

# TRAVEL PROFILE: France



## 1. Tourist Numbers & Revenue

France is one of the world's largest outbound travel markets (ranked 5th globally after China, US, Germany and UK for global outbound travel) and an important source market for Irish Tourism. Growth rates in tourist numbers have varied year on year. 2015 was a peak year with double-digit growth (12%); however other years have been more modest; 2016 reporting 5% growth.

### French Tourists

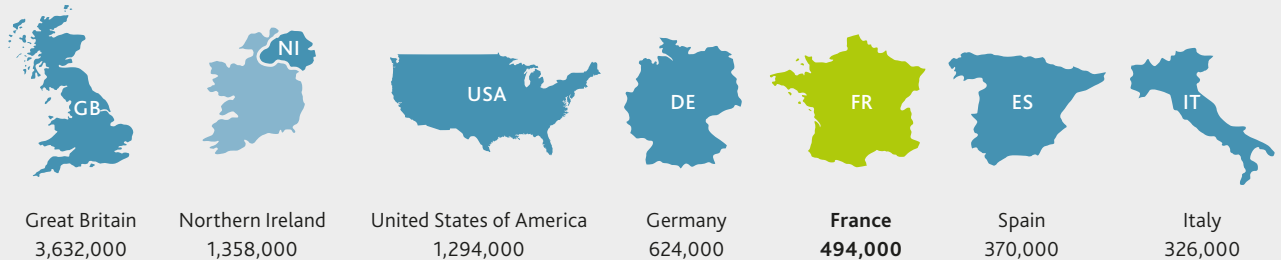
Tourists stay more than one night (i.e. excluding same day travellers) and can be classified into:

#### Main purpose of visit

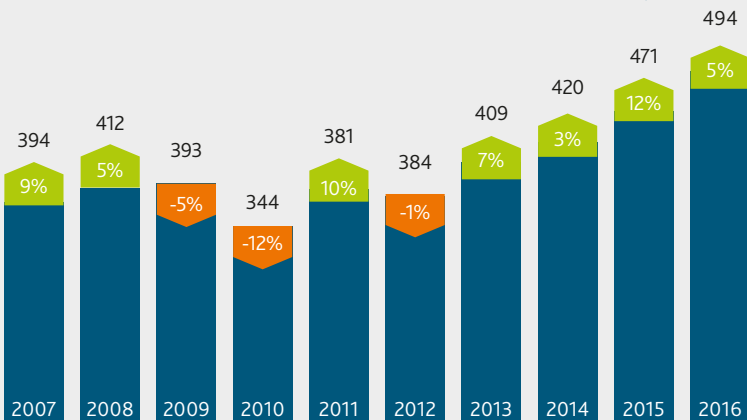


This travel profile looks at (1) the overview of tourist numbers and revenue (figures include holidaymakers, visiting friends and relatives, business tourists and others combined), then (2) focuses on the French holidaymaker specifically, and finally (3) looks at what holiday activities and experiences interest potential French holidaymakers to Ireland.

### Where Do Ireland's Tourists Come From?

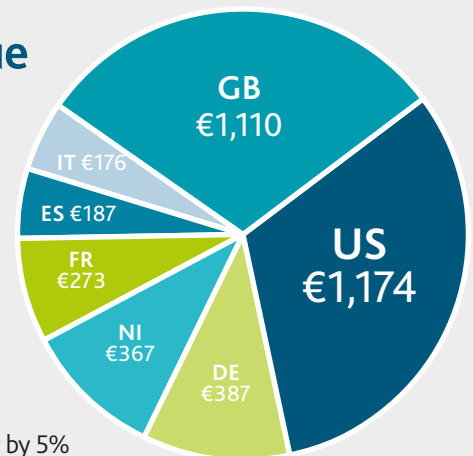


### Trend in French Tourist Numbers (000s)



France consistently holds the fourth position for both tourist numbers and revenue for overseas markets to Ireland.

### Revenue (€m)



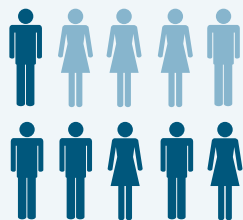
While tourist numbers grew by 5% in 2016, revenue grew by 16%, possibly impacted by an increase in average length of stay by French tourists.

# 2. French Holidaymaker Profile

61% of French tourists cite holiday as the main purpose of visit to Ireland with a further 20% visiting friends and relatives.

French holidaymakers are young; 48% are under 35 years of age. When in Ireland nearly three quarters (73%) prefer to use serviced accommodation, split between hotels (33%) and guesthouses and B&Bs (40%). A quarter (25%) will stay more than 9 nights.

The French are looking to relax, recharge and soak up the atmosphere of picturesque Irish towns and dramatic scenery. Experiences on or near the water that requires minimal physical exertion but provides a connection to the landscape are valued.



## Profile of French Holidaymakers

Six in ten (61%) French holidaymakers are first time visitors to Ireland, with nearly four in ten (39%) returning to Ireland for a repeat visit. French holidaymakers are the second market after GB for return visits to Ireland. The number returning to Ireland increased by 5 percentage points from 2012-2016, highlighting a level of satisfaction with what Ireland has to offer.

## Travel Arrangements

Most French holidaymakers (85%) travel independently to Ireland, with 15% on a package holiday - where the fare to/from Ireland and at least one other element (such as accommodation, car hire etc) was paid fully or partly in advance.



85%



15%

## Holiday Party Type

Four in ten French holidaymakers travel to Ireland as part of a couple. The percentages of families travelling have reduced by 6 percentage points since 2012, with couples and adult groups increasing by 4 and 6 percentage points respectively over the same period.

1 Couple



40%

2 Adult Group



25%

3 Alone



20%

4 Family



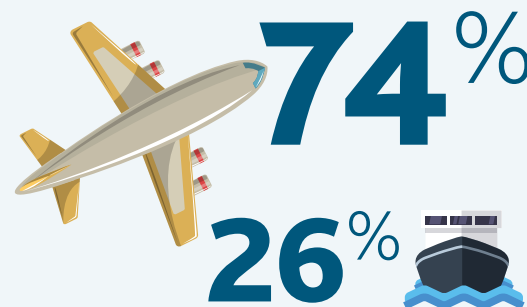
16%

Nearly six in ten (59%) French holidaymakers will stay in Ireland for more than 5 nights.

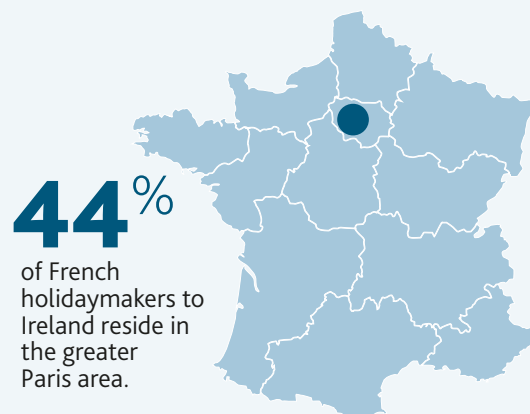
Age (2016)		Length of Stay (2016)	
Under 19 Years	10%	1 - 3 Nights	24%
19 - 34 Years	38%	1 - 5 Nights	41%
35 - 54 years	32%	1 - 8 Nights	75%
55 - 64 years	15%	9 or more nights	25%
65+ years	5%		

## Travel Routes

French holidaymakers typically travel to Ireland by air (74%) and 26% travel by sea.



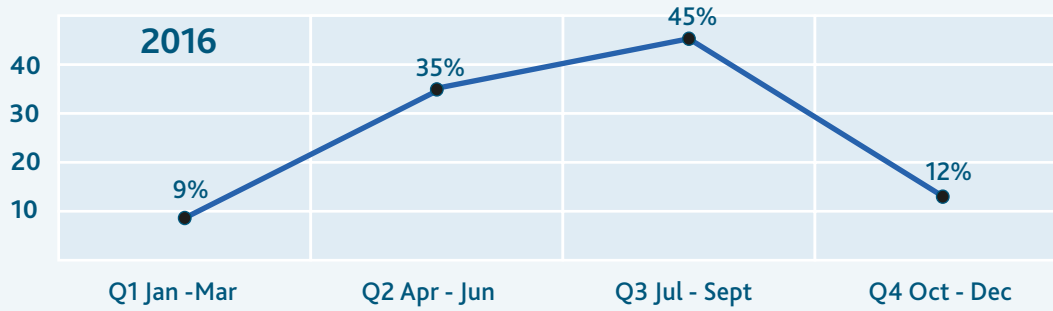
## Where Are They From?



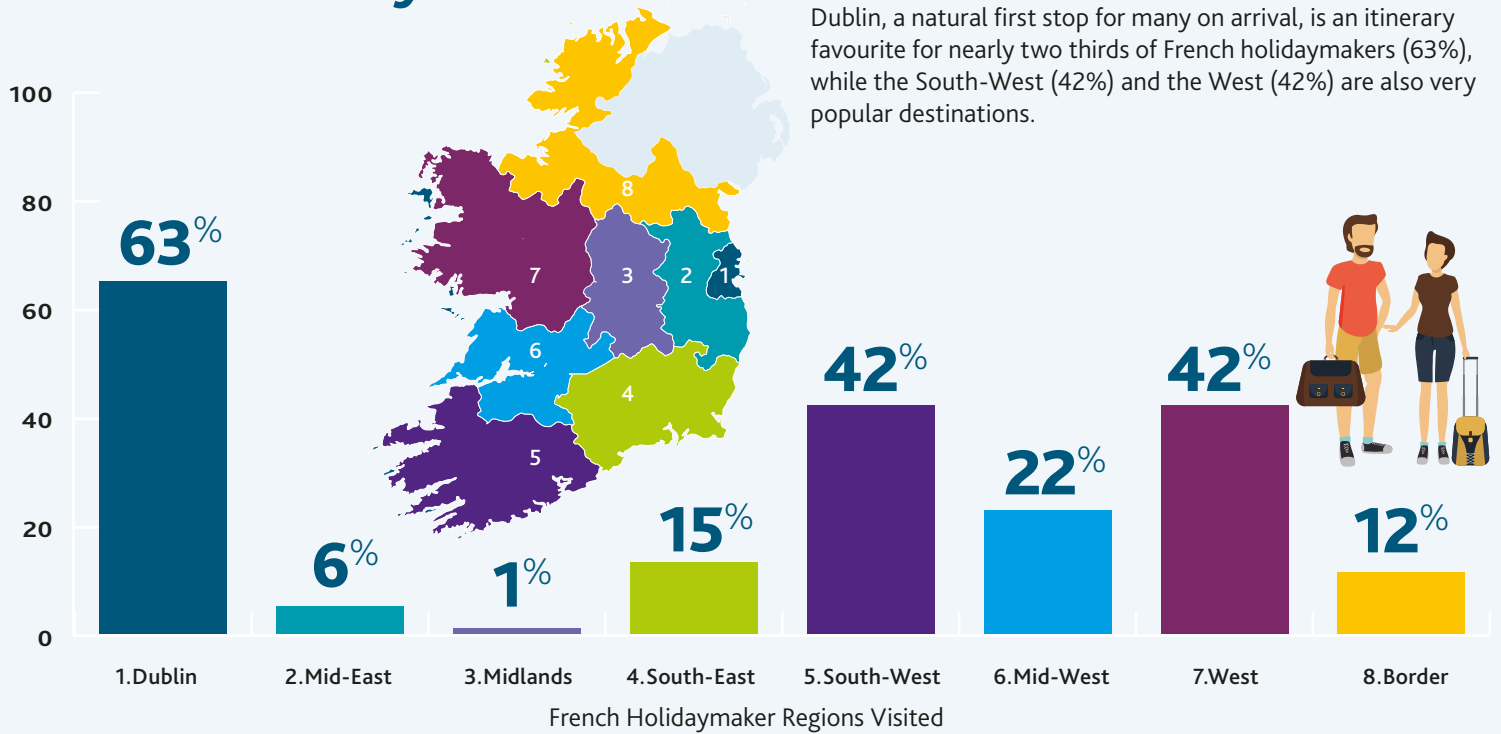
# 2. French Holidaymaker Profile



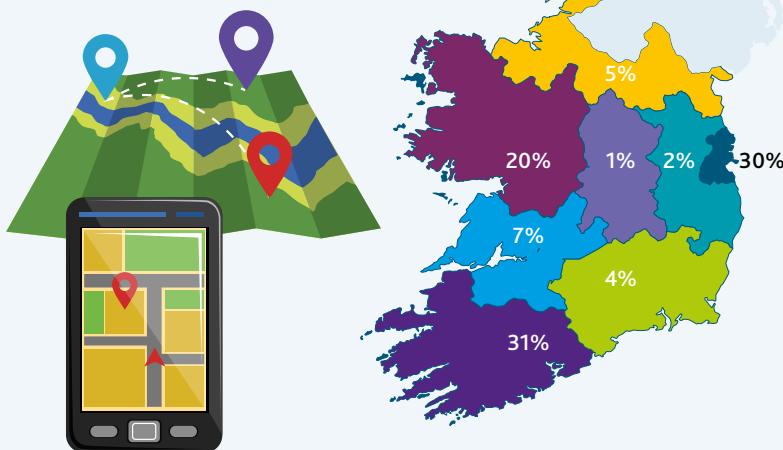
## When Do They Travel?



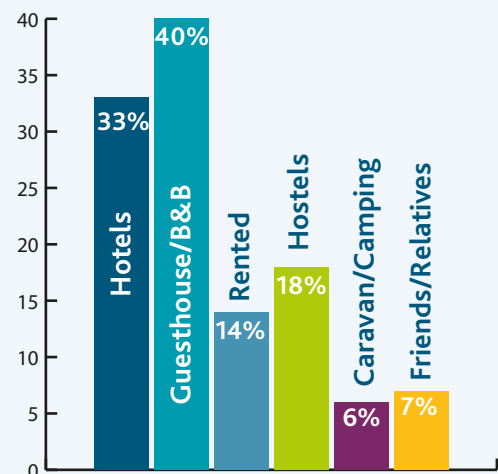
## Where Do They Go?



## Where Do They Stay?



## Holiday - Accommodation Used (%)



# 3. French Holiday Travel Choices

## What Types Of Holiday Are The French Looking For?

The French would definitely consider visiting Ireland for city breaks and see it as a place for rural, touring, and active holidays, particularly walking - reflecting the types of holidays they take generally. Ireland is therefore well positioned as a potential destination for this market.



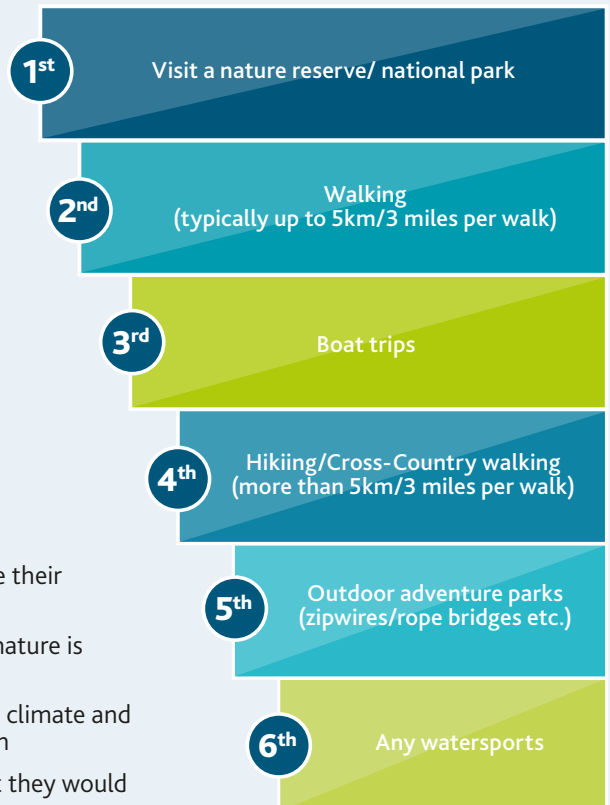
The French would definitely consider taking this type of holiday in Ireland in the next three years



## What Activities Do The French Typically Do On Holiday?



Type of holiday activities the French would consider doing while on holiday in Ireland?



- ▶ The appeal of water is strong for the French and something that they anticipate their experience in Ireland will incorporate at some level
- ▶ Any activity that is gentle and a means to enjoy the scenery and connect with nature is attractive to them
- ▶ While watersports feature as part of past holidays a lack of awareness as to the climate and water temperature may prohibit a high level of uptake from initial consideration
- ▶ Activities that the French typically participate in on holiday abroad match what they would see themselves doing if holidaying in Ireland

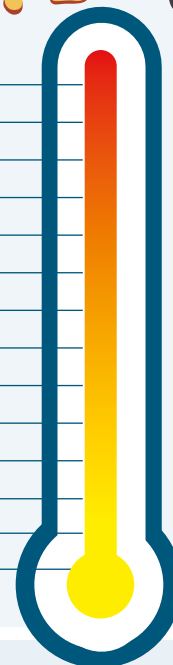
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## Things To See And Do On Holiday

- ▶ The French are interested in nature. They enjoy the freedom of exploring unspoilt Irish landscapes, while appreciating the warm hospitality of charming local towns
- ▶ Getting on the water is appealing, it doesn't require too much exertion but allows for a new perspective of the countryside

Experiences interested in doing in Ireland		%
1	Spend an afternoon exploring/strolling around a picturesque town	52%
2	Go whale and dolphin watching off the west coast	52%
3	Walk along some of the highest sea cliffs in Europe	50%
4	Explore spectacular scenery by bike or on foot	50%
5	Take a boat tour around Ireland's coastal villages	49%
6	Take trip to the rugged, remote islands off the coast	45%
7	Driving tour visiting a number of historical sites	42%
8	Sit outside a pub/cafe and people watch	41%
9	Visit tombs and historical sites older than the pyramids	40%
10	Take a tour where a guide tells you the story of the area	40%
11	Visit a festival celebrating local culture, food and heritage	39%
12	Shop for something that would remind you of your time in Ireland	38%
13	Listen to live traditional music in a local pub	38%
14	Hear Stories behind historical houses, buildings and monasteries	38%



## Enhancing The Holiday Experience

The French like to travel and are looking for authentic and unique experiences from their holidays. Ireland can provide a backdrop of spectacular scenery in which to enjoy local culture, soak up the atmosphere and recharge their batteries.

## How Can We Ensure They Have The Best Possible Experience?

- ▶ Ireland's scenery is a big draw for the French. Can we provide recommendations on where they can enjoy Ireland's unspoilt landscape?
- ▶ Engaging with authentic local culture at a relaxed pace appeals to this market
- ▶ Experiences that incorporate the water or the coast attract this market, are there opportunities for them to explore dramatic scenery by boat?
- ▶ The French like activity but anything too strenuous does not appeal; experiences for all ages and abilities will suit this market
- ▶ Touring holidays appeal to the French, are there opportunities to cross promote and provide local knowledge and recommendations for the next leg of their holiday?
- ▶ Can we stimulate the senses of our French holidaymakers with music, food and drink as part of the holiday experience?

