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key figures 2004 edition for tourism

direction du Tourisme



The economic weight of tourism in France in 2003

external trade

spending of foreign tourists and visitors in France

Euro 32.3 billion

spending of french tourists and visitors abroad

Euro 20.7 billion

balance: **Euro 11.6 billion**

source: banque de France

tourist consumption in France

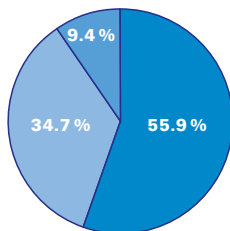
Euro 102.4 billion

French tourists **55.9 %**

foreign tourists **34.7 %**

French consumption in France of French people leaving to travel abroad **9.4 %**

source: Tourism accounts (direction du Tourisme)



weight of tourist consumption as against the GDP

6.6 % in current Euros

source: Tourism accounts (direction du Tourisme), Insee (French national statistics agency)

firms in the tourist sector

	number of firms	turnover in Euro million	added value in Euro million
hotels	28 807	14 651	7 251
other tourist accommodation	10 037	2 997	1 310
restaurants	98 205	24 776	11 457
cafes	52 623	5 734	2 823
travel agencies	3 776	11 334	1 697
total	193 448	59 492	24 538

source: Insee, annual survey of service companies, 2001

employment

As at 31 December 2003, there were **786, 000** employees in hotels, cafes and restaurants and about **150, 000** independent workers.

At the end of 2003, there were **35, 000** more jobs in the sector than at the end of 2001.

source: Insee

Most popular tourist destinations in France in 2003

1.5 billion overnight stays
(French: 65%, foreigners: 35%)

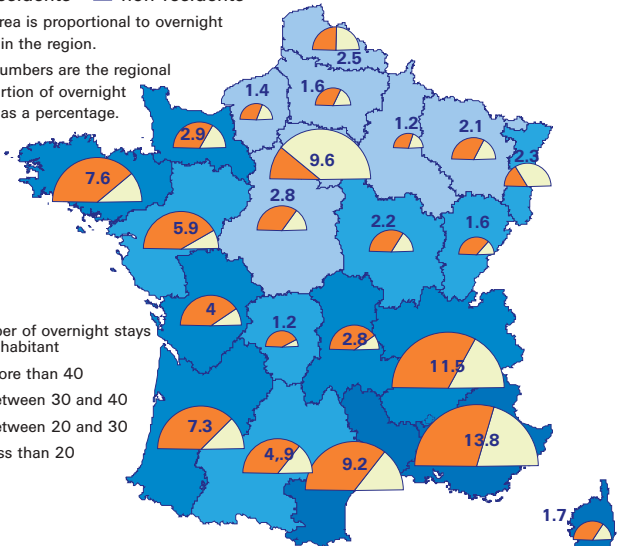
residents non-residents

The area is proportional to overnight stays in the region.

The numbers are the regional proportion of overnight stays as a percentage.

Number of overnight stays per inhabitant

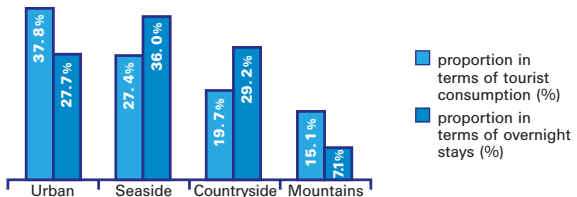
- more than 40
- between 30 and 40
- between 20 and 30
- less than 20



Number of overnight stays by tourists against the population of the region. The minimum is for Nord-Pas-de-Calais and the maximum for Corsica.

source: direction du Tourisme estimate

weight in terms of tourism of places visited



source: Tourism accounts (direction du Tourisme)

Regional tourist consumption in France in 2003

tourist consumption: Euro 102.4 billion including regional part: Euro 88 billion (French: 59%, foreigners: 41%)

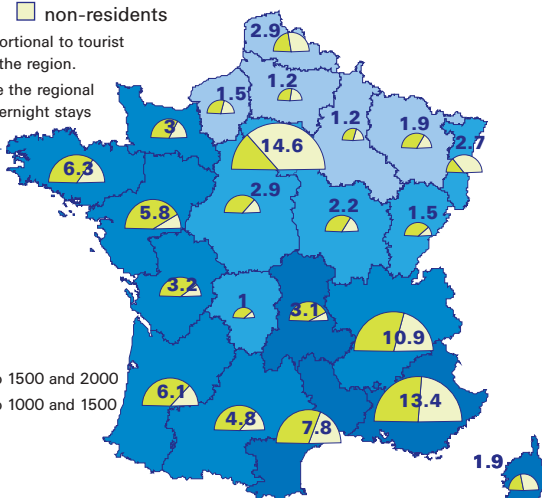
residents non-residents

The area is proportional to tourist consumption in the region.

The numbers are the regional proportion of overnight stays as a percentage.

Tourist revenue per inhabitant

- > Euro 2000
- between Euro 1500 and 2000
- between Euro 1000 and 1500
- < Euro 1000



Ile-de-France: 14.6% of tourist consumption (of which foreigners: 73%)

PACA (Provence-Alpes-Côte d'Azur): 13.4% of tourist consumption (of which foreigners: 47%)

source: direction du Tourisme estimate

overall accommodation capacity as at 1st January 2004

	beds (in thousands)	%
classified tourist hotels	1 206.6	6.9
tourist residences and assimilated	429.5	2.5
camping sites	2 773.1	15.9
holiday camps	276.3	1.6
furnished tourist accommodation	605.6	3.5
guest houses	62	0.4
youth hostels	14.4	0.1
total commercial accommodation	5 367.5	30.9
other second residences	12 022.5	69.1
total	17 390	100

source: Insee, direction du Tourisme, professional federations

French tourism of the 15 years and over

age bracket in 2003

departure rate

- 73.4 %** of French people travelled for personal reasons and spent at least one night away
- 65.6 %** of French people travelled for personal reasons on a journey of 4 days or more
- 21.6 %** of French people made a personal journey of at least one night abroad or in the Overseas Departments and Territories

journeys for personal reasons

	journey	overnight stays	average length of stay (overnight stays)
	168.1 million	935.9 million	5.6
in mainland France	89.7 %	85.4 %	5.3
abroad and in the Overseas Departments and Territories	10.3 %	14.6 %	7.9
short stays (< 4 nights)	52.9 %	17.5 %	1.8
long stays (≥ 4 nights)	47.1 %	82.5 %	9.8

journeys for personal reasons in mainland France

	journey	overnight stays	average length of stay (overnight stays)
	150.8 million	799.3 million	5.3
non-commercial accommodation	66.3 %	62.6 %	4.9
commercial accommodation	33.7 %	37.4 %	5.8
including in a hotel	12.8 %	7.4 %	3.0
including camping	5.9 %	9.1 %	8.1
including rented accommodation	4.8 %	8.9 %	9.6

journeys for personal reasons

	mainland France	Europe	other destinations	all
car	81.0 %	39.1 %	8.7 %	75.5 %
plane	2.0 %	33.5 %	85.1 %	7.1 %
train	13.0 %	10.6 %	1.6 %	12.5 %
coach	1.4 %	12.2 %	2.0 %	2.2 %
other	2.6 %	4.7 %	2.8 %	2.8 %
total	100.0 %	100.0 %	100.0 %	100.0 %

source: monitoring of tourist demand (direction du tourisme/TNS Sofres)

French tourism of the 15 years and over age bracket in 2003

method of reservation for personal journeys

	mainland	abroad and Overseas Departments and Territories	total
service provider	58.5 %	24.9 %	51.1 %
travel agency, tourist operator	6.9 %	57.7 %	18.0 %
association	15.3 %	14.7 %	15.2 %
tourist office, tourist information bureau	4.5 %	1.4 %	3.8 %
others	18.1 %	9.2 %	16.2 %

35.6% of stays by French residents in mainland France and 83.6% of stays by French residents in Overseas Departments and Territories were booked in advance.

journeys for personal reasons abroad and in the Overseas Departments and Territories

	journeys	overnight standing	average length of stay (overnight stays)
	17.2 million	136.5 million	7.9
Europe	68.0 %	58.8 %	6.8
including Spain	16.3 %	16.9 %	8.2
Italy	11.9 %	10.2 %	6.8
Portugal	3.1 %	4.2 %	10.7
Greece	3.0 %	3.6 %	9.5
Great Britain	4.2 %	2.8 %	5.1
Belgium, Luxembourg	6.3 %	2.5 %	3.2
Germany	4.2 %	2.9 %	5.5
America	8.0 %	10.9 %	10.7
including the United States	2.2 %	2.9 %	10.4
Africa	14.2 %	16.8 %	9.3
including Tunisia	3.8 %	4.1 %	8.6
Morocco	3.8 %	4.1 %	8.6
Asia, Oceania	3.2 %	5.0 %	12.2
Overseas Departments and Territories	4.3 %	7.0 %	12.8

source: monitoring of tourist demand (direction du Tourisme/TNS Sofres)

The "monitoring of tourist demand" survey was carried out on a sample of 20,000 people aged 15 years and over, questioned every month, residing exclusively in mainland France.

Foreign tourism in France in 2003

arrivals, overnight stays and revenue

	arrivals	overnight stays	revenue
total	75.0 million	567 million	Euro 32.3 billion
Europe	90.6 %	86.5 %	72.1 %
America	5.3 %	7.4 %	14.7 %
Africa	1.2 %	2.6 %	5.7 %
Asia, Oceania	2.8 %	3.3 %	5.5 %
not specified	0.1 %	0.2 %	2.0 %

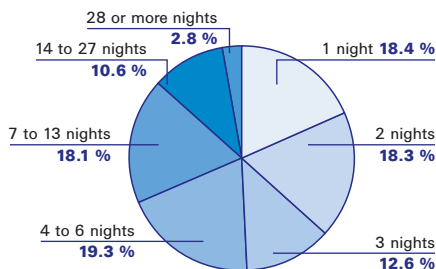
source: direction du Tourisme estimate

main foreign clientele

	proportion of arrivals	proportion of overnight stays	proportion of revenue
United Kingdom, Ireland	19.8 %	19.2 %	15.9 %
Germany	18.7 %	18.7 %	12.0 %
Netherlands	16.6 %	13.9 %	5.9 %
Belgium, Luxembourg	11.5 %	11.3 %	9.8 %
Italy	10.0 %	8.9 %	8.1 %
Switzerland	4.0 %	3.5 %	9.3 %
United States	3.3 %	4.4 %	12.6 %
Spain	3.8 %	3.4 %	4.3 %
Japan	0.8 %	0.7 %	2.3 %

source: direction du Tourisme estimate

distribution of arrivals according to length of stay



Moreover, in 2003, between 90 and 100 million foreign visitors came to France without an overnight stay.

source: direction du Tourisme estimate

Tourism in the world in 2003

definition of the tourist (international standards)

A tourist is any person on a journey outside of his usual surroundings for a period of at least one night and for reasons that are not related to paid activity in the visited location. The arrival of an international tourist in a given country means any visit of a person that is not resident in that country and will make at least one overnight stay. For example, an American tourist visiting Europe will be counted each time he enters one of the States in Europe. A French tourist visiting New York, California and Florida will only be counted once on his entry into the United States.

tourist arrivals

rank in 1990	rank in 2003	country visited	arrivals 2003 (in millions)
1	1	France	75.0
3	2	Spain	52.5
2	3	United States	40.4
4	4	Italy	39.6
12	5	China	33.0
7	6	United Kingdom	24.8
6	7	Austria	19.1
8	8	Mexico	18.7
9	9	Germany	18.4
10	10	Canada	17.5

NB: data is not homogenous for certain countries

tourism revenue

rank in 1990	rank in 2003	country visited	revenue 2003 (\$ US billion)
1	1	United States	65.1
4	2	Spain	41.7
2	3	France	36.6
3	4	Italy	31.3
5	5	Germany	23.0
6	6	United Kingdom	19.4
25	7	China	17.4
7	8	Austria	13.6
21	9	Turkey	13.2
24	10	Greece	10.7

source: World Tourism Organisation

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