short stays (38% and 42%, respectively).

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

| | Number of tourists in 2016 (millions) | Percentage of total in 2016 (%) | Change in arrivals 2016-2015 (millions) | Percentage change 2016-2015 (%) | Contribution to change 2016-2015 (percentage points) |
|----------------------|---------------------------------------|---------------------------------|---|---------------------------------|--|
| Europe | 64.5 | 78.1 | -2.6 | -3.8 | -3.0 |
| United Kingdom | 11.9 | 14.5 | -0.3 | -2.4 | -0.4 |
| Germany | 11.4 | 13.8 | -0.1 | -0.8 | -0.1 |
| Belgium, Luxembourg | 10.7 | 13.0 | -0.1 | -0.8 | -0.1 |
| Italy | 6.7 | 8.2 | -0.9 | -11.4 | -1.0 |
| Switzerland | 6.0 | 7.3 | 0.0 | 0.4 | 0.0 |
| Spain | 5.8 | 7.0 | -0.3 | -5.1 | -0.4 |
| Netherlands | 4.1 | 5.0 | -0.9 | -18.5 | -1.1 |
| Russia | 0.6 | 0.7 | 0.0 | -5.6 | 0.0 |
| Americas | 8.1 | 9.8 | 1.0 | 14.4 | 1.2 |
| United States | 4.2 | 5.0 | 0.5 | 15.0 | 0.6 |
| Canada | 1.1 | 1.4 | 0.1 | 11.0 | 0.1 |
| Brazil | 1.0 | 1.2 | -0.1 | -11.3 | -0.2 |
| Asia | 5.7 | 7.0 | -0.4 | -6.0 | -0.4 |
| China | 2.0 | 2.4 | -0.2 | -8.7 | -0.2 |
| Near and Middle East | 1.3 | 1.5 | -0.1 | -7.4 | -0.1 |
| India | 0.6 | 0.7 | 0.0 | 5.3 | 0.0 |
| Japan | 0.4 | 0.5 | -0.3 | -39.7 | -0.3 |
| Africa | 3.1 | 3.7 | 0.3 | 10.8 | 0.4 |
| North Africa | 2.2 | 2.7 | 0.3 | 15.9 | 0.4 |
| Oceania | 1.2 | 1.4 | -0.3 | -19.7 | -0.3 |
| Total | 82.6 | 100 | -1.9 | -2.2 | -2.2 |

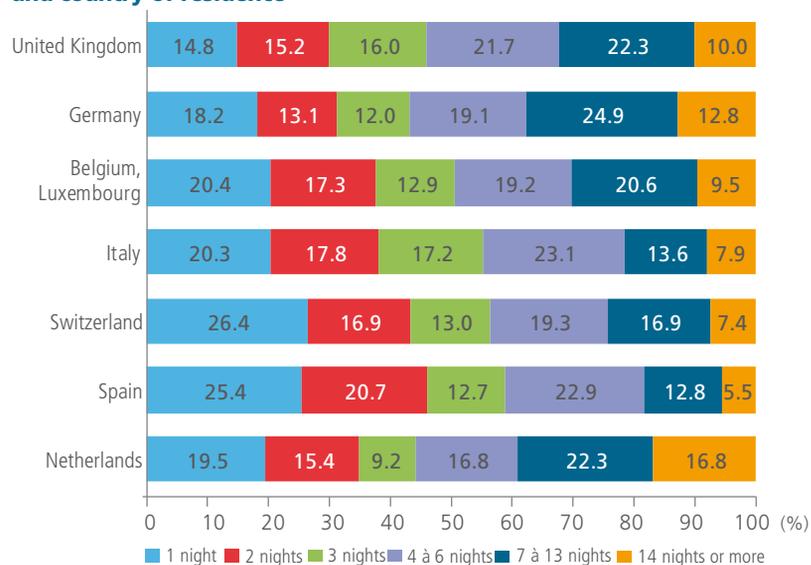
Source: DGE and Banque de France, EVE survey of visitors from abroad.

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



How to read this chart: In 2016, 19.0% of European tourists arriving in France stayed one night, 15.8% stayed two nights, and 13.9% 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 2016, 14.8% of United Kingdom residents arriving in France stayed one night, 15.2% stayed two nights, and 16.0% 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 DGE (Directorate General for Enterprises) 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 covers two areas: first, it counts outbound flows, distinguishing between residents and non-residents; second, it questions 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. Flows are characterised on the basis of specific counting operations; in particular, over a million vehicles are observed at border crossing points and over 120,000 airline passengers are questioned when they embark.

The actual survey of non-residents based on questionnaires was administered to over 80,000 visitors in both 2015 and 2016.

Scope of EVE survey

The data in the EVE survey relate to metropolitan France and thus exclude the estimated 400,000 international tourists who visited the French overseas départements and territories in 2016. The 2016 findings point to approximately 100,000 foreign tourist arrivals to Réunion Island, 50,000 to Martinique, 30,000 to Guadeloupe, 150,000 to French Polynesia, and 50,000 to New Caledonia. In keeping with international recommendations, cruise passengers visiting France are considered same-day visitors and not tourists.

France is also one of the world's leading destinations for long tourist stays

France is not only a destination for tourists passing through to another country, or for short stays. Forty-four million tourists stayed for four nights or more in 2016, making France one of the world's leading destinations for long stays, as only five countries welcomed over 44 million tourists in 2016, all lengths combined. Only the U.S., which is far larger geographically, and Spain, which is most often a final destination, register more long stays than France.

Very slight decline in average stay length

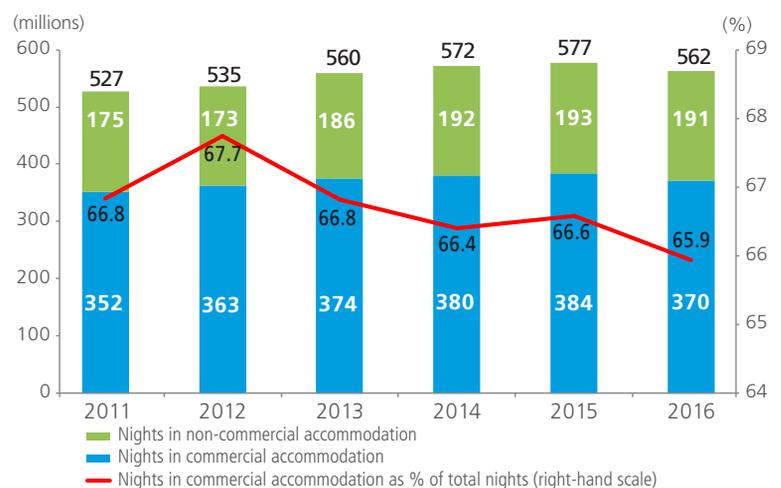
In 2016, the average stay length of a foreign tourist in France was 6.8 days (Table 2), or roughly the same as in 2015. The average stay length declined by 0.4% in a year's time, which helps to explain why the reduction in the number of nights (down 2.7%) exceeded the reduction in the number of arrivals (down 2.2%). Europeans stay 6.3 days on average, or two days less than U.S. tourists (8.2 days). Africans, some of whom come for very long stays—30.5% come for over two weeks—stay for 13.3 days on average. These average stay figures were largely unchanged between 2015 and 2016. By contrast, the average stay of Asian tourists in France was sharply lower in 2016 (down 6.5%); combined with the 6% decline in arrivals, this explains the significant 12.1% fall in the number of nights in France by Asian tourists in 2016.

Most nights were spent in commercial accommodations

Two-thirds of the nights spent in France by foreign tourists (65.9%, or 562 million nights) were in commercial accommodation (Chart 3). This proportion has been falling slowly since 2012. Roughly half of all nights in the commercial sector are in hotels or tourist residences.

The decline in the total number of foreign tourist nights in France between 2015 and 2016 (-15 million) is primarily concentrated in commercial accommodation (down 13.8 million, Table 3). The hotel sector, with 10 million fewer nights, accounts for two-thirds of the overall decline. Rentals by private individuals as a percentage of total nights in commercial accommodation continued to increase, rising from 26.2% in 2015 to 26.7% in 2016.

Chart 3: Foreign tourists in France, nights by type of accommodation



How to read this chart: In 2016, foreign tourists spent 370 million nights in commercial accommodation and 191 million nights in non-commercial accommodation. Just under two-thirds (65.9%) of foreign tourists' nights were in commercial accommodation.

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

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

| | Number of nights in 2016 (millions) | Percentage of total in 2016 (%) | Percentage change in number of nights 2016-2015 (%) | Average length on stay in 2016 (nights) | Percentage change in average length of stays 2016-2015 (%) |
|----------------------|-------------------------------------|---------------------------------|---|---|--|
| Europe | 403.5 | 71.8 | -4.4 | 6.3 | -0.7 |
| United Kingdom | 77.5 | 13.8 | -1.8 | 6.5 | 0.7 |
| Germany | 74.7 | 13.3 | -1.8 | 6.6 | -1.0 |
| Belgium, Luxembourg | 61.9 | 11.0 | -1.6 | 5.8 | -0.8 |
| Italy | 38.4 | 6.8 | -9.6 | 5.7 | 2.0 |
| Switzerland | 31.5 | 5.6 | -1.6 | 5.2 | -2.0 |
| Spain | 29.6 | 5.3 | -8.0 | 5.1 | -3.0 |
| Netherlands | 29.9 | 5.3 | -19.3 | 7.3 | -0.9 |
| Russia | 4.8 | 0.9 | -5.4 | 8.2 | 0.2 |
| Americas | 66.8 | 11.9 | 12.1 | 8.2 | -2.0 |
| United States | 34.3 | 6.1 | 12.6 | 8.2 | -2.1 |
| Canada | 11.5 | 2.0 | 6.8 | 10.2 | -3.8 |
| Brazil | 8.2 | 1.5 | -9.4 | 8.0 | 2.1 |
| Asia | 41.6 | 7.4 | -12.1 | 7.2 | -6.5 |
| China | 11.4 | 2.0 | -13.9 | 5.7 | -5.7 |
| Near and Middle East | 11.8 | 2.1 | -16.8 | 9.4 | -10.2 |
| India | 3.7 | 0.7 | 5.7 | 6.8 | 0.3 |
| Japan | 2.6 | 0.5 | -39.6 | 6.4 | 0.2 |
| Africa | 40.9 | 7.3 | 11.1 | 13.3 | 0.3 |
| North Africa | 29.0 | 5.2 | 15.9 | 13.0 | 0.0 |
| Oceania | 9.1 | 1.6 | -19.1 | 7.8 | 0.7 |
| Total | 561.9 | 100 | -2.7 | 6.8 | -0.4 |

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

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

| | Number of nights in commercial accommodation in 2016 (millions) | Percentage of total in 2016 (%) | Nights in commercial accommodation as percentage of total nights in 2016 (%) | Change in number of nights in commercial accommodation 2015-2016 (millions) | Percentage change in number of nights in commercial accommodation 2015-2016 (%) | Contribution to change 2015-2016 (percentage points) |
|----------------------|---|---------------------------------|--|---|---|--|
| Europe | 270.9 | 73.1 | 67.1 | -18.2 | -6.3 | -4.7 |
| United Kingdom | 49.0 | 13.2 | 63.3 | -1.3 | -2.6 | -0.3 |
| Germany | 56.5 | 15.2 | 75.6 | -0.6 | -1.1 | -0.2 |
| Belgium, Luxembourg | 42.1 | 11.4 | 68.0 | -3.1 | -6.9 | -0.8 |
| Italy | 23.5 | 6.3 | 61.2 | -5.2 | -18.1 | -1.4 |
| Switzerland | 18.6 | 5.0 | 59.0 | -1.5 | -7.3 | -0.4 |
| Spain | 20.0 | 5.4 | 67.7 | -0.9 | -4.2 | -0.2 |
| Netherlands | 23.1 | 6.2 | 77.2 | -5.7 | -19.7 | -1.5 |
| Russia | 3.3 | 0.9 | 68.3 | -0.1 | -3.7 | 0.0 |
| Americas | 48.5 | 13.1 | 72.6 | 9.2 | 23.3 | 2.4 |
| United States | 25.7 | 6.9 | 74.9 | 4.7 | 22.5 | 1.2 |
| Canada | 7.5 | 2.0 | 65.1 | 1.3 | 20.5 | 0.3 |
| Brazil | 6.4 | 1.7 | 77.2 | -0.1 | -2.1 | 0.0 |
| Asia | 27.6 | 7.4 | 66.3 | -5.3 | -16.1 | -1.4 |
| China | 9.0 | 2.4 | 78.9 | -1.5 | -14.4 | -0.4 |
| Near and Middle East | 5.9 | 1.6 | 49.8 | -2.1 | -26.0 | -0.5 |
| India | 3.1 | 0.8 | 84.5 | 0.4 | 13.1 | 0.1 |
| Japan | 2.2 | 0.6 | 82.0 | -1.5 | -40.5 | -0.4 |
| Africa | 16.3 | 4.4 | 40.0 | 2.4 | 16.9 | 0.6 |
| North Africa | 12.2 | 3.3 | 42.0 | 3.2 | 35.0 | 0.8 |
| Oceania | 7.1 | 1.9 | 78.2 | -1.8 | -20.5 | -0.5 |
| Total | 370.5 | 100 | 65.9 | -13.8 | -3.6 | -3.6 |

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

Tourists from the Americas are increasingly turning to rentals

Properties rented by private individuals are gaining market share among tourists of all origins, with the U.S., Canada, Brazil, and Oceania in the lead; visitors from Northern Europe, Germany, Austria, and Belgium also appreciate this form of accommodation. U.S. tourists stayed in private rental properties two million nights more in 2016 than in the previous year. This form of accommodation benefits from the ease with which private individuals can communicate using Internet platforms.

Tourists from Asia—notably Chinese, Japanese, and Indian visitors—overwhelmingly stay in hotels, which account for 56% to 71% of their nights in France. The Dutch spend proportionally more nights in campsites (31%) than any other nationality. African visitors spend over half their nights in non-commercial accommodation, primarily with family or friends.

■ François-Pierre GITTON, DGE

■ Box 2: International tourism continued to grow in 2016

The World Tourism Organization (UNWTO) reports that international tourist arrivals totalled 1.235 billion in 2016, up 3.9% from 2015. This marked the seventh straight year of growth in international tourism. By region, Asia-Pacific saw the largest growth in international tourist arrivals in 2016, with the 8% increase fuelled by high demand from outbound tourism markets, both near and far. Africa experienced a robust 8% rebound after two fairly sluggish years. The rising trend continued in the Americas, where arrivals were up 4%. Europe saw a 2% overall increase, with contrasting trends, some destinations experiencing double-digit growth while others reported declines. In the Middle East, demand was down 4% overall: the picture was uneven, as arrivals were higher in some destinations and lower in others. With 82.6 million international tourist arrivals in 2016, France remains the world's number one destination. Turkey and Russia experienced sharp drops in arrivals (28.5% and 8.6%, respectively) and no longer rank among the world's top ten tourist destinations.

Table 4: Top ten international tourism destinations

| Rank | Country | Number of tourists in 2016 (millions) | Percentage change 2016-2015 (%) |
|------|----------------|---------------------------------------|---------------------------------|
| 1 | France | 82.6 | -2.2 |
| 2 | United States | 75.7* | -2.3* |
| 3 | Spain | 75.6 | 10.3 |
| 4 | China | 59.3 | 4.2 |
| 5 | Italy | 52.6 | 3.7 |
| 6 | United Kingdom | 37.6** | 4.1** |
| 7 | Germany | 35.6 | 1.7 |
| 8 | Mexico | 35.0 | 8.9 |
| 9 | Thailand | 32.6 | 8.9 |
| 10 | Austria | 28.1 | 1.9 |

Source: DGE and Banque de France, EVE survey of visitors from abroad; UNWTO, provisional 2016 figures.

*U.S. Department of Commerce, ITA, National Travel and Tourism Office from the Summary of International Travel to the U.S. Estimate based on the trend in the first 8 months of 2016.

**Office for National Statistics.

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ISSN : 2269-3092

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 DES ENTREPRISES