

FRANCE

MARKET PROFILE

2024



INBOUND TOURISTS

The island of Ireland welcomed 408,000 French tourists who spent over €398/£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.



WHERE DID OUR TOURISTS COME FROM?

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

Paris	South - East	West	South - West	North	East	Corsica
24%	17%	19%	16%	16%	8%	<0.1%

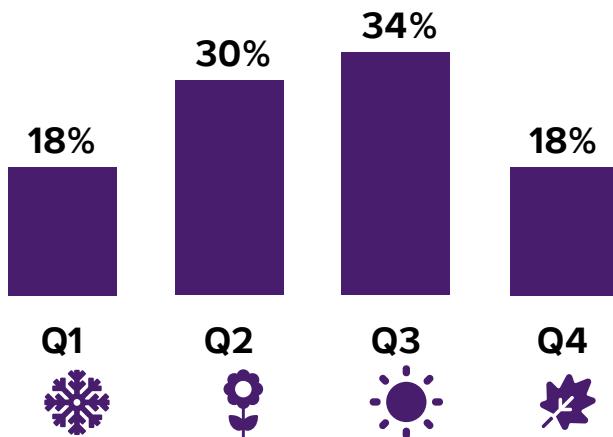
WHERE DID OUR TOURISTS VISIT?



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

WHEN DID OUR TOURISTS VISIT?

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



INBOUND TOURISTS

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).

	REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
 HOLIDAY	€213/£185m	53%	209k	51%	1.6m	43%
 VFR	€44/£38m	11%	100k	24%	636k	17%
 BUSINESS	€71/£62m	18%	60k	15%	521k	14%
 OTHER	€70/£61m	18%	41k	10%	925k	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.



€974/£848 (IOI)
£324 (NI)

Av. spend per trip



€109/£95 (IOI)
£63 (NI)

Av. spend per night

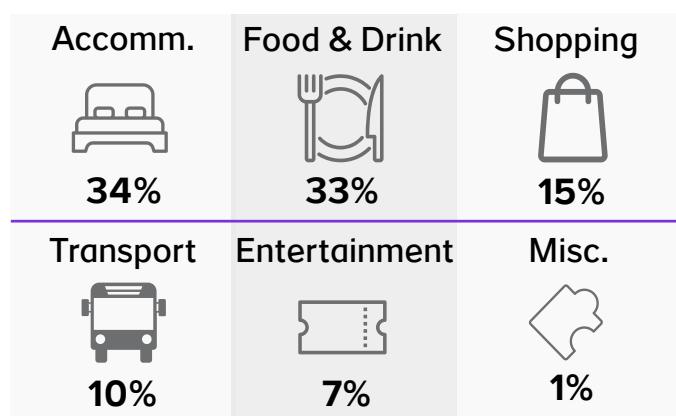


8.9 (IOI)
5.1 (NI)

Av. stay (nights)

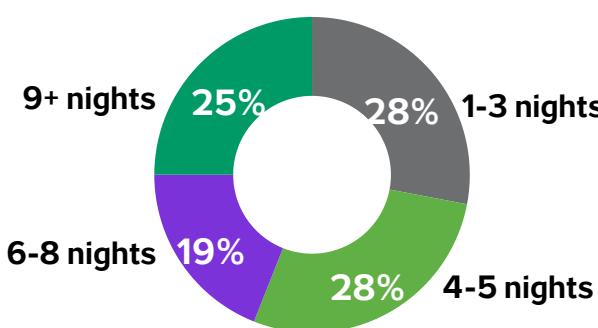
HOW DID OUR TOURISTS SPEND THEIR MONEY?

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



HOW LONG DID OUR TOURISTS STAY?

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



Source: CSO, NISRA, Fáilte Ireland's Survey of Overseas Travellers

INBOUND TOURISTS AND HOLIDAYMAKERS

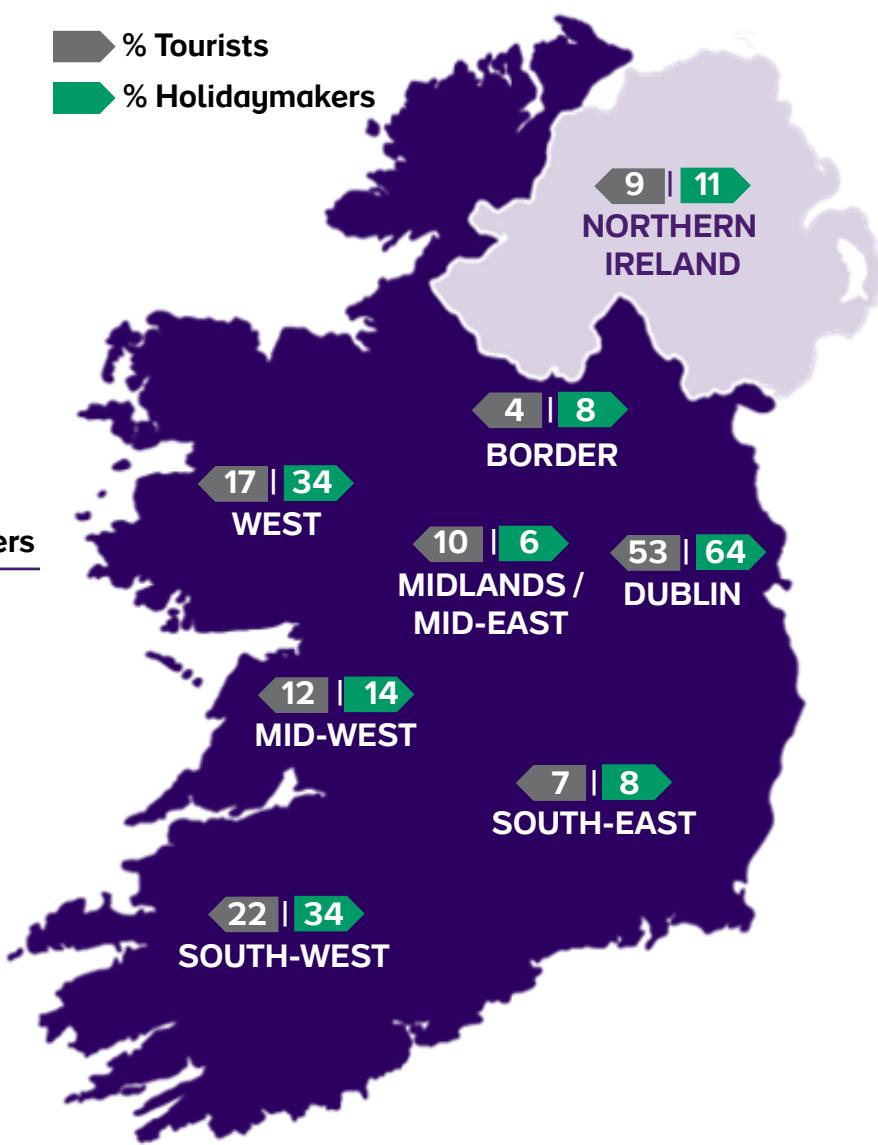
WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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 overnighed on both sides of the border.

Rank	Tourists	Holidaymakers
#1	Dublin	Dublin
#2	South-West	West
#3	West	South-West

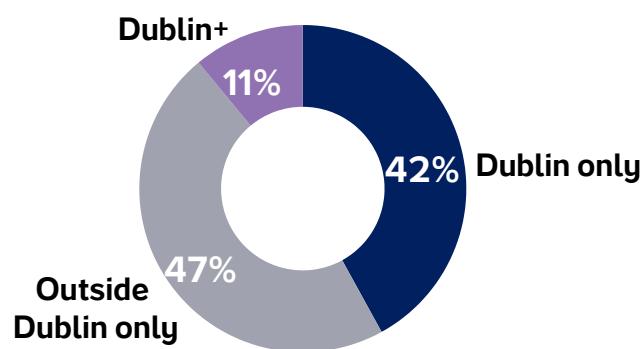
Dublin: Dublin City and County. Midlands / Mid-East: Laois, Longford, Louth, Offaly, Westmeath, Kildare, Meath, Wicklow. South-East: Carlow, Kilkenny, Waterford, Wexford. South-West: Cork, Kerry. Mid-West: Clare, Limerick, Tipperary. West: Galway, Mayo, Roscommon. Border: Cavan, Donegal, Leitrim, Monaghan, Sligo. Northern Ireland: Antrim, Armagh, Down, Fermanagh, Derry/Londonderry, Tyrone



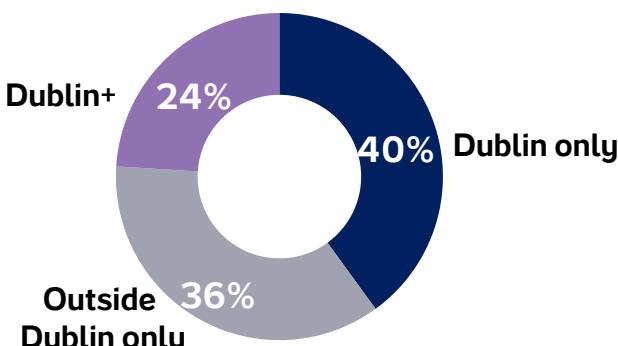
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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%).

TOURISTS

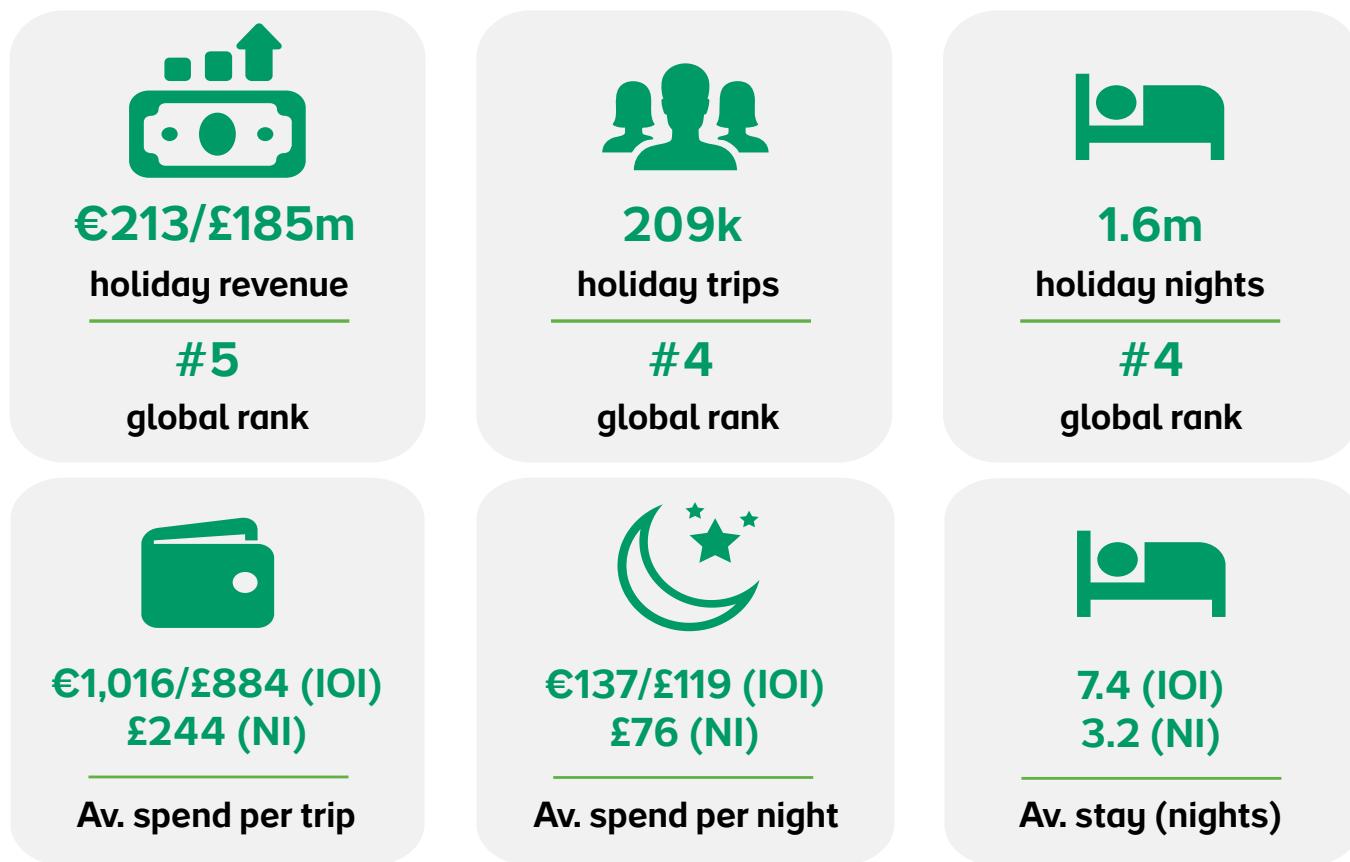


HOLIDAYMAKERS



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 nights. 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.

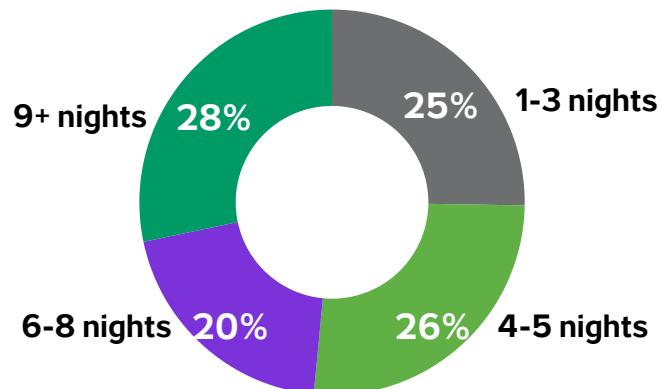
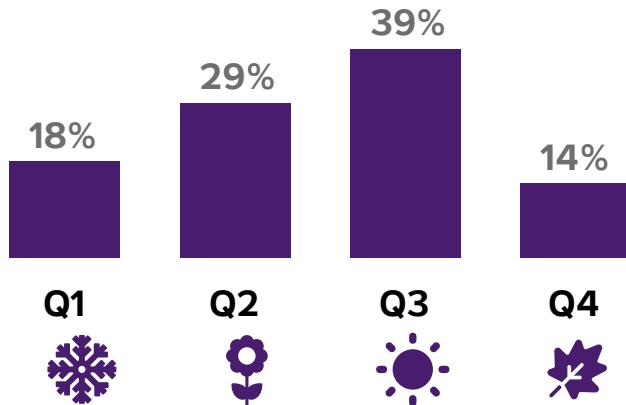


WHEN DID OUR HOLIDAYMAKERS VISIT?

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

HOW LONG DID OUR HOLIDAYMAKERS STAY?

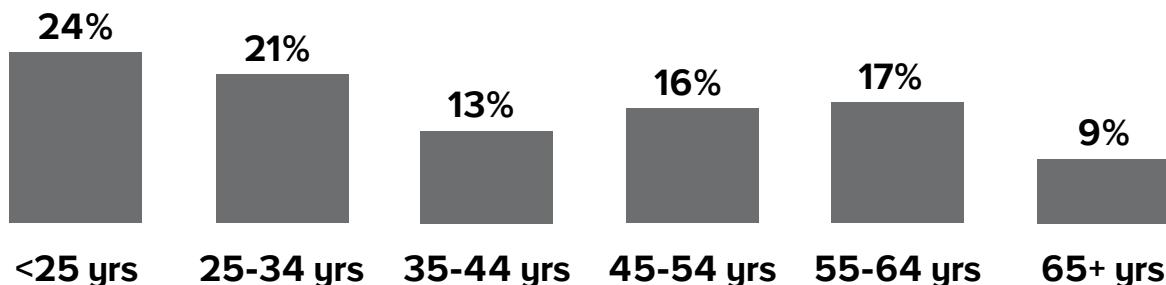
The majority (75%) of French holidaymakers stayed four or more nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

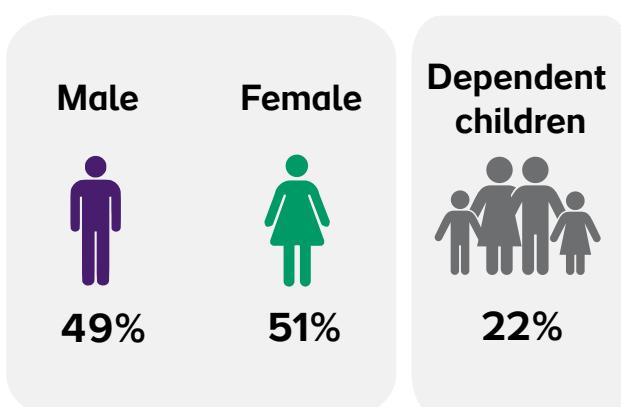
WHAT AGE WERE OUR HOLIDAYMAKERS?

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



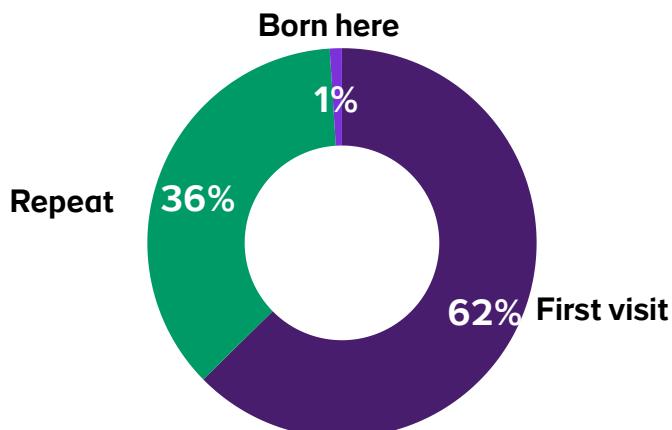
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

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



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

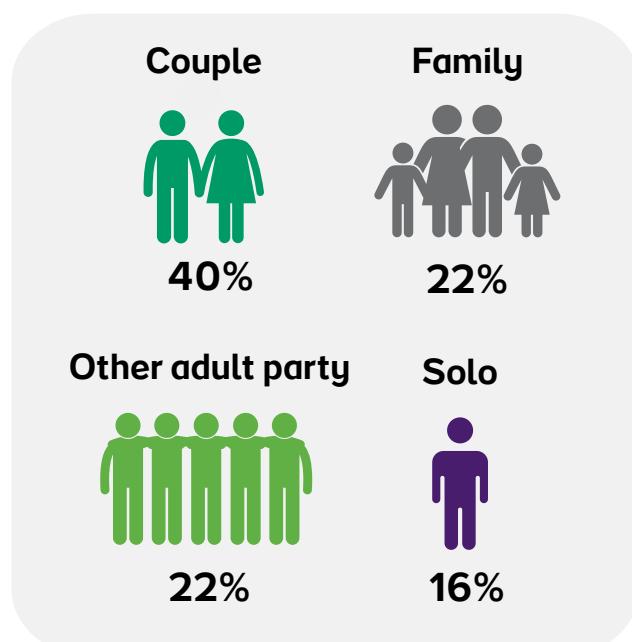
It was a first visit for three-fifths (62%) of French holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Two-fifths (40%) of French holidaymakers visited with their partner/spouse.

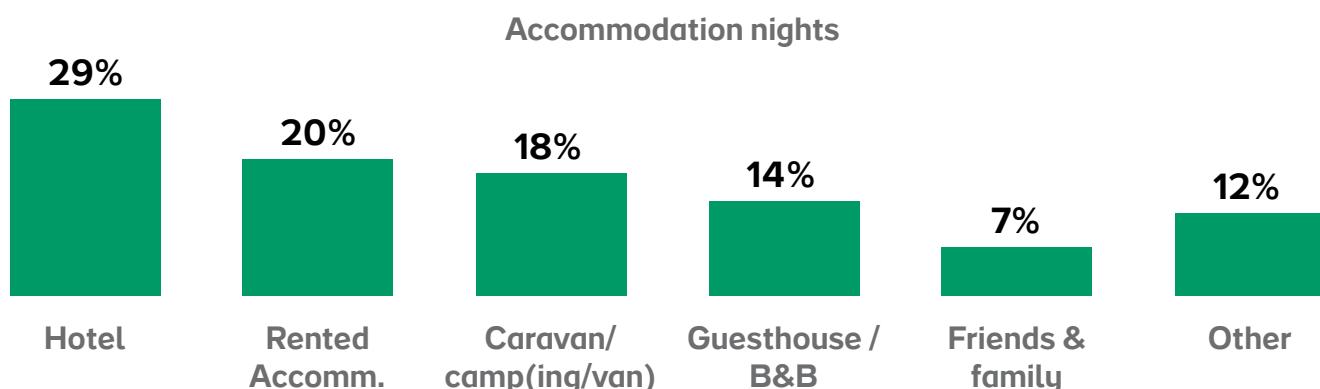
One-fifth (22%) travelled with family, higher than any other key market.



INBOUND HOLIDAYMAKERS

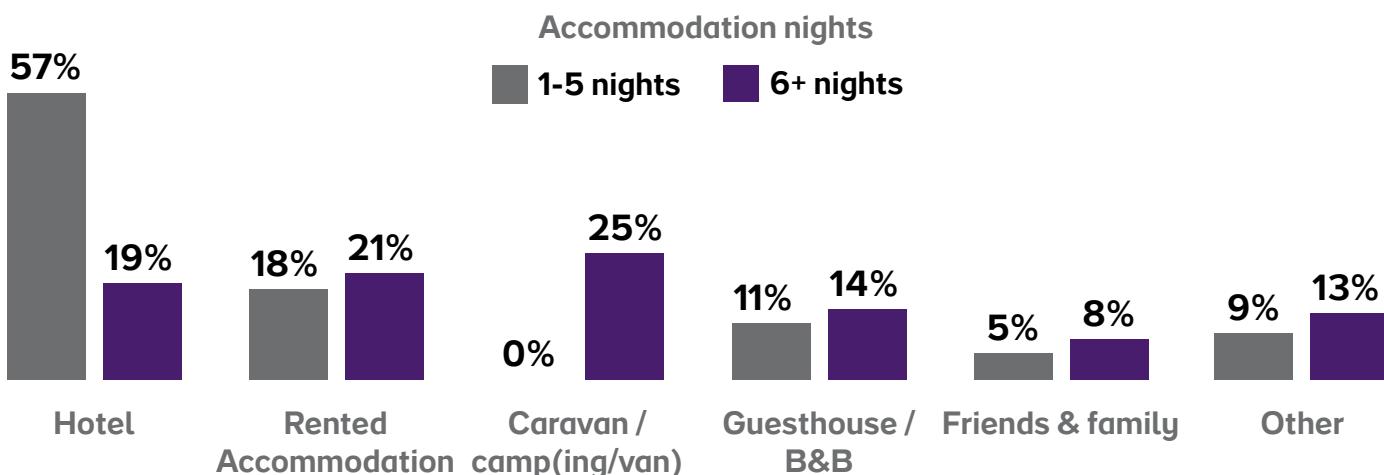
WHERE DID OUR HOLIDAYMAKERS STAY?

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%).



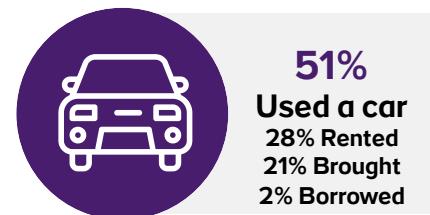
HOW DID LENGTH OF STAY AFFECT ACCOMMODATION TYPE?

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.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

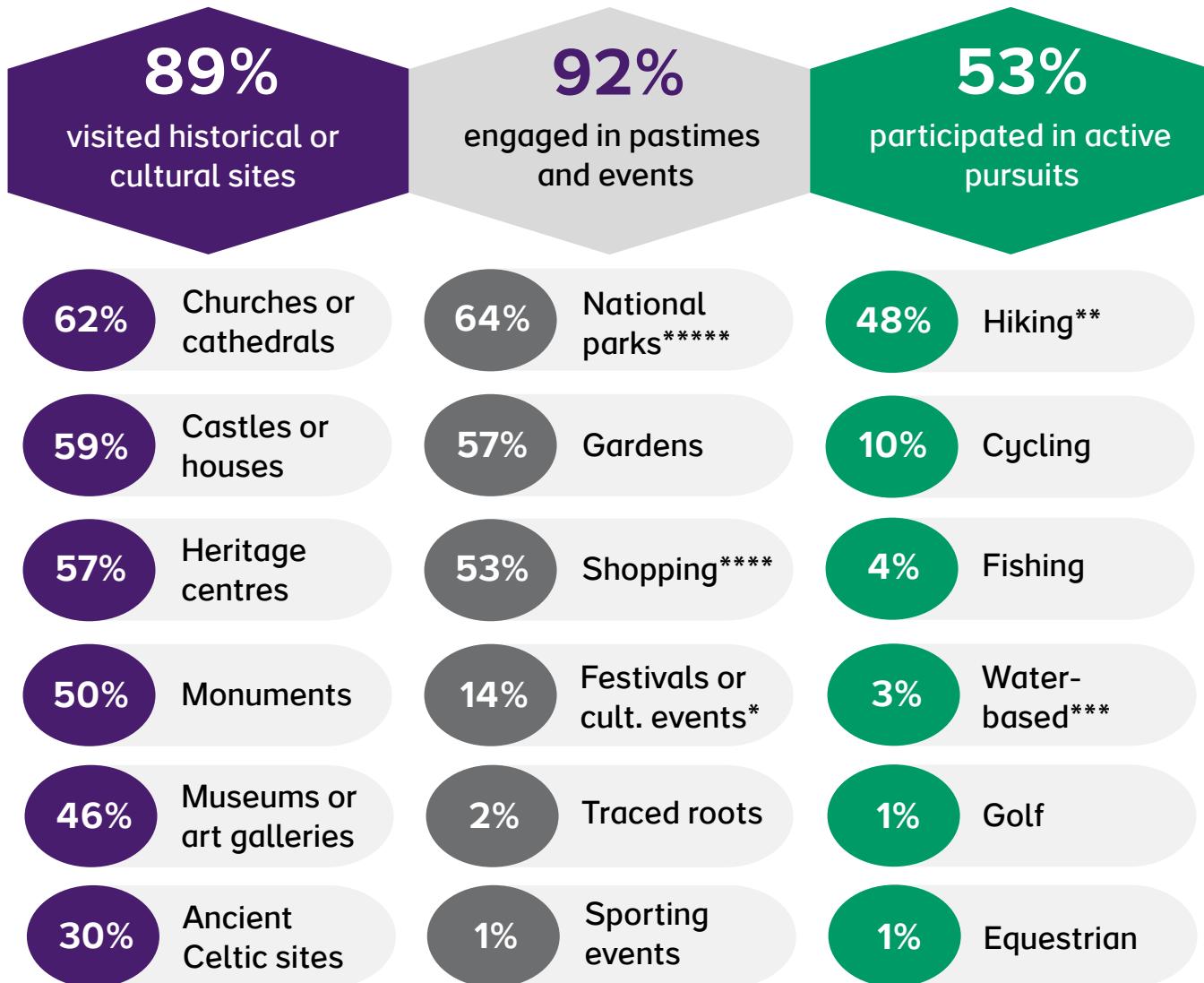
The majority (95%) of French holidaymakers travelled independently and over half (51%) used a car while on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

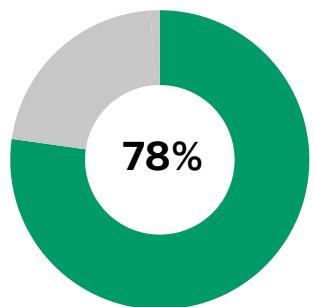
French holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



*incl. concerts | **incl. cross country walking | ***excl. fishing and swimming | ****excl. food/drink/souvenirs | *****incl. forests

LIKELIHOOD TO RECOMMEND A HOLIDAY IN IRELAND TO OTHERS

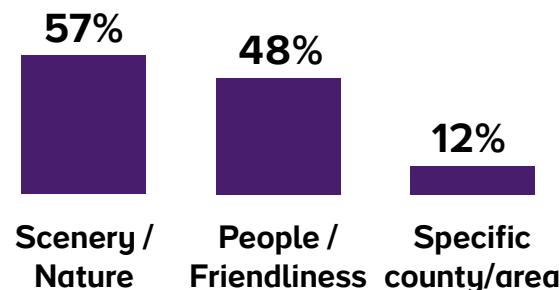
The majority (78%) of French holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the scenery and nature (57%), friendly people (48%) and visiting a specific county or area (12%).



**Promoters (9 - 10)
"highly recommend"**

On a scale of 0 to 10, how likely would you be to recommend a holiday in Ireland to others?
0 = definitely not recommend
10 = definitely recommend

Promoters - Top 3 reasons



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.

Recommendations from family and friends was the most important source of inspiration

3-in-10 holidaymakers used guidebooks for researching and planning their trip

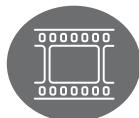
DREAMING



42% family and friends' recommendations



38% online search



25% films, TV shows, travel shows



24% travel websites*



23% guidebooks



21% destination website



21% social media

RESEARCH AND PLANNING



54% online search



34% travel websites*



34% destination websites



29% guidebooks



27% family and friends' recommendations



19% travel articles e.g. magazines, websites



16% social media

*Travel websites include company websites and booking platforms

ENRICHMENT EXPLORERS

OUR TARGET SEGMENT



of 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	6		To experience living like a local
2		To broaden and stimulate my mind	7		To enjoy authentic moments with friendly locals
3		To feel the character of the place and people	8		To be transported back in history
4		To appreciate historical/modern architecture	9		To discover and explore somewhere new
5		To experience the vibrancy of the place and people	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 almost 9,000 flights from France to the island of Ireland in 2024. There were 24 gateways from France to airports on the island of Ireland.



1.6 million seats



8,927 flights



22 FR airports



8 carriers



5 IOI airports

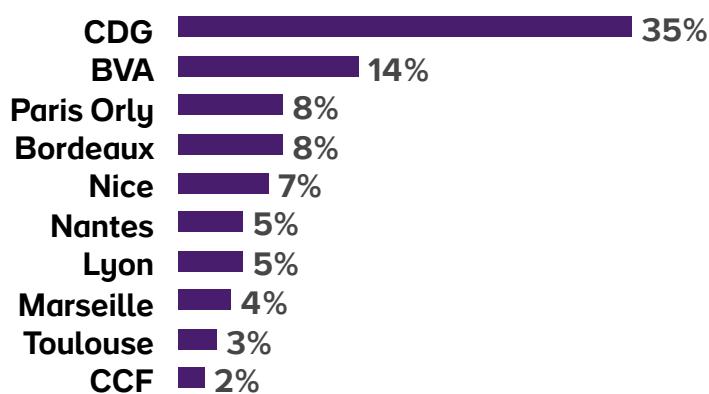
WHERE CAN OUR TOURISTS FLY FROM?

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 (CDG, BVA, ORY).

WHO CAN OUR TOURISTS FLY WITH?

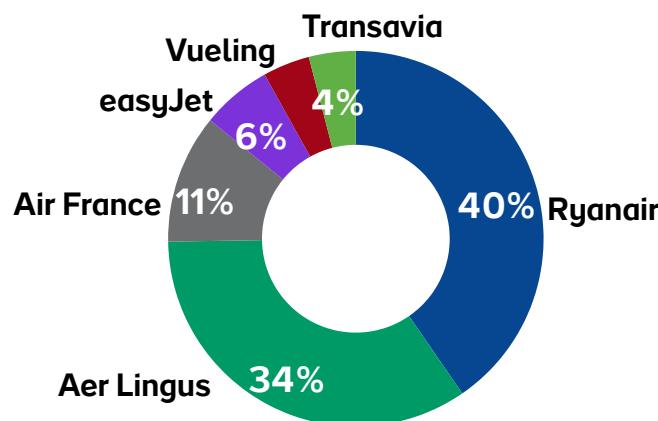
Seven carriers operated between France and the island of Ireland. In 2024, three-quarters (74%) of seats were delivered by Ryanair (40%) and Aer Lingus (34%).

Share of seats by airport (Top 10)



CDG: Charles de Gaulle, BVA: Beauvais-Tillé, ORY: Orly Apt, BOD: Bordeaux Mérignac, NCE: Nice, NTE: Nantes Atlantique, LYS: Lyon-Saint-Exupéry, MRS: Marseille Provence, TLS: Toulouse, CCF: Carcassonne

Share of seats by carrier



ACCESS BY SEA (2023 as 2024 data not available)



1,300 sailings



3 carriers



4 routes