

France

Tourism in the economy

Tourism plays a major role in the French economy. Accommodation and food services alone account for 2.5% of total added value in the national accounts. Tourism is also stimulating a wide range of activities and spending, including transport and leisure. The overall impact of tourism (as measured by internal tourism consumption) amounts to over 7% of GDP.

France plays a leading role in international tourism. It is the number one tourism destination in the world in terms of international tourist arrivals, recording 83.8 million arrivals in 2014, up from 83.6 million in 2013. France ranks third in the world for international tourism-related revenues, behind the United States and Spain. Tourism represents one of the highest surpluses in the balance of payments. Travel and tourism delivered a positive balance of EUR 10.6 billion in 2012, EUR 10.2 billion in 2013 and EUR 6.6 billion in 2014.

Investment in tourism sub-sectors – accommodation, food service, second homes, facilities, etc. – came to EUR 13.1 billion in 2014, rising to EUR 22 billion if the sector's share of transport investment is included.

Tourism governance and funding

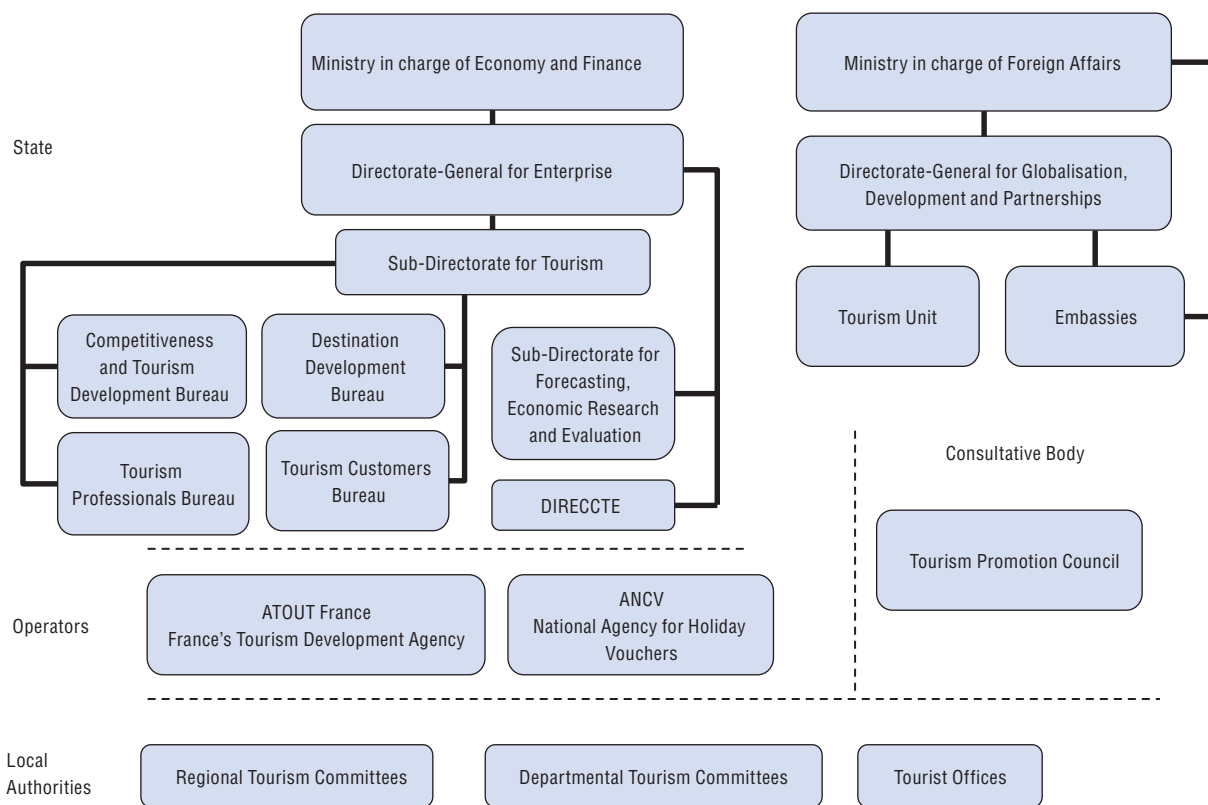
Since 2014, responsibility for the government's tourism strategy has fallen to both the Ministry in charge of the Economy, which monitors tourism professionals, standards and access to holidays, and the Ministry in charge of Foreign Affairs, which promotes France as a tourist destination. Services are managed by the Directorate-General for Enterprise (DGE) and Directorate-General for Globalisation, Development and Partnerships (DGMDP).

Policy implementation also involves agencies under State control: Atout France, an agency charged with growing tourism in France and promoting the destination abroad, and the National Agency for Holiday Vouchers (ANCV), whose mission is to broaden access to holidays.

Several levels of local government are involved in tourism. Regional councils appoint Regional Tourism Committees to promote tourism. The general rules governing the composition of these committees and the scope of their promotional activities are set out in law. Departmental councils may set up Departmental Tourism Committees. The departmental assembly is free to choose the committee's legal status, while its composition and scope of activities are set out in law. Communes (town councils) may set up a tourist office for advising tourists and promoting local sites. The law allows the creation of inter-communal offices by public establishments for inter-communal co-operation.

Responsibility for promoting tourism, which includes opening tourist offices, is planned to be transferred to groupings of municipalities. At the time of writing, Parliament has yet to decide whether this responsibility will be automatically or optionally transferred in the case of other authorities (peri-urban, rural and mountain communities).

France: Organisational chart of the tourism bodies



Source: OECD, adapted from the Directorate-General for Enterprise, 2016.

Atout France, the French National Tourism Organisation, was set up as an Economic Interest Group (EIG) which gives it the flexibility it needs to fulfil its role and to find funding. In 2014 it had a budget of just over EUR 68 million. This includes a general subsidy of around EUR 30 million (since 2015, this subsidy is paid by the Ministry in charge of Foreign Affairs), and additional contributions from local authorities, industry professionals, and members' subscriptions.

A tourism specific budget of around EUR 4 million is managed by the Ministry in charge of the Economy. This money can be spent on improving the quality and diversity of the tourist offering or on widening access to holidays.

Tourism also benefits indirectly from State spending on other policies: culture and national heritage (museums, renovations of monuments, etc.), transport infrastructure and the preservation and promotion of the environment. The total financial resources committed to these policies, either closely or remotely connected to tourism, amounts to around EUR 2 billion (estimated and presented in the Transversal Policy Document for Tourism).

Tourism policies and programmes

France has been losing market share, accounting for 7.5% of world arrivals in 2014 compared with 11% in 2000. This partly reflects the growth of new destinations such as China and the relative loss of market share by Europe as a whole. However, it is also attributable to heavy investment in promotion by some of France's competitors. The need for France to improve its promotion and hospitality is recognised as a key challenge.

Three regions of France (the Paris region, Riviera and ski resorts of Rhone Alps) have high visibility and account for almost half of the overnight stays by foreign tourists. While they should be supported by adequate marketing campaigns to maintain demand from international clientele, it is vital to showcase other destinations with a strong identity, by presenting new tourist products based on specific themes (exploring, industrial tourism, urban tourism, remembrance tourism etc.) and innovative tourist experiences.

Several measures have been taken and are planned to improve promotion and hospitality. Many relate to the four themes identified in the report of the Tourism Promotion Council (which includes tourism professionals and government officials) in June 2015:

- Taking further steps to harness the power of digital technology such as free wifi,
- Improving hospitality by, for example, streamlining visa procedures or encouraging tourism professionals to launch drives to improve quality,
- Ensuring that education and training keep up with new developments in the sector,
- Maintaining investment in tourist activities, with the creation of a special tourist fund managed by national long-term investment agency, Caisse des Dépôts, and/or the public investment bank, Banque publique d'investissement (BPI) (Box 1.21).

An example of a major thematic promotional initiative is the event “Goût de France” launched in March 2015.

To develop and promote alternative destinations in France, the government has been developing destination contracts to rally public and private partners in support of a destination brand with international appeal (Box 1.3).

A further important initiative to improve the competitiveness of tourism in France is work to reduce the burden of regulations and to streamline procedures, resulting in benefit to both businesses and visitors.

Simplifying laws and regulation in France

An ambitious consultation exercise held between November 2013 and June 2014, the national Tourism Conference, the “Assises du Tourisme”, produced a number of proposals that the Government has pledged to implement rapidly through new laws and regulations. Actions adopted, in the pipeline or being considered include simplification of requirements and procedure in the following areas:

- Simplifying the procedure for classifying tourist offices, particularly in the case of grouping of municipalities,
- Relaxing regulatory burdens on the standards of tourist accommodation,
- Expanding the use of holiday vouchers, especially to people working for private individuals. Facilitating the missions of the National Agency for Holiday Vouchers,
- Easier classification of a site as a tourist resort,
- Recruitment of tourist office directors,
- Registration procedures for travel agents and other holiday retailers,
- Transmission to the police of guest registration forms,
- Theatre management licenses,
- Methods of displaying mandatory information, including prices, in accommodation,
- Introduction of a single set of health regulations for the tourism sector.

Statistical profile

Table 1. France: Domestic, inbound and outbound tourism

	2010	2011	2012	2013	2014
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	268 040	276 752	269 784	266 647	265 712
Overnight visitors (tourists)	194 125	198 784	199 577	198 707	198 085
Same-day visitors (excursionists)	73 915	77 968	70 207	67 940	67 627
Nights in all types of accommodation	1 001 768	1 032 061	1 015 958	1 018 495	1 012 268
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	189 826	196 595	197 522	204 410	205 837
Overnight visitors (tourists)	76 647	80 499	81 980	83 634	83 767
Same-day visitors (excursionists)	113 179	116 096	115 543	120 776	122 070
Top markets					
Germany	11 720	11 953	12 572	13 393	12 684
United Kingdom	12 175	12 332	12 143	12 549	11 808
Belgium	9 935	10 086	10 365	9 320	9 297
Italy	6 583	7 408	7 394	7 171	7 504
Netherlands	6 944	6 447	6 301	6 496	5 548
Nights in all types of accommodation	510 934	551 935	560 817	586 682	599 027
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	29 973	31 153	29 775	30 638	32 203
Overnight visitors (tourists)	25 041	26 155	25 450	26 243	28 180
Same-day visitors (excursionists)	4 932	4 998	4 325	4 395	4 023
Top destinations¹					
Spain	3 729	3 729	3 729	3 729	4 099
Italy	2 714	2 714	2 714	2 714	2 981
Belgium	1 258	1 428	1 419	1 598	1 843
United Kingdom	1 761	1 959	1 580	1 511	1 785
Germany	1 120	1 170	1 257	1 285	1 444
TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	43 332	47 634	50 446	..	..
International travel receipts	35 464	39 333	41 751	42 596	43 233
International passenger transport receipts	7 868	8 301	8 695	..	..
Outbound tourism					
Total international expenditure	35 412	39 145	37 918	..	..
International travel expenditure	29 243	32 260	31 118	32 361	36 658
International passenger transport expenditure	6 169	6 885	6 800

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1. Belgium, including Luxembourg. United Kingdom, including Ireland.

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933319922>

Table 2. France: Enterprises and employment in tourism

	Number of establishments ¹	Number of persons employed ²				
	2013	2010	2011	2012	2013	2014
Total	..	..	..	..	..	..
Tourism industries	294 802	1 238 906	1 251 988	1 261 481	1 256 782	1 265 338
Accommodation services for visitors	44 966	220 205	221 716	220 115	216 276	216 853
Hotels and similar establishments	18 281	178 888	180 630	178 444	174 887	175 983
Food and beverage serving industry	205 242	576 678	594 940	603 566	603 724	612 443
Passenger transport	5 435	284 134	278 390	279 342	277 500	276 672
Air passenger transport	568	70 570	69 124	68 302	65 672	64 140
Railways passenger transport	18	173 184	167 640	167 740	166 643	165 636
Road passenger transport	3 951	30 099	31 700	33 019	34 703	36 196
Water passenger transport	898	10 281	9 926	10 281	10 482	10 700
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	3 177	12 837	13 417	13 267	12 984	13 075
Travel agencies and other reservation services industry	8 400	49 010	48 989	47 844	47 275	46 405
Cultural industry	855	22 465	22 595	23 219	24 931	24 677
Sports and recreation industry	26 728	73 577	71 941	74 128	74 092	75 213
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries
Other industries

.. Not available

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1. Data refer to number of enterprises.

2. Data refer to number of employees.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933319936>

Table 3. France: Internal tourism consumption


Million EUR

	2013		
	Domestic tourism consumption	Inbound tourism consumption	Internal tourism consumption
Total	105 852 p	51 052 p	156 904 p
Consumption products	100 556 p	49 837 p	150 393 p
Tourism characteristic products	74 330 p	34 403 p	108 733 p
Accommodation services for visitors	30 841 p	10 117 p	40 958 p
Food and beverage serving services	12 645 p	7 585 p	20 230 p
Passenger transport services	17 131 p	11 057 p	28 188 p
Air passenger transport services	9 502 p	7 603 p	17 105 p
Railways passenger transport services	5 984 p	1 896 p	7 880 p
Road passenger transport services	1 165 p	1 236 p	2 401 p
Water passenger transport services	480 p	322 p	802 p
Passenger transport supporting services	..	..	..
Transport equipment rental services	1 378 p	788 p	2 166 p
Travel agencies and other reservation services industry	6 483 p	948 p	7 431 p
Cultural services	1 082 p	1 114 p	2 196 p
Sports and recreation services	4 770 p	2 794 p	7 564 p
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	26 226 p	15 434 p	41 660 p
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	5 296 p	1 215 p	6 511 p

.. Not available; p Provisional data

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933319949>



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