



**Euromonitor
International**

Travel in France

September 2025

Table of Contents

EXECUTIVE SUMMARY

Travel in 2025: The Big Picture
Airlines: Key trends
Hotels: Key trends
Booking: Key trends
What next for travel?

MARKET DATA

Table 1 - Surface Travel Modes Sales: Value 2020-2025
Table 2 - Surface Travel Modes Online Sales: Value 2020-2025
Table 3 - Forecast Surface Travel Modes Sales: Value 2025-2030
Table 4 - Forecast Surface Travel Modes Online Sales: Value 2025-2030
Table 5 - In-Destination Spending: Value 2020-2025
Table 6 - Forecast In-Destination Spending: Value 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2025 DEVELOPMENTS

After the ambivalent effects of the Olympic Games in Paris in 2024, uncertainties prevent dynamic growth in 2025
French consumers are reluctant to spend more abroad

PROSPECTS AND OPPORTUNITIES

Potential for limited Olympic Games trickle-down effects, but Destination France 2030 aims to drive continued development
French consumers will still be attracted by outbound tourism, but remain cautious in terms of expenditure

CATEGORY DATA

Table 7 - Inbound Arrivals: Number of Trips 2020-2025
Table 8 - Inbound Arrivals by Country: Number of Trips 2020-2025
Table 9 - Inbound City Arrivals 2020-2025
Table 10 - Inbound Tourism Spending: Value 2020-2025
Table 11 - Forecast Inbound Arrivals: Number of Trips 2025-2030
Table 12 - Forecast Inbound Arrivals by Country: Number of Trips 2025-2030
Table 13 - Forecast Inbound Tourism Spending: Value 2025-2030
Table 14 - Domestic Tourism by Destination: Number of Trips 2020-2025
Table 15 - Domestic Spending: Value 2020-2025
Table 16 - Forecast Domestic Tourism by Destination: Number of Trips 2025-2030
Table 17 - Forecast Domestic Spending: Value 2025-2030
Table 18 - Outbound Departures: Number of Trips 2020-2025
Table 19 - Outbound Departures by Destination: Number of Trips 2020-2025
Table 20 - Outbound Tourism Spending: Value 2020-2025
Table 21 - Forecast Outbound Departures: Number of Trips 2025-2030
Table 22 - Forecast Outbound Departures by Destination: Number of Trips 2025-2030
Table 23 - Forecast Outbound Spending: Value 2025-2030

KEY DATA FINDINGS

2025 DEVELOPMENTS

Better fate in 2025 than in 2024, but ongoing concern about failure to return to pre-pandemic passenger numbers
Promising recovery for Air France/KLM, and ongoing dynamism for Arabic airlines, but not a positive scenario for US airlines

PROSPECTS AND OPPORTUNITIES

French carriers to be increasingly jeopardised by new taxes and global uncertainties
Gen AI to have an increasing presence in all aspects of airlines in France

CATEGORY DATA

Table 24 - Airlines Sales: Value 2020-2025
Table 25 - Airlines Online Sales: Value 2020-2025
Table 26 - Airlines: Passengers Carried 2020-2025
Table 27 - Airlines NBO Company Shares: % Value 2020-2024
Table 28 - Non-Scheduled Carriers Brands by Key Performance Indicators 2025
Table 29 - Low Cost Carriers Brands by Key Performance Indicators 2025
Table 30 - Full Service Carriers Brands by Key Performance Indicators 2025
Table 31 - Forecast Airlines Sales: Value 2025-2030
Table 32 - Forecast Airlines Online Sales: Value 2025-2030

[Lodging \(Destination\) in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Promising first half of 2025 thanks to short-term rentals, premiumisation in hotels, and the ongoing recovery of inbound arrivals
Airbnb consolidates its leadership despite an increasingly aggressive Booking.com

PROSPECTS AND OPPORTUNITIES

Hotels likely to struggle to match the growth rates of short-term rentals
Sustainable/eco-friendly features and more use of GenAI

CATEGORY DATA

Table 33 - Lodging (Destination) Sales: Value 2020-2025
Table 34 - Lodging (Destination) Online Sales: Value 2020-2025
Table 35 - Hotels Sales: Value 2020-2025
Table 36 - Hotels Online Sales: Value 2020-2025
Table 37 - Other Lodging Sales: Value 2020-2025
Table 38 - Other Lodging Online Sales: Value 2020-2025
Table 39 - Lodging (Destination) Outlets: Units 2020-2025
Table 40 - Lodging (Destination) Rooms: Number of Rooms 2020-2025
Table 41 - Lodging (Destination) by Incoming vs Domestic: % Value 2020-2025
Table 42 - Hotels NBO Company Shares: % Value 2020-2024
Table 43 - Hotel Brands by Key Performance Indicators 2025
Table 44 - Forecast Lodging (Destination) Sales: Value 2025-2030
Table 45 - Forecast Lodging (Destination) Online Sales: Value 2025-2030
Table 46 - Forecast Hotels Sales: Value 2025-2030
Table 47 - Forecast Hotels Online Sales: Value 2025-2030
Table 48 - Forecast Other Lodging Sales: Value 2025-2030
Table 49 - Forecast Other Lodging Online Sales: Value 2025-2030
Table 50 - Forecast Lodging (Destination) Outlets: Units 2025-2030

[Booking in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

2025 is positive for booking – despite some concerns before the summer

Booking.com BV still leads, while a sudden wave of mergers and acquisitions and alliances creates new key players

PROSPECTS AND OPPORTUNITIES

Ongoing solid growth expected, but the impact of GenAI remains to be seen

Experiences and attractions to offer potential for intermediaries

CATEGORY DATA

Table 51 - Booking Sales: Value 2020-2025

Table 52 - Business Travel Sales: Value 2020-2025

Table 53 - Leisure Travel Sales: Value 2020-2025

Table 54 - Travel Intermediaries NBO Company Shares: % Value 2020-2025

Table 55 - Forecast Booking Sales: Value 2025-2030

Table 56 - Forecast Business Travel Sales: Value 2025-2030

Table 57 - Forecast Leisure Travel Sales: Value 2025-2030

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.