

Travel Trends



This profile reflects a pre-Covid marketplace and reviews trend data for the French market from 2007 to 2019. The series begins in 2007 to track the recovery from the last recession up to 2019, the last year of complete overseas data.

As an industry, tourism has experienced cycles of downturn and recovery before. While the challenge has never been of this magnitude, the data highlights its resilience and capacity for growth based on past economic shocks.

Understanding travel behaviour in pre-pandemic times will help drive recovery post-Covid.

This travel profile looks at:

1. The trend in French tourist numbers and revenue (tourist figures include all reasons for travel: holidaymakers, visiting friends and relatives, business tourists and others combined).
2. French holidaymakers, as an important subset of tourists, and their characteristics and behaviour in pre-Covid times.

Tourism Numbers and Revenue Trends

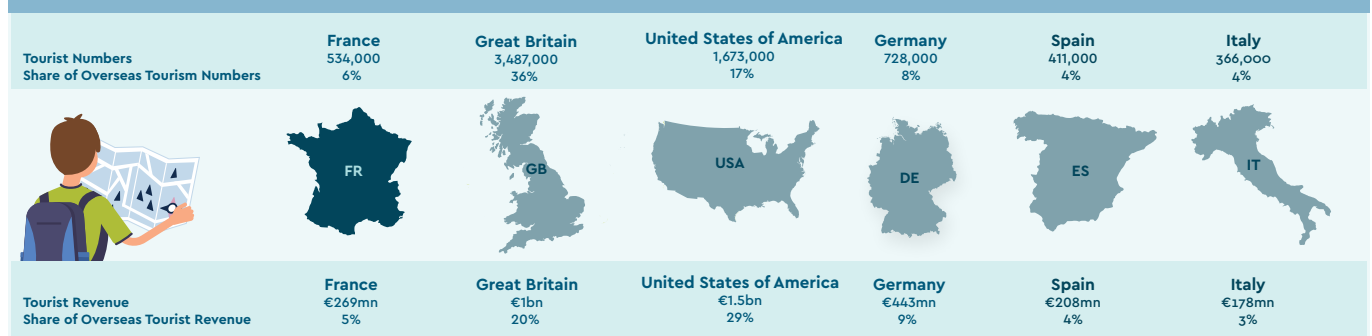
As one of the world's largest outbound travel markets, France is an important source market for Ireland's tourism industry. While growth rates have varied year on year the general trend has been one of growth; 2019 represented the largest tourist numbers on record,

while the associated revenue decreased in both 2018 and 2019.

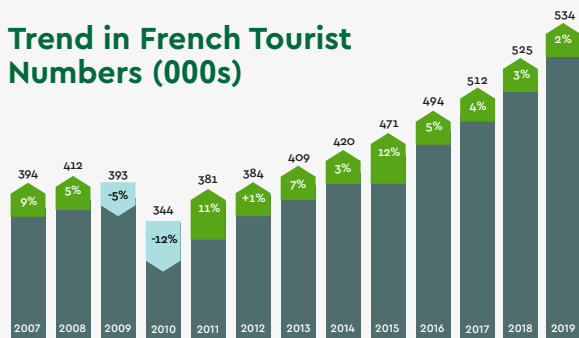
The French market is important for Ireland, as half of all French holidaymakers choose to stay five or more nights.



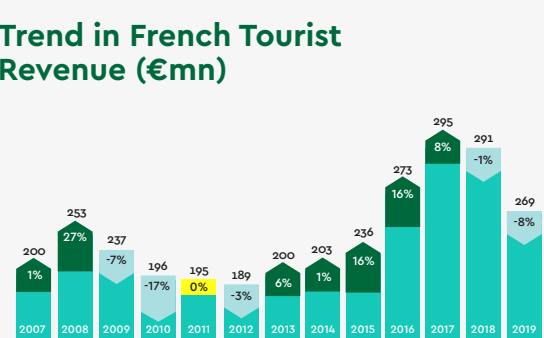
French Share of Overseas Tourists and Revenue (2019)



Trend in French Tourist Numbers (000s)



Trend in French Tourist Revenue (€mn)



France consistently holds the fourth position for both tourist numbers and revenue for overseas markets to Ireland. While tourist numbers steadily grew, revenue declined in 2018 and 2019.

French Tourists

Stay one or more nights (i.e. excluding same day travellers) and can be classified into:



FRENCH HOLIDAYMAKER TRENDS

Motivation to Travel¹ (Pre-Covid)

French holidaymakers enjoy getting off the beaten track, away from perceived tourist hotspots and are drawn to places that provide a sense of freedom and a means to explore unspoilt landscapes.

The French market is drawn to authenticity and therefore has a low threshold for any promotion of tourism experiences that they do

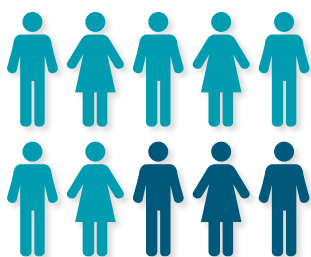
not perceive to be credible. Rather than the promise that an experience is unique, different, or world-class, this market prefers clarity on what makes the experience distinctive and worth the visit.

As with all markets variety is key, a sense of lots to see and do.

Post-Covid Drivers of Destination Choice

Research by Tourism Ireland² in Ireland's key source markets highlights that while Covid safety assurance comes into play for destination choice, **relaxation, variety of attractions and things to do, quality time with loved ones and value for money** are just as, if not more influential when choosing where to go on a short break or holiday.

Repeat Visitors

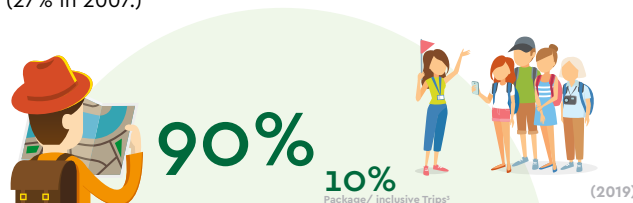


Seven in ten (70%) French holidaymakers are first time visitors to Ireland, with three in ten (30%) returning to Ireland for a repeat visit.

(2019)

Travel Arrangements

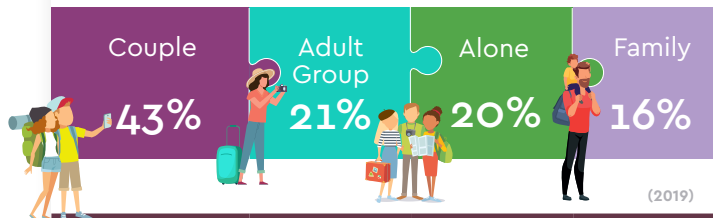
Most French holidaymakers (90%) travel independently to Ireland. The proportion of French holidaymakers travelling on a package tour, like other markets has declined over time (27% in 2007.)



(2019)

Holiday Party Type

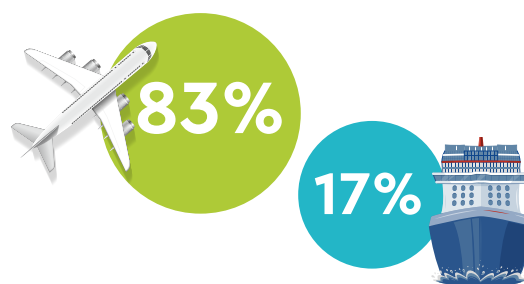
More than two in five (43%) French holidaymakers travel to Ireland as part of a couple, which has seen an increase over time (33% in 2007), while marginal declines have been seen across all other categories.



(2019)

Travel Routes

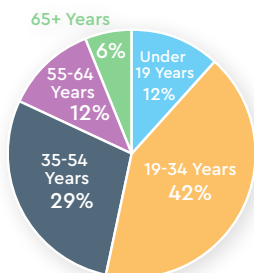
French holidaymakers typically travel to Ireland by air (83%).



(2019)

More than half (54%) of French holidaymakers are under 35, the 19-34 age group in particular has grown over time (from 30% in 2007).

Holidaymaker Age



Length of Stay

1 - 3 Nights	21%
1 - 5 Nights	47%
1 - 8 Nights	71%
9 or more Nights	29%

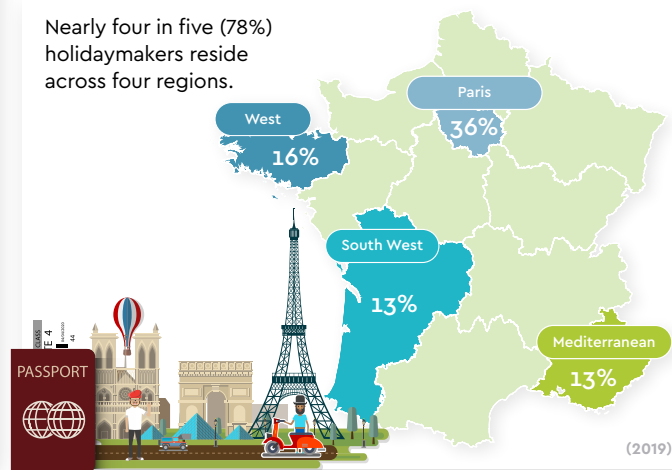
Over half (53%) of French holidaymakers will say in Ireland for more than 5 nights.

The French and German markets have the highest proportion of holidaymakers who stay 9 or more nights (both at 29%).

(2019)

Where Holidaymakers Are From

Nearly four in five (78%) holidaymakers reside across four regions.



(2019)

Source: Fáilte Ireland Survey of Overseas Travellers (2007-2019)

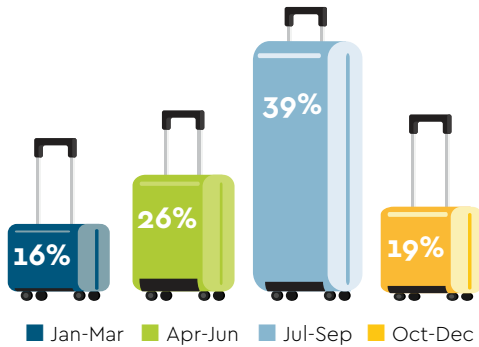
1. Fáilte Ireland Consumer Testing (Innovation Screener (2017)

2. Tourism Ireland Covid Research (June 2021)

3. The fare to/from Ireland and at least one other element (such as accommodation, car hire etc) was paid fully or partly in advance

FRENCH HOLIDAYMAKER TRENDS

When Holidaymakers Travel



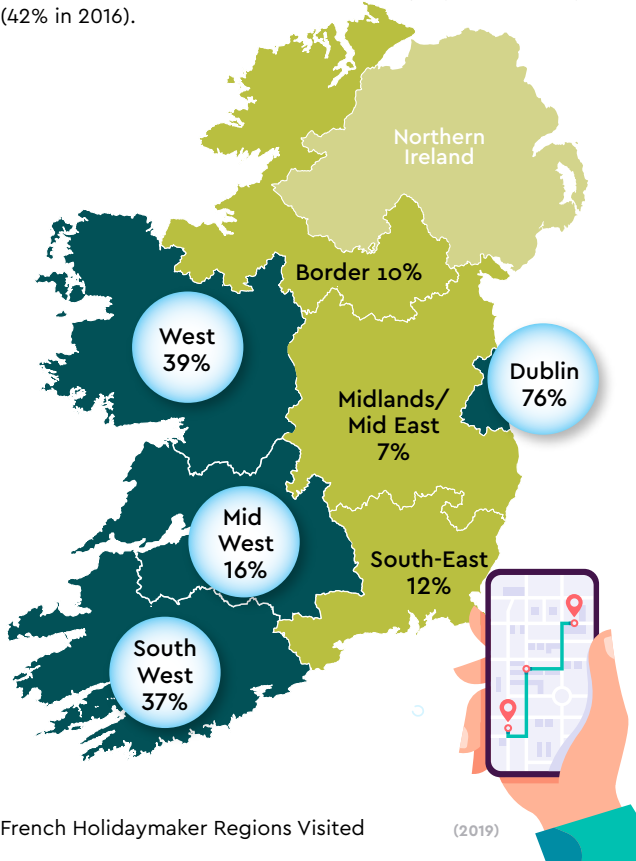
(2019)



Where Holidaymakers Visit

Dublin is an itinerary favourite for more than three quarters (76%) of French holidaymakers, while the South-West (37%) and the West (39%) are also popular destinations.

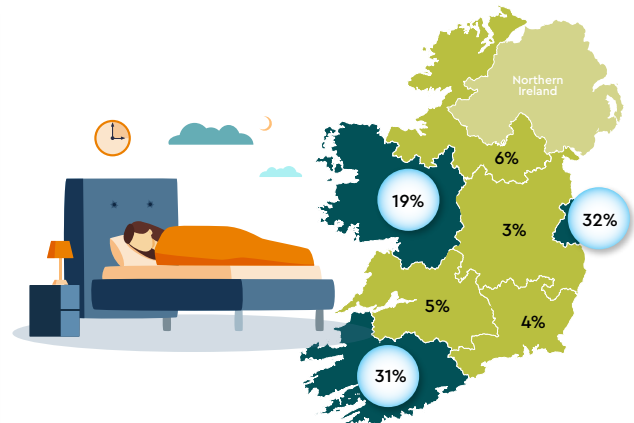
Dublin has featured on more itineraries in recent years (increasing from 63% in 2016), while the South-West (42% in 2016) and the West have diminished slightly in popularity (42% in 2016).



French Holidaymaker Regions Visited

(2019)

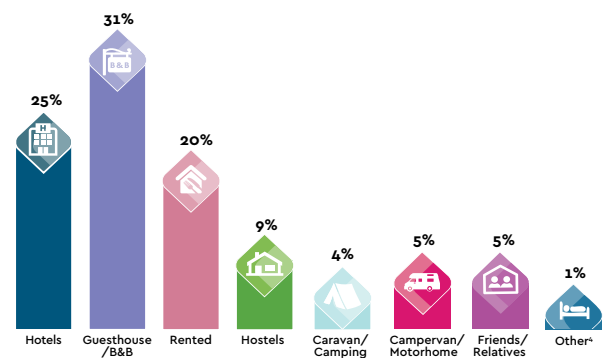
Where Holidaymakers Stay Overnight



French Holidaymaker Nights Spent in Regions

(2019)

Holiday - Accommodation Nights

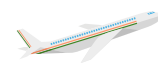


French Holidaymaker Nights spent by Accommodation Type

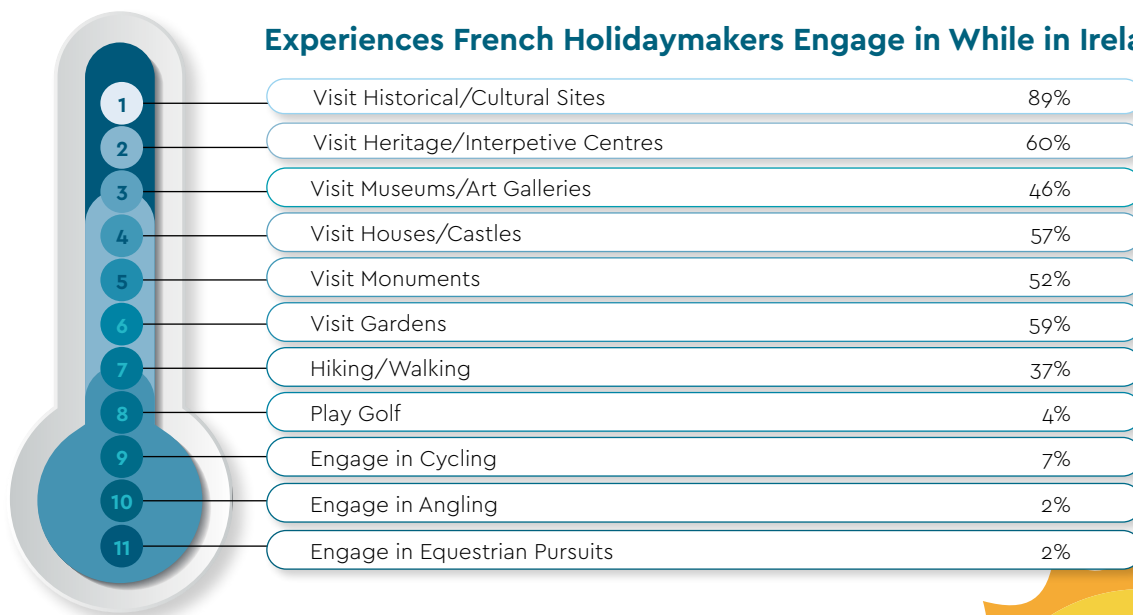
(2019)

THINGS TO SEE AND DO ON HOLIDAY (PRE-COVID)

- As with all markets, variety is key for French holidaymakers therefore a sense of lots to see and do is important.
- The French prefer activity of an easy nature in which to enjoy the coastal scenery, as well as dramatic green landscape.



Experiences French Holidaymakers Engage in While in Ireland



Excellent Experience Drives New Business

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 the batteries.



Importance of Holidaymaker Recommendations and Online Presence⁵



When deciding on where to holiday French holidaymakers rely on recommendations from friends and family, the Internet, as well as guidebooks.

- 53% are influenced by family and friends, 49% avail of the Internet and 34% use guidebooks as a valued source of motivational information when choosing a holiday destination.
- 66% French holidaymakers use the Internet, 41% seek further recommendations from family and friends and 34% use a guidebook, or a mix of all three when planning their holiday.

How To Ensure The Best Possible Experience?

- Touring holidays off the beaten track appeal to the French. Are there opportunities to cross promote and make recommendations for the next day or the next leg of their holiday?
- Engaging with authentic local culture at a relaxed pace appeals to this market. Are there opportunities to provide recommendations on how the French can 'live like a local' when in Ireland?
- Can we stimulate the senses of our French holidaymakers with music, food and drink as part of the holiday experience?
- The French prefer easy activity; experiences for all ages and abilities will suit this market.

How to take advantage of Market Opportunities?

- Getting the marketing messages right is key. Credibility and authenticity of content orientated towards the French market is a must – e.g. images of people should be natural (not staged) and should not detract from the focus of the landscape.
- Give recommendations where this market can explore off the beaten path, if not on this holiday, it may give them a reason to return.
- Experiences that incorporate the water attracts this market; are there opportunities for them to explore dramatic scenery either on or by the water (but not in the water).

