

TOURIST NUMBERS IN FRANCE ARE ABOVE PRE-CRISIS LEVELS



Insee has just published its Focus N°275 which analyzes summer visits to France by both residents and international visitors. The results are very positive. The data confirm the results from the regions and is good news to take into account the more uncertain outlook for the coming seasons.

The report stated that the hotel and campground occupancy from June to August 2022 was 3% above its pre-crisis level. **The number of domestic tourists exceeded the 2019 level and remains the main component of tourism in France.**

Since June 2022, the inhabitants of metropolitan France have been spending more nights in commercial accommodations (hotels, campsites, private rentals, etc.) than in non-commercial accommodations (second homes, with family or friends).

The international clientele has returned in the same numbers as before the health crisis; the absence of tourists from China, Japan or Russia has been compensated by European customers.

Foreign tourists' travel spending in the summer of 2022 is 7% higher than in 2019, due to price increases, especially in hotels and restaurants.

With increased visitation and prices, revenue increased by 14% in lodging and food services in July 2022, compared to July 2019.

Tourist Accommodation Became Mainly Commercial

In June and July 2022, commercial accommodation (hotels, campsites, other tourist accommodations, especially rentals from individuals) became the main mode of accommodation for tourists residing in metropolitan France.

The return to this type of accommodation had been initiated in the summer of 2021, mainly on the coast and in the mountains.

Until June 2022, resident tourists spent as much time in non-market accommodation (second homes, with family or friends) as in market accommodation, and even more outside the summer period.

When travel restrictions were lifted in the summer of 2020, non-market lodging was even the primary summer lodging option for residents.

The higher the income level, the more residents take trips. The differences in departure rates observed in the summer of 2022 according to residents' income level correspond to the pre-crisis situation.

Return of the Main International Clients in Hotels and Campgrounds

With the development of the resident clientele and the return of international clientele this summer, the tourist numbers in France in hotels and campgrounds from June to August 2022 were 3% higher

than before the crisis. The number of overnight stays by international customers remains half that of domestic tourists.

Attendance by Americans and Brits, the two main international hotel guests, gradually recovered to their July and August 2019 levels. The return of American customers was helped by a stronger dollar against the euro.

The Dutch, German and Belgian clientele, the main international clientele for campsites for many years, had already returned in the summer of 2021. They are even more present in the summer of 2022. In contrast, the British clientele has only returned to 72% of its 2019 level at campsites. The other visitors have almost all returned in the summer of 2022, including those from countries outside Europe, such as the Americans and those from the Middle East.

However, Russian, Japanese and especially Chinese customers are still missing. Hotel attendance by each of these groups reaches 15% to 20% of its level in summer 2019. These three foreign groups of clients accounted for 1% of foreign hotel visitation during the summer of 2022, compared to 7% in 2019.

Pre-crisis Attendance Finally Restored in Paris Region

With the return of international customers and a steady flow of domestic customers, Paris and the Île-de-France region will return to the 2019 level of hotel occupancy by June 2022 for the first time since the start of the health crisis.

Similarly, hotel occupancy in urban areas, affected by the low presence of international tourists prior to the summer of 2022, returns to levels comparable to 2019.

In addition to hotels, rentals from private individuals have been popular: the number of comments left on the Airbnb website about a rental in Paris is well above the 2019 level.

Some of this increase may be due to the more frequent use of reviews, but its magnitude nonetheless indicates a very likely increase in rentals from individuals compared to 2019.

In the summer of 2022, foreign visitors spent 7% more than in the summer of 2019. This increase is the result of two opposing developments: a rise in prices and a decline in volumes.

Significant Price Increases in the Tourism Sectors

The consumer price index for hotels, motels, inns, and similar accommodations increases throughout the first half of 2022; in June-July-August 2022, the index stood 13% above the price level for the same period in 2019. Consumer prices at restaurants, cafes, and similar establishments also increased by 8% above prices in June-July-August 2019.

In addition to lodging and restaurants, the price increase compared to summer 2019 concerns all products that enter into tourist spending (transportation tickets, miscellaneous purchases, etc.). In total, the increase in prices in the tourism sector was greater than the increase in spending by foreign visitors.

This means that adjusted for inflation, foreign visitor spending declined in the summer of 2022 compared to the summer of 2019.

This decline in volume is primarily due to the drop in total spending by tourists from China and to a lesser extent Japan and Russia, which was not offset by the increase in spending by travelers from Europe and the United States.

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