

French Travel Insights 2024

STATUS OCTOBER 2024

GENERAL SOCIETY FACTS

Political crisis

Bad weather

Olympic Games 2024



PART TWO : SUMMER 2024

AN ATYPICAL OLYMPIC SUMMER



Summer 2024: review

65% of French people went on holiday or for a weekend in July and August (2 pts down vs 2023) - 88% of these travelled in France

- **Two phenomena should be noted with regard to the behaviour of French tourists in 2024: a significant shift in departures towards August, due to a lengthening of the summer season, and an increase in short stays!**
- Up until the third week of August, overnight stays by domestic customers were down by 6%.
- Domestic overnight stays stabilised in August compared with last year.
- **1,4 M domestics visitors visited Paris (+27%)**
- Across the host regions (Paris + 8 areas), French overnight stays rose by 12% & European & long haul by 16%
- The Mediterranean territories were the most dynamic
- Slowdown in rural tourism, and to a lesser extent in mountain and urban tourism, as along the Atlantic arc



The figure of the month

76%

of French people expressed interest
in the Paris 2024 Olympic Games

KEY FINDINGS

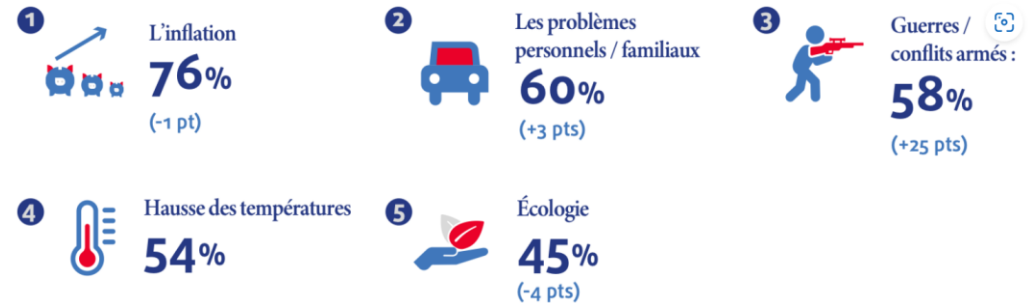
The French remain enthusiastic about going on holiday!

- **77%**, +1 pt compared to 2023 and +6 pts compared to 2022,
- **68%** plan to take holiday between June and September
- **64%** intend to go

- **Holiday budget down by 5% for 2024 for domestic travel** The budget for stays in commercial accommodation comes to €2,262, down by almost €130. The decrease mainly concerns people leaving for France, at €1,725, i.e. €140 compared to 2023 (-7%), whereas the budget for commercial holidays abroad rises to €3,730, i.e. €215 (+6%). People who go abroad tend to be more wealthy households, who manage to keep their holidays.

Travel trends in 2024: travel appears to be an invigorating and calming means of escape in an uncertain global context

Top 5 des facteurs qui impactent le plus cet enthousiasme :



French overnights in Norway January- August 2024 (vs 2023)

Hotels & Campsites/cottages/hostels

- Total overnights **446 842**
- Hotels 269 877 (+7%)
- Campsites, cottages & hostels 176 965 (+9%)
- Share of the FR market in hotels overnights in NO 5% (NO 66% - UTL 34%) // 5% (NO 70% - UTL 30%)
- The sixth market after GER SVE DE DK UK
- Highlights
 - **January 2024: 38% growth VS 2023**
 - **Jan-Feb-March 2024: 22%**
 - **April-Mai 2024: 29%**
 - **Juni-Juli- August 2024: 1%**

+ 8 %



Most visited regions by French tourists January-August 2024 (vs 2023)

- VESTLAND **156 623** (+ 4%)
- NORTHERN NORWAY **102 952** (+ 6%)
- OSLO **97 177** (+ 18%)
- OSLOREGION **62 727** (+7%)
- TRØNDELAG **12 744** (+ 7%)
- AGDER **7258** (- 8%)



**Summer 2024
for French
Travel trade
actors :**

**Fewer clients
Higher basket**



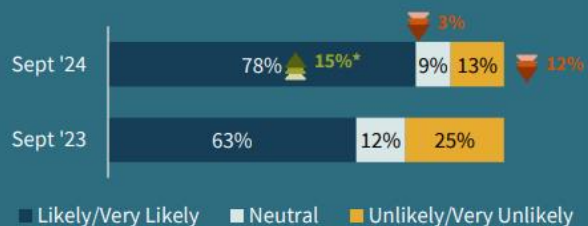
PART THREE : OUTLOOKS



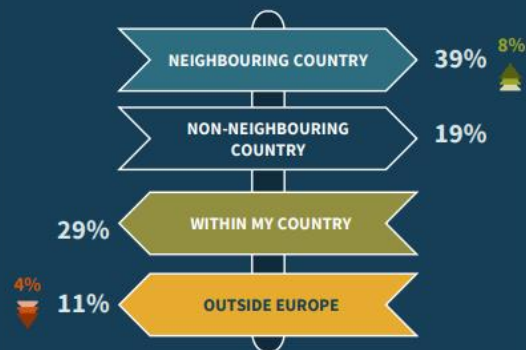
French travel plans

Travel horizon: October 2024-March 2025

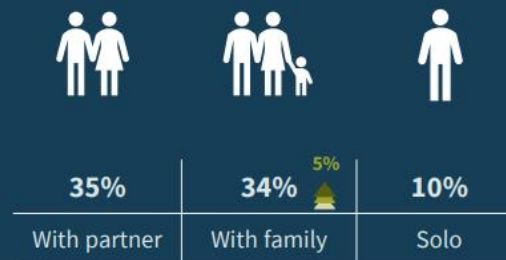
INTENTION TO TRAVEL



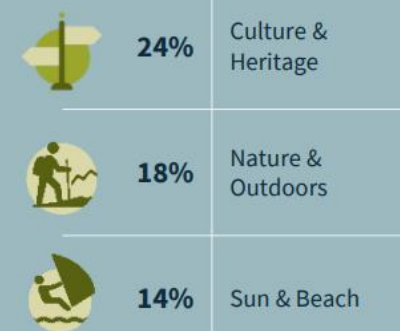
WHERE TO?



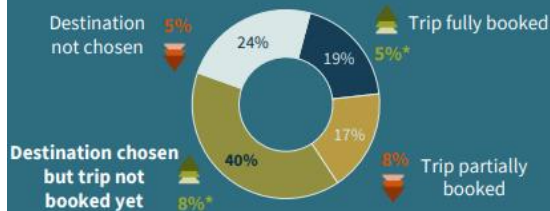
TRAVELLING WITH?



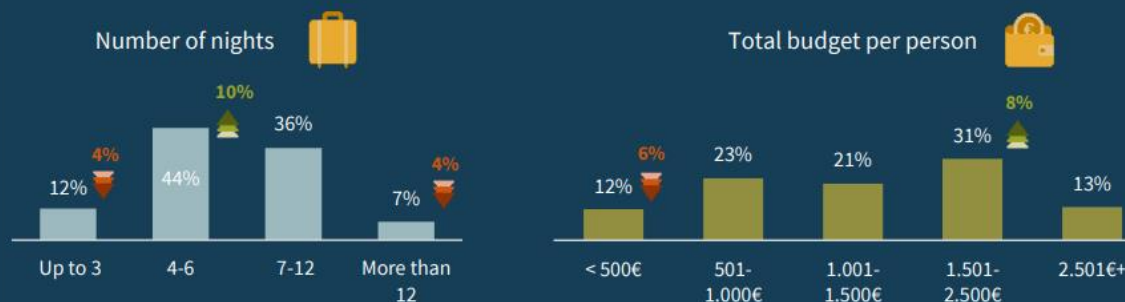
TOP 3 TYPES OF TRIPS



TRAVEL READINESS



INTENDED LENGTH OF STAY AND BUDGET



TOP EUROPEAN DESTINATIONS**

	PLAN TO VISIT	HAVE VISITED BEFORE
Italy	8%	7%
Spain	7%	8%
Croatia	7%	5%
Greece	5%	4%
UK	5%	4%

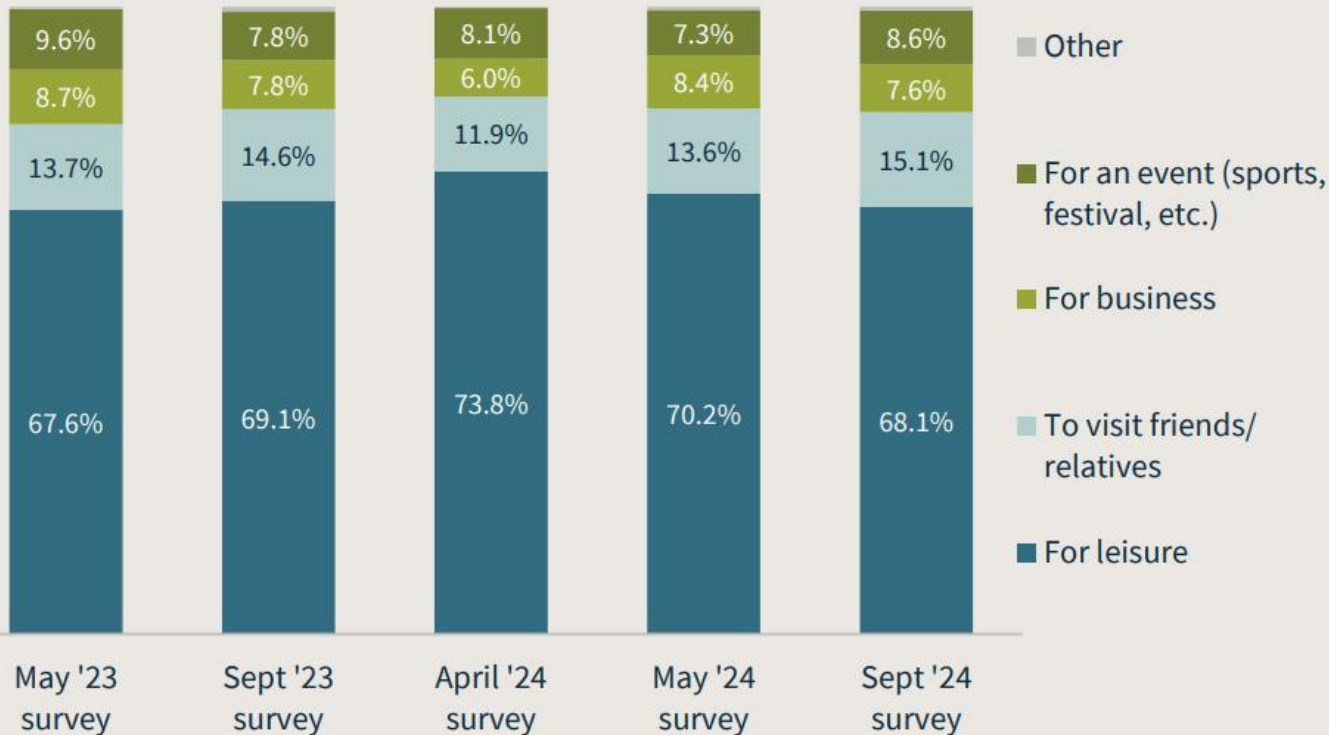
** Based on total sample, without reference to domestic trips

* Statistically significant difference vs a year ago (September 2023)

No. of respondents: 750 (total sample of respondents per country)

68% of Europeans plan leisure trips in the next 6 months, while only 8% will travel for business

Purpose of travel



Q8. For what reason are you most likely to travel within Europe next?

* Statistically significant difference vs a year ago (September 2023)

No. of respondents: 4,399

Top 3 markets to take a leisure trip

Italy

79%

UK

78%

France

77% 4%*

Top 3 markets to take a business trip

Switzerland

13%

Belgium

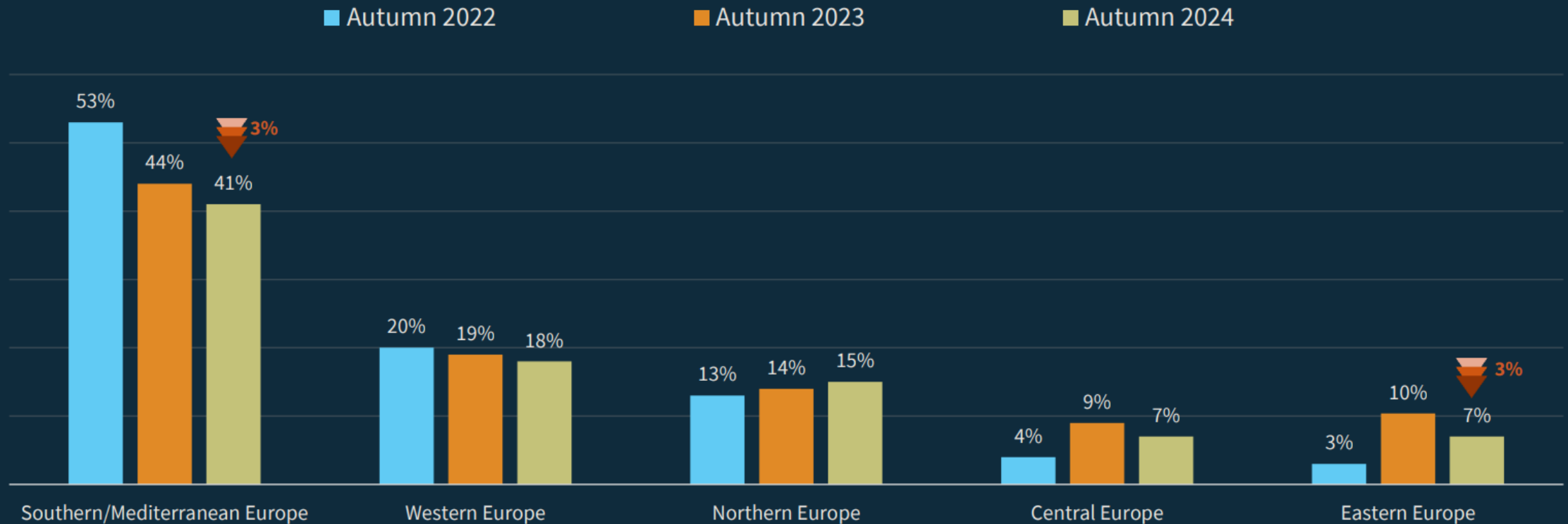
12% 5%

Austria

10%

Results for business trip per country are indicative due to small sample bases

Intentions to visit the Mediterranean and Eastern Europe this autumn and winter slightly drop



French Travel trade outlooks :

- Some recovery in Autumn
- Uncertain winter
- In advance on Summer 2025 bookings





TRENDS FOR 2025

Travel Trends 2025

What experiences are travellers searching for?



The search for community

1. Sports Mode
2. Astro Adventurers
3. Reset Jettors
4. Art-Venture
5. Cowboy Core
6. Horti-Culture
7. Gami-Vacation



Key Takeaways

1. **Travel remains a priority, both in the number of trips and spending habits**
2. **Travellers are embracing technology and AI to aid planning**
3. **Search for community and collective experience is driving traveller behaviour**

FEEDBACKS & NEWS FROM THE INDUSTRY



INFORMATION / RESPONSIVNESS / FRENCH SPEAKING STAFF



ACTIVITIES IN 2025



Thank you!

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