

French Travel Insights 2023

STATUS MARS 2024

2023 vs 2022 A good year for French holidays: review

More travel, more spending and more departures abroad

- 65% French people aged 15 + went on holiday in 2023
- 77% in France (79%), **49% abroad** (44%), 26% both (23%)
- **Findings 2023:**
- High level of short commercial leisure stays (1 to 3 nights)
 - last minute booking , often new destinations and high need of "letting go" ↗
- Online booking made by 65% of French people ↗
- For the 40% of French people who were unable to leave, financial considerations remained the main obstacle
- [L'année 2023 marque un record de départs en courts séjours de loisir marchands avec hébergement payant - Tour Hebdo](#)
🇳🇴 **Norway**



Norway Insights 2023

STATUS MARS 2024

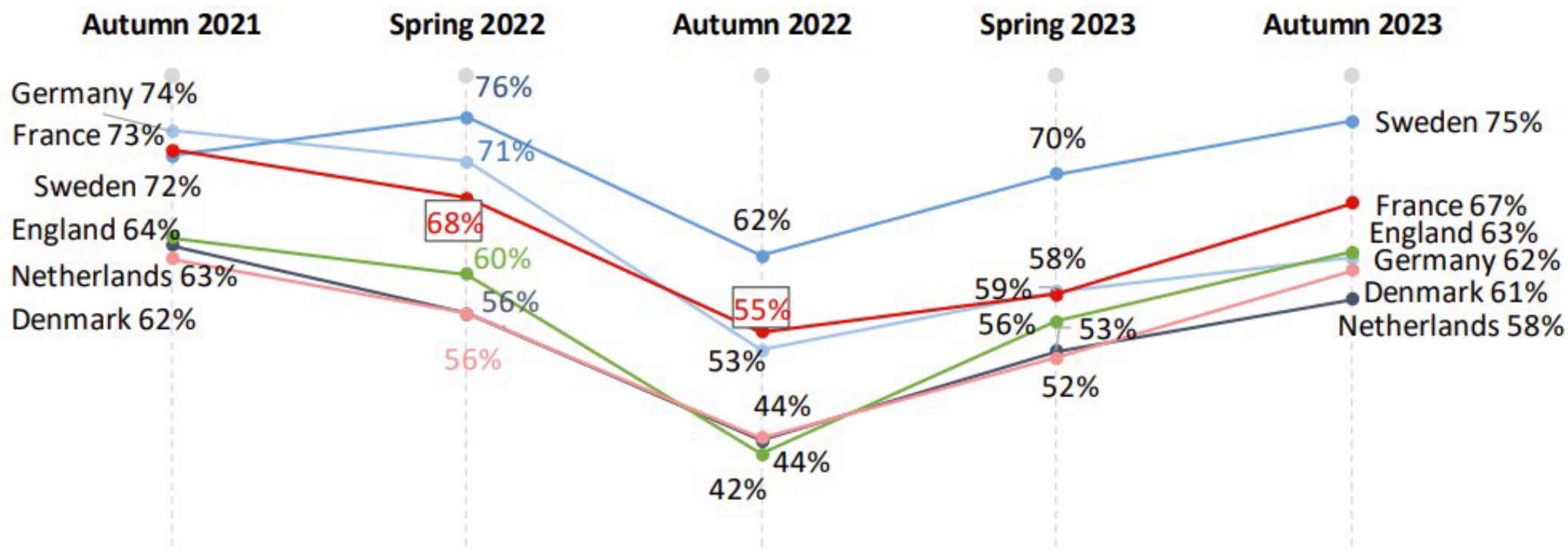
64

million of
Europeans are
considering
travelling to Norway
over the
next three years

Norway is increasingly popular

Development in the proportion of the target group interested in visiting Norway in the next three years

Proportion of people interested in travelling abroad in the next 3 years.

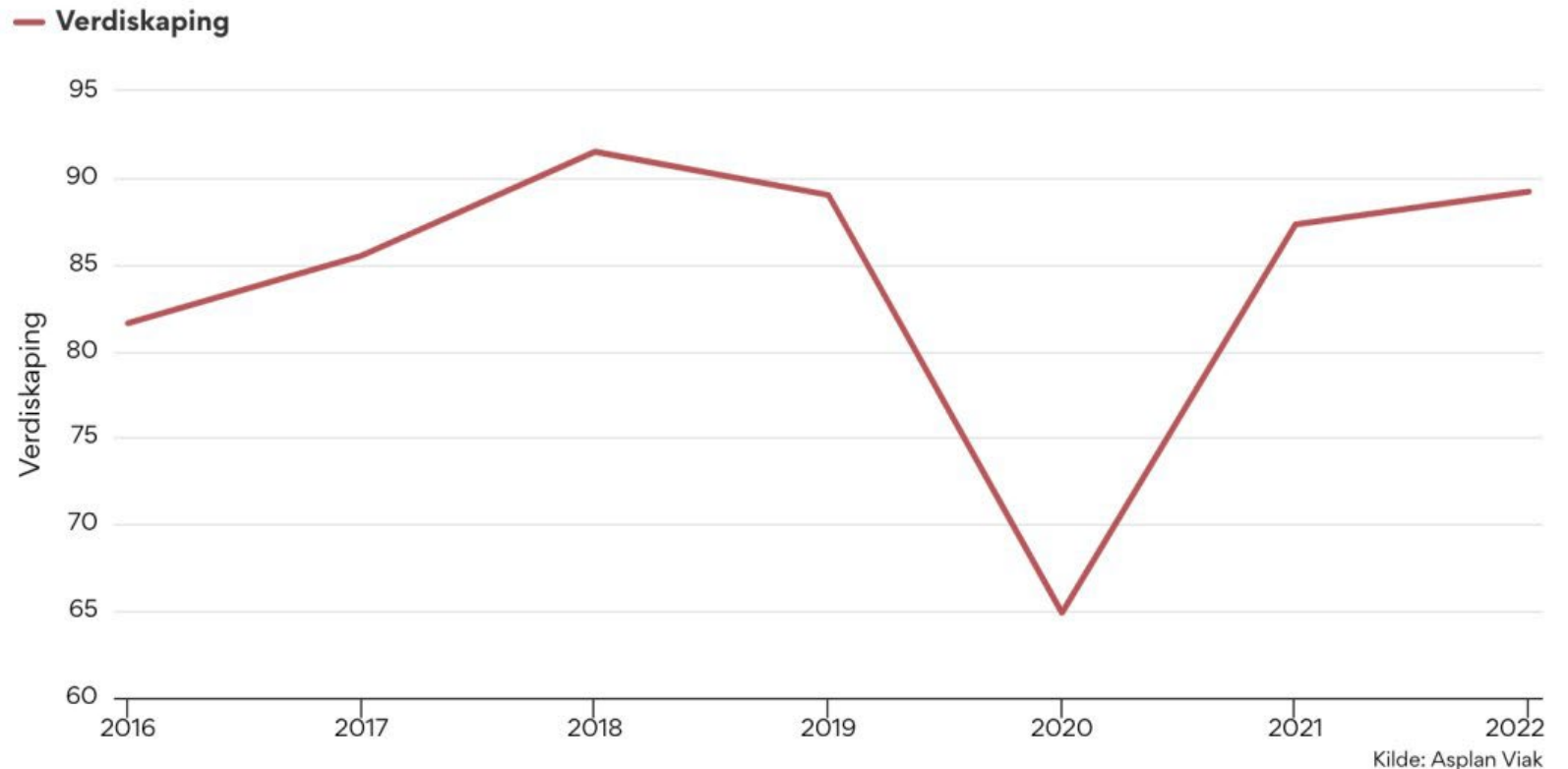


We're getting back to where we were before the pandemic



Compared to other markets abroad 4%


11% increase in French commercial overnight stays in Norway between 2019 and 2023



Value creation for tourism in Norway

French overnights in Norway 2023 (vs 2022)

Hotels & Campsites/cottages/hostels

- Total overnights **499 152** 
- Hotels 314 906 (+7%)
- Campsites, cottages & hostels 184 246 (+11)
- Share of the FR market in hotels overnights in NO 5% (NO 70% - UTL 30%) // 4%(NO 68% - UTL 32%)
- The sixth market after GER SVE DE DK UK (the fifth)
- Highlights "All Norway All Year"
 - October-March period 2019 vs 2023 : 28% increase
 - January 2024 38% growth VS 2023



Most visited regions by French tourists 2023 (vs 2022)

- FJORD NORWAY **173 804** (+ 12%)
- NORTHERN NORWAY & SVALBARD **120 972** (+ 2%)
- OSLO **112 072** (+ 22%)
- OSLOREGION **38 170** (- 2%)
- SOUTHERN NORWAY **8560** (+ 25%)
- TRØNDELAG **14 153** (- 6%)



“2023 has been a good year for travel operators and more generally for tourism. More French people traveled, they went further away and spent more money than in 2022.”

Valérie Boned – president of the French travel trade companies association (Entreprises du Voyage)



Evolution des départs sur l'année 2023 vs. 2022

Evolution du volume d'affaires

Evolution du nombre de dossiers

Evolution du panier moyen

Global

+21%

+6%

+14%

France
Métropolitaine

stable

-4%

+4%

Moyen
Courrier

+22%

+12%

+10%

Long
Courrier

+34%

+19%

+13%

LES ENTREPRISES
DU VOYAGE



Données arrêtées au 1er janvier 2024

A good year for French tour-operators selling Norway

- Fears on inflation
- Winter and Northern Norway on the rise
- Concerns about flexibility and responsiveness



Travel trade – The Nordics are in the air for 2024



[Palmarès des voyageurs 2023] Europe du Nord : un nouvel attrait

Par Emilie Vignon — Le Fév 13, 2024

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Il aura fallu attendre le mois de février 2022 pour que souffle enfin un vent de reprise avec la suppression de la quarantaine.



Norwegian ouvre un vol Montpellier - Oslo

Les billets sont déjà en vente

Du 22 juin au 17 août 2024, la compagnie Norwegian reliera Montpellier à Oslo, norvégienne, à raison de deux vols par semaine (le mardi et le samedi).



Norwegian ouvre un vol Montpellier - Oslo

Powered by Podle

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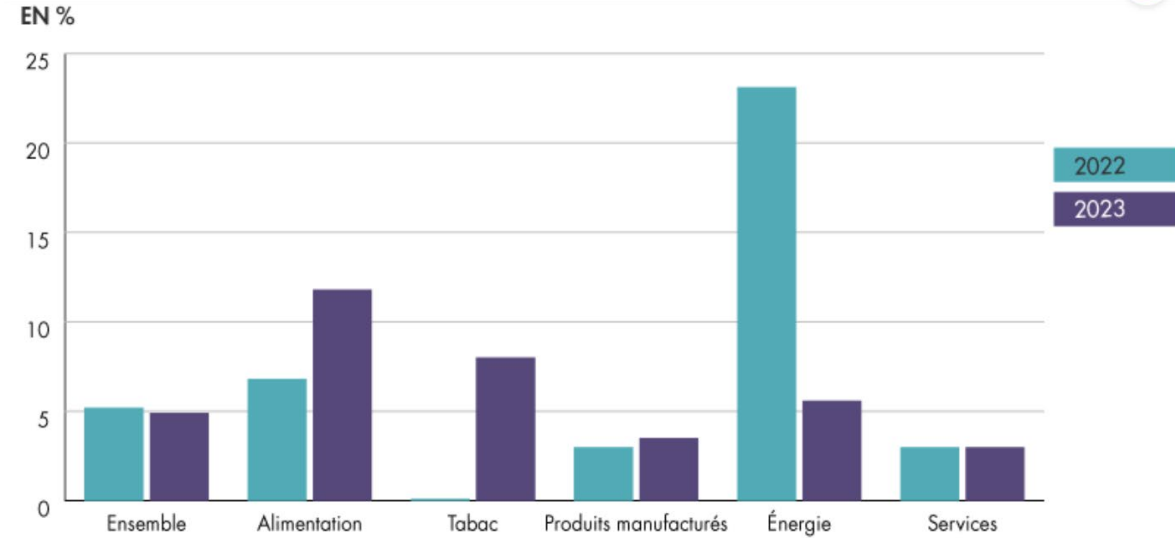
Rédigé par Amélia Brille le Mardi 14 Nov



Short Economic Outlook

- **Inflation reached 4,9% (2023) vs 5,2% (2022)**
High level inflation but disinflation (slower increase in prices)
- **France's public deficit for 2023 stands at 5.5% of GDP**, or €154 billions, according to figures published on Tuesday 26 March by the French National Institute for Statistics and Economic Studies (INSEE). This figure is considerably higher than the 4.9% assumption used by the Ministry of Finance in the 2024 budget. As a result of **slowing growth and lower tax revenues**, the public deficit, announced on Tuesday by INSEE, has far exceeded the government's forecasts in 2023.

VARIATIONS ANNUELLES MOYENNES DES PRIX



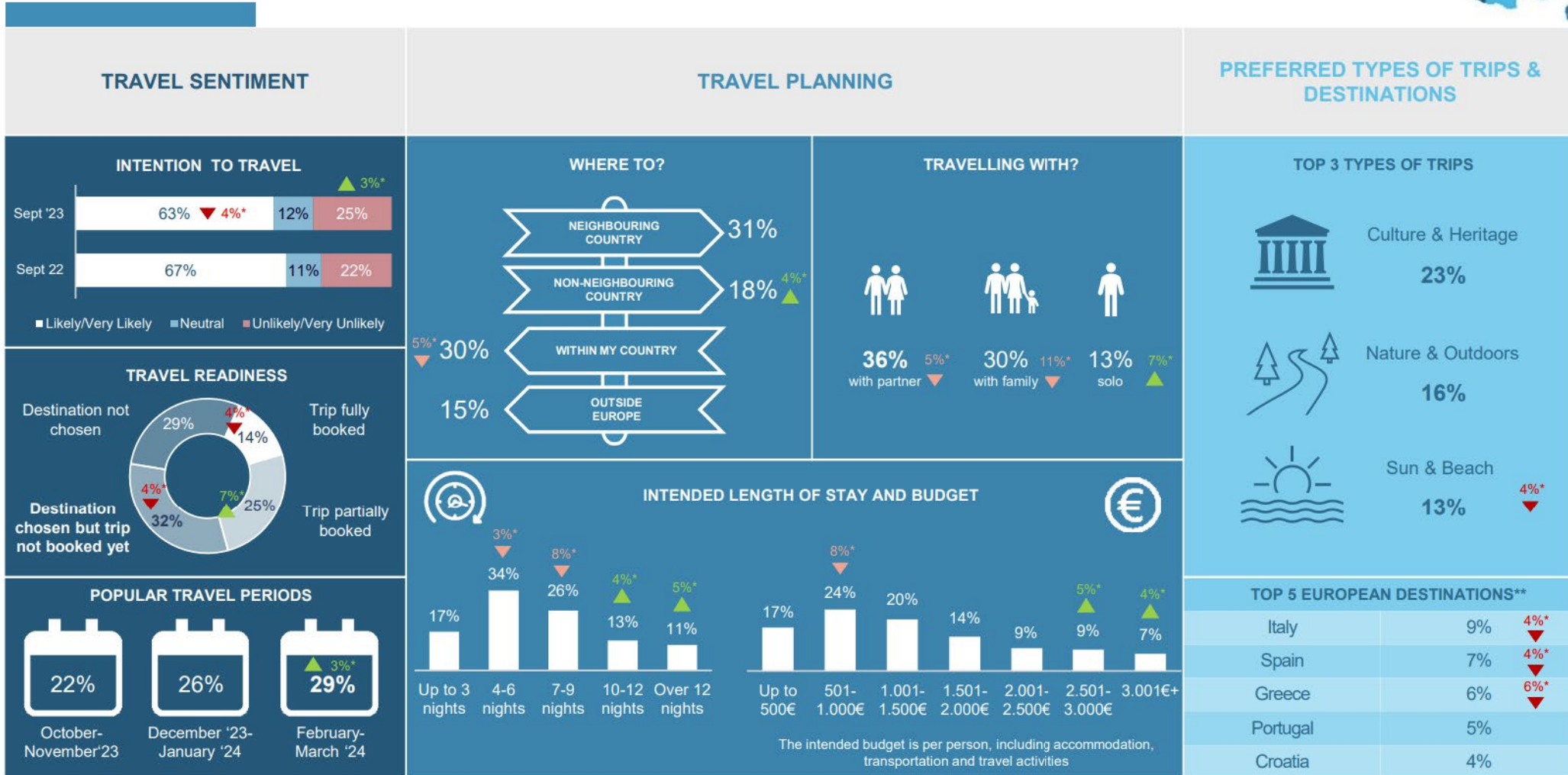
Source : lafinancepourtous.com d'après INSEE



What will inflation be in 2024? According to INSEE, inflation will continue to fall, **reaching 2.6% in June 2024**. This slowdown will lead to a slight increase in the purchasing power of French households of around 0.8% in the same year.

SNAPSHOT: FRENCH TRAVEL PLANS

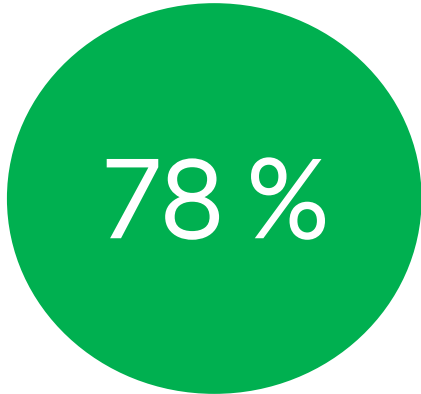
Travel horizon: October 2023-March 2024



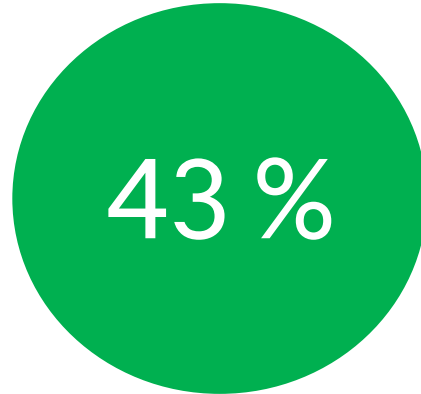
* Significant increase ▲ or decrease ▼ vs the same time last year

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

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



More than **3 out of 4 French** people (78%) plan to travel just as much or more in 2024 than in 2023, **value for money** remains a key factor for French travelers, with the cost of the **hotel** (22%) and the **flight** (39%) being the main factors determining the choice of destination.



Price is no longer the only criterion in decision-making 43% of French travellers now consider the "**vibe**" of a destination to be an important factor in their choice of holiday: recharging, rejuvenating, sleeping, strong interest for cultural experiences, main character energy (film), concert, dining experience, affordable luxury

In 2024, it is clear that consumers will continue to enjoy travelling: almost a third (31%) of French travelers plan to spend more on travel in 2024 than in 2023, while almost half (43%) will spend as

General mood for French travelers

Inflation, new ways of working, ecological issues... are they having an impact on the sector?

If so, what dynamics and opportunities are emerging?



A NEED TO GET AWAY

7,9/10

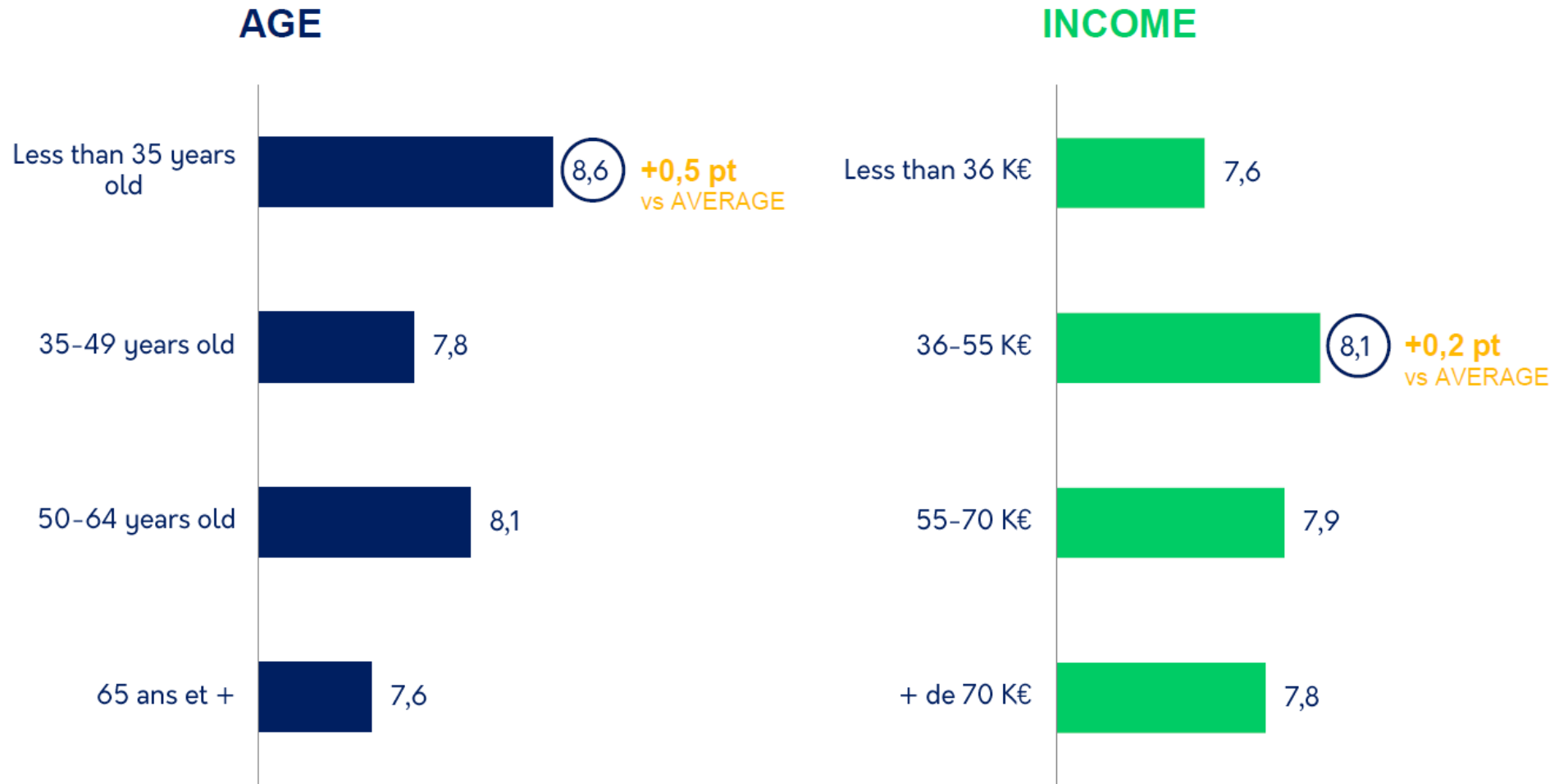
On average

+0,1 pt
vs December 2021

Health restrictions context to face
the Covid-19 pandemic

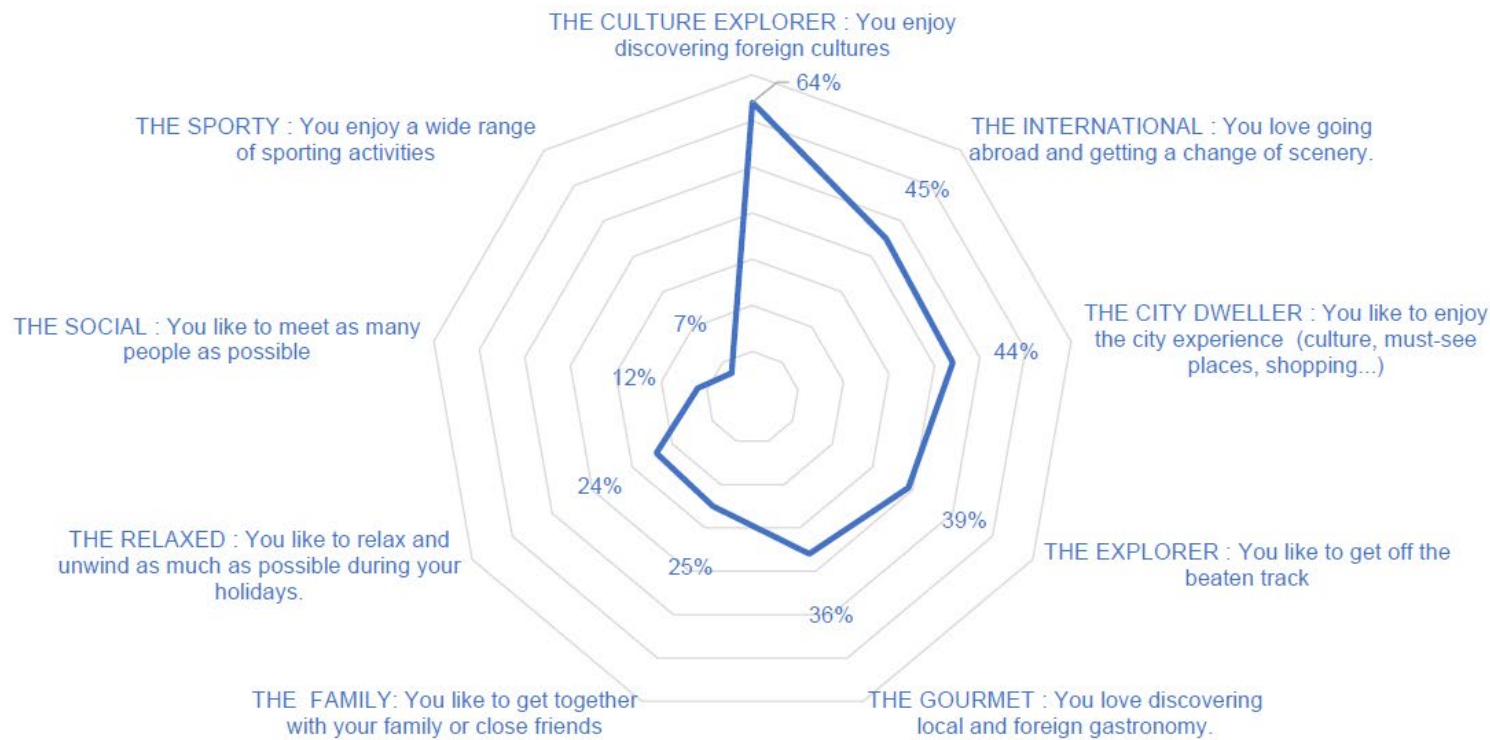
Le Monde Tourism Barometer – March 2024

WITH A GREATER DESIRE TO TRAVEL AMONG YOUNGER PEOPLE AND THOSE ON AVERAGE INCOMES



3 TRAVELLER PROFILES ARE EMERGING: CULTURAL EXPLORER, INTERNATIONAL AND CITY DWELLER

What type of traveller are you?



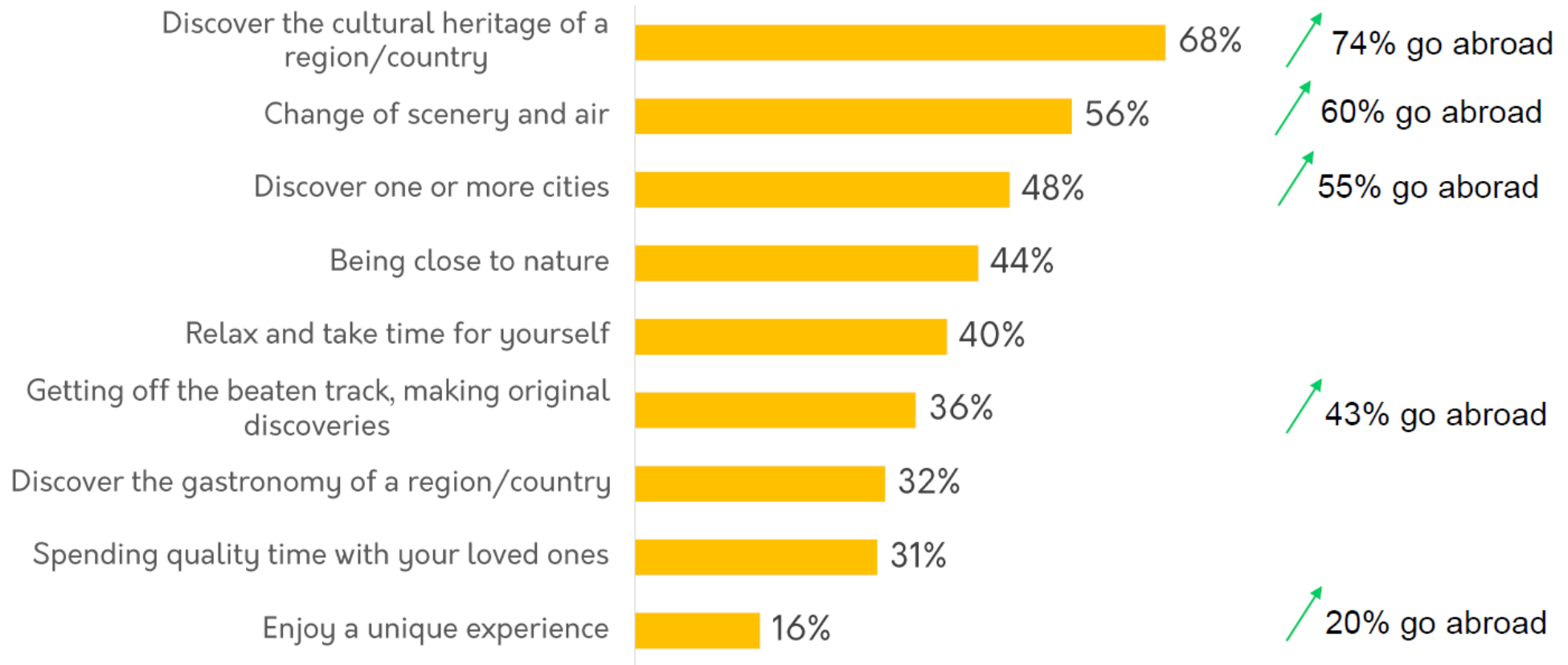
On average

**3 profiles
per Traveller**

Top of the list of expectations is the interest in discovering cultural heritage

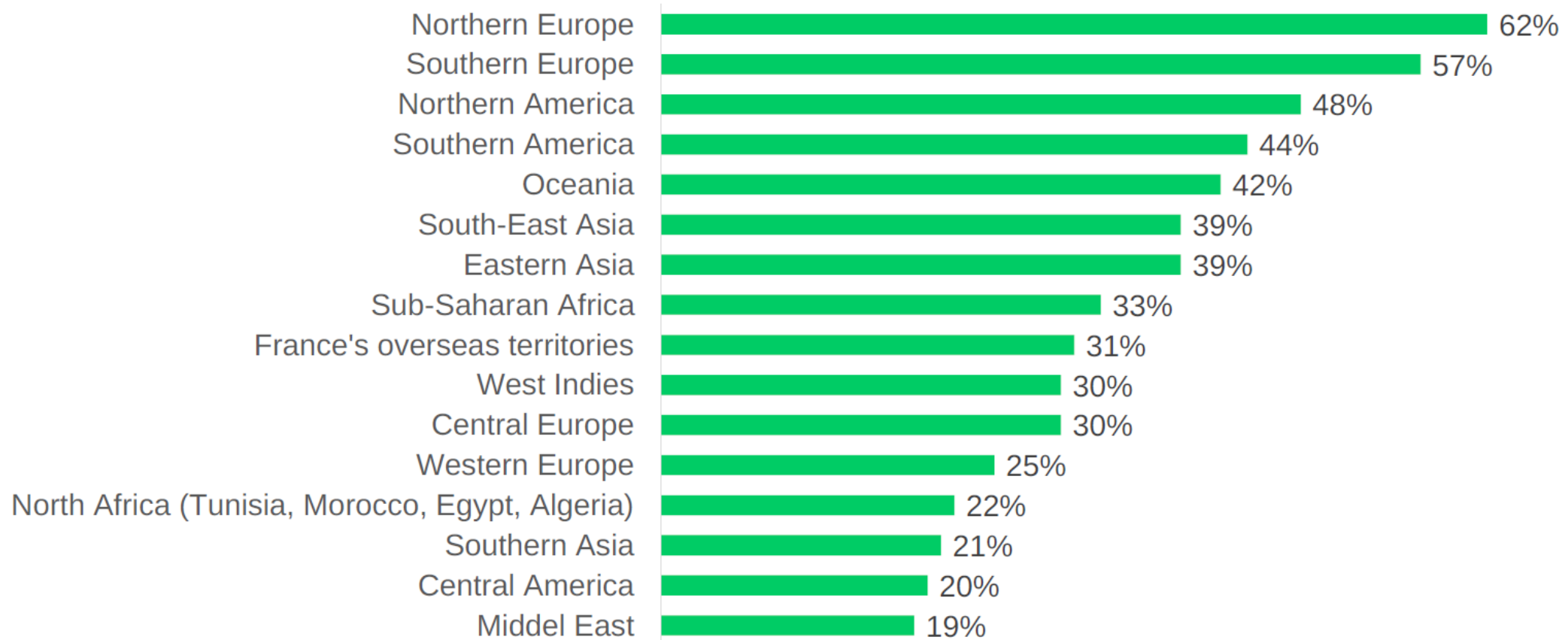
TYPES OF HOLIDAY DESIRED

4 expectations on average



...ABOVE ALL, A VERY STRONG DESIRE TO GO INTERNATIONAL

What would be your dream trip?



A DIRECT IMPACT OF REMOTE WORKING ON OUR READERS' RELATIONSHIP WITH TRAVEL

Remote working changes the length of stay ...

... and the choice of holiday accommodation

55%

Would extend their holiday or stay in a region if they could work remotely there

33%

Could choose their holiday accommodation on the basis of the remote working opportunities it offers (network, possibility of isolation)

MORE THAN AWARENESS, RESPONSIBLE BEHAVIOUR

Our readers' behaviour in terms of ecological and social responsibility for their holidays

84%

Try to consume locally
(food, tourist services)

64%

Avoid wasting local
resources at their tourist
destination

69%

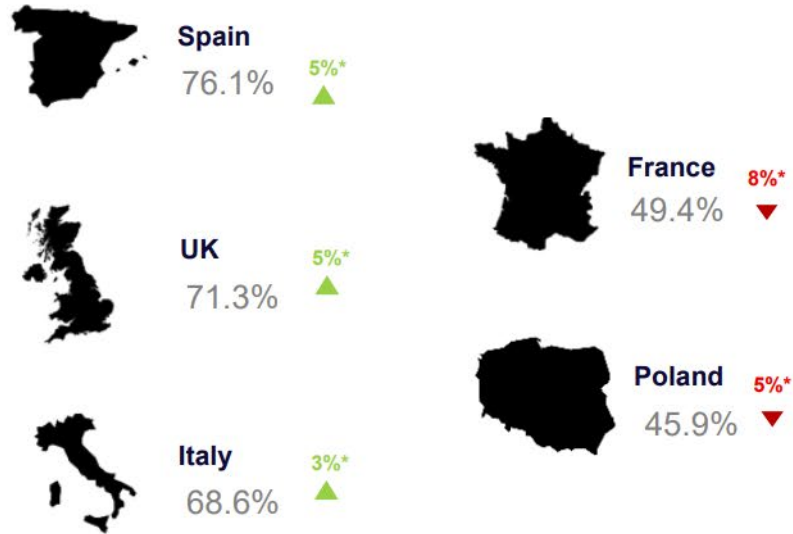
Pay attention to their
carbon footprint when
travelling

69%

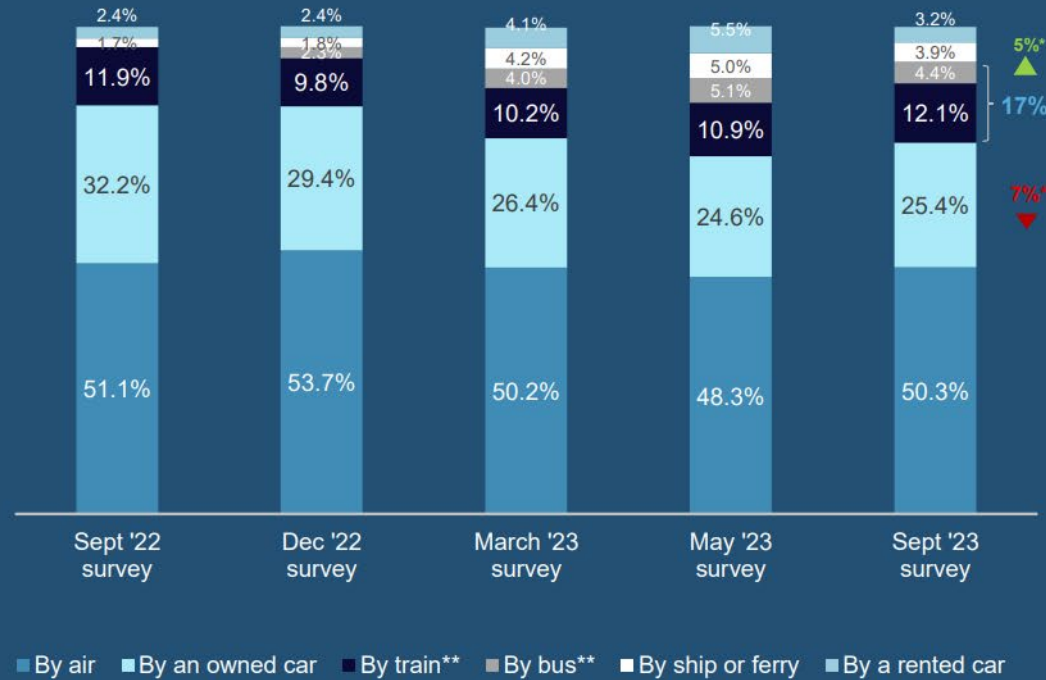
Increasingly competing
between air and rail for
short journeys

Interest in train and bus travel (17%) increases; these transport options serve as a green alternative to driving, which drops by 7% compared to a year ago

Top 5 markets most likely to travel by plane in the next six months



Preferred modes of transport for respondents most likely to travel in the next six months



*Statistically significant difference vs a year ago (Sept 2022)

**Up to September '22, 'By train/bus' was recorded as one answer

No. of respondents: 4,052

19 Q13. Which of the following modes of transport would you most consider using during your next trip within Europe?


Some moves from French TOs



 Norway

A screenshot of a video player. The top left corner has the WTGF logo (World Tourism Federation Global). The top right corner has the ITB Berlin logo. The main content area is dark blue with a red number '2.' followed by the text 'Radical regulation of travel with a Distance-Duration Ratio' in white. On the right side, there is a video inset showing a woman with curly hair. The bottom of the player shows a progress bar at 22:19 / 53:00 and various control icons like play, volume, and settings.

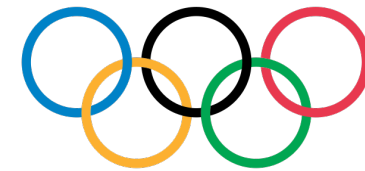


 Norway

IMPACT OF THE OLYMPIC GAMES ?



PARIS 2024



Thank you!

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