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Domestic travelers lift France’s hotel stays in the third quarter

Hotel overnight stays rose 1.7% to 70.4 million after resident demand climbed 2.8%, led by a 5.7% gain in four- and five-star properties

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France’s hospitality market grew in the third quarter, but the gains were uneven across hotel categories and were driven mainly by domestic travelers rather than foreign visitors, according to Insee data reported by Les Echos Etudes on Tuesday, Nov. 24.

The figures show that collective tourist accommodations in France recorded 213.3 million overnight stays in the third quarter of 2026, up 1.1% from the same period a year earlier. That was a slower pace than in 2025, when third-quarter overnight stays rose 2.9%. For hotels, the increase was stronger: 70.4 million overnight stays, up 1.7% year over year, or 1.2 million more nights than in the third quarter of 2025.

For the hotel industry, the detail matters as much as the headline number. Insee’s data, as cited by Les Echos Etudes, show that domestic demand provided the main support for hotel activity. Overnight stays by residents rose 2.8% in hotels, while nonresident demand was nearly flat at +0.2%. Across all collective tourist accommodations, resident demand rose 1.8%, while foreign demand fell 0.4%.

That split suggests that France’s summer tourism season remained resilient, but did not benefit from a broad rebound in international travel. Within foreign markets, European visitors increased 1.3%, with Dutch travelers up 3.2%. By contrast, the number of overnight stays by visitors from the United States fell 1.2%, and demand from Asia and Oceania dropped 6.2%. Les Echos Etudes said those declines came after

strong gains in 2025, when U.S. demand had risen 15% and Asia-Oceania demand had climbed 30%.

The hotel market also showed a clear divide by price segment. Four- and five-star hotels posted a 5.7% increase in overnight stays in the third quarter, while three-star hotels rose 3.1%. Lower-tier properties moved in the opposite direction. One- and two-star hotels saw overnight stays fall 2.2%, and unclassified hotels posted an 11.4% drop.

For hospitality operators, that breakdown points to a market where growth was concentrated in higher-end properties. Budget hotels and unclassified establishments did not share in the broader rise in demand, even as the overall hotel market expanded. The figures indicate that consumer demand in the quarter favored more upscale accommodation, while lower-cost segments faced weaker traffic.

The regional pattern was mixed as well. Insee’s figures show tourism attendance increased 4.0% in coastal areas and 1.9% in mountain regions. Intermediate urban areas recorded an 8.0% rise. Dense urban zones, however, saw attendance decline 2.0%, indicating that the quarter’s growth was not spread evenly across all destinations.

Camping activity also increased, though at a slower rate than hotels. Metropolitan France’s campgrounds recorded 108 million overnight stays in the third quarter, up 0.9% from a year earlier. Here again, resident demand was the driver, rising 1.9%, while nonresident demand fell 1.3%.

The camping market showed its own segmentation. Overnight stays increased 5.6% in one- and two-star campgrounds and 1.3% in four- and five-star sites. They fell 0.8% in three-star campgrounds and 3.1% in unclassified sites.

Other collective tourist accommodations, including serviced residences, holiday villages and youth hostels, totaled 34.9 million overnight stays in the quarter, up 0.2%. According to the data cited by Les Echos Etudes, the increase came only from serviced residences, where overnight stays rose 2.0%. Those properties account for 70% of nights in that category. Other types of collective accommodation declined 3.9%.