

# France Market Profile 2024

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## Inbound Tourists

The island of Ireland welcomed 408,000 French tourists who spent over €398 million / £346 million and stayed 3.6 million nights in 2024. This makes France the island's fourth-largest source of overseas revenue, nights and tourists.

Metric	Value	Global Rank
Revenue	€398 million / £346 million	4th
Trips	408 thousand	4th
Nights	3.6 million	4th

## Where did our tourists come from?

Two-fifths (41%) of French tourists came from Paris (24%) and the South-East (17%).

Region	Share of trips
Paris	24%
South-East	17%
West	19%
South-West	16%
North	16%
East	8%
Corsica	<0.1%

## Where did our tourists visit?

Country	Trips
Ireland	394,000
Northern Ireland	35,000

Visits to Ireland and Northern Ireland total more than the island of Ireland figure due to tourists overnighiting in both.

## When did our tourists visit?

Around two-thirds (64%) of French tourists visited the island during Q2 and Q3 (April - September).

Quarter	Share of visits
Quarter 1	18%
Quarter 2	30%
Quarter 3	34%
Quarter 4	18%

## What were our tourists' reasons for visiting?

Half (51%) of French tourists visiting the island of Ireland in 2024 came for a holiday, accounting for 53% of French tourism revenue. One in four (24%) were visiting friends and/or relatives (VFR).

Purpose of visit	Revenue	Share of revenue
Holiday	€213 million / £185 million	53%
Visiting friends / relatives	€44 million / £38 million	11%
Business	€71 million / £62 million	18%
Other	€70 million / £61 million	18%

Purpose of visit	Trips	Share of trips
Holiday	209,000	51%
Visiting friends / relatives	100,000	24%
Business	60,000	15%
Other	41,000	10%

Purpose of visit	Nights	Share of nights
Holiday	1,600,000	43%
Visiting friends / relatives	636,000	17%
Business	521,000	14%
Other	925,000	25%

## How much did our tourists spend and how long did they stay?

On average, French tourists spent €974 / £848 per trip or €109 / £95 per night and stayed 8.9 nights on the island of Ireland in 2024.

Region	Metric	Value
Island of Ireland	Average spend per trip	€974 / £848
Island of Ireland	Average spend per night	€109 / £95
Island of Ireland	Average length of stay	8.9 nights
Northern Ireland	Average spend per trip	£324
Northern Ireland	Average spend per night	£63
Northern Ireland	Average length of stay	5.1 nights

## How did our tourists spend their money?

A third (34%) of French tourists' revenue was spent on accommodation and a third (33%) was spent on food and drink.

Category	Share of spend
Accommodation	34%
Food & Drink	33%
Shopping	15%
Transport	10%
Entertainment	7%
Miscellaneous	1%

## How long did our tourists stay?

Around three quarters (72%) stayed four or more nights on the island of Ireland.

Length of stay	Share of trips
1-3 nights	28%
4-5 nights	28%
6-8 nights	19%
9+ nights	25%

# Regionality: Inbound Tourists and Holidaymakers

## Definitions

Dublin: Dublin City and County.

Midlands / Mid-East: Laois, Longford, Louth, Offaly, Westmeath, Kildare, Meath, Wicklow.

South-East: Carlow, Kilkenny, Waterford, Wexford.

South-West: Cork, Kerry.

Mid-West: Clare, Limerick, Tipperary.

West: Galway, Mayo, Roscommon.

Border: Cavan, Donegal, Leitrim, Monaghan, Sligo.

Northern Ireland: Antrim, Armagh, Down, Fermanagh, Derry/Londonderry, Tyrone

## What areas did our tourists and holidaymakers visit?

Dublin, the South-West and the West were the most popular regions for both French tourists and holidaymakers, though the order varied with holidaymakers favouring the West over the South-West.

Almost 21,000 French tourists and 18,000 holidaymakers overnighted on both sides of the border.

Region	Share of tourists
Dublin	53%
Midlands / Mid-East	10%
South-East	7%
South-West	22%
Mid-West	12%
West	17%
Border	4%
Northern Ireland	9%

Region	Share of holidaymakers
Dublin	64%
Midlands / Mid-East	6%
South-East	8%
South-West	34%
Mid-West	14%
West	34%
Border	8%
Northern Ireland	11%

## Where did our tourists and holidaymakers visit?

French tourists were more likely to overnight in areas outside Dublin (47%) than Dublin only (42%). French holidaymakers were more likely to include Dublin as part of their trip (64%).

Region	Share of tourists
Dublin only	42%
Outside Dublin only	47%
Both Dublin and outside Dublin	11%

Region	Share of holidaymakers
Dublin only	40%
Outside Dublin only	36%
Both Dublin and outside Dublin	24%

## Inbound Holidaymakers

France was the island of Ireland's fourth-largest source of holiday nights and holidaymakers and the fifth-largest in terms of holiday revenue. French holidaymakers stayed for an average of 7.4 nights on the island of Ireland. Those visiting Northern Ireland stayed for an average of 3.2 nights.

Metric	Value	Global Rank
Revenue	€213 million / £185 million	5th
Trips	209 thousand	4th
Nights	1.6 million	4th

Region	Metric	Value
Island of Ireland	Average spend per trip	€1,016 / £884
Island of Ireland	Average spend per night	€137 / £119
Island of Ireland	Average length of stay	7.4 nights
Northern Ireland	Average spend per trip	£244
Northern Ireland	Average spend per night	£76
Northern Ireland	Average length of stay	3.2 nights

## When did our holidaymakers visit?

Two-thirds (68%) of French holidaymakers visited during Q2 and Q3 (April - September).

Quarter	Share of visits
Quarter 1	18%
Quarter 2	29%
Quarter 3	39%
Quarter 4	14%

## How long did our holidaymakers stay?

The majority (75%) of French holidaymakers stayed four or more nights on the island of Ireland.

Length of stay	Share of trips
1-3 nights	25%
4-5 nights	26%
6-8 nights	20%
9+ nights	28%

## What age were our holidaymakers?

The majority (58%) of French holidaymakers were under 45 years old.

Age	Share of trips
<25 years	24%
25-34 years	21%
35-44 years	13%
45-54 years	16%
55-64 years	17%
65+ years	9%

## Holidaymaker gender and dependent children

French holidaymakers are evenly split on gender. One-fifth (22%) of holidaymakers visiting the island of Ireland had dependent children in their household.

Gender	Share of trips
Female	49%
Male	51%

## Had our holidaymakers been here before?

It was a first visit for three-fifths (62%) of French holidaymakers.

Visitor type	Share of trips
First visit	62%
Repeat visit	36%
Born in Ireland	1%

## Who did our holidaymakers travel with?

Two-fifths (40%) of French holidaymakers visited with their partner/spouse. One-fifth (22%) travelled with family, higher than any other key market

Party composition	Share of trips
Solo	16%
Couple	40%
Family	22%
Other adult party	22%

## Where did our holidaymakers stay?

Almost three-in-ten (29%) nights stayed by French holidaymakers were in hotels, while around a fifth (20%) of nights were spent in rented accommodation. Almost a fifth of nights spent by French holidaymakers were by camping and campervans/motor homes (18%).

Accommodation type	Share of nights
Hotel	29%
Rented accommodation	20%
Caravan / camping	18%
Guesthouse / B&B	14%
Friends / family	7%
Other	12%



## How did length of stay affect accommodation type?

Hotels (57%) are especially popular among French holidaymakers on short breaks (1 - 5 nights), while those staying 6+ nights were much more likely to be camping/caravan/campervan.

Accommodation type	Trip length	Share of nights
Hotel	5 nights or shorter	57%
Hotel	6 nights or longer	19%
Rented accommodation	5 nights or shorter	18%
Rented accommodation	6 nights or longer	21%
Caravan / camping	5 nights or shorter	0%
Caravan / camping	6 nights or longer	25%
Guesthouse / B&B	5 nights or shorter	11%
Guesthouse / B&B	6 nights or longer	14%
Friends / family	5 nights or shorter	5%
Friends / family	6 nights or longer	8%
Other	5 nights or shorter	9%
Other	6 nights or longer	13%

## How did our holidaymakers travel and get around

The majority (95%) of French holidaymakers travelled independently, 5% travelled as part of a package, and over half (51%) used a car while on the island of Ireland.

Car use	Share of trips
Hired a car	28%
Brought own car	21%
Borrowed a car	2%
Did not use a car	49%

## What were our holidaymakers' interest and activities?

French holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.

89% visited historical or cultural sites.

Type of activity	Share of trips
Churches or cathedrals	62%
Castles or houses	59%
Heritage centres	57%
Monuments	50%
Museums or art galleries	46%
Ancient Celtic sites	30%

92% engaged in pastimes and events.

Type of activity	Share of trips
National parks including forests	64%
Gardens	57%
Shopping excluding food, drink, and souvenirs	53%
Festivals or cultural events including concerts	14%
Traced roots	2%
Sporting events	1%

53% participated in active pursuits.

Type of activity	Share of trips
Hiking including cross-country walking	48%
Cycling	10%
Fishing	4%
Water-based activities excluding fishing and swimming	3%
Golf	1%
Equestrian	1%

## **Likelihood to recommend a holiday in Ireland to others**

The majority (78%) of French holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the scenery and nature (57%), friendly people (48%) and visiting a specific county or area (12%).

# Outbound holidaymakers

## Sources of inspiration, research and planning

Outbound holidaymakers from France use multiple sources of inspiration when choosing their holiday destination, including family and friends' recommendations, online search and films and TV shows.

While social media, for example, is cited in its own right, it's often also a channel for the discovery of travel articles and recommendations.

Channel	Share of holidaymakers' inspiration
Family and friends' recommendations	42%
Online search	38%
Films, TV shows, travel shows	25%
Travel websites including company websites and booking platforms	24%
Guidebooks	23%
Destination websites	21%
Social media	21%

Channel	Share of holidaymakers' research and planning
Online search	54%
Travel websites including company websites and booking platforms	34%
Destination websites	34%
Guidebooks	29%
Family and friends' recommendations	27%
Travel articles, e.g. magazines, websites	19%
Social media	16%

## **Enrichment Explorers**

Our target segment makes up 25% of all French outbound holidaymakers

### **Who are the Enrichment Explorers as people?**

Embracing a lifestyle centred around exploration, they exude passion and consistently seek fresh experiences. They place emphasis on human connection which extends to their travels, with great importance placed on engaging with local communities. They have a wide variety of hobbies and interests, with learning and experiencing new things high on their priority list – even during their free time on holiday.

### **What do they look for on a holiday?**

Passionate about travelling, these holidaymakers enjoy going off the tourist trail to obtain the most authentic experience. Regardless of the chosen destination, Enrichment Explorers aspire to immerse themselves in the country's richness, exploring wildlife and nature and discovering their passion for art, history and culture.

They are less likely to have children and most likely to travel with a partner.

### **Top 10 holiday needs**

1. To feel connected to nature
2. To broaden and simulate their mind
3. To feel the character of the place and people
4. To appreciate historical / modern architecture
5. To experience the vibrancy of the place and people
6. To experience living like a local
7. To enjoy authentic moments with friendly locals
8. To be transported back in history
9. To discover and explore somewhere new
10. To enjoy the beauty of the landscape

## **Outbound Tourists**

France was the world's fifth-largest outbound market in 2024 and 70% of all outbound trips from France were to other parts of Europe.

## Access by air

There were 1.6 million direct one-way air seats available on 8,927 flights from France to the island of Ireland in 2024. There were 24 gateways from France, operated by 8 carriers to 5 airports on the island of Ireland

### Where can our tourists fly from?

The top ten French airports accounted for the majority (92%) of seats in 2024. More than half (57%) of seats were delivered by Paris-based airports (Charles de Gaulle, Beauvais-Tillé, Orly).

Airports in France	Share of seats
Paris Charles de Gaulle	35%
Paris Beauvais-Tillé	14%
Paris Orly	8%
Bordeaux	8%
Nice	7%
Nantes	5%
Lyon	5%
Marseille	4%
Toulouse	3%
Carcassonne	2%

### Who can our tourists fly with?

Seven carriers operated between France and the island of Ireland. In 2024, three-quarters (74%) of seats were delivered by Ryanair (40%) and Aer Lingus (34%)

Carrier	Share of seats
Ryanair	40%
Aer Lingus	34%
Air France	11%
easyJet	6%
Vueling	4%
Transavia	4%
Chalair	0.1%

## Access by sea

2024 data not currently available. In 2023, there were 1,300 sailings from France to the island of Ireland operated by 3 carriers on 4 different routes.