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France

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France

Tourism in the economy

Tourism plays a major role in the national economy. In 2011, the accommodation and catering sector produced an output of EUR 88.5 billion (2.4% of total output) and an added value of EUR 44.1 billion (2.5% of GDP). Internal tourism consumption accounts for more than 7% of GDP (Tourism Satellite Account). Tourism accounts for one of the biggest balance of payments surpluses. The surplus for 2012 was EUR 11.3 billion.

The number of inbound foreign tourists rose by 1.8% between 2011 and 2012 and reached 83 million in 2012, with an average stay of seven nights. Europe represents more than 83% of total inbound arrivals. In 2012, the number of overnights increased by 2.4%, reaching 577.7 million, and Europe's share was 77.4%.

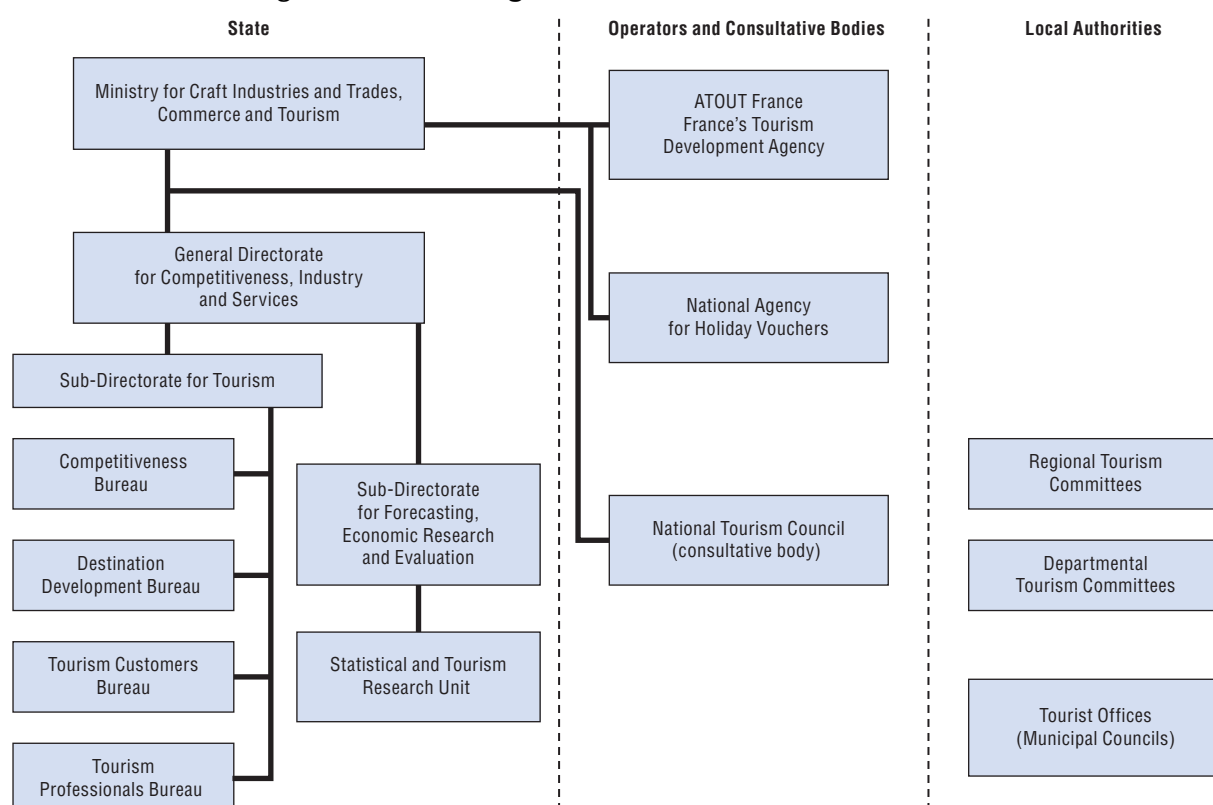
Tourism organisation and governance

The Directorate General for Competitiveness, Industry and Services (DGCIS) was established in 2009 (Figure 1). Tourism now comes under the ministries responsible for economic and financial matters, a sign that it is now recognised as being a major economic sector. In 2009, the law on the development and modernisation of tourism services established *Atout France* as the National Tourism Organisation responsible for development of tourism in France. The agency helps to implement public policies relating to tourism and promotes tourism in France.

Several public bodies share the responsibility for developing tourism. The state defines national tourism policy and establishes the legislative and regulatory framework. It sets international co-operation policy guidelines and implements them within the relevant international organisations. Finally, it promotes the co-ordination of public and private initiatives in the field of tourism and provides assistance for tourism development measures by local and regional authorities.

The *Région* (Regional Council) draws up medium-term objectives for regional tourism development as part of a “regional tourism and recreational development scheme”, and each region sets up a Regional Tourism Committee (RTC) responsible for promoting tourism. The general rules on the composition of the RTCs and their main duties regarding promotion are laid down by law. Law No. 2002-276 of 27 February 2002 on local democracy states that the Regional Council is responsible for collecting, processing and disseminating data on tourism in the region and for co-ordinating, within the region, public and private initiatives in the field of tourism development, promotion and information.

The *Département* (General Council) may set up a Departmental Tourism Committee (DTC). The departmental assembly freely chooses the legal system applicable to the committee. The rules on its composition and duties are determined by law so that it can

Figure 1. **France: Organisational chart of tourism bodies**

Source: OECD, adapted from the Ministry for Craft Industries and Trades, Commerce and Tourism, 2014.

act in harmony with the regional authorities and other bodies involved in tourism development in the *département*. Finally, the General Council can draw up a development plan that takes into account the guidelines set by the regional plan.

The *Commune* (Municipal Council) may set up a tourist office responsible for welcoming tourists, providing information and promoting local tourism. In line with these objectives, the *Commune* freely chooses the tourist office's legal system. Finally, the law allows for the creation of inter-communal tourist offices by public inter-communal co-operation institutions. A new law, currently at the drafting stage, may alter the legal framework for promotional activities by municipal councils. At their request, communes may be classified as a "tourist community" (*commune touristique*) or "certified resort" (*station classée*) following a decision by the state.

In France, tourism operators are structured by industry branch, but there is no confederation regulating the structure of the whole tourism industry. The public authorities strive to promote dialogue either in the context of informal discussions or talks (*Rencontres Nationales du Tourisme*, or national tourism meetings) or within official consultation bodies (such as the Higher Council on Ground Facilities and Air Navigation, CSINA, or the National Tourism Council, CNT).

Tourism budget

The state budget specifically devoted to tourism was for many years housed under a specific programme. The planned expenditure for 2013 is EUR 42.4 million in commitment authorisations and EUR 36.9 in payment appropriations. That budget includes the grant paid to *Atout France* in respect of its promotional activities and classification of the tourism offer (EUR 30.4 million), and the contribution of the state to tourism development activities (“Val de Loire”, “France by bike”), to the Tourism Quality Plan and various measures to make holidays more accessible to all.

The budget of *Atout France* includes not only the general grant from the state but also the subscriptions of members and the funding which derives from partnerships entered into with the whole range of industry stakeholders. At the end of 2012, the approved budget was EUR 73.9 million. The economic model adopted by *Atout France*, which brings together public and private financing, is a novel one. In order to have the necessary flexibility for its activities, *Atout France* has Economic Interest Grouping (EIG) status. It is a successful example of a public-private partnership (PPP).

Tourism also benefits indirectly from state spending on other policies such as the culture and heritage policy (museums, renovation of historic monuments, etc.), the infrastructure and transport policy and the policy to conserve and enhance the environment. This overall budget input is estimated in an overview document, *Cross-cutting policy document (DPT) on tourism*. The total appropriations committed under these policies which are closely or loosely connected with tourism are estimated to be around EUR 1.9 billion.

It is also necessary to take account of expenditure incurred by local and regional authorities. The combined budget of the 22 RTCs would be between EUR 120 and 140 million, depending on the year. That of the departmental tourism committees would amount around EUR 190 million. The tourist offices may have a budget of about EUR 520 million of which EUR 290 million would come from public financing.

Tourism-related policies and programmes

In her communication to the Council of Ministers of 11 July 2012, the Minister for Tourism presented the main guidelines of tourism policy, including the creation of a genuine tourism industry sector, capable of bringing all operators together in partnership and improving the quality of the tourism offer and moving it upmarket, whether in terms of accommodation or training. Recently, policy has focused principally on the following themes.

Strengthening the promotion of France abroad

The promotion abroad of France as a destination is one of the tasks assigned to *Atout France*. Promotion aimed at customers in emerging countries has been stepped up. One indication of that effort is that 9% of the promotional expenditure of French tourist offices abroad is aimed at customers from BRIC countries, and the latter account for around 5% of all foreign tourist arrivals. Furthermore, promotional activities have been diversified. Measures aimed at the general public have been stepped up, notably through online and social network initiatives, by targeting as a priority families, young people and seniors on established European and longer-haul markets and the emerging middle classes in BRIC markets. *Atout France* has harmonised its publications aimed at the general public, bringing them together under the umbrella title of *Rendez-vous en France*.

Modernisation and adaptation of supply

The 2009 law on the development and modernisation of tourism services updated the classification of tourist accommodation, which was then entrusted entirely to *Atout France*. The purpose of that reform was to encourage an upgrading of all types of tourism offer. An initial review of that reform indicates that it is playing a vital role in consolidating the quality of that offer (Box 1). Other measures are being implemented, including measures to enhance the image of the tourism industries and to address the problem of low year-round occupancy in leisure accommodation in certain ski and seaside resorts.

Box 1. Review of the reform of classification of accommodation in France

An initial review indicates that classification is being adopted by an increasing number of tourism professionals. By the end of 2012, 68% of hotels and 77% of total bed capacity were classified. In terms of camping sites, the shares were 65% of establishments and 77% of bed capacity, respectively. Accommodation establishments which opted to go for quality and to adjust to the new classification standards are experiencing higher occupancy rates than others. Between 2011 and 2012, hotel occupancy in terms of overnight stays increased by 1.1% in cases where the new classification had been adopted and fell by 2.9% where it had not. For camping sites, 2012 was characterised by a rather gloomy summer, but the drop in the occupancy rate was only -0.6% compared to 2011 in the case of establishments which had adopted the classification and -2.8% where they had not. In terms of both growth and its effects on quality, the reform of the classification of accommodation can be hailed as a success.

Diversification of the French tourism offer includes supporting the emergence of new types of tourism – e.g. memorial tourism, industrial tourism (Box 2), cycling tourism – with high added value or the structuring of new tourist destinations under “destination contracts”, by establishing synergies between public and private operators in the tourism field. These destination contracts look set to become the preferred means of co-ordinating operators and resources in the field of tourism. In 2013, three destination contracts were signed.

The Tourism Quality Plan is another tool for improving the quality of the tourism offer in France. It involves recognition of the “quality initiatives” implemented by professionals in the various tourism sectors and is associated with the award of a national Tourism Quality mark. The Quality Plan also helps to structure the territorial tourism offer by bringing together the various local tourism operators and focusing on the emergence and implementation of quality sectoral initiatives.

Holiday entitlement

In addition to action by the National Holiday Voucher Agency (ANCV), the “access-to-holidays” policy encourages – in accordance with the law of 11 February 2005 on equal opportunity and the participation and citizenship of disabled persons – the creation of special amenities within tourism structures. The state helps to fund the action programmes of tourism institutions working in the field of social tourism. Entering into local contracts, particularly in connection with 2007-13 projects under the “Tourism and Handicap” label, also helps to improve the accessibility of tourist facilities as a driver for integrating handicapped persons into the world of tourism, leisure and culture. Regarding

Box 2. Development of niche tourism offers in France

Company visits – industrial tourism

Industrial tourism has become a genuine tourism sector, both in terms of leisure tourism (flagship sites, sometimes in areas far from the traditional tourism destinations, are now open to the public in the energy, foodstuffs, cosmetics and craft sectors), and business tourism. Around 5 000 establishments are open to the public and receive around 10 million visitors. In order to structure the offer and make it more accessible to visitors, the Association for Company Visits has opened a website www.entrepriseetdecouverte.fr as part of a public-private partnership project, which lists, for the first time, all companies in France which are open to the public.

Memorial tourism

With over 6 million visitors in 2010, sites which levy a charge generated a total direct turnover in France of EUR 40 million and 1 050 full-time equivalent jobs, not including the indirect expenditure generated by customers with high spending power, with nearly half of all visitors coming from abroad (United Kingdom, Germany, Belgium, the Netherlands and the United States). In 2012, the 16 most-visited memorial sites in France received 4.25 million visitors, in other words 750 000 more than in 2010. From 2014, France will be the focus of numerous major international commemorative occasions associated with the centenary of the First World War and with the 70th anniversary of the landings, the Resistance and the liberation of France during the Second World War. In order to increase the attractiveness of memorial sites and, as part of a partnership effort, to improve the accessibility of sites and the quality of welcome, the State is undertaking various initiatives, among which the tourism quality initiative specific to memorial sites and the "Great War", and initiative jointly with the regions and other interested stakeholders.

the effectiveness of the right to holidays for all, the mission announced by the Minister for Tourism on 11 July 2012 in her communication on tourism to the Council of Ministers, and launched officially in November 2012, aims to identify sectors of the public that have difficulty in taking a holiday (particularly young people aged 18-25 and single-parent families) and to draw up a list of aid schemes for people and schemes to support recreational facilities in order to bring together more effectively the beneficiaries of this aid, operators in the sector and managers of tourist amenities.

Statistical profile

Table 1. **France: Domestic tourism**

| | Unit | 2008 | 2009 | 2010 | 2011 | 2012 |
|---------------------------------------|----------|-----------|-----------|-----------|-----------|-----------|
| Total domestic trips | Thousand | 278 950 | 278 274 | 268 040 | 276 752 | 269 784 |
| Overnight visitors (tourists) | Thousand | 200 675 | 202 063 | 194 125 | 198 784 | 199 577 |
| Same-day visitors (excursionists) | Thousand | 78 275 | 76 211 | 73 915 | 77 968 | 70 207 |
| <i>Trips by main purpose of visit</i> | | | | | | |
| Business and professional | Thousand | 181 351 | 181 002 | 175 929 | 180 481 | 180 772 |
| Holiday, leisure and recreation | Thousand | 19 324 | 21 061 | 18 196 | 18 303 | 18 805 |
| Nights in all means of accommodation | Thousand | 1 056 877 | 1 034 334 | 1 001 768 | 1 032 061 | 1 015 958 |
| Hotels and similar establishments | | .. | .. | .. | .. | .. |
| Other collective establishments | | .. | .. | .. | .. | .. |
| Domestic travel receipts | | .. | .. | .. | .. | .. |

Note: Covers metropolitan France. Visitors aged 15 years and over.

Source: General Directorate for Competitiveness, Industry and Services (DGCIS), Survey SDT.


StatLink  <http://dx.doi.org/10.1787/888932986853>

Table 2. **France: Inbound tourism**

| | Unit | 2008 | 2009 | 2010 | 2011 | 2012 |
|--|-------------|---------|---------|---------|---------|-----------|
| Total international arrivals | Thousand | 193 571 | 192 369 | 190 491 | 197 301 | 198 370 p |
| Overnight visitors (tourists) | Thousand | 79 218 | 76 764 | 77 648 | 81 550 | 83 013 p |
| Same-day visitors (excursionists) | Thousand | 114 353 | 115 605 | 112 843 | 115 751 | 115 357 p |
| <i>Top markets</i> | | | | | | |
| Germany | Thousand | 11 645 | 10 692 | 11 410 | 11 622 | 12 226 p |
| United Kingdom | Thousand | 13 560 | 12 195 | 12 246 | 12 388 | 12 205 p |
| Belgium | Thousand | 8 636 | 10 165 | 10 013 | 10 150 | 10 436 p |
| Italy | Thousand | 8 233 | 7 248 | 7 178 | 8 068 | 8 025 p |
| Netherlands | Thousand | 6 244 | 7 224 | 7 002 | 6 493 | 6 355 p |
| Nights in all means of accommodation | | .. | .. | .. | .. | .. |
| Hotels and similar establishments | | .. | .. | .. | .. | .. |
| Other collective establishments | | .. | .. | .. | .. | .. |
| Total international receipts | Million EUR | 45 640 | 42 163 | 42 834 | 47 098 | 49 714 p |
| International travel receipts | Million EUR | 38 465 | 35 505 | 35 464 | 39 333 | 41 680 p |
| International passenger transport receipts | Million EUR | 7 175 | 6 658 | 7 370 | 7 765 | 8 034 p |

Source: General Directorate for Competitiveness, Industry and Services (DGCIS), Central Bank, Survey EVE.


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Table 3. **France: Outbound tourism**

| | Unit | 2008 | 2009 | 2010 | 2011 | 2012 |
|--|-------------|--------|--------|--------|--------|----------|
| Total international departures ¹ | Thousand | 30 960 | 30 646 | 29 973 | 31 153 | 29 775 p |
| Overnight visitors (tourists) ¹ | Thousand | 25 506 | 25 140 | 25 041 | 26 155 | 25 450 p |
| Same-day visitors (excursionists) ¹ | Thousand | 5 454 | 5 506 | 4 932 | 4 998 | 4 325 |
| Total international expenditure | Million EUR | 33 872 | 32 813 | 34 928 | 38 664 | 36 716 p |
| International travel expenditure | Million EUR | 27 926 | 27 509 | 29 251 | 32 259 | 30 405 p |
| International passenger transport expenditure | Million EUR | 5 946 | 5 304 | 5 677 | 6 405 | 6 311 p |

1. Residents aged 15 years and over.

Source: General Directorate for Competitiveness, Industry and Services (DGCIS), Central Bank, Survey SDT.

StatLink  <http://dx.doi.org/10.1787/888932986891>

Table 4. France: Enterprises in tourism
Number of enterprises

| | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---------|---------|---------|-----------|------|
| Total tourism enterprises | .. | .. | .. | .. | .. |
| Tourism industries ¹ | .. | 242 830 | 265 441 | 273 494 p | .. |
| Accommodation services for visitors ² | 35 414 | 32 415 | 36 293 | 41 295 | .. |
| Hotels and similar establishments | 20 535 | 17 765 | 18 867 | 18 060 | .. |
| Food and beverage serving industry ³ | 187 303 | 182 466 | 193 123 | 195 016 | .. |
| Passenger transport | .. | 3 308 | 3 710 | 3 578 | .. |
| Air passenger transport | 410 | 395 | 362 | 471 | .. |
| Railways passenger transport | 8 | 8 | 8 | 15 | .. |
| Road passenger transport ⁴ | .. | 2 372 | 2 563 | 2 300 | .. |
| Water passenger transport ⁵ | 616 | 533 | 777 | 792 | .. |
| Passenger transport supporting services | .. | .. | .. | .. | .. |
| Transport equipment rental | .. | 1 882 | 1 959 | 3 152 | .. |
| Travel agencies and other reservation services industry | 5 324 | 4 886 | 5 967 | 6 396 | .. |
| Cultural industry ⁶ | .. | 699 | 556 | 558 | .. |
| Sports and recreation industry ⁷ | .. | 17 174 | 23 773 | 22 410 | .. |
| Retail trade of country-specific tourism characteristic goods | .. | .. | .. | .. | .. |
| Other country-specific tourism industries | .. | .. | .. | .. | .. |
| Other industries | .. | .. | .. | .. | .. |

Note: Covers metropolitan and overseas France.

1. Tourism characteristic industries. Includes confidential data on cafeterias, other self-service restaurants and museums in 2010 and 2011.
2. Includes hotels and similar accommodation, touristic and other short-term accommodation, campsites and recreational vehicle parks and caravan parks.
3. Includes traditional restaurants, cafeterias and other self-service and fast food restaurants.
4. Coaches.
5. Includes coastal and river transport.
6. Includes museums, historical monuments, botanical and zoological gardens.
7. Includes amusement and thematic parks and other recreative activities, aerial tramways and lifts, rental sport and leisure goods, gambling.

Source: National Institute for Statistics and Economic Studies (INSEE), ESANE.


StatLink  <http://dx.doi.org/10.1787/888932986910>

Table 5. France: Employment in tourism
Number of employees

| | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|-----------|-----------|-----------|-----------|-----------|
| Total tourism employment (direct) | .. | .. | .. | .. | .. |
| Tourism industries ¹ | 1 209 014 | 1 215 894 | 1 244 192 | 1 257 987 | 1 266 250 |
| Accommodation services for visitors ² | 222 440 | 218 212 | 222 050 | 223 810 | 221 976 |
| Hotels and similar establishments | 180 570 | 176 929 | 181 021 | 183 022 | 180 691 |
| Food and beverage serving industry ³ | 544 151 | 557 354 | 579 700 | 599 057 | 606 922 |
| Passenger transport | 284 382 | 285 983 | 285 665 | 279 918 | 281 007 |
| Air passenger transport | 73 349 | 71 836 | 70 565 | 69 115 | 68 291 |
| Railways passenger transport | 174 961 | 176 018 | 174 546 | 168 943 | 168 773 |
| Road passenger transport ⁴ | 25 964 | 27 954 | 30 640 | 32 328 | 34 070 |
| Water passenger transport ⁵ | 10 108 | 10 175 | 9 914 | 9 532 | 9 873 |
| Passenger transport supporting services | .. | .. | .. | .. | .. |
| Transport equipment rental | 14 226 | 13 302 | 13 002 | 13 670 | 13 470 |
| Travel agencies and other reservation services industry | 51 270 | 49 365 | 48 934 | 48 933 | 47 729 |
| Cultural industry ⁶ | 21 449 | 21 707 | 22 081 | 22 224 | 22 863 |
| Sports and recreation industry ⁷ | 71 096 | 69 971 | 72 760 | 70 375 | 72 283 |
| Retail trade of country-specific tourism characteristic goods | .. | .. | .. | .. | .. |
| Other country-specific tourism industries | .. | .. | .. | .. | .. |
| Other industries | .. | .. | .. | .. | .. |
| <i>Gender breakdown</i> | | | | | |
| Male (% of total tourism employment) | .. | .. | .. | .. | .. |
| Female (% of total tourism employment) | .. | .. | .. | .. | .. |

Note: Number of employees as of 31 December. Excludes self-employed. Covers metropolitan and overseas France.

1. Tourism characteristic industries.
2. Includes hotels and similar accommodation, touristic and other short-term accommodation, campsites and recreational vehicle parks and caravan parks.
3. Includes traditional restaurants, cafeterias and other self-service and fast food restaurants.
4. Coaches.
5. Includes coastal and river transport.
6. Includes museums, historical monuments, botanical and zoological gardens.
7. Includes amusement and thematic parks and other recreative activities, aerial tramways and lifts, rental sport and leisure goods, gambling.

Source: Central Agency of Social Security Bodies (ACOSS).

StatLink  <http://dx.doi.org/10.1787/888932986929>

Table 6. France: Internal tourism consumption
Million EUR, 2012

| | Domestic tourism consumption | Inbound tourism consumption | Internal tourism consumption |
|--|------------------------------|-----------------------------|------------------------------|
| Total | 98 766 p | 50 280 p | 149 046 p |
| Consumption products | 94 435 p | 49 135 p | 143 570 p |
| Tourism characteristic products | 70 283 p | 34 446 p | 104 730 p |
| Accommodation services for visitors ¹ | 28 991 p | 10 212 p | 39 203 p |
| Food and beverage serving services ² | 11 691 p | 6 261 p | 17 952 p |
| Passenger transport services ³ | 15 810 p | 11 569 p | 27 379 p |
| Air passenger transport services | 8 127 p | 8 705 p | 16 832 p |
| Railways passenger transport services | 6 008 p | 1 277 p | 7 285 p |
| Road passenger transport services | 1 217 p | 1 265 p | 2 482 p |
| Water passenger transport services | 458 p | 322 p | 780 p |
| Passenger transport supporting services | .. | .. | .. |
| Transport equipment rental services | 1 404 p | 738 p | 2 142 p |
| Travel agencies and other reservation services | 6 259 p | 1 630 p | 7 889 p |
| Cultural services | 1 136 p | 1 191 p | 2 327 p |
| Sports and recreation services ⁴ | 4 992 p | 2 846 p | 7 838 p |
| Country-specific tourism characteristic goods | .. | .. | .. |
| Country-specific tourism characteristic services | .. | .. | .. |
| Other consumption products ⁵ | 24 151 p | 14 689 p | 38 840 p |
| Tourism connected products | .. | .. | .. |
| Non-tourism related consumption products | .. | .. | .. |
| Non-consumption products ⁶ | 4 331 p | 1 145 p | 5 476 p |

Note: Visitor consumption of individual consumer goods and services purchased from national suppliers.

1. Includes non-commercial accommodation.
2. Meals in restaurants and cafés exclusively. Purchased food products and beverages are counted separately.
3. Excludes taxi services and urban collective transports (bus, underground, RER, etc.).
4. Includes amusement and thematic parks and other recreative activities, aerial tramways and lifts, rental sport and leisure goods, gambling.
5. Includes toll motorways, taxi services and urban collective transport (bus, underground, RER, etc.), vehicle fuel and food products and beverages bought outside restaurants.
6. Includes motor caravans, pleasure boats, luggage.

Source: General Directorate for Competitiveness, Industry and Services (DGCIS), Tourism Satellite Account.



StatLink  <http://dx.doi.org/10.1787/888932986948>

Table 7. France: Key economic indicators
Percentage

| | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|------|------|------|------|------|
| Tourism GDP (direct) as % of total GDP | .. | .. | .. | .. | .. |
| Total tourism employment (direct) as % of total employment ¹ | 6.7 | 6.9 | 7.0 | 7.1 | 7.1 |

1. Tourism characteristic industries.

Source: General Directorate for Competitiveness, Industry and Services (DGCIS), Tourism Satellite Account, National Institute for Statistics and Economic Studies (INSEE), Central Agency of Social Security Bodies (ACOSS).

StatLink  <http://dx.doi.org/10.1787/888932986967>

For more information

Ministry of Craft Industries and Trades, Commerce
and Tourism

Tourism knowledge portal

Direction générale de la compétitivité, de l'industrie et des services

Atout France, tourism development agency

Rendez-vous en France, official portal for tourism in France

National Institute for Statistics and Economic Studies

www.artisanat-commerce-tourisme.gouv.fr

www.veilleinfotourisme.fr

www.dgcis.gouv.fr

www.atout-france.fr

www.rendezvousfrance.com

www.insee.fr