

France

Tourism in the economy and outlook for recovery

Tourism is a major sector in France. As measured by combining tourism-related spending by both French residents and non-residents, the sector accounted for 7.5% of GDP in 2019. Tourism directly employed 1.5 million people, approximately 7.5% of the national workforce. The impacts of COVID-19 saw tourism GDP fall by 34% to EUR 114.5 billion, or 5.3% of the economy in 2020. Employment was less impacted, but there was still a loss of 155 764 jobs. Three-quarters of the jobs lost were in the accommodation and food services sectors.

In 2019, almost 91 million international tourists visited France. At that time, international revenues exceeded EUR 56 billion, accounting for 21% of French service exports. In 2020, France recorded 41.7 million international tourists, a decline of 54.2%. This translated to a 49.7% decline in international travel receipts. In 2021, there was a slight recovery, with international tourists increasing to 48.4 million.

The domestic market was an important backbone for tourism in 2020, declining just 26.7% to 152 million tourists. This saw the domestic share of tourism expenditure increase from 59.7% in 2019 to 66.7% in 2020. In 2021, domestic tourists recovered to 187.3 million, remaining only 9.8% below 2019 numbers.

Tourism governance and funding

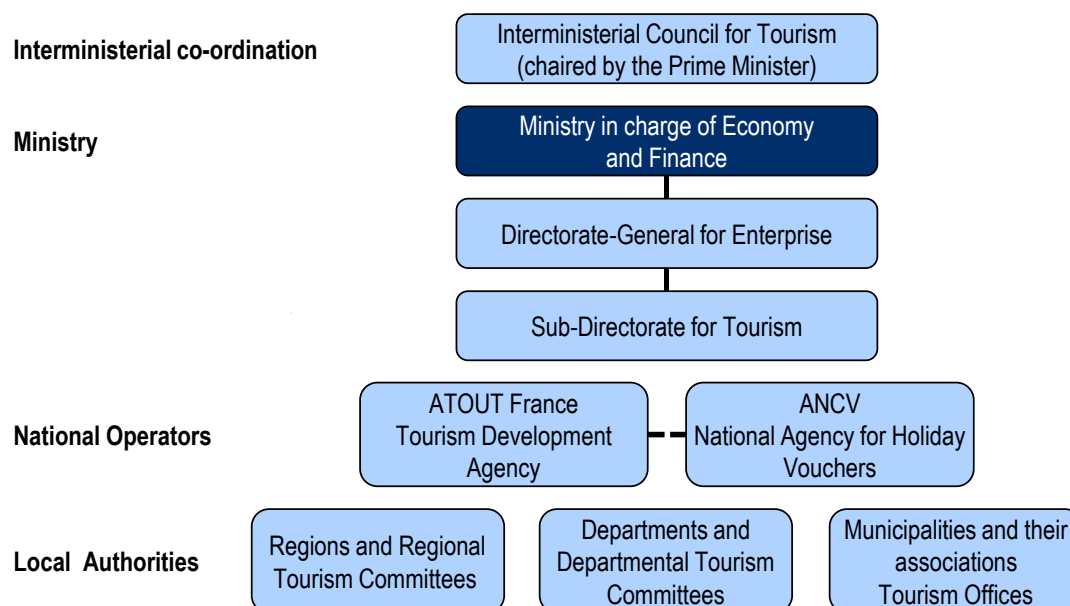
Since 2022, the Ministry in charge of Economy is mainly responsible for tourism policy (previously responsibility was shared with the Ministry for European and Foreign Affairs). Other ministries involved in monitoring tourism issues include the ministries of Foreign Affairs, Ecological Transition, Sport, Culture, Territorial Cohesion, and the Ministry of France Overseas.

All territorial levels of public governance have tourism responsibility. The Regional Council, with the support of the Regional Tourism Committee, co-ordinates public and private initiatives in tourism development, information and promotion, including initiatives in foreign markets. It also ensures the collection of local data and the processing and dissemination of data relating to tourism activity in its territory. The Departmental Council can create a Departmental Tourism Committee, whose actions are focused on structuring the offer and supporting tourism actors. Municipalities also formulate local tourism policies.

Until 2022, an Inter-Ministerial Council for Tourism met regularly under the chair of the Prime Minister, bringing together ministers, elected representatives and sector professionals to present France's roadmap for tourism in the context of key issues for discussion. To better co-ordinate public and private tourism governance, in 2020 the Inter-Ministerial Council for Tourism set up a Committee for the Tourism Sector to enable stakeholders to consult each other and allow for the co-construction of tourism policies by professionals (nearly 300 members) and public authorities. This committee was useful in raising the concerns of professionals and improving support measures for the sector during the COVID-19 crisis.

The total state's tourism budget (including spending by various ministries, such as culture) is estimated to be EUR 7.5 billion. The cumulative budget of the Regional Tourism Committee exceeds EUR 120 million, and the Departmental Tourism Committee receives EUR 230 million.

France: Organisational chart of tourism bodies



Source: OECD, adapted from the Directorate-General for Enterprise, 2022.

Tourism policies and programmes

Following the COVID-19 pandemic, France increased support measures for all sectors, with a particular focus on tourism. These included solidarity funds, fixed cost schemes, partial activity (where the Government covers some of employees' salaries), and state-guaranteed loans. The measures, totalling EUR 36 billion, made it possible to preserve employment and avoid losing knowledge and long-acquired assets.

In addition to the support measures to overcome the crisis, France has also announced recovery measures.

Firstly, in May 2020, stimulus measures to support investment (totalling EUR 1.3 billion) with a focus on the hotel and restaurant sector and events and business tourism (EUR 100 million) were introduced. Some measures related to standardisation, for example, the modernisation and greening of accommodation classifications. The themes of sustainability and digital technology are very present in the plan.

Priority lines of action for France include the quality and structuring of the tourist offer, state support for investments, training and employment, support for digitalisation and information sharing, and providing access to holidays for as many people as possible.

Secondly, in May 2021, France launched the Future of Mountains plan (*Avenir Montagnes*) to enhance sustainable and resilient mountain tourism which addresses its objective through three priorities:

- Encouraging the diversification of the tourism offer and the development of new customers.
- Stepping up the pace of the ecological transition of tourism activities in the mountains.
- Revitalising recreational real estate and stopping the development of empty beds.

In total, *Avenir Montagnes* represents a commitment of over EUR 640 million of public funds for mountain regions, generating nearly EUR 1.8 billion of investment in these areas. France is launching the *Avenir Montagnes* fund with a budget of EUR 331 million, including EUR 300 million for investment support (with

six regions committing the same amounts) and EUR 31 million allocated to providing engineering support to regions.

Thirdly, at the end of 2021, the Destination France plan was launched for the revival and transformation of the tourism sector. The plan lays the foundations for tourism policy in France over the next ten years. It allocates almost EUR 2 billion, and the main lines of action include:

- Win over and win back talent (see box below) through a major communication campaign particularly targeted at young people, aimed at showing the rich diversity of jobs in tourism.
- Strengthen the resilience of the sector and encourage quality upgrades of product. Support will be targeted towards major events, trade fairs, exhibitions and congresses with an international dimension who were particularly affected by the health crisis.
- Promote and develop French tourism assets by creating a Destination France fund. EUR 51 million is earmarked to support the development of French tourism assets, and another EUR 55 million is allocated to promote and strengthen a tourism engineering support offer for regions.
- Respond to the challenges of transforming the sector by promoting sustainable tourism, a reduced eco-footprint, investment in sustainable tourism infrastructure, digital transformation and supporting the development and scale-up of start-ups in the tourism sector.
- Promote France as a destination and consolidate its market share by strengthening communication aimed at tourists and investors.

Campaign to win over and win back tourism workers in France

In September 2022, France launched a large-scale communication campaign to tackle tourism workforce challenges and to enhance the attractiveness of the sector following the pandemic (*Conquérir et Reconquérir les Talents*). The campaign is a key component under the Destination France plan, and aims to strengthen and to sustain tourism jobs and skills. Three major objectives are formulated:

- Strengthen attractiveness of the tourism sector and raise awareness on the rich diversity in professional tourism opportunities.
- Facilitate recruitment, particularly in areas where there is a great need for the upcoming tourism seasons, and in the view of major events in 2023 (e.g. the Rugby World Cup and the Olympic Games).
- Attract more young people to tourism training and courses leading to these professions.

The campaign targets people between 16-25 years old who are looking for a job or career in tourism, as well as people who consider to change careers. A co-ordination mechanism is also planned to mobilise all the local institutional players including schools, training institutes, job centers, regions, professional federations, as well as private tourism actors.

France's tourism communication campaign is of unprecedented scope, and mobilises EUR 8 million. It will include the broadcasting of three spots on most TV channels and on digital channels (social networks, YouTube, etc.), digital billboards in high-traffic areas. Continuous development and support will be made to sustain reoccurring tourism workforce needs in 2022-23.

Statistical Profile

France: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	276 537	268 152	299 315 |	212 547	252 240
Overnight visitors (tourists)	191 636	189 755	207 624 |	152 119	187 321
Same-day visitors (excursionists)	84 901	78 397	91 691 |	60 428	64 919
Nights in all types of accommodation	895 659	897 591	921 767 |	768 138	865 396
Hotels and similar establishments	..	..	306 077 |	235 128	277 539
Other collective establishments	..	..	87 991 |	64 311	77 925
Private accommodation	..	..	527 698 |	468 699	509 932
Inbound tourism					
Total international arrivals	207 274	211 998	217 877	117 109	141 297
Overnight visitors (tourists)	86 758	89 322	90 914	41 684	48 395
Same-day visitors (excursionists)	120 516	122 676	126 963	75 424	92 902
Top markets					
Belgium	10 448	10 507	11 854	7 203	8 314
Germany	12 256	12 272	13 606	6 447	7 515
Switzerland	7 013	6 772	6 506	3 657	4 750
Spain	6 753	6 734	6 730	3 242	4 735
Netherlands	4 307	4 730	5 599	3 799	3 935
Nights in all types of accommodation	582 100	596 784	619 887	298 289	375 456
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	44 265 |	48 069	52 542 |	20 803	21 366
Overnight visitors (tourists)	29 055	30 509	38 301 |	11 461	13 108
Same-day visitors (excursionists)	15 209 |	17 560	14 241 |	9 342	8 258
Top destinations					
Spain	4 429	4 526	6 175 |	1 652	2 990
Italy	3 192	3 311	3 847 |	1 149	1 556
Belgium	1 660	1 727	2 012 |	998	931
Portugal	1 555	1 627	1 906 |	642	876
Germany	1 372	1 472	1 509 |	532	686
TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	59 612	61 555	63 304	31 444	..
International travel receipts	52 097	55 490	56 730	28 510	..
International passenger transport receipts	7 515	6 065	6 574	2 934	..
Outbound tourism					
Total international expenditure	47 443	50 164	53 405	27 367	..
International travel expenditure	38 949	41 978	45 148	24 319	..
International passenger transport expenditure	8 494	8 186	8 257	3 048	..

.. Not available; | Break in series

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/2np4d6>

France: Enterprises and employment in tourism


	Number of establishments ¹	Number of persons employed ²				
	2020	2017	2018	2019	2020	2021
Total	..	1 361 019	1 382 831	1 495 842	1 340 078 p	..
Tourism industries	333 350 p	1 344 350	1 367 134	1 495 842	1 340 078 p	..
Accommodation services for visitors	55 287 p	214 866	216 623	233 270	194 278 p	..
Hotels and similar establishments	20 671 p	173 445	176 046	178 728	147 310 p	..
Food and beverage serving industry	200 397 p	691 794	710 313	860 291	782 305 p	..
Passenger transport	3 902 p	271 747	274 683	200 638	183 894 p	..
Air passenger transport	632 p	60 867	60 809	61 189	57 439 p	..
Railways passenger transport	13 p	165 708	167 493	94 533	84 476 p	..
Road passenger transport	2 229 p	35 461	36 202	34 208	31 386 p	..
Water passenger transport	1 028 p	9 711	10 179	10 708	10 593 p	..
Passenger transport supporting services	.. p	..	..	..	..	..
Transport equipment rental	4 541 p	14 197	14 518	14 408	12 970 p	..
Travel agencies and other reservation services industry	9 361 p	45 210	45 549	46 101	39 563 p	..
Cultural industry	908 p	12 904	13 000	14 371	13 342 p	..
Sports and recreation industry	58 954 p	93 632	92 448	126 763	113 726 p	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	..	16 669	15 697	..	..	..

.. Not available; p Provisional data; | Break in series

1. Data refer to number of enterprises.

2. Data refer to number of employees.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/7df45g>

France: Internal tourism consumption

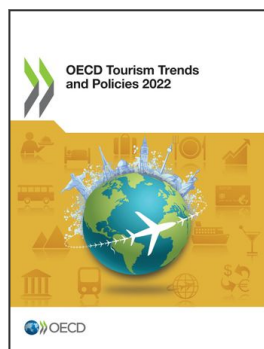
Million EUR

	2020		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	114 500
Consumption products	62 100	31 000	107 200
Tourism characteristic products	38 400	22 900	82 700
Accommodation services for visitors	12 100	10 500	44 000
Food and beverage serving services	7 100	3 700	10 800
Passenger transport services	12 700	6 200	18 900
Air passenger transport services	3 400	2 800	6 200
Railways passenger transport services	3 600	600	4 200
Road passenger transport services	900	800	1 700
Water passenger transport services	300	200	500
Passenger transport supporting services	..	..	..
Transport equipment rental services	3 900	1 500	5 400
Travel agencies and other reservation services industry	2 900	300	3 200
Cultural services	500	700	1 200
Sports and recreation services	3 100	1 500	4 600
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	23 700	8 100	31 800
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	5 900	1 400	7 300

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/qy1uzc>



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