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France’s tourist accommodations recorded 1.1% growth in the third quarter

Resident travelers drove hotel gains, lifting 4-star and 5-star stays 5.7%, even as foreign demand barely moved

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France’s hospitality market grew modestly in the third quarter, but the gains were uneven across the industry, with stronger demand at higher-end hotels and from domestic travelers while lower-priced hotel segments lost ground, according to data released by Insee on Thursday, November 19.

The French statistics agency said overnight stays in collective tourist accommodations rose 1.1% from the third quarter of 2025. Hotels posted a 1.7% increase, campgrounds rose 0.9% and other collective tourist accommodations, a category that includes tourist residences, holiday villages and youth hostels, edged up 0.2%.

For hotels, the quarter brought 70.4 million overnight stays, or about 1.2 million more than a year earlier. Insee said most of that increase came from resident guests. Overnight stays by residents rose 2.8%, adding about 1.1 million nights, while nonresident demand was almost flat, up 0.2%, or about 70,000 nights.

The hotel rebound was concentrated in the upper end of the market. Overnight stays at 4-star and 5-star hotels climbed 5.7%, and 3-star hotels rose 3.1%. By contrast, 1-star and 2-star hotels fell 2.2%, and unclassified hotels dropped 11.4%. Insee said those shifts followed changes in room supply.

The geography of hotel demand also showed a split market. Hotel overnight stays increased 4.0% in coastal areas and 1.9% in mountain areas, while areas outside those zones rose 0.9%. Intermediate urban areas recorded the strongest growth, up 8.0%, and rural communities rose 1.6%. Dense urban areas moved in the other direction, falling 2.0%.

The foreign market improved only slightly in hotels. Insee said overnight stays by nonresident guests reached 28.5 million in the quarter. European demand rose 1.3%, helped in part by a 3.2% increase from Dutch travelers, equal to 55,000 additional nights. But demand from U.S. visitors fell 1.2%, a decline of about 45,000 nights, and overnight stays from travelers from Asia and Oceania dropped 6.2%, or about 210,000 nights. Insee noted that those markets had risen sharply in 2025, by 15% for U.S. guests and 30% for Asia and Oceania.

Business travel provided another area of support for operators. Insee said overnight stays for business purposes in hotels and other collective tourist accommodations increased 7.2% from the third quarter of 2025, adding 1.4 million nights. Business travel totaled 21.1 million overnight stays and remained heavily concentrated in dense urban areas, which accounted for 50% of the total. Even so, the strongest increase came from intermediate urban areas, where business-related overnight stays rose 16.6%. Dense urban areas were up 4.5%, and rural areas rose 0.2%.

Other collective tourist accommodations showed only slight overall growth. In metropolitan France, those establishments recorded 34.9 million overnight stays in the quarter, up 0.2% from a year earlier. Insee said the gain came mainly from nonresident guests, whose overnight stays rose 0.7%. Tourist residences, which make up 70% of overnight stays in this category, increased 2.0%. Other types of collective accommodations, including holiday villages and youth hostels, fell 3.9%.

Performance in that segment also varied by location. Overnight stays in other collective accommodations rose 2.7% in mountain areas but fell 1.1% on the coast. Intermediate urban areas increased 6.4% and rural areas 1.6%, while dense urban areas declined 7.6%.

Campgrounds, which are measured for metropolitan France, recorded 108.0 million overnight stays in the third quarter, up 0.9% from the same period a year earlier. Insee said the increase came entirely from French residents. Resident campground overnight stays rose 1.9%, or about 1.4 million nights, while nonresident stays fell 1.3%, a drop of about 400,000 nights.

That segment also showed a mixed pattern by category. Overnight stays rose 5.6% at 1-star and 2-star campgrounds and 1.3% at 4-star and 5-star sites. Unclassified campgrounds fell 3.1%, and 3-star campgrounds declined 0.8%. Coastal campgrounds remained the core of the market, with more than 60 million overnight stays, or 56% of the total, and posted a 0.8% increase. Mountain campgrounds rose 1.6%, and areas outside coastal and mountain zones rose 0.6%.

Across all collective tourist accommodations, Insee reported 213.3 million overnight stays in the quarter. Resident demand rose 1.8%, while nonresident demand slipped 0.4%, underscoring how much the season depended on domestic travelers. The agency said the data are final through August 2026 and provisional for September 2026.