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The year 2024 marked a historic shift for the Marseille tourism sector, with 19.5 million overnight stays recorded and 1,223 events linked to business tourism hosted. These results confirm the growing appeal of Marseille as a destination. We delivered an exceptional programme and all stakeholders in the region responded to the call.

One unforgettable moment was welcoming the Olympic flame aboard the *Belem* in the Vieux-Port, an incredible experience for the people of Marseille on 8 May 2024. Between 24 July and 8 August, there were also men's and women's Olympic football matches, along with the sailing events, bringing Marseille international renown and continuing the momentum from the 2023 Rugby World Cup.

Capitalising on this exceptional rise in our global profile is now a strategic challenge. More than ever, it is a question of enhancing the appeal of our beautiful Phocaean city, by promoting a tourist, cultural and sporting offering that is constantly enriched and diversified, season after season and year after year.

This document provides a comprehensive panoramic overview of tourist activity in 2024 and illustrates the dynamics at play within the "Marseille, Sustainable and Attractive Destination" strategy adopted in early 2024. This roadmap aims to build a tourism sector that is more respectful, balanced, and beneficial for all.

We are committed to eco-responsible tourism, balanced throughout all seasons and across the whole region. We strive to increase the appeal of winter and the shoulder seasons, and to highlight the extraordinary wealth of Marseille's 111 districts.

Alongside the City of Marseille, the Tourist Office, Leisure and Convention Bureau continues its commitment to harmonious tourism development that creates value and connections, serving the region and its residents.

























5 KM OF COASTLINE **INCLUDING 20 KM OF ROCKY INLETS (LES CALANQUES)**







MILLION EUROS OF ECONOMIC SPIN-OFFS (+32%)



TH BEST **FRENCH CITY ON THE GDS***

2023 index, 43rd worldwide * Global Destination Sustainability Index



19.5 MILLION

TOURIST OVERNIGHT STAYS IN MARSEILLE IN 2024

PROFESSIONALS COMMITTED TO THE ECOTABLE AND GREEN KEY LABELS (+53% vs 2023) 7.5/10

SATISFACTION RATING

GIVEN BY SUMMER-2024 VISITORS TO THEIR TIME IN MARSEILLE



PORT IN FRANCE

FOR PASSENGER



23,828 DIRECT JOBS



(Urssaf 2023 data, +1% vs 2022)

MICE EVENTS

70% HOTEL-OCCUPANCY RATE IN 2024





MARSEILLE

Marseille, the second largest city in France, is a Mediterranean gem that attracts millions of visitors every year.

With 26 centuries of history behind it, it stands out thanks to its exuberant vitality and rich cultural diversity, whose greatest wealth undoubtedly lies in its inhabitants. With its 111 districts, the city embodies

a unique mix of living traditions and modernity, perpetuated by those who live here. Together, they shape a warm and distinctive identity that captivates the heart of all those who discover it.

Savour its cuisine, enjoy its warm atmosphere, take a break in the heart of Les Calanques National Park or dive into the Mediterranean.

Experience exciting moments in its legendary stadium and soak up

its traditions, its accent and the smile of its inhabitants.

In this edition of key figures of Marseille tourism, created by the Tourist Office, Leisure and Convention Bureau, find all the information about the sector and the actions carried out by the Tourist Office, a real operational structure at the service

of the city of Marseille's tourism policy.



SUSTAINABLE TOURISM

STAKES

Located at the crossroads of the Mediterranean, Marseille enjoys a **unique geographical location** which makes it an exceptional destination for travellers from around the globe.

Its cultural wealth, historical heritage and natural diversity attract **millions of visitors** each year. However, this tourist appeal comes with many challenges that Marseille's tourism stakeholders are eager to tackle.

Inclusive and harmonious economic development, social inclusion and solidarity, and protection of the environment and biodiversity are **the three pillars of sustainable tourism.** Based on an **ecosystem of committed actors**, Marseille strives to minimise the environmental footprint of its tourism activities, while adapting to the inevitable consequences of global warming.

This proactive approach aims not only to preserve the city's natural resources and exceptional heritage, but also to ensure a sustainable future for the destination and its inhabitants.

Among the agents of this change, the **Marseille Tourist Office, Leisure and Convention Bureau** carries out its missions of promoting the territory, welcoming visitors, uniting professionals and monitoring the sector, while anchoring its actions within the framework of the United Nations (UN) Sustainable Development Goals (SDGs).

15 SDGs guide our actions across the territory every day:

































Parc Borély



Place General de Gaulle

THE TOURIST OFFICE'S ACTIONS FOR SUSTAINABLE TOURISM

CONTINUING OUR COMMITMENT TO RECOGNISED AND PRESCRIPTIVE LABELS OR CERTIFICATIONS



4th year of certification. This ISO 20121 standard includes the principles of sustainable tourism as a whole (environmental, social/societal and economic). It aims to implement procedures that make it possible to identify the key issues of sustainable development as applied to our activities and trades.



DID certification (Innovative and Sustainable Destination) is the national label for sustainable destinations.

Compliance rate calculated by Bureau Veritas: 100% compliance.































70.2% score obtained on the GDS Index in 2023. +20 pts compared to 2021. The GDS Index is an international programme with high standards, launched in 2016, making it possible to measure, compare, and improve the sustainability strategy of leisure, business, and event tourism destinations combined.

BACKING THE ECOLOGICAL AND SOLIDARITY TRANSITION, BY SUPPORTING PROFESSIONALS

110 professionals committed to our Ecotable and Green Key programmes 100% of Office employees are trained in sustainable development

















THE OFFICE'S ACTIONS FOR SUSTAINABLE TOURISM



IMPLEMENTING INNOVATIVE SOLUTIONS TO RAISE AWARENESS AMONG VISITORS

Intensification of the #GourdeFriendly project by Hoali to local Marseille retailers to promote the use of refillable water bottles and fight single-use plastics.

Placement of tourist advisors at the entrance to the Calanques as part of the "Hors Les Murs" programme from April to mid-October to inform and raise awareness among visitors.

Launch of the Cool Noons project, two summer trails along shady routes to improve visitor and resident comfort and experience during the hottest hours of the day.











PROMOTING THE DESTINATION IN THE LOW SEASON TO BETTER DISTRIBUTE TOURIST FLOWS

Second edition of the "Marseille in Winter" campaign (from November 2024 to late March 2025) in France and Europe, aiming to promote year-round tourism.

Communication campaigns aimed at business visitors (MICE). The diversification of tourism products makes it possible to maintain jobs all year round, reducing the sector's dependency on seasonal tourism.













INVOLVING LOCAL RESIDENTS IN TOURISM DEVELOPMENT

Marseille Experience week: 1,000 tickets at €5 each over the course of a week, allowing Marseille residents to rediscover their city, alongside free access to tourist activities in the city for several leisure and social centres.







MAINTAINING A BALANCED PROMOTION OF THE DESTINATION TO SUPPORT THE LOCAL ECONOMY

Communication campaigns to boost the destination's reputation by promoting an online sales platform bringing together 50 Marseille service providers and 190 offers.

Promoting Marseille culture to the press. 45 press conferences and 125 journalists welcomed in 2024.

An accessible and rich website with 3.6 million unique users in 2024 (+49% compared to 2023).

An active presence on social media. 81k followers on Instagram, 35k on Facebook, 13.8k on TikTok.

Priority markets selected according to their geographical proximity and/or their economic contribution to the area.

France, Europe (Germany, UK, Switzerland, Austria and CEE countries, Spain, Italy, Scandinavia), USA and Canada, South Korea and Japan.

Promoting low-carbon modes of transport through targeted partnerships, influencer events, and participating in specialised workshops.







NATURAL HERITAGE

MARSEILLE'S NATURAL SPACES IN FIGURES

79

PROTECTED SPACES

79 protected areas¹ (+18% compared to 2023)



Including 4 Natura 2000 protected areas
Representing **10,000** hectares of protected nature, of which 1,000 are urban green spaces and 9,000 are natural spaces, located on the outskirts of the city.

5,623 plant and animal species recorded and 479 protected

Including **32** mammals, **29** amphibians and reptiles, **91** plants, mosses and ferns, and **288** birds, like Bonelli's eagle and the Eurasian eagle-owl.

8 m² of green space per inhabitant

Goal: 12 m² of green space per inhabitant (WHO, 2016).

64 parks spanning over 1 hectare (+10% vs 2023), of which 16 are larger than 5 hectares

Including 3 remarkable gardens (label awarded by the Ministry of Culture and Communication since 2005): Parc Borély, Parc du 26° Centenaire and Parc de la Magalone

8 parks with the Ecojardin label: Parc de l'Oasis, Parc Athéna, Parc Bortoli, Parc de la Buzine, Parc des Sœurs Franciscaines, Parc Central de Bonneveine, Parc de la Moline and Parc de la Colline Saint-Joseph

And two gardens listed as Historic Monuments: Parc du Palais Longchamp and Jardin du Port Antique (Jardin des Vestiges)

85% of compliant bathing in 2023 across 21 sites

With almost half (48%) classified as having excellent-quality water (excluding artificial bathing areas)²

15 monitored beaches and bathing areas

Corbiere Fortin, Batterie (Rade Nord), Corbière La Lave, St Estève (Île du Frioul), Les Catalans, Prophète, Prado Nord (Petit Roucas), Prado Nord (Grand Roucas), Prado Sud, Huveaune (David) - (Prado Sud), Borély - (Escale Borely), Bonneveine, Vieille-Chapelle, Pointe-Rouge and Sormiou.



'Number of spaces across the area with a protected or conservation status, or listed as natural heritage: parks, reserves and conservation sites; Natura 2000, Znieff or INPG sites; and archaeozoological and archaeobotanical sites. Source: INPN - Biodiversity across territories (mnhn.fr)

²Source: ARS - Report on bathing-water quality in the Provence Alpes-Côte d'Azur region 2023 (rankings calculated based on analysis from 2019 to 2022). Ranking: excellent, good quality, acceptable, unacceptable.

LES CALANQUES NATIONAL PARK

10th largest French national park and 1st largest suburban park in Europe, 85% of which extends over the sea

CALANQUES NATIONAL PARK VISITOR NUMBERS IN 2024

1 seasonal programme with:

61 seasonal workers during the summer (staff increased due to the 2024 Olympics) **137,000 visitors made aware** on-site (+11% compared to 2023)

3rd edition of the summer-regulation programme for visitors to the Sugiton Calanque, with:

400 people maximum / day, renewed for 5 years (2023 – 2027).

In 2024: **28,108 bookings** over the **66** days that the Calanques Massif is open, of which **51**% were honoured. Over **91**% of respondents to the satisfaction survey consider that this measure to limit visitor numbers can help the vegetation regenerate.







SUBURBAN PARK IN EUROPE



Map of Les Calanques

LES CALANQUES NATIONAL PARK



Les Calanques

In 2024, the trend of visitor numbers smoothing out across the entire year continued, with numbers in spring and autumn now comparable to those in the summer period.

Although local visitors are the most common all throughout the year, there is nevertheless a certain variation in visitor profiles according to the seasons:

the proportion of tourists increases during the summer.

The ways in which Les Calanques are used also varies from season to season. The summer season is mainly characterised by swimming and relaxing, particularly in the coves, while the rest of the year sees more sporting activities (hiking, climbing, etc.) and organised outings, such as school trips or team-building activities.

Overall visitor numbers to Les Calanques in 2024 were equivalent to 2023, with a slight increase at certain sites.

Peak visitor numbers varied from site to site, but certain periods stood out clearly: the long weekends in May, as well as the public holidays and weekends in July and August, with particularly high numbers in August. It should also be noted that several weekends in April, June and September saw almost record-high visitor numbers.

Apart from days when the forest areas were closed, the weather remained a key factor in determining visitor numbers to Les Calanques (intensity of wind, sun, rainy episodes).

Maritime traffic remained dense and varied, driven by pleasure boating, boat rental and underwater activities such as diving.

Finally, fire risk continues to require vigilance. However, the number of red days is decreasing:

7 days recorded in 2024, compared to 10 in 2023.



ECONOMY

TOURIST TAX IN 2024

€13,595,984

TOURIST-TAX AMOUNT IN 2024

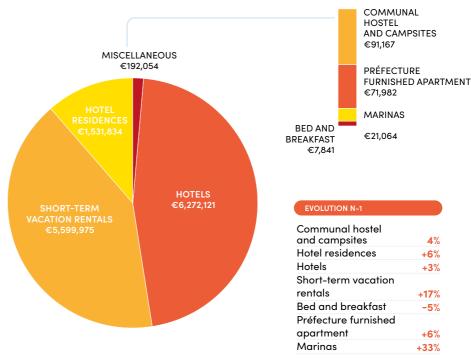


In 2024, the proceeds from tourist taxes collected between 1 January and 31 December 2024 represented a total of €13,595,984, broken down into €9,453,241.30 for the city, €949,301.65 for the department and €3,193,441.08 to finance the Nouvelle Provence Côte d'Azur line.

MARSEILLE TOURIST-TAX EVOLUTION FROM 2019 TO 2024 (CITY SHARE)



TOURIST-TAX DISTRIBUTION BY TYPE OF ACCOMMODATION 2024 VS 2023



TOURISM EMPLOYMENT IN 2023*

23,828 DIRECT TOURISM JOBS IN 2023



JOB DISTRIBUTION

EVOLUTION N-1

Business tourism

Accomodation

Heritage - Specialities

Culture

Transport

Catering

Leisure

75% of salaried tourist jobs are concentrated in the hotel and catering sectors.

Tourism employment represented 8.9% of total salaried private employment in the city in 2023 (268,189 jobs) and remained stable.

3,688 tourism employers, compared to 3,575 in 2022 (-0.1%).

-7%

+3%

+1%

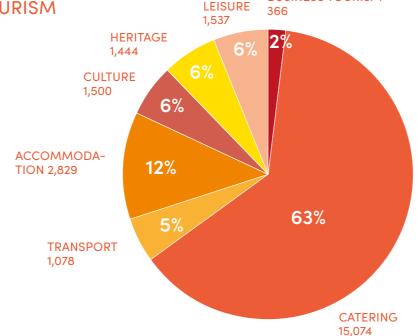
0%

+2%

+3%

0%

DISTRIBUTION OF TOURISM JOBS IN 2023





Guided tour of Le Panier

Source: AGAM/Urssaf-Acoss data communicated as at 31 December for the year N-1 Note: 2022 data has been revised. *2024 data not available at time of publication

BUSINESS TOURISM



TOURISM EMPLOYMENT IN 2023



Vallon des Auffes, pre-dinner drinks

With **15,074** jobs in 2023, representing nearly **63**% of the tourism and lifestyle sector, the restaurant industry is the leading employer within the Marseille tourism sector.



ACCOMMODATION

OVERVIEW OF THE RANGE

RANGE BY ACCOMMODATION TYPE HOTEL - PARA-HOTEL INDUSTRY

HOTELS	NUMBER OF ESTABLISHMENTS	NUMBER OF ROOMS	NUMBER OF ACCESSIBLE ROOMS	CAPACITY
NON-CLASSIFIED HOTELS	21	619	9	1,354
1-STAR HOTELS	3	189	5	428
2-STAR HOTELS	18	1,244	45	2,918
3-STAR HOTELS	33	2,446	81	5,041
4-STAR HOTELS	25	2,653	100	5,776
5-STAR HOTELS	4	367	11	891
TOTAL	104	7,518	251	16,408

TOURIST RESIDENCES	NUMBER OF ESTABLISHMENTS	NUMBER OF APARTMENTS
1 STAR AND NOT CLASSIFIED	1	272
3 STARS	15	2,741
TOTAL	16	3,013

OTHER ACCOMMODATION	NUMBER OF ESTABLISHMENTS	CAPACITY
HOLIDAY VILLAGES	2	520
HOSTELS	4	482

OF HOTELS BY NUMBER OF ROOMS



Source: Marseille Tourist Office, Leisure and Convention Bureau

NEW ESTABLISHMENTS

Boutique Hôtel Provencia | Hotel | 4 stars | 20 rooms



This boutique hotel has reinvented itself to offer stays centred around comfort, authenticity and simplicity. It features 20 rooms, excellent amenities and a prime location, just a stone's throw from the Vieux-Port, Notre-Dame-de-la-Garde and Cours Julien, in the heart of the bustling 6th district.

Find more information at www.boutiquehotelprovencia.com

EasyHôtel | Hotel | 2 stars | 111 rooms



This affordable hotel opened recently in Marseille, ideally located in the centre of the modern Euromed district – just 2 km from the Vieux-Port and the famous Mucem museum. Perfectly accessible by public transport, easyHotel Marseille Euromed is just a few minutes' walk away from the Désirée Clary metro station and less than 20 minutes' walk from Saint-Charles Train Station. Whether you're travelling for business or leisure, here, you'll be in the heart of the city.

Find more information at www.easyhotel.com



Hôtel Ligo by HappyCulture | Hotel | 4 stars | 142 rooms

Located in the heart of Marseille, this 4-star hotel offers 142 rooms and an unforgettable experience, combining luxury and comfort. Each room, elegantly decorated and perfectly equipped, is designed to provide a haven of tranquillity after a day spent exploring the city. No matter whether it's work or pleasure that brings you to Marseille, this hotel promises a memorable stay where every detail is carefully considered for your well-being.

Find more information at www.hotel-ligo.com



Maison Sénac | Hotel | Not classified | 17 rooms

Here, you will be ideally located right in the city centre, just a few steps from the Vieux-Port, the historic alleys of Le Panier, the magnificent Palais Longchamp or the famous Canebière. Fully renovated in early 2024, Maison Sénac is more than just a hotel, it's a gateway to the soul of Marseille. Discover a true haven of peace and comfort at the heart of the bustling city centre. Enjoy comfortable, recently renovated rooms. You are sure to appreciate the atmosphere: tasteful decor, blending charm and elegance, and a cosy mood.

Find more information at www.maisonsenac.fr



Boutique Hôtel Provencia



easyHotel



Hôtel Ligo by HappyCulture



Maison Sénac

HOTEL INDUSTRY

HOTEL PERFORMANCE

In 2024, the performance of Marseille's hotel industry was satisfactory, exceeding that seen in the rest of the country excluding Paris. Driven by the 2024 Olympic Games and favourable weather, the city's RevPAR was up compared to 2022. However, in comparison to 2023, the sector experienced a moderate dip in RevPAR, due to a simultaneous decrease in both occupancy rate and average price. The events hosted in Marseille for the 2024 Olympics only partially offset the loss of activity following the 2023 Rugby World Cup.



KEY FIGURES FOR 2024 HOTEL PERFORMANCE:

€109.80

AVERAGE PRICE

1.3% decrease

€76.80 RevPAR 2.4% decrease compared to 2023

1.5 D Average hotel stay duration in 2024

EVOLUTION OF CUMULATIVE HOTEL PERFORMANCE FROM 1 JANUARY TO 31 DECEMBER 2024:

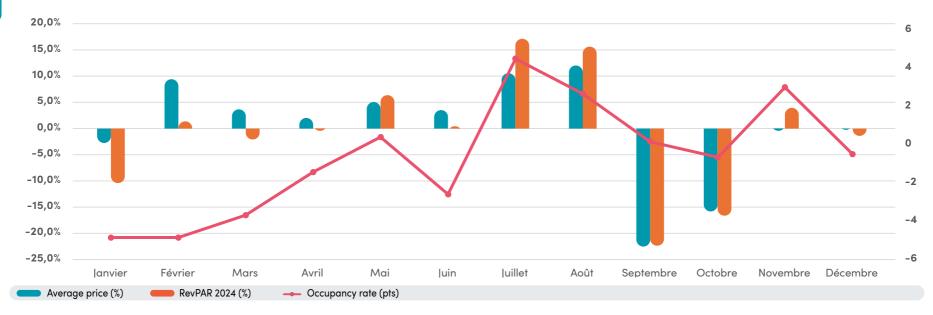




Source: MKG Destination | Note: Based on a sample of 74 hotels and residences representing 7,386 rooms | Average price and RevPAR excl. taxes

ACCOMMODATION

EVOLUTION OF CUMULATIVE HOTEL PERFORMANCE FROM 1 JANUARY TO 31 DECEMBER 2024 VS 2023:



Source: MKG Destination | Note: Based on a sample of 74 hotels and residences representing 7,386 rooms

CUMULATIVE HOTEL PERFORMANCE FROM 1 JANUARY TO 31 DECEMBER 2024 BY HOTEL CATEGORY

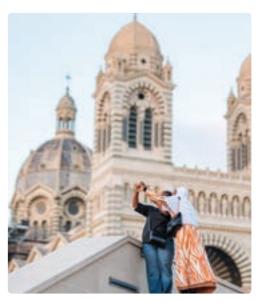
SEGMENTS	OCCUPANCY RATE %	AVERAGE PRICE €	RevPAR €
SUPER-ECO	69.6%	€69.60	€48.50
ECONOMY	73.2%	€89.50	€65.50
MID-RANGE	69.3%	€125.70	€87.10
PREMIUM	67.1%	€203.10	€136.30
RESIDENCES	70.6%	€74.30	€52.40
OVERALL	70.0%	€109.80	€76.80

Source: MKG Destination | Based on a sample of 74 hotels and residences representing 7,386 rooms | Average price and RevPAR excl. taxes

OCCUPANCY RATE: Ratio of number of rooms (or apartments) sold and the number of rooms (or apartments) available.

AVERAGE PRICE: Accommodation turnover divided by the number of rooms (or apartments) sold.

RevPAR: Occupancy rate multiplied by average price or accommodation turnover divided by the number of rooms (or apartments) available



Young women taking a photo at La Major

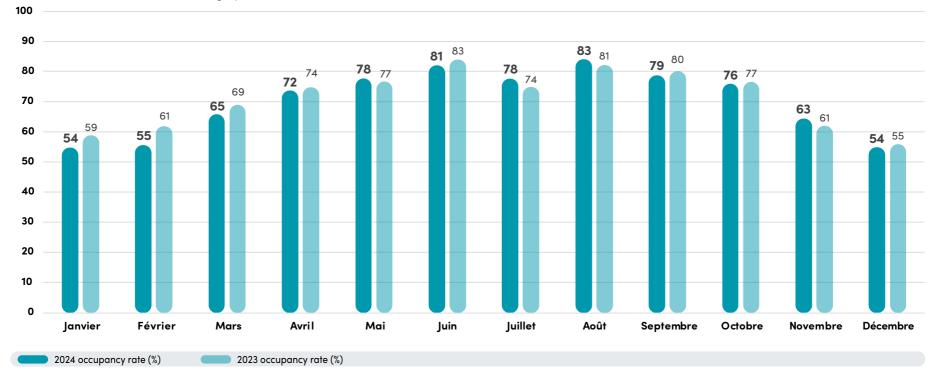
OCCUPANCY RATE IN 2024 VS 2023, MONTH BY MONTH:



The most dynamic months for the Marseille hotel industry were August, with an occupancy rate of 83%, followed by June at 81% and September at 79%. May and October also maintained a high rate, between 76% and 78%. The months with the lowest activity also remained relatively satisfactory, with occupancy rates not falling below 54% during the winter period. The shoulder seasons, March and November, achieved satisfactory occupancy rates of 65% and 79% respectively.

Analysis of the monthly occupancy rates demonstrates that Marseille's hotel clienteles are highly complementary. The business clientele could be found during the week more and more as summer approached, less so during the two months of summer holidays, and returned from September onwards. The leisure clientele also came out in force, on weekends and during school holidays, driven by 2024's especially sunny weather. The month of May brought long weekends, thanks to a favourable calendar of public holidays.

Finally, the highlight of the year in Marseille was hosting a number of events for the 2024 Olympics and Paralympics between July and September, as well as the arrival of the Olympic Flame in May. This momentum provided an opportunity to welcome foreign guests, particularly from the US dollar zone seeking to benefit from their purchasing power. The upper segments therefore achieved a significantly higher RevPAR compared to 2022, driven by the increase in average price.



Source: MKG Destination | Note: Based on a sample of 74 hotels and residences representing 7,386 rooms

CUMULATIVE TOP 10 NATIONALITIES FROM 1 JANUARY TO 31 DECEMBER 2024 AND 2023

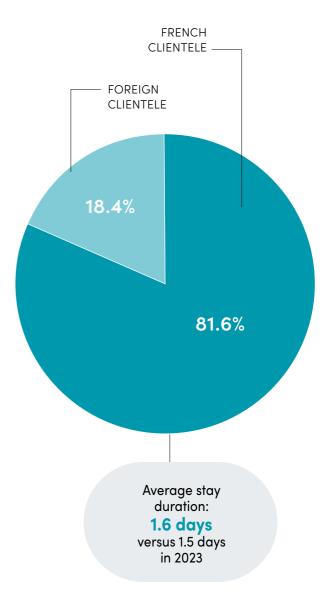
2024	OVERALL
FRANCE	81.6%
UNITED KINGDOM	2.8%
ITALY	2.3%
GERMANY	1.7 %
UNITED STATES	1.4%
BELGIUM	1.1%
SPAIN	1.0%
SWITZERLAND	0.9%
ALGERIA	0.7%
THE NETHERLANDS	0.4%
OTHER	6.0%

2023	OVERALL
FRANCE	79.5%
UNITED KINGDOM	5.7%
GERMANY	1.7%
UNITED STATES	1.2%
BELGIUM	1.2%
ITALY	1.2%
SWITZERLAND	1.0%
SPAIN	1.0%
TURKEY	0.7%
ALGERIA	0.6%
OTHER	6.2%



Tourist train on La Corniche

Source: MKG Destination



HOTEL INDUSTRY

CUSTOMER REVIEWS

EVOLUTION IN THE AVERAGE RATING GIVEN TO MARSEILLE ESTABLISHMENTS BETWEEN 2023 AND 2024:

2023 average rating: 7.9 (Good)

2024 average rating: 8 (Very good)

AVERAGE RATING GIVEN TO MARSEILLE HOTELS IN 2024

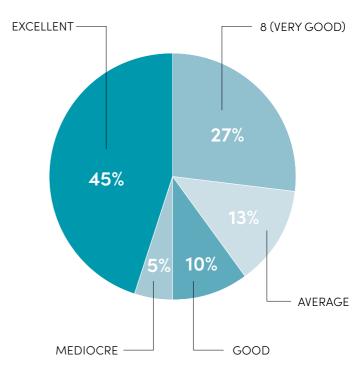
DISTRIBUTION OF REVIEWS BY OVERALL SENTIMENT - 2024

TOP REVIEW SITE IN 2024:

1	2	3	4	5
BOOKING	GOOGLE	HOTELS.COM	EXPEDIA	TRIPADVISOR
55,071 REVIEWS	13,027 REVIEWS	3,655 REVIEWS	1,839 REVIEWS	1,485 REVIEWS
73 %	17.3%	4.8%	2.4%	2%
B.	G		X	00

TOP COUNTRIES OF ORIGIN IN 2024:

1 FRANCE	2 ITALY	3 GERMANY	4 UNITED KINGDOM	5 UNITED STATES
32,928 REVIEWS	3,111 REVIEWS	2,647 REVIEWS	2,321 REVIEWS	2,252 REVIEWS
54.3%	5.1%	4.4%	3.8%	3.7%





HOTEL INDUSTRY

SECTOR COMMITMENTS

NUMBER OF LABELLED OR CERTIFIED ESTABLISHMENTS (OR IN PROGRESS):

50

Green Key-labelled establishments: representing **47**% of the rooms in the hotel fleet, +39% compared to 2023. The City of Marseille is one of the French cities with the highest number of labelled establishments in proportion to its hotel fleet



As the first international sustainable tourism label for tourist accommodation, the Green Key label is managed by the Teragir association within the metropolitan area. The City of Marseille, the Marseille Tourist Office and Teragir offer this programme to Marseille professionals thanks to an agreement between these three institutions. This label covers all areas of environmental management based on 100-120 criteria, across seven different themes. On average, 54 L of water is saved per night thanks to the Green Key label.



NUMBER OF COMMERCIAL ESTABLISHMENTS IMPLEMENTING MEASURES TO FACILITATE

ACCESS FOR PEOPLE WITH DISABILITIES (Destination's total capacity for people with reduced mobility):

hotel establishments in Marseille have at least one accessible room, of which four have been labelled "Tourisme et Handicap". (+6% compared to 2023)

accessible rooms in total. (+6% compared to 2023)



NUMBER OF ESTABLISHMENTS LABELLED "FAMILLE PLUS"

16

hotel establishments in Marseille have been labelled "Famille Plus". (Equal to 2023)



NUMBER OF ESTABLISHMENTS LABELLED "QUALITÉ TOURISME"



hotel establishments in Marseille are labelled "Qualité Tourisme". (-1 compared to 2023)



SHORT-TERM VACATION RENTALS

OVERVIEW OF THE RANGE

AVERAGE NUMBER OF PROPERTIES ACTIVE IN 2024 AND COMPARISON TO 2023

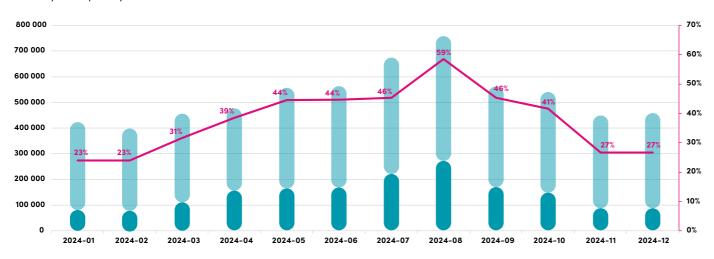
In 2024, there were **a total of 22,953 active properties**, representing an increase of **11.5**% compared to 2023, and an average of **14,707 active properties each month.**



VISITOR NUMBERS

EVOLUTION OF VISITOR NUMBERS FOR VACATION RENTALS IN MARSEILLE IN 2024

Monthly occupancy rate of vacation rentals in Marseille in 2024





TOTAL NIGHTS BOOKED: total number of nights booked over the period, defined according to the study of rental calendars.

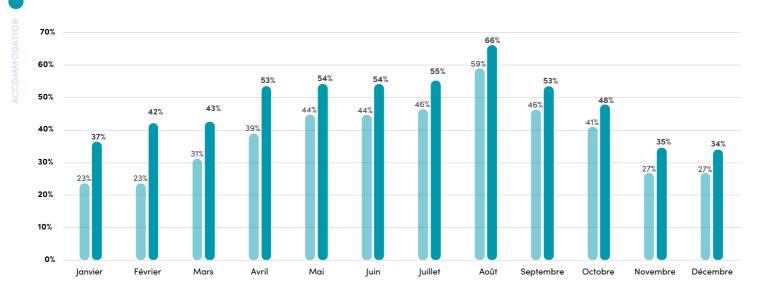
TOTAL NIGHTS AVAILABLE: number of active bookable, booked or temporarily unavailable nights (period between two bookings, as established by owner) in the observed period, defined according to the study of rental calendars.

OCCUPANCY RATE: Total nights booked / Total nights available (excluding accommodation not bookable during the observed period, adverts too recent to be categorised or bookings of over 90 nights).

ACTIVE PROPERTY: a rental that has been listed for at least one day during the year on one of the three platforms (Airbnb, Booking, Abritel).

Source: LightHouse - OTLCM

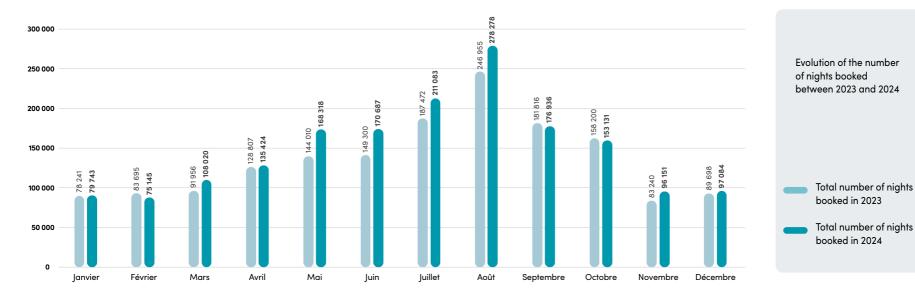
EVOLUTION OF THE OCCUPANCY RATE BETWEEN 2023 AND 2024





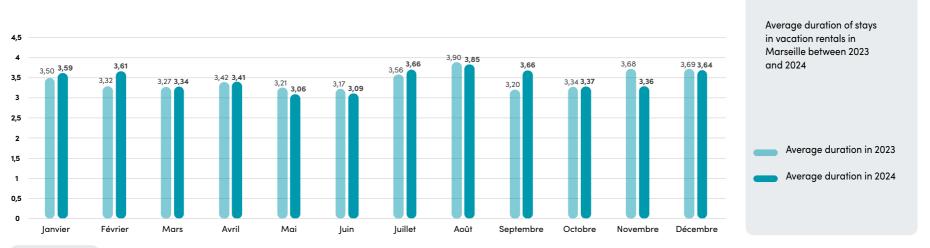
Occupancy rate in 2024

EVOLUTION OF THE NUMBER OF NIGHTS BOOKED BETWEEN 2023 AND 2024



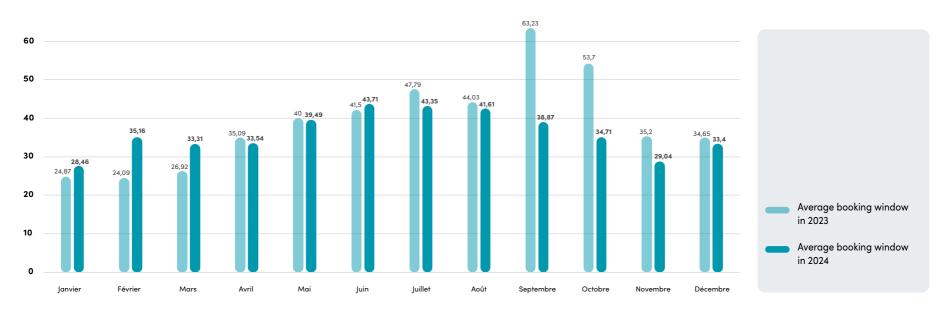
Source: LightHouse - OTLCM

AVERAGE DURATION OF STAYS BETWEEN 2023 AND 2024



DURATION OF STAY: average number of nights booked per stay in the accommodation (= average period between the occupants' arrival and departure).

AVERAGE BOOKING WINDOW BETWEEN 2023 AND 2024:



AVERAGE BOOKING WINDOW: average number of days between the date the booking was made and the date on which the stay began (check-in). The date indicated corresponds to the date on which the stay began.

PLEASURE BOATS (*)

In the clientele study carried out in summer 2023, we observed that **2**% of visitors stayed on a boat. When staying in a Marseille marina for one or several nights, each visitor must pay the tourist tax. In 2024, the tourist tax from marinas accounted for 0.2% of the total amount collected.

PORTS	NUMBER OF MOORINGS	NUMBER OF NIGHTS BOATS STAYED/YEAR	AVERAGE DURATION OF STAY	NUMBER OF BOATS
VIEUX-PORT (*)	3,476	9,275	14.5 DAYS	629
FRIOUL + SMALL CONNECTED PORTS	845	5,981	3 DAYS	1,992
POINTE ROUGE + SMALL CONNECTED PORTS	1,893	8,489	53 DAYS	160
TOTAL FOR MARSEILLE	6,214	23,745	9 DAYS	2,781
2024 NUMBER OF YACHTS (>24 M)				
VIEUX-PORT	10	102	4.5 DAYS	23
FRIOUL	1	3	1.5 DAYS	2
TOTAL FOR LARGE YACHTS	11	105	4 DAYS	25







Vieux-Port

Source: Aix-Marseille-Provence Metropolitan Area – Ports Department (*) Only wet berths managed by the Aix-Marseille-Provence Metropolitan Area have been counted

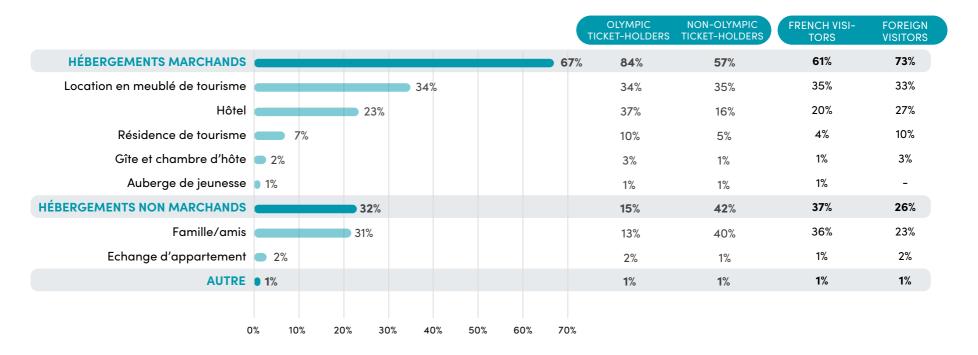
FOCUS ON SUMMER 2024 VISITORS



DISTRIBUTION OF ACCOMMODATION TYPES - SUMMER 2024 - OLYMPICS

Between 24 July and 8 August 2024, with the Olympics in full swing in Marseille, and in collaboration with the IFOP survey institute, 2,314 visitors distributed across 10 sites were surveyed during their visit to Marseille. In the survey, 67% of tourists chose commercial accommodation for their stay, mainly short-term vacation rentals or hotels. 31% stayed with family or friends.

ACCOMMODATION OPTIONS FOR STAYS IN MARSEILLE





TRANSPORT

Marseille enjoys exceptional accessibility by land, sea and air, making it a strategic location both nationally and internationally. As the main natural port of entry on the Mediterranean, the city attracts a constant flow of visitors from all over the world. Marseille is continuing and increasing its efforts to decarbonise mobility, resolutely committing to the transition to more sustainable and eco-friendly forms of transport.

LAND

TRAIN

Marseille is a remarkably well-connected city, offering easy access by train from a host of destinations, whether regional, French or even European!

4 hr 46 **REGIONAL JOURNEYS** Briançon 2 hr 03 Sisteron 3 hr 07 Digne 57 min Avignon 41 min Arles Aix-en-Provence Menton 46 min 3 hr 26 Nice 2 hr 27 Antibes Cannes 2 hr 11 1 hr 57 Marseille Toulon 41 min

NATIONAL AND INTERNATIONAL JOURNEYS







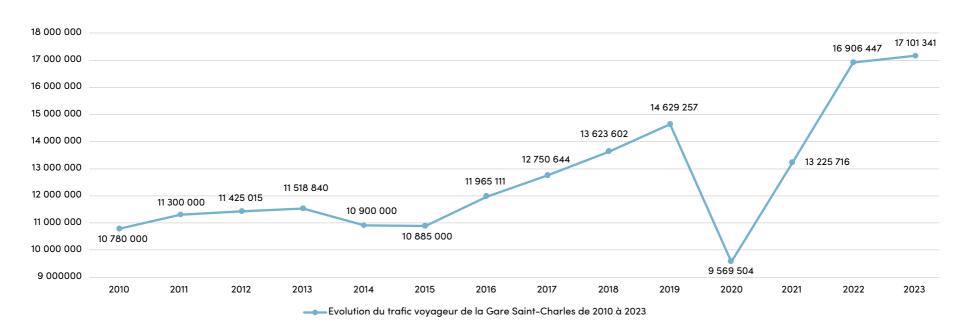
17,101,341

TRAVELLERS TO SAINT-CHARLES STATION IN 2023



Saint-Charles Station - Historic staircase

EVOLUTION OF PASSENGER TRAFFIC TO SAINT-CHARLES STATION FROM 2010 TO 2023



Source: Marseille station and connection data, 31 December 2024

LAND

GETTING AROUND IN MARSEILLE

BIKE

2,000 e-bikes across 200 stations **88.2** km of cycle paths

ELECTRIC SCOOTERS

2,500 self-service electric scooters

WALKING

104,244 m² of pedestrian areas in the city centre
42 urban trails offered by the Marseille Tourist Office,
Leisure and Convention Bureau

PUBLIC TRANSPORT

BUS:

420,000 journeys per day

93 bus lines

674.6 km of lines

2,532 stops, including 573 accessible to people with reduced mobility

85% satisfied customers (2022 satisfaction survey)





E-bikes

METRO:

321,000 journeys per day

2 lines

20.8 km

29 stations

92% satisfied customers (2022 satisfaction survey)

TRAM:

141,000 journeys per day

3 lines

14.8 km

34 stations

95% satisfied customers (2022 satisfaction survey)

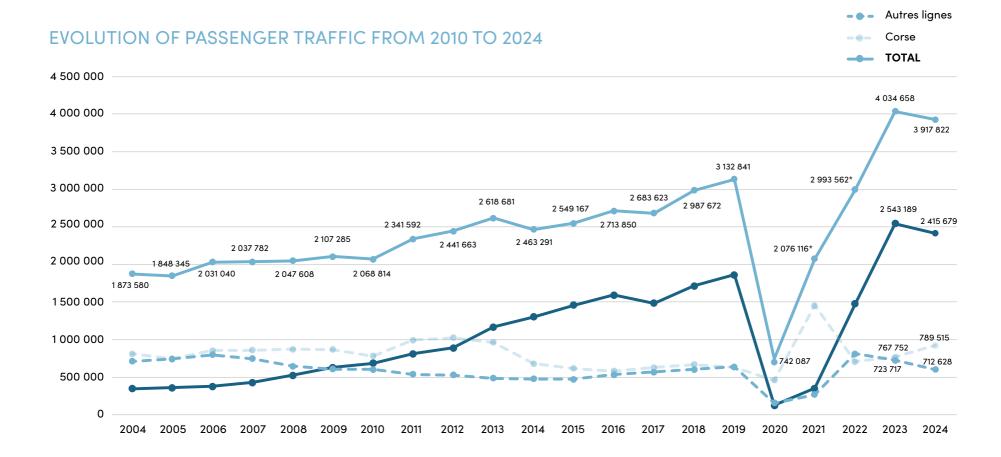
SEA

Croisières

GRAND PORT MARITIME DE MARSEILLE

3,917,822 passengers, **-4**% compared to 2023.

Of which, 2.4 million were cruise passengers, -5% compared to 2023.



Source: Grand Port Maritime de Marseille - stats@marseille-port.fr *Cruise club

SEA

SEA SHUTTLES

la**navette**

3,900 trips/day **422,000** trips/year

3 seasonal lines:

Vieux-Port <> L'Estaque (35 min): 1,414 trips/day Vieux-Port <> Pointe Rouge (35 min): 1,920 trips/day Pointe Rouge <> Les Goudes (15 min): 539 trips/day

5 boats with a capacity of 123 persons / boat

THE FERRY BOAT

331,000 trips/year 1 year-round line

lebateau

6,100 trips/day **1,090,000** trips/year

1 year-round line, in rotation with or without stop at Château d'If

Vieux Port <> Château d'If (20 min)

Château d'If <> lle du Frioul (15 min)

Vieux Port <> lle du Frioul (35 min)

3 boats with a capacity of 196 people / boat



la**navette**



The Ferry Boat



lebateau

SKY

11,167,485 passengers in 2024,

- +3.4% compared to 2023
- +5% international passengers compared to 2023

2nd largest regional French airport

35 airlines

132 destinations in 38 countries

Top 5 countries with busiest routes:

Spain (including the Balearic Islands and Canary Islands)
906,540 passengers

Morocco 853,288 passengers

Algeria 812,260 passengers

United Kingdom **711,588** passengers

Italy **566,885**





New flight connections in 2024:

- Shanghai (China)
- Limoges (France)
- Tirana (Albania)
- Zagreb (Croatia)
- Reggio di Calabria (Italy)
- Wroclaw (Poland)
- Stockholm (Sweden)
- Antalya (Turkey)

Average passenger load factor of 70% on the Marseille-Shanghai line (1st half-year)

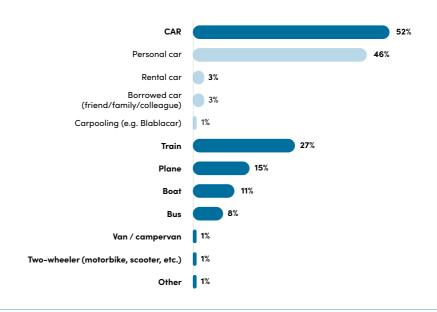
RT

FOCUS ON SUMMER 2024 VISITORS / OLYMPICS

Between 24 July and 8 August 2024, with the Olympics in full swing in Marseille, and in collaboration with the IFOP survey institute, 2,314 visitors distributed across 10 sites were surveyed during their visit to Marseille.

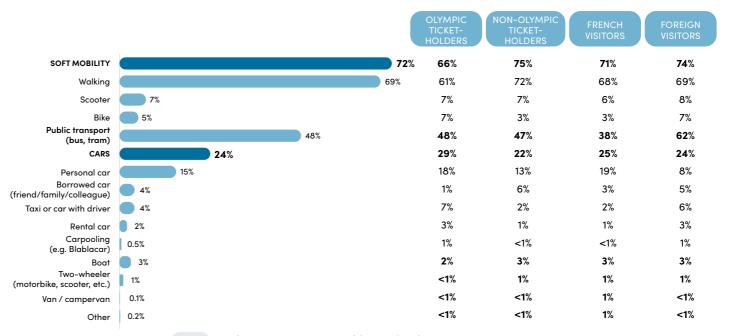
Distribution of modes of transport for visitors for the origin-destination return journey:

Modes of transport used to come to Marseille and return home



Distribution of modes of transport for visitors during their stay:

Modes of transport used for getting around Marseille (multiple answers possible)



Cycling and walking on La Corniche Kennedy

NOTE: 39% of visitors use a car as one of their modes of transport



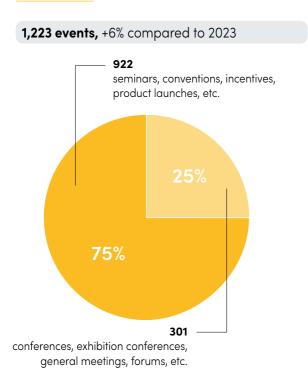
BUSINESS TOURISM

This year, Marseille confirmed its appeal as a major destination for business tourism, an essential sector in the strategy to reduce seasonal fluctuation for the destination. In 2024, the city recorded particularly encouraging results, with a 13% increase in international economic spin-offs and a 4% rise in total economic spin-offs. The year was also marked by a notable increase in event attendance, with a 9% rise in the number of participants.

Marseille hosted no fewer than 22 conferences with over 800 attendees, consolidating its position as a key player in the sector at both national and international level. Corporate events accounted for 75% of all events, reflecting the strong demand for modern, accessible infrastructure adapted to the needs of professionals. Moreover, 56% of economic spin-offs from business tourism was directly linked to the organisation of conferences, highlighting the strategic importance of this segment for the local economy. These results confirm Marseille's ability to meet the expectations of event organisers and attract attendees from all over the world.



MAIN BUSINESS TOURISM FIGURES IN 2024 (EXCL. TRADE FAIRS):



185,069 attendees, +9% compared to 2023 **458,644 conference days,** +4% compared to 2023

€182,922,983

TOTAL DIRECT ECONOMIC IMPACT* +4% compared to 2023

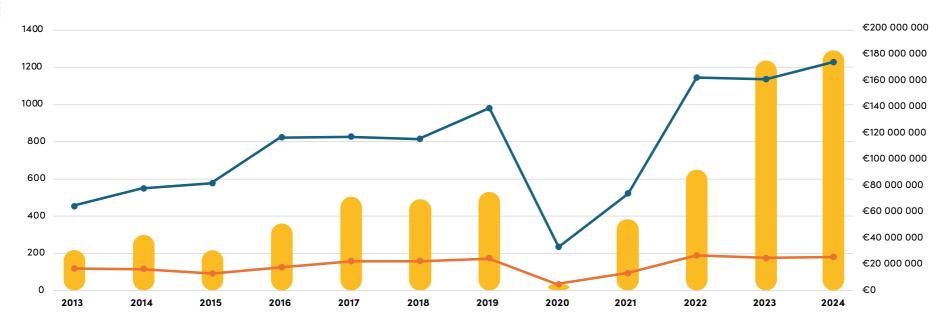
IN THE TOP 50 EUROPEAN CITIES FOR CONFERENCES (ICCA 2023)

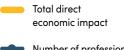
71st in the world
45th in Europe
3rd in France

Source: Aix-Marseille-Provence Convention Bureau / Nova Consulting / Find more information at: www.marseille-congres.com

^{*}The total direct economic impact corresponds to costs linked to event organisation. The economic spin-offs related to attendees' spending outside of the event (transport, souvenirs, leisure, etc.) are calculated in the indirect economic impact. Note: Coefficients revised in 2023 and 2024, meaning that there is a break in comparability with data from previous years.

EVOLUTION OF BUSINESS TOURISM IN MARSEILLE EXCL. TRADE FAIRS (BETWEEN 2013 AND 2024)





Number of professional events

Total participation (in k)







Conference at the Marseille Chanot

^{*}Break in series in 2023 and 2024 (change in the method used to calculate economic spin-offs).

MAIN CONFERENCE SITES AND CAPACITIES

	CONFERENCE CENTRES	ТҮРЕ	SIZE OF SPACES
PALASON COLUMN	MARSEILLE CHANOT www.marseille-chanot.com	CONFERENCE AND EXHIBITION CENTRE	102,000 M ² OUTDOORS 51,000 M ² INDOORS
	PALAIS DU PHARO palaisdupharo.marseille.fr	CONFERENCE CENTRE	10,000 M²
	WORLD TRADE CENTER MARSEILLE PROVENCE www.wtcmp.com	CONFERENCE CENTRE	CITY CENTER VIEUX-PORT: 2,000 M ² SKY CENTER LA MARSEILLAISE: 900 M ²



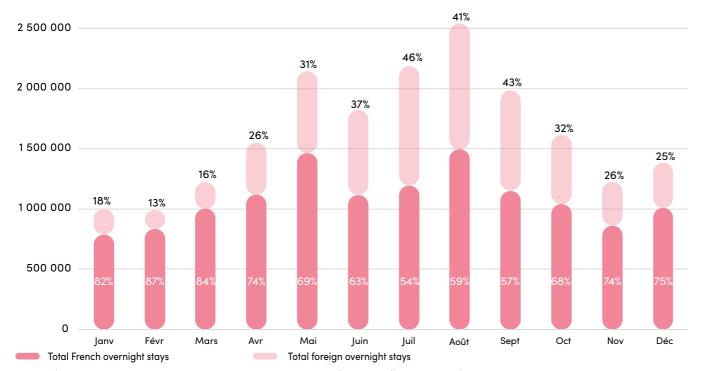
CLIENTELES

IN SUMMARY

FRENCH AND FOREIGN TOURIST OVERNIGHT STAYS IN 2024

TOURIST OVERNIGHT STAYS IN MARSEILLE IN 2024	2024 YEARLY VOLUME	EVOLUTION COMPARED TO 2023
FRENCH OVERNIGHT STAYS	13.2 MILLION	+20%
FOREIGN OVERNIGHT STAYS	6.3 MILLION	+20%

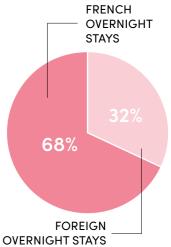
Distribution of tourist overnight stays in Marseille in 2024



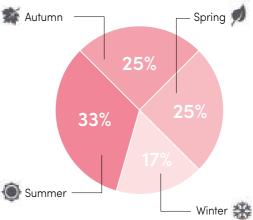
Source: Flux Vision Tourism – Orange Business / Provence Tourism / Marseille Tourist Office, Leisure and Convention Bureau.

Methodology note: The volume of tourist overnight stays presented in the key figures is based on a specific processing method using mobile telephone data (Orange Flux Vision). Unlike more targeted tourism analysis, it is based on a broader definition of visitors, taking an expanded approach to tourist behaviour in the region.





Seasonal distribution of overnight stays in 2024



FRENCH CLIENTELES



DISTRIBUTION AND PROPORTION OF MAIN TOURIST CLIENTELES FROM MAINLAND FRANCE IN 2024

		PERCENTAGE PROPORTION OF THE FRENCH CLIENTELE	NUMBER OF TOURIST OVERNIGHT STAYS IN 2024	EVOLUTION COMPARED TO 2023
1	PROVENCE-ALPES-CÔTE D'AZUR	42%	5.5 MILLION	+8%
2	ÎLE-DE-FRANCE	22%	2.9 MILLION	+7%
3	AUVERGNE-RHÔNE-ALPES	10%	1.3 MILLION	+2%
4	OCCITANIE	7%	940,000	+6%
5	NOUVELLE AQUITAINE	3%	450,000	+11%
6	HAUTS-DE-FRANCE	3%	400,000	+4%
7	OTHER REGIONS	13%	1.7 MILLION	+6%

PROPORTION OF TOURIST OVERNIGHT STAYS FROM THE LOCAL DEPARTMENTS (PROVENCE-ALPES-CÔTE D'AZUR) IN 2024

DEPARTMENT	PROPORTION OF REGIONAL OVER- NIGHT STAYS	EVOLUTION COMPARED TO 2023
BOUCHES-DU-RHÔNE	78%	+9%
VAR	8%	+1%
ALPES-MARITIMES	5%	+7%
VAUCLUSE	5%	+5%
ALPES DE HAUTE-PROVENCE	2%	-1%
HAUTES-ALPES	2%	+3%



Family in Le Panier

FOREIGN CLIENTELES

DISTRIBUTION AND PROPORTION OF MAIN FOREIGN TOURIST CLIENTELES IN 2024:

Algeria 24%

of foreign tourist overnight stays in 2024

+55%

(⊁

Germany 12%

of foreign tourist overnight stays in 2024

+1%



3

United States 10%

of foreign tourist overnight stays in 2024

+29%



4

United Kingdom

of foreign tourist overnight stays in 2024

-43%



5

Italy 5%

of foreign tourist overnight stays in 2024

+12%



6

Spain 5%

of foreign tourist overnight stays in 2024

+3%



7 Switzerland

4%

of foreign tourist overnight stays in 2024

+5%





Panorama of La Major



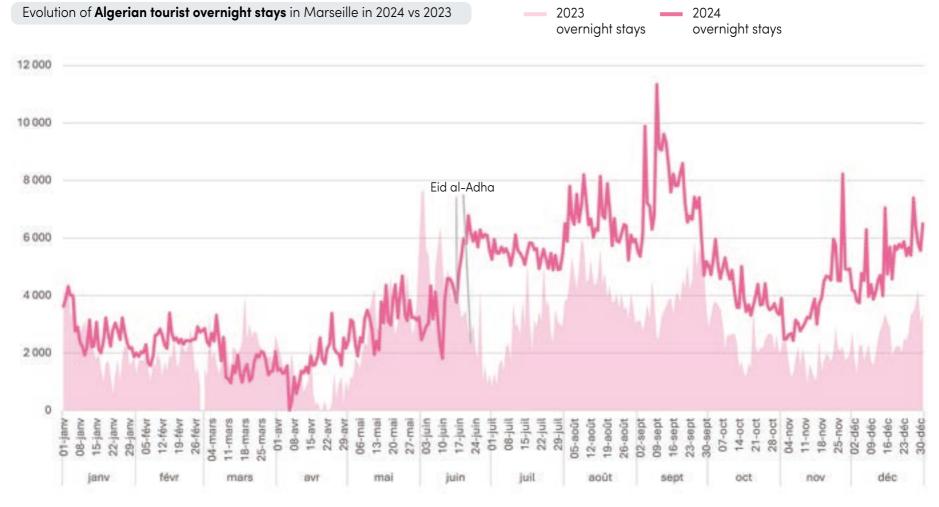


CHENTELES

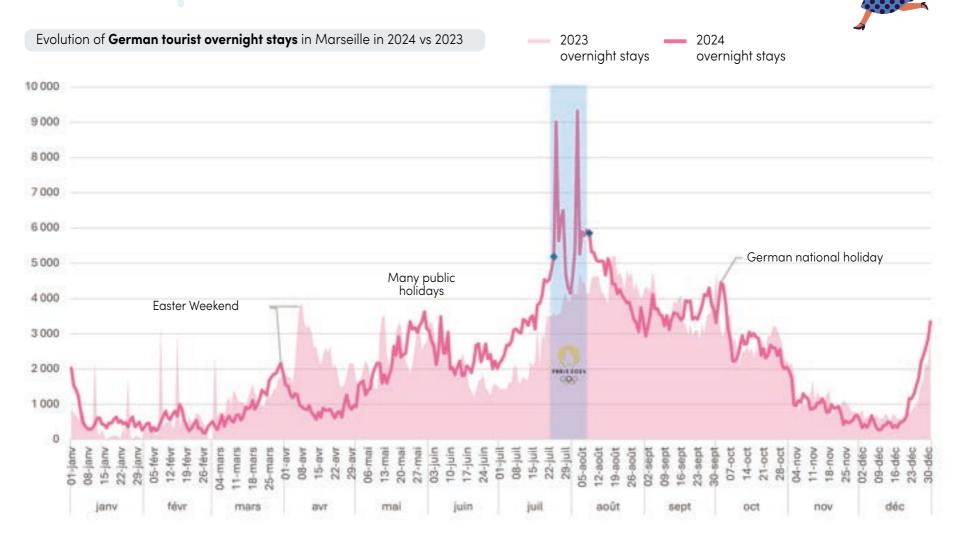
1.5 million

OVERNIGHT STAYS, +55% COMPARED TO 2023





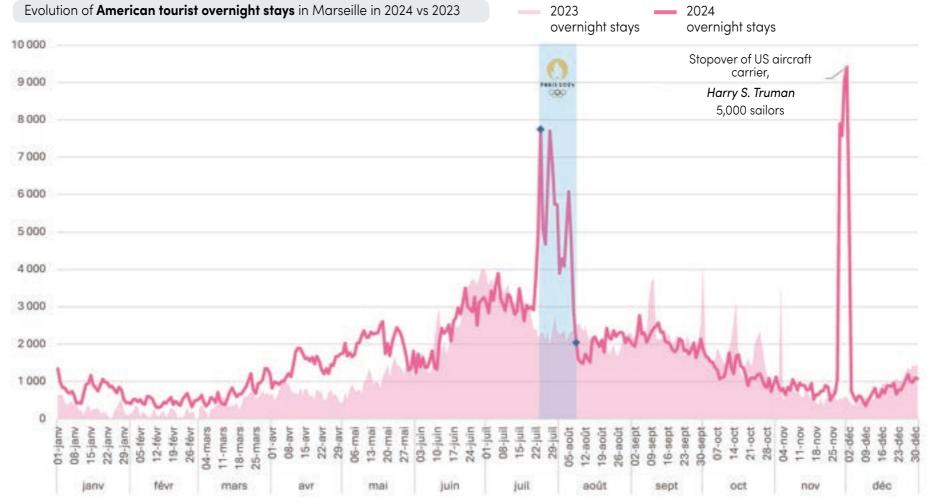
OVERNIGHT STAYS, +1% COMPARED TO 2023





OVERNIGHT STAYS, +29% COMPARED TO 2023



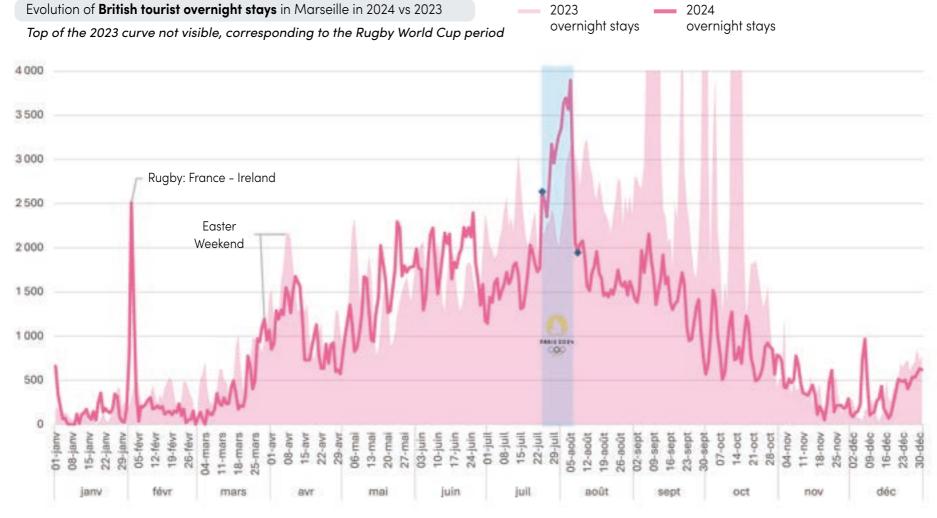


Source: Flux Vision Tourism - Orange Business / Provence Tourism / Marseille Tourist Office, Leisure and Convention Bureau



OVERNIGHT STAYS, -43% COMPARED TO 2023





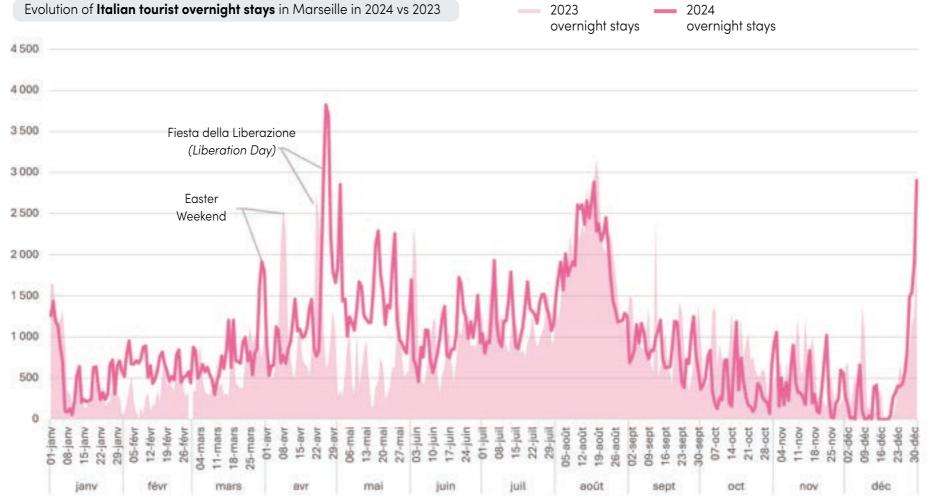
Source: Flux Vision Tourism – Orange Business / Provence Tourism / Marseille Tourist Office, Leisure and Convention Bureau

CHENTELES

339k

OVERNIGHT STAYS, +12% COMPARED TO 2023

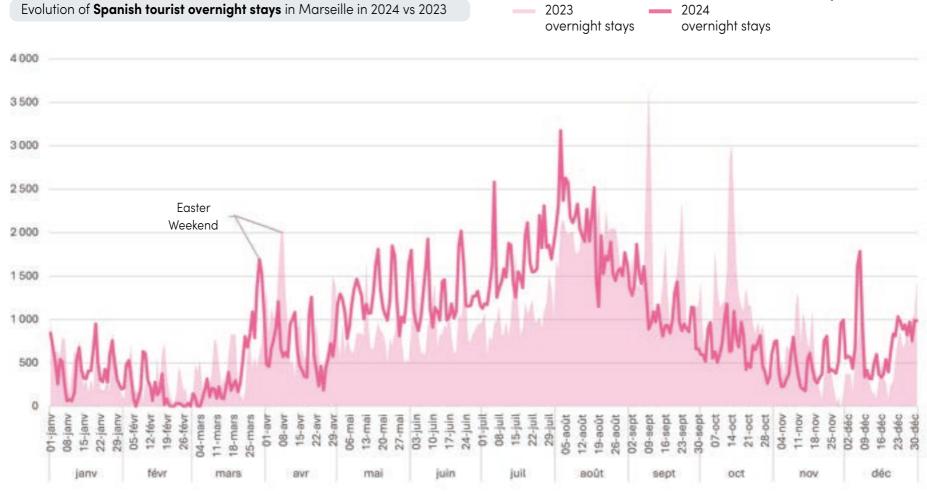




Source: Flux Vision Tourism - Orange Business / Provence Tourism / Marseille Tourist Office, Leisure and Convention Bureau

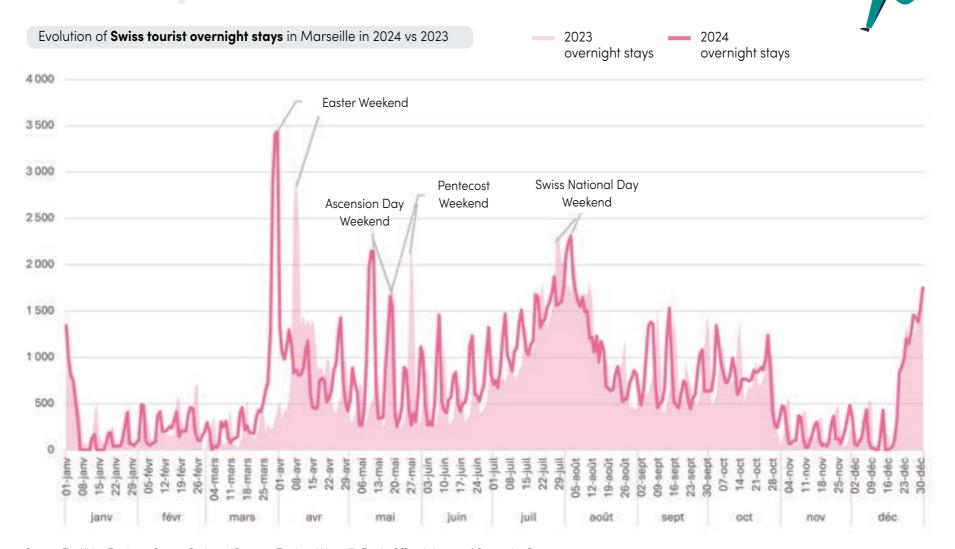
OVERNIGHT STAYS, +3% COMPARED TO 2023







OVERNIGHT STAYS, +5% COMPARED TO 2023



Source: Flux Vision Tourism - Orange Business / Provence Tourism / Marseille Tourist Office, Leisure and Convention Bureau

TOURIST OFFICE RECEPTION

The Marseille Tourist Office, Leisure and Convention Bureau welcomes tourists and residents 363 days a year at 11, La Canebière. Its **15 tourist advisors** offer information to visitors from all over the world, with **8 languages** spoken fluently (French, English, Italian, Spanish, German, Portuguese, Chinese and French Sign Language).

TYPOLOGY OF TOURISTS WELCOMED AT THE CANEBIÈRE OFFICES:

290,000

PEOPLE WELCOMED BY THE TOURIST OFFICE IN 2024

With 63% at the Canebière reception and 37% via the "Hors-les-Murs" programme.



Marseille Tourist Office, Leisure and Convention Bureau



The "Hors-les-Murs" external information point programme

Implemented in 2020, this programme extends throughout the summer season, from April to mid-October. A total of 50 seasonal workers are distributed across Marseille (including Les Calanques National Park) to guide and advise visitors and locals.

To note in 2024:

Specific points were set up at Saint-Charles Train Station, Marseille Provence Airport, Club 24 and Parc Chanot, as part of the Olympic Games in Marseille, from 24 July to 8 August 2024.

The most visited sites in 2024 were the welcome points located at the Vieux-Port and the Mucem.



TOURIST OFFICE RECEPTION

TOP 5 COUNTRIES OF ORIGIN FOR FOREIGN TOURISTS WELCOMED

1 Italy

Germany

3 United Kingdom 4 Spain

5 United States

(<u>©</u>



TOP 5 REGIONS OF ORIGIN FOR FRENCH TOURISTS WELCOMED

Provence-

Provence-Alpes-Côted'Azur



2

Île-de-France



3

Auvergne Rhône Alpes



4

Occitanie



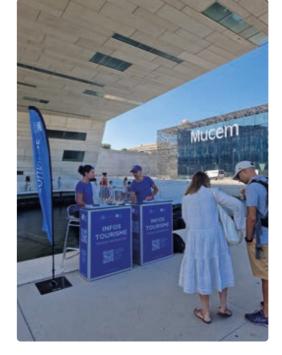
5

Nouvelle Aquitaine









Seasonal workers

Source: Marseille Tourist Office, Leisure and Convention Bureau



ACTIVITIES

MUSEUMS, SITES AND EXHIBITIONS

VISITOR NUMBERS TO PERMANENT AND TEMPORARY EXHIBITIONS IN 2022, 2023 AND 2024:

-2%

COMPARED TO 2023

MUSEUM	2022	2023	2024
MUCEM	423,927	446,614	428,194
CENTRE DE LA VIEILLE CHARITE	151,656	221,911	195,738
MUSEUM D'HISTOIRE NATURELLE (PALAIS LONGCHAMP)	127,458	148,804	136,978
CHÂTEAU D'IF	101,194	107,323	116,680
MUSEE DES BEAUX-ARTS (PALAIS LONGCHAMP)	64,637	78,962	86,743
MUSEE D'HISTOIRE DE MARSEILLE (MHM)	77,433	58,951	78,592
MAC MUSEE D'ART CONTEMPORAIN	2,787	75,262	46,905
MUSEE REGARDS DE PROVENCE	35,706	35,015	35,848
BORELY - MUSEE DE LA FAÏENCE, DES ARTS DECORATIFS, DE LA MODE	30,267	25,306	33,875
MUSEE CANTINI	39,383	27,991	33,604
LE PREAU DES ACCOULES	19,889	20,852	32,017
MEMORIAL DES DEPORTATIONS	20,766	21,996	25,398
MUSEE GROBET-LABADIE	4,968	3,263	CLOSED
MUSEE DES DOCKS ROMAINS	7,556	1,343	CLOSED

Sources: City of Marseille - MUCEM - Château d'If - Musée Regard de Provence



Arrival of the Olympic flame in Marseille aboard the *Belem*

KEY EVENTS OF 2024

99th MARSEILLE INTERNATIONAL FAIR

300,000 attendees

DELTA FESTIVAL

150,000 attendees

EUROPEAN HERITAGE DAYS

80,000 attendees

TOP 14 RUGBY FINAL

67,000 attendees

RAMMSTEIN CONCERT

53,000 attendees

MARSATAC FESTIVAL

30,000 attendees

MARSEILLE JAZZ DES CINQ CONTINENTS FESTIVAL

24,646 attendees

MARSEILLE-CASSIS RACE

20,000 participants

ARRIVAL OF THE OLYMPIC FLAME

On 8 May 2024, Marseille had the honour of welcoming the Olympic Flame to French soil, marking the start of its journey throughout the country. Arriving from Greece aboard the *Belem*, the flame made a historic entrance into the Vieux-Port.



- Nearly 200,000 spectators
- 95% of visitors who came specifically to Marseille to watch the arrival of the Olympic Flame were French*

THE OLYMPIC GAMES IN MARSEILLE

Among the eight host cities selected outside Paris, Marseille held some of the men's and women's football events at the Stade Vélodrome between 24 July and 8 August 2024, as well as all the sailing events in the Bay of Marseille, thus confirming the city's position as a key hub of sailing in France.

The Olympic Games in a few figures:

- 35,000 tickets sold for the 10 sailing events leaving from the new Olympic marina at Roucas-Blanc
- 350,000 spectators attended the 10 football matches at the Stade Vélodrome
- 200,000 people strolled along the 8,000 m² of Club 2024 on the Prado beaches in the city of Marseille
- 47% of ticket-holders were visiting Marseille for the first time*
- An unprecedented media impact: Over 16,780 articles and nearly 38 billion opportunities to see

CUISINE

€3 MICHELIN 2024

NUMBER OF MICHELIN-STARRED RESTAURANTS:

4 MICHELIN-STARRED RESTAURANTS IN MARSEILLE:

2 one-star restaurants

2 three-star restaurants



NUMBER OF ECOTABLE RESTAURANTS

60 candidates (+36% compared to 2023) **24 LABELLED RESTAURANTS**

Managed by the Marseille Tourist Office, Leisure and Convention Bureau with the support of the PACA region, the Ecotable programme aims to encourage, support and unite restaurateurs in a transition towards sustainable cooking.

The programme will welcome up to 60 Marseille establishments and runs until December 2026.

KOUSS-KOUSS FESTIVAL

Marseille celebrates its diverse cuisine with the Kouss-Kouss Festival. Launched in 2018, this culinary event explores the flavours, variations and sounds of the great transcultural dish. After harissa (2022) and blue-backed fish (2023), the festival returned to its eponymous theme by dedicating the 2024 edition to the famous grain, or rather grains. The 7th edition was part of the Été Marseillais 2024 festival and coproduced by the Marseille Tourist Office, Leisure and Convention Bureau, Marseille Centre and I.C.I-Les Grandes Tables, in partnership with the City of Marseille, and the local councils of the 2nd & 3rd and 1st & 7th districts.

8 chefs in the kitchen

_____ 12 days of sharing

Nearly 200 venues involved



THE TOURIST OFFICE'S ACTIVITIES



MARSEILLE EXPÉRIENCE

MarseilleExperience.com is the leading platform for booking leisure activities for individuals. It was created in 2021, designed to give visibility to professionals in the leisure sector and promote them all year round. Marseille Experience represents:

Around **50** member service providers in Marseille and the surrounding area

190 activities proposed online: guided tours, CityPass, walking tours, treasure hunts, escape games, boat trips, tours by bike, tuk-tuk or sidecar, paddle-boarding, day trips in Provence, exhibitions, and more.

Including 125 "low carbon" activities



CITYPASS

The CityPass brings together tourist and cultural offers (public transport, tourist buses and trackless trains, museums, culture and leisure) and allows visitors to enjoy all-inclusive packages for 24, 48 or 72 hours.

2024: **20,432** CityPasses sold 2023: **18,860** CityPasses sold





GUIDED TOURS

TOP 5 PUBLIC TOURS

- 1 TOUR OF LE PANIER
- MALMOUSQUE
- 3 GRAFFITI AND STREET ART
- 4 SOUTH BANK OF THE VIEUX-PORT
- 5 EN ROUTE TO THE MUCEM

Thank you to our partners for sharing their data

Marseille Provence Airport
Agence d'Urbanisme de l'Agglomération Marseillaise (AGAM)
Centre des Monuments Nationaux
Marseille Jazz des Cinq Continents Festival
Grand Port Maritime de Marseille Fos
Aix-Marseille-Provence Metropolitan Area
Musée des Civilisations de l'Europe et de la Méditerranée (MUCEM)
Musée Regards de Provence
Les Calanques National Park
SNCF
City of Marseille

And to the teams of the Marseille Tourist Office, Leisure and Convention Centre









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