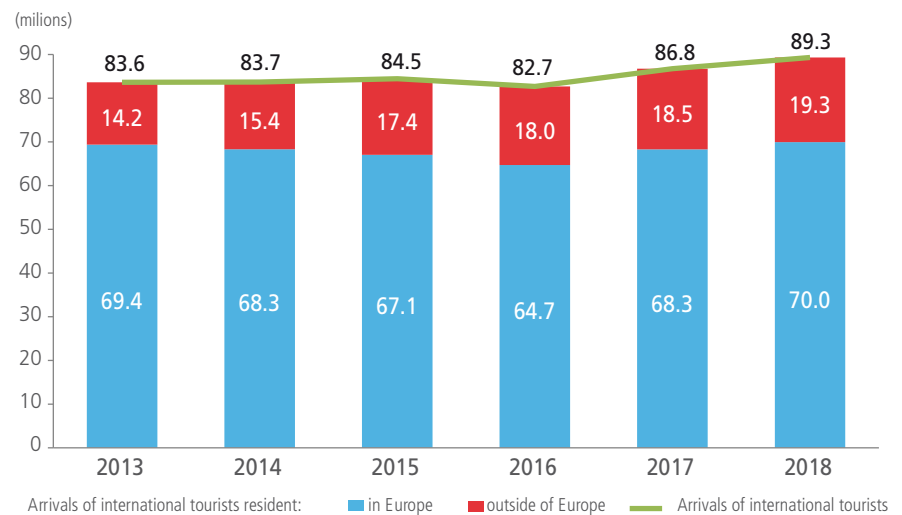


More than 89 million foreign tourists in France¹ in 2018

The favourable global economic environment and strong outbound demand from major source markets led to an increase in foreign tourist arrivals to France in 2018. France welcomed a record 89.3 million foreign tourists and remained the world's most popular tourist destination. Arrivals of non-European tourists were particularly robust, gaining 4.9%. European tourists, however, were the main drivers of the growth in arrivals and, to an even greater extent, the number of foreign tourist nights. The average length of stay did not increase. France is already behind Spain and the United States for the average length of stay and this has affected foreign tourism spending in France. Meanwhile, air travel has risen since 2010 as road travel declines, in line with the growth in international air traffic. French cultural heritage sites and gastronomy ranked highly in the leisure activities of foreign tourists in France. Shopping was foreign tourists' second most popular activity and a primary motivation for travelling to France. France is a major shopping destination, in particular its large cities, although tourists cite customer service as an area for further improvement.

Chart 1: Arrivals of foreign tourists in France by origin



How to read this chart: in 2018, France welcomed 70 million European tourists and 19.3 million non-European tourists. All told, France received 89.3 million international tourists in 2018.
Sources: DGE and Banque de France, EVE survey of visitors from abroad.

continued to rank as the world's leading tourist destination, ahead of Spain (82.8 million foreign tourists - Box 2) and the United States (80.1 million). However, France was ranked third behind Spain and the United States for international tourism receipts by the World Tourism Organization (UNWTO).

Robust growth in non-European tourist numbers

Metropolitan France welcomed a record 89.3 million foreign tourists in 2018 (Chart 1), according to the EVE survey of visitors from abroad conducted by the DGE and the Banque de France (Box 1). Despite the social unrest across France, the air and rail strikes in the spring and the "yellow vest" movement starting in November, international tourist arrivals were 3% higher than in 2017. As a result, international tourism receipts grew by 6.5% to €55.5 billion. For international tourist arrivals, France

The number of non-European tourists rose by 4.9% in 2018, or nearly 1 million arrivals. Foreign tourists from almost every region contributed to the increase (Table 1), with tourists from Asia 7.4% higher than in 2017. Asian tourists returned in large numbers after the sharp decline in 2016, beating the record set in 2015 with 6.4 million arrivals. Tourists from India increased by 16.4% in 2018 and confirmed their upward trend, despite tourist numbers still being low considering the size of the country's population. The shared history between India and the United Kingdom is clearly undermining France's tourism appeal. Meanwhile, China made up for lower tourist arrivals in 2016,

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

contributing 2.2 million arrivals, an increase of 3.8% from 2017.

Tourists from the Americas were the largest group of non-European travellers, accounting for 10% of foreign tourist arrivals to France. There was a 3.8% increase in tourist numbers from the Americas in 2018, driven in particular by the return of travellers from Canada. Tourists from the United States were still the biggest overall group from the Americas to visit France and their numbers grew by 2.1% compared with 2017, consolidating their lead. Tourists from Africa increased by 4.3% while those from Oceania rose by 1.5%, reversing the decline observed in 2017 (by 4.4% and 5.3%, respectively).

European tourists drive growth of international tourist arrivals

European tourist arrivals increased by 2.4%, at a more moderate pace than tourists from other continents. European tourists accounted for nearly 80% of all international arrivals. Europe was still the main region of origin of foreign tourists visiting France, making up two-thirds of the total growth in international tourist arrivals in 2018.

Tourists from the United Kingdom were the biggest overall group from Europe in 2018 with 13 million arrivals, up 2.4% on 2017, widening the gap with German tourists, whose numbers were steady in 2018 at 12.3 million. Tourist arrivals from the Netherlands climbed by nearly 10% for the second year in a row. However, that increase did not offset the sharp falls recorded from 2010 to 2016. Arrivals in 2018 were only two-thirds of the total number reached at the start of the decade. Tourists from the Netherlands are considered by professionals to be sensitive to the price of products and services, the quality of accommodation and the availability of new accommodation options. France increasingly has to compete with other destinations in these areas. After two years of falling numbers, Italian tourists made a comeback in 2018, increasing by 5.5%.

Foreign tourists prefer air and road transport

A total of 54% of foreign tourists used road transport to leave France, while 32% used air transport (Chart 2). The choice of mode of transport depends largely on the travel distance and the natural barriers that need to be crossed to reach one's destination. Non-European tourists often have to travel by plane and 66% of them do so, whereas 62% of European visitors leave France by road. Air travel for shorter distances has become more common, however. The percentage of European tourists using air travel to leave France has grown from 17% in 2010 to 23% in 2018. Another factor behind the increase in air travel is the growing number of arrivals of non-European tourists, who naturally prefer air travel. But foreign tourists' final destination is not always France and they may be touring several different European countries. That

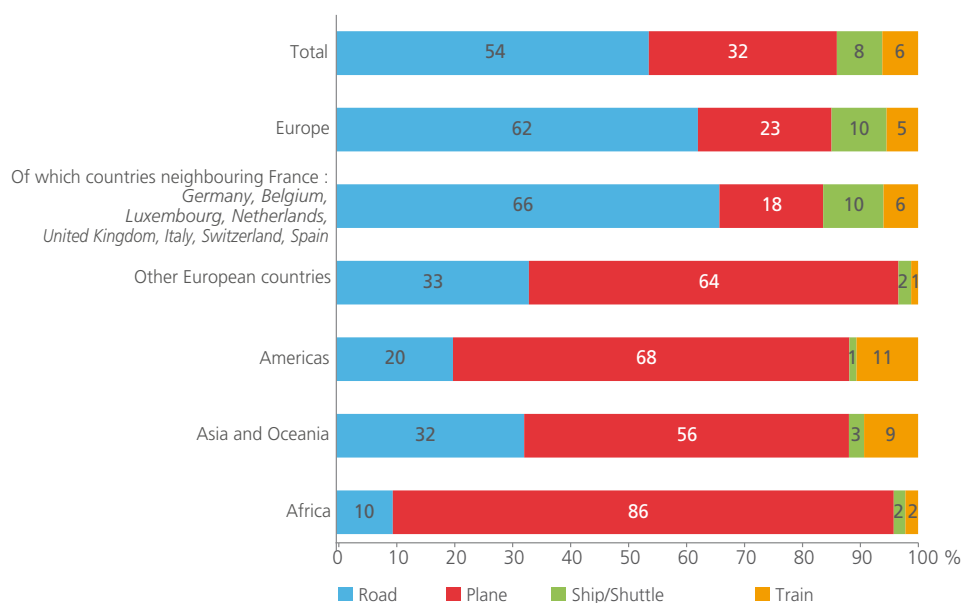
Table 1: Arrivals of foreign tourists in France by region of residence

	Number of tourists in 2018 (millions)	Percentage of total in 2018 (%)	Change in arrivals 2018/2017 (millions)	Percentage change 2018/2017 (%)
Europe	70.0	78.3	1.7	2.4
United Kingdom	13.0	14.6	0.3	2.4
Germany	12.3	13.7	0.0	0.1
Belgium, Luxembourg	11.6	13.0	0.3	2.5
Switzerland	6.8	7.6	-0.2	-3.4
Spain	6.7	7.5	0.0	-0.3
Italy	7.0	7.8	0.4	5.5
Netherlands	4.7	5.3	0.4	9.8
Russia	0.9	1.0	0.0	5.0
Americas	9.0	10.0	0.3	3.8
United States	4.5	5.0	0.1	2.1
Canada	1.2	1.3	0.2	18.2
Brazil	1.1	1.2	-0.1	-10.5
Asia	6.4	7.1	0.4	7.4
China	2.2	2.4	0.1	3.8
Middle East	1.4	1.6	0.1	7.3
India	0.6	0.7	0.1	16.4
Japan	0.5	0.6	0.1	11.5
Africa	2.9	3.3	0.1	4.3
North Africa	2.1	2.3	0.1	5.8
Oceania	1.1	1.2	0.0	1.5
Total	89.3	100	2.6	3.0

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

is often the case with non-European tourists, who want to make their trip to Europe more worthwhile. Some 32% of travellers from Asia and Oceania left France by road, mainly on coach tours of European cities. Similarly, rail was frequently used by tourists from the Americas (11%) and Asia/Oceania (9%).

Chart 2: Arrivals of foreign tourists in France by mode of transport and continent of residence



How to read this chart: the mode of transport is the outbound mode of transport used by foreign tourists to leave France. Sources: DGE and Banque de France, EVE survey of visitors from abroad.

French cultural heritage sites and gastronomy – Drawcards for foreign tourists

French cultural heritage sites ranked highly among foreign tourists' leisure activities in France. Some 49% of international travellers visited French cultural heritage sites in 2018 (Chart 3). Similarly, 31% of foreign tourists participated in food- and wine-related activities in 2018. Visiting cultural sites was very popular with tourists from far-flung countries, particularly travellers from the Americas (78%) and Asia/Oceania (72%).

One-third of foreign tourists went shopping, which is a primary motivation for tourists visiting France. Tourists from Africa are the group which did the most shopping (63%). Travellers from Asia also enjoyed shopping as a leisure activity in 2018. Particularly noteworthy were Chinese tourists, 58% of whom went shopping during their stay in France in 2018. The International Tourist Zone (ZTI) scheme in France, which extends shop opening hours to suit tourists, has boosted France's appeal among foreign tourists. It is standard practice in major tourist hubs around the world for shops to open on Sunday.

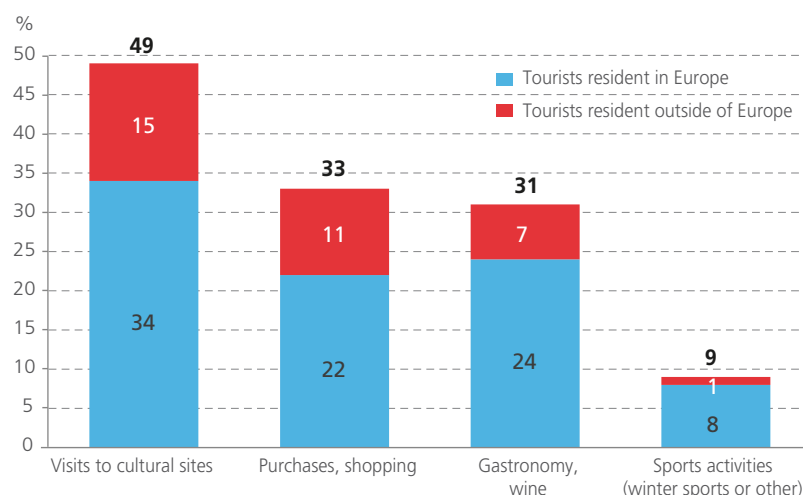
European tourists were slightly under-represented in visits to cultural sites, food-related activities and shopping. This may be due to the fact that their home country is close to France and they can travel to France more frequently. Their country of residence may also offer similar experiences and products. However, European tourists were over-represented in sports activities and accounted for 91% of foreign tourists who participated in sports activities in France in 2018, while they account for 78.3% of foreign tourists.

Short stays for 43% of foreign tourists

The average length of stay of a foreign tourist in France was 6.7 days in 2018, as in 2017 (Table 2). In 2018, 38 million international tourists came to France for short stays of one to three nights, or 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 origin (Chart 4a). For European tourists as a whole, short stays accounted for 44% of all stays. More than half of all tourists from Spain and Switzerland had short stays (Chart 4b).

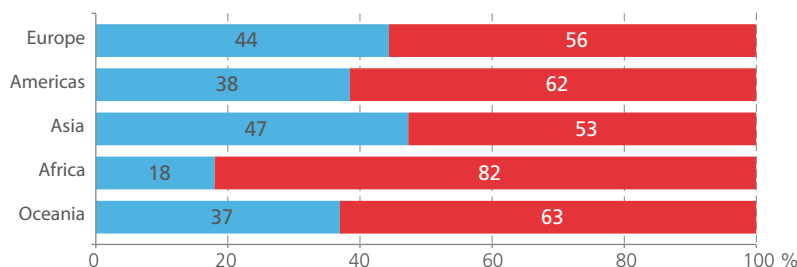
Non-European tourists also travelled to France for short stays. A total of 56% of Chinese tourists came to France for stays of one to three nights, typically as part of a tour of multiple European cities. Tourists from the Americas also had a high

Chart 3: Foreign tourists' leisure activities by origin



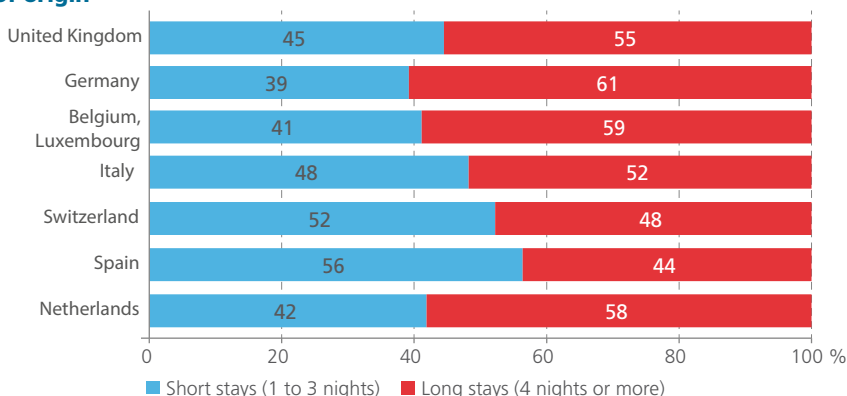
How to read this chart: in 2018, 49% of foreign tourists visited cultural sites. Sources: DGE and Banque de France, EVE survey of visitors from abroad.

Chart 4a: Arrivals of foreign tourists in France by length of stay and continent of origin



How to read this chart: in 2018, 44% of European tourists arriving in France stayed one to three nights and 56% stayed four nights or more.

Chart 4b: Arrivals of foreign tourists in France by length of stay and country of origin



How to read this chart: in 2018, 45% of UK residents arriving in France stayed one to three nights and 55% stayed four nights or more. Sources: 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.

percentage of short stays (38%). The vast majority of visitors from Africa, however, came to France for long stays. The length of stay of international tourists is clearly related to France's location: car travellers to Spain frequently drive through France and France is also an air traffic hub in Europe. However, foreign travellers are sensitive to the quality of tourism products and services and the standards of customer service, which can fall short of expectations. They are also sensitive to price, and, by extension, value for money. This could explain why tourists spend less each day in France than in Spain, for instance. A satisfaction survey conducted by the DGE has found that value for money puts France at a competitive disadvantage compared with its southern neighbours.

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

	Number of nights in 2018 (millions)	Percentage of total in 2018 (%)	Percentage change in number of nights 2018/2017 (%)	Average length of stay in 2018 (nights)	Percentage change in average length of stay 2018/2017 (%)
Europe	439.7	73.7	2.8	6.3	0.4
United Kingdom	84.1	14.1	1.7	6.5	-0.7
Germany	80.9	13.6	-0.1	6.6	-0.2
Belgium, Luxembourg	71.7	12.0	5.0	6.2	2.5
Switzerland	37.5	6.3	1.3	5.5	4.9
Spain	33.7	5.7	-0.4	5.0	-0.2
Italy	41.6	7.0	7.8	6.0	2.2
Netherlands	32.6	5.5	7.5	6.9	-2.1
Russia	7.5	1.3	7.9	8.4	2.7
Americas	69.6	11.7	1.5	7.8	-2.2
United States	34.7	5.8	-1.1	7.7	-3.1
Canada	11.8	2.0	18.2	9.9	0.0
Brazil	8.4	1.4	-10.3	7.7	0.3
Asia	41.3	6.9	1.9	6.5	-5.1
China	11.9	2.0	4.4	5.4	0.5
Middle East	11.3	1.9	-2.5	7.8	-9.1
India	4.0	0.7	11.5	6.6	-4.2
Japan	3.5	0.6	10.1	6.5	-1.2
Africa	37.9	6.4	3.4	13.0	-0.9
North Africa	26.2	4.4	4.6	12.6	-1.1
Oceania	8.2	1.4	-4.2	7.4	-5.6
Total	596.8	100	2.5	6.7	-0.4

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

Laetitia CUIGNET, DGE

Box 2: International tourism continued to grow in 2018

The World Tourism Organization (UNWTO) reports that international tourist arrivals totalled 1.4 billion in 2018, up 5.6% from 2017. This marked the ninth straight year of growth in international tourism. The remarkable growth of international arrivals in recent years has meant that the UNWTO's target of 1.4 billion international tourist arrivals for 2020 has been met two years ahead. All regions saw an increase in the number of international arrivals in 2018, but to varying degrees. Africa recorded the strongest growth in international tourist arrivals in 2018, with the 7% increase fuelled by the tourism drawcard of the Mediterranean coastline. Asia and the Pacific were in second position, with arrivals up 6.5% and the entire region experiencing a rise in international tourist numbers. Europe (up 6.1%), the Middle East (up 3.8%) and the Americas (up 3.1%) all trended upwards. Europe had the highest number of international tourist arrivals, accounting for 51% of the total worldwide. With 89.3 million international tourists, France remained the world's leading tourist destination in 2018 (Table 3).

International tourism receipts amounted to \$1,448 billion in 2018, 4.2% higher than in 2017. Growth in receipts was mirrored by arrivals, with some regions and destinations recording faster-growing receipts than arrivals. Tourism receipts increased sharply in Asia and the Pacific (up 6.7%) as China,

Japan and South Korea were all attractive destinations. Europe attracted the largest share of tourism spending, accounting for 39% of the world total. Tourism expenditure rose by 5.1% in the region. International tourism receipts in the Americas were unchanged (up 0.2%), mainly due to the moderate 1.8% increase in receipts in the United States.

Table 3: Top ten international tourism destinations

Rank	Country	Number of tourists in 2018 (millions)	Percentage change 2018/2017 (%)
1	France	89.3	3.0
2	Spain	82.8	1.1
3	United States*	80.1	4.2
4	China	62.9	3.6
5	Italy	62.1	6.7
6	Turkey	45.8	21.7
7	Mexico	41.4	5.5
8	Germany	38.9	3.8
9	Thailand	38.3	7.9
10	United Kingdom*	36.3	-3.6

Sources: DGE and Banque de France, EVE survey of visitors from abroad; UNWTO, provisional 2018 figures.

* Provisional figures. Calculation based on UNWTO estimates.

Find out more:

"UNWTO World Tourism Barometer" section of the www2.unwto.org website

CUIGNET L., 87 million foreign tourists in France in 2017, Le 4 Pages de la DGE, No. 84, June 2018.

Go to the "Statistics" section of the www.entreprises.gouv.fr website

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