

Travel in France

September 2024

Table of Contents

Travel in France

EXECUTIVE SUMMARY

Travel in 2024 Airlines: Key trends Hotels: Key trends Booking: Key trends What next for travel?

MARKET DATA

Table 1 - Surface Travel Modes Sales: Value 2019-2024Table 2 - Surface Travel Modes Online Sales: Value 2019-2024Table 3 - Forecast Surface Travel Modes Sales: Value 2024-2029Table 4 - Forecast Surface Travel Modes Online Sales: Value 2024-2029Table 5 - In-Destination Spending: Value 2019-2024Table 6 - Forecast In-Destination Spending: Value 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Tourism Flows in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Paris Olympics creates challenges and opportunities for tourism flows Domestic travel remains buoyant with locals heading south in search of warmer weather

PROSPECTS AND OPPORTUNITIES

With Olympic Games over uncertainties remain about the possible trickledown effect A bright outlook for business travel and MICE tourism

CATEGORY DATA

- Table 7 Inbound Arrivals: Number of Trips 2019-2024
- Table 8 Inbound Arrivals by Country: Number of Trips 2019-2024
- Table 9 Inbound City Arrivals 2019-2024
- Table 10 Inbound Tourism Spending: Value 2019-2024
- Table 11 Forecast Inbound Arrivals: Number of Trips 2024-2029
- Table 12 Forecast Inbound Arrivals by Country: Number of Trips 2024-2029
- Table 13 Forecast Inbound Tourism Spending: Value 2024-2029
- Table 14 Domestic Tourism by Destination: Number of Trips 2019-2024
- Table 15 Domestic Spending: Value 2019-2024
- Table 16 Forecast Domestic Tourism by Destination: Number of Trips 2024-2029
- Table 17 Forecast Domestic Spending: Value 2024-2029
- Table 18 Outbound Departures: Number of Trips 2019-2024
- Table 19 Outbound Departures by Destination: Number of Trips 2019-2024
- Table 20 Outbound Tourism Spending: Value 2019-2024
- Table 21 Forecast Outbound Departures: Number of Trips 2024-2029
- Table 22 Forecast Outbound Departures by Destination: Number of Trips 2024-2029
- Table 23 Forecast Outbound Spending: Value 2024-2029

Airlines in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Airlines on course to see a full recovery in terms of passenger numbers in 2024 Air France retains the lead but low cost carriers seeing a strong rebound thanks to new routes and increased ancillary revenue streams

PROSPECTS AND OPPORTUNITIES

Paris Olympics could leave lasting impression on travel in France Players will concentrate on consolidation, optimisation and new eco-technologies to keep prices stable and address sustainability concerns

CATEGORY DATA

Table 24 - Airlines Sales: Value 2019-2024

- Table 25 Airlines Online Sales: Value 2019-2024
- Table 26 Airlines: Passengers Carried 2019-2024
- Table 27 Airlines NBO Company Shares: % Value 2019-2023
- Table 28 Non-Scheduled Carriers Brands by Key Performance Indicators 2024

Table 29 - Low Cost Carriers Brands by Key Performance Indicators 2024

- Table 30 Full Service Carriers Brands by Key Performance Indicators 2024
- Table 31 Forecast Airlines Sales: Value 2024-2029
- Table 32 Forecast Airlines Online Sales: Value 2024-2029

Lodging (Destination) in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

2024 proving to be an outstanding year for most lodging options in France AccorHotels and Airbnb the standout players in an otherwise fragmented market

PROSPECTS AND OPPORTUNITIES

Return to normalisation in lodging could impact the growth momentum of upscale and luxury hotels The Airbnb model is growingly jeopardised ... even if it has been saying it for years

CATEGORY DATA

- Table 33 Lodging (Destination) Sales: Value 2019-2024
- Table 34 Lodging (Destination) Online Sales: Value 2019-2024
- Table 35 Hotels Sales: Value 2019-2024
- Table 36 Hotels Online Sales: Value 2019-2024
- Table 37 Other Lodging Sales: Value 2019-2024
- Table 38 Other Lodging Online Sales: Value 2019-2024
- Table 39 Lodging (Destination) Outlets: Units 2019-2024
- Table 40 Lodging (Destination) Rooms: Number of Rooms 2019-2024
- Table 41 Lodging (Destination) by Incoming vs Domestic: % Value 2019-2024
- Table 42 Hotels NBO Company Shares: % Value 2019-2023
- Table 43 Hotel Brands by Key Performance Indicators 2024
- Table 44 Forecast Lodging (Destination) Sales: Value 2024-2029
- Table 45 Forecast Lodging (Destination) Online Sales: Value 2024-2029
- Table 46 Forecast Hotels Sales: Value 2024-2029
- Table 47 Forecast Hotels Online Sales: Value 2024-2029
- Table 48 Forecast Other Lodging Sales: Value 2024-2029
- Table 49 Forecast Other Lodging Online Sales: Value 2024-2029
- Table 50 Forecast Lodging (Destination) Outlets: Units 2024-2029

Booking in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Booking sales on the rise as leisure and business tourism bounces back Most players are thriving in 2023-2024 with competition heating up

PROSPECTS AND OPPORTUNITIES

New players, new systems and a growing focus on social media Booking operators faced with challenges and opportunities heading into the forecast period

CATEGORY DATA

Table 51 - Booking Sales: Value 2019-2024Table 52 - Business Travel Sales: Value 2019-2024Table 53 - Leisure Travel Sales: Value 2019-2024Table 54 - Travel Intermediaries NBO Company Shares: % Value 2019-2024Table 55 - Forecast Booking Sales: Value 2024-2029Table 56 - Forecast Business Travel Sales: Value 2024-2029Table 57 - Forecast Leisure Travel Sales: Value 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/travel-in-france/report.