

FRANCE

MARKET PROFILE 2025



INBOUND TOURISTS

In 2025, the island of Ireland welcomed 369,000 French tourists, who spent €319/£278 million and stayed 3.2 million nights. France was the island's fourth largest overseas market by spend, tourist numbers and nights.

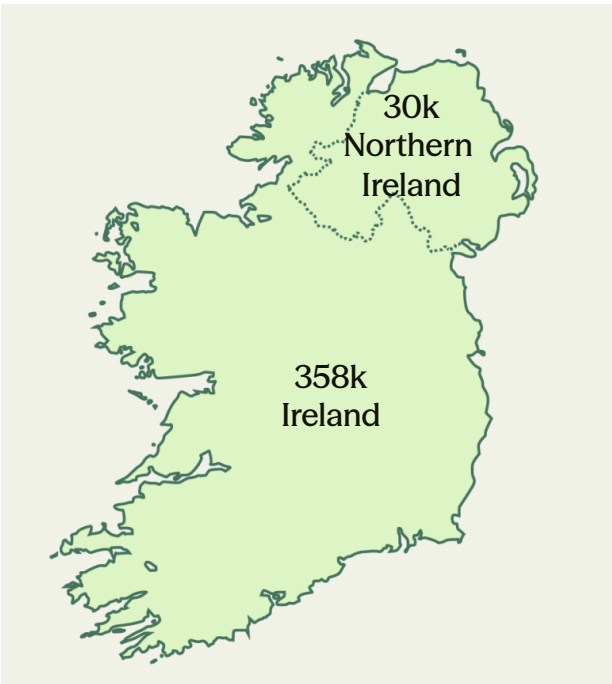


WHERE DID OUR TOURISTS COME FROM?

Almost one-quarter (24%) of French tourists visiting the island of Ireland in 2025 came from Paris.

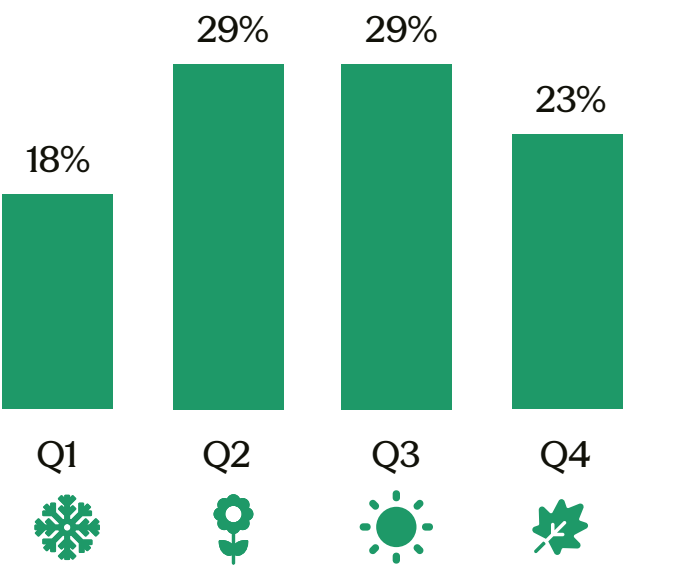


WHERE DID OUR TOURISTS VISIT?



WHEN DID OUR TOURISTS VISIT?

More than half of French tourists (59%) visited the island of Ireland between April and September (Q2 and Q3).



INBOUND TOURISTS

WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Half (51%) of French tourists visiting the island of Ireland in 2025 came for a holiday, accounting for 55% of French tourism revenue. One in four (25%) were visiting friends and/or relatives (VFR).

		REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
	HOLIDAY	€175/£152m	55%	189k	51%	1.4m	46%
	VFR	€45/£39m	14%	92k	25%	619k	19%
	BUSINESS	€39/£34m	12%	46k	13%	341k	11%
	OTHER	€61/£53m	19%	44k	12%	777k	24%

HOW MUCH DID OUR TOURISTS SPEND AND HOW LONG DID THEY STAY?

In 2025, French tourists stayed an average of 8.7 nights on the island of Ireland and spent €865/£753 per trip, equivalent to €99/£86 per night.



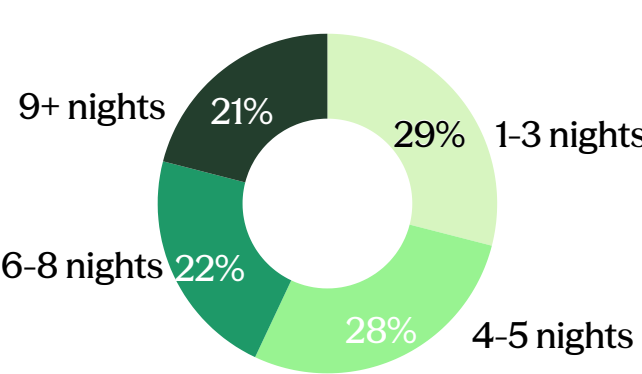
HOW DID OUR TOURISTS SPEND THEIR MONEY?

Food and drink accounted for the largest share of French tourist spend, at 34%, marginally ahead of accommodation (32%).

Food & drink	Accomm.	Shopping
		
34%	32%	14%
Transport	Entertainment	Misc.
		
9%	8%	2%

HOW LONG DID OUR TOURISTS STAY?

French visitors were evenly distributed across short, medium and longer stays.



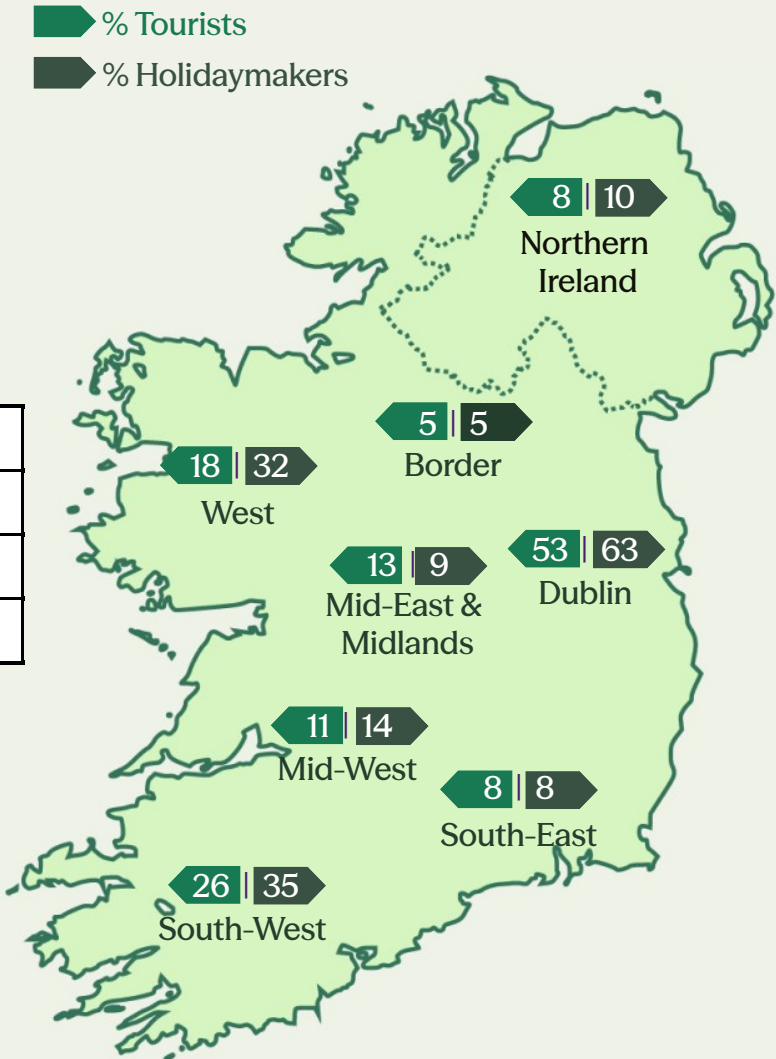
INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin remained the most visited destination, while the South-West, West and Northern Ireland also featured strongly in French itineraries.

Almost 20,000 French tourists and 15,000 holidaymakers overnighted on both sides of the border.

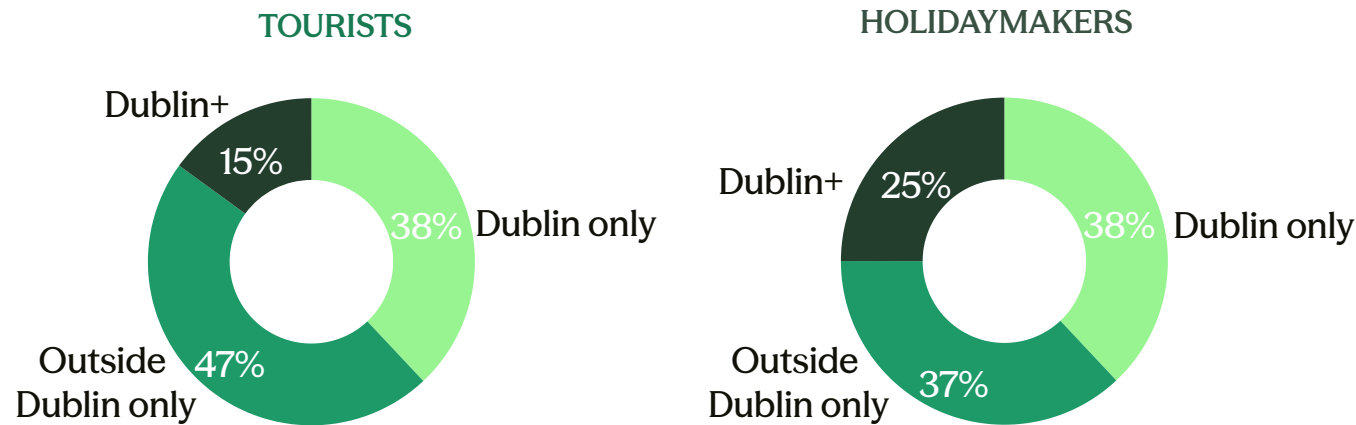
Top	Tourists	Holidaymakers
1	Dublin	Dublin
2	South-West	South-West
3	West	West



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

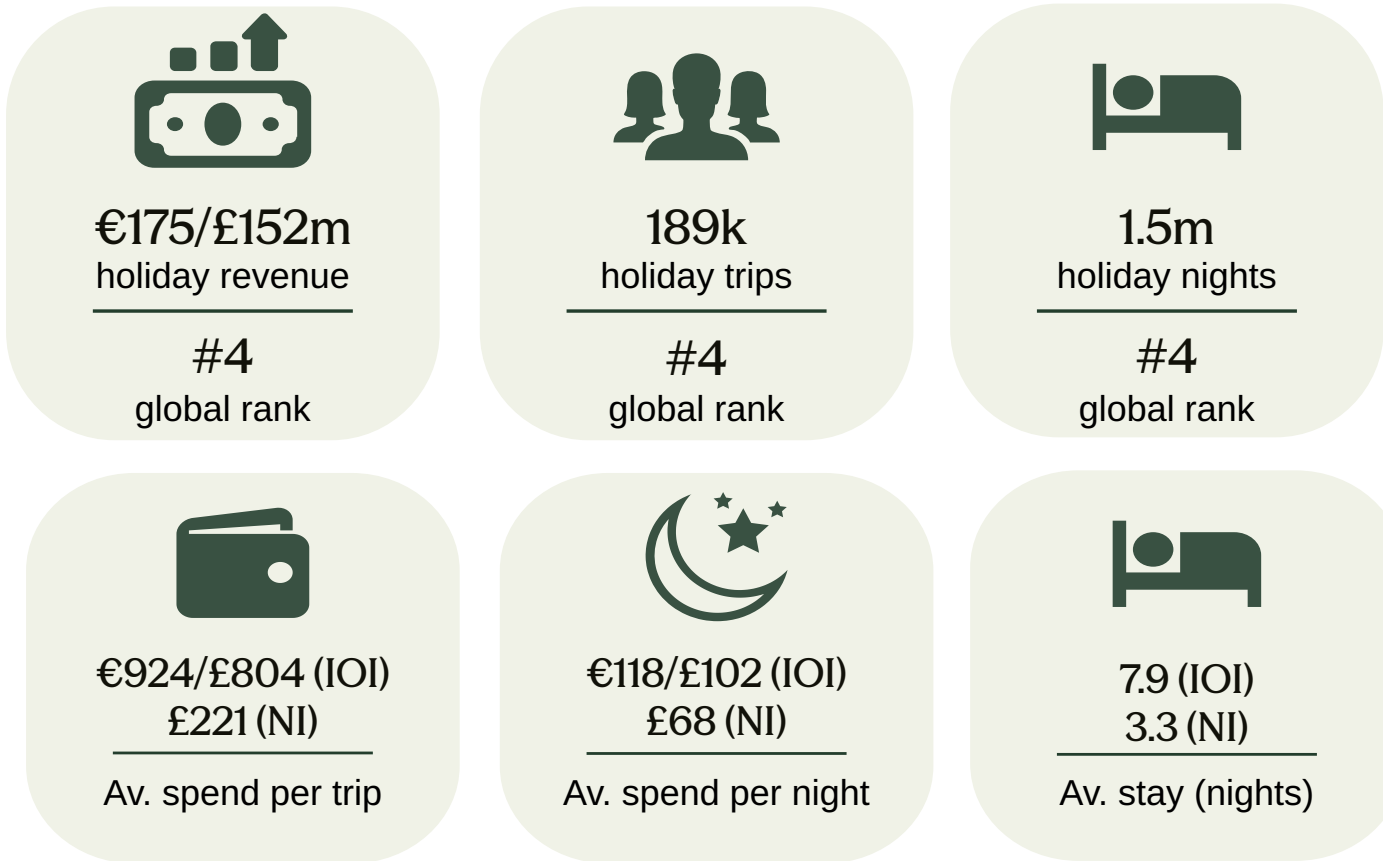
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Nearly half of French tourists stayed exclusively outside Dublin. French holidaymakers are more likely than tourists to visit both Dublin and another region/area.



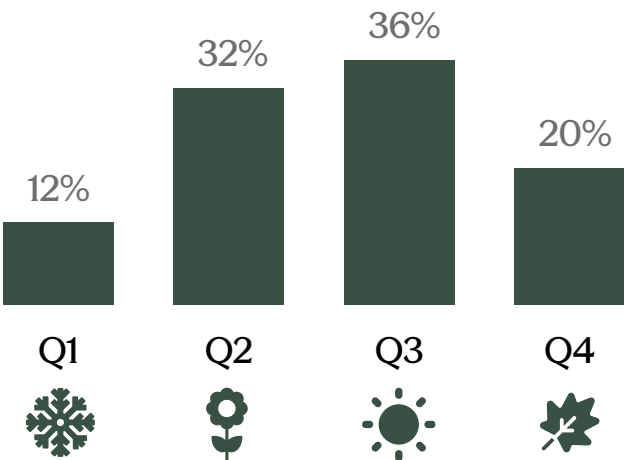
INBOUND HOLIDAYMAKERS

France was the island of Ireland’s fourth-largest source of holidaymakers, overseas holiday revenue and holiday nights. French holidaymakers stayed for an average of 7.9 nights on the island of Ireland. Those visiting Northern Ireland stayed an average of 3.3 nights.



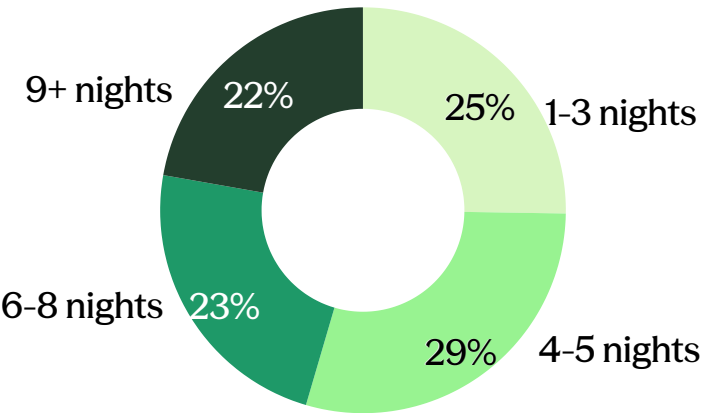
WHEN DID OUR HOLIDAYMAKERS VISIT?

Over two-thirds (68%) of French holidaymakers visited in Q2 or Q3, from April to September.



HOW LONG DID OUR HOLIDAYMAKERS STAY?

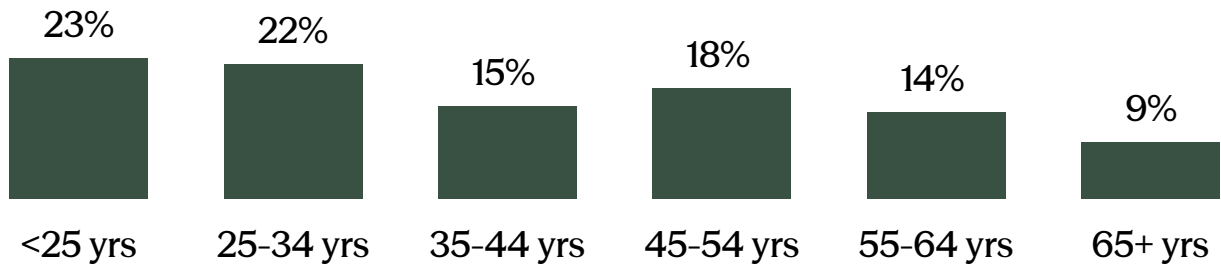
French holidaymakers showed a broad spread of trip lengths, with no single duration dominating.



INBOUND HOLIDAYMAKERS

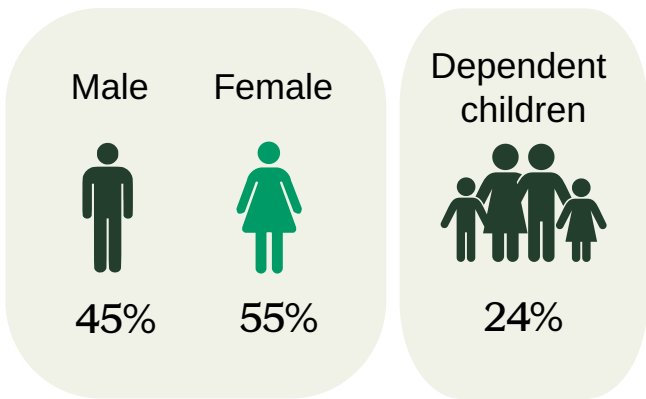
WHAT AGE WERE OUR HOLIDAYMAKERS?*

French holidaymakers tend to be younger, with almost half (45%) aged under 35 years.



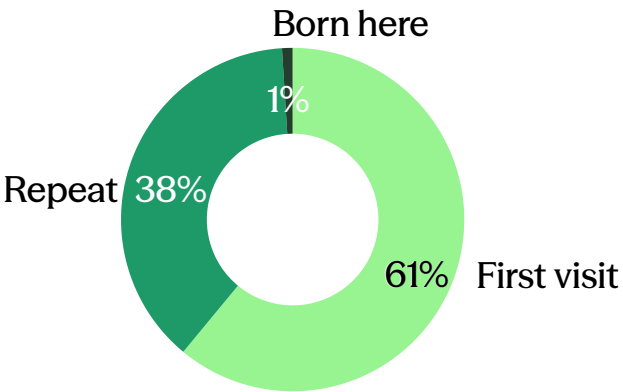
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN*

French holidaymakers are broadly gender-balanced, with a slight skew towards females. One in four (24%) had dependent children in their household.



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

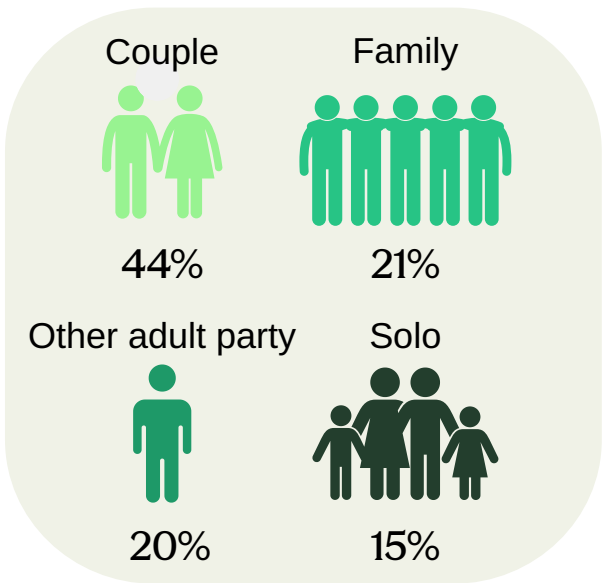
Most (61%) French holidaymakers were discovering the island of Ireland for the first time, highlighting the market's continued ability to attract new visitors.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

French holidays on the island of Ireland are primarily couple-focused.

Holidaying with family or another adult party is equally popular with each accounting for one in five trips.

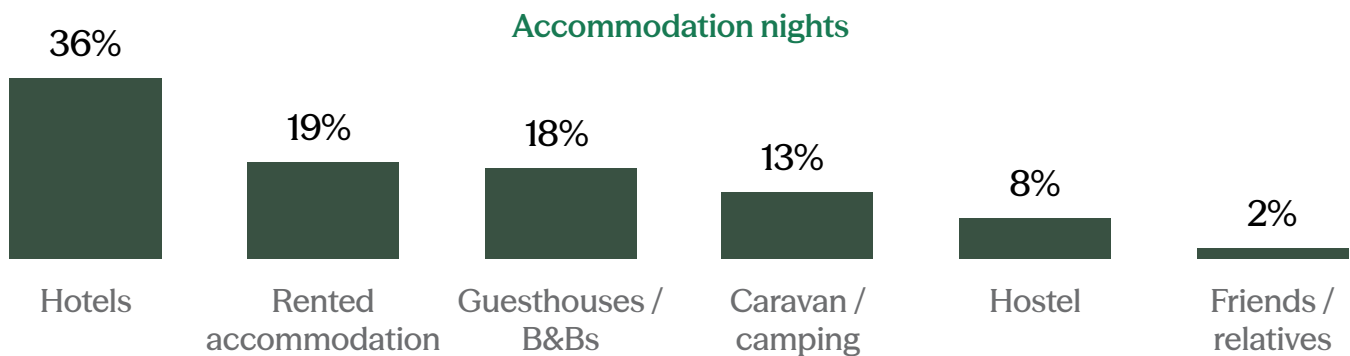


*Survey of Overseas Travellers only
Source: Fáilte Ireland's Survey of Overseas Travellers, NISRA

INBOUND HOLIDAYMAKERS

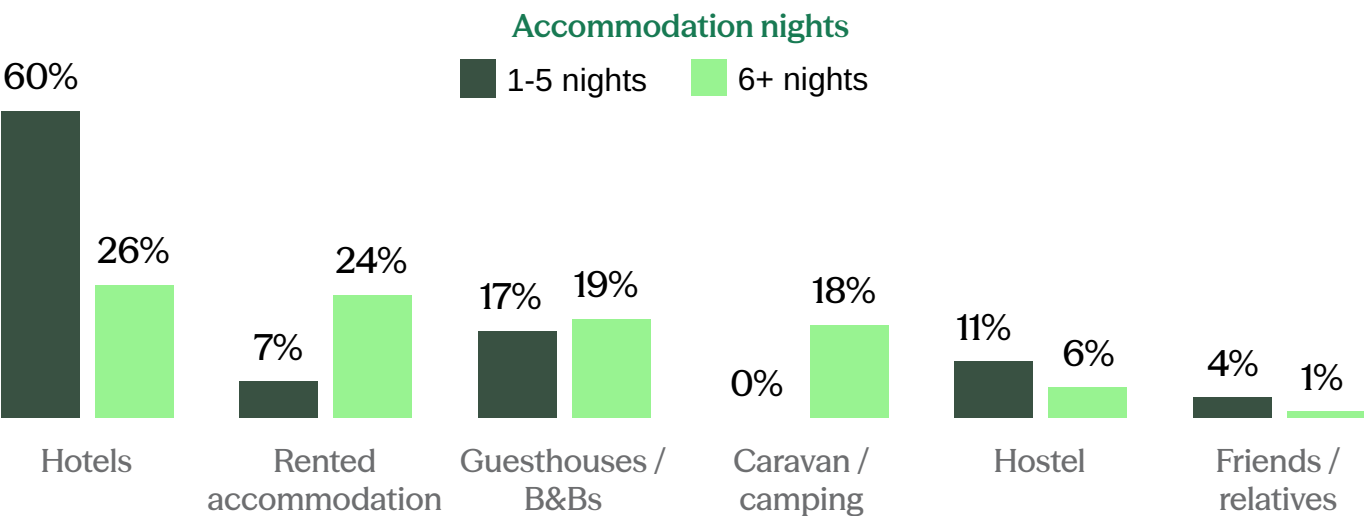
WHERE DID OUR HOLIDAYMAKERS STAY?

French holidaymakers favour hotels, while accommodation nights are well spread across other commercial accommodation types.



HOW DID ACCOMMODATION CHOICE VARY BY LENGTH OF STAY?*

Hotels dominate shorter stays, while longer stays use a wider mix of accommodation.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?*

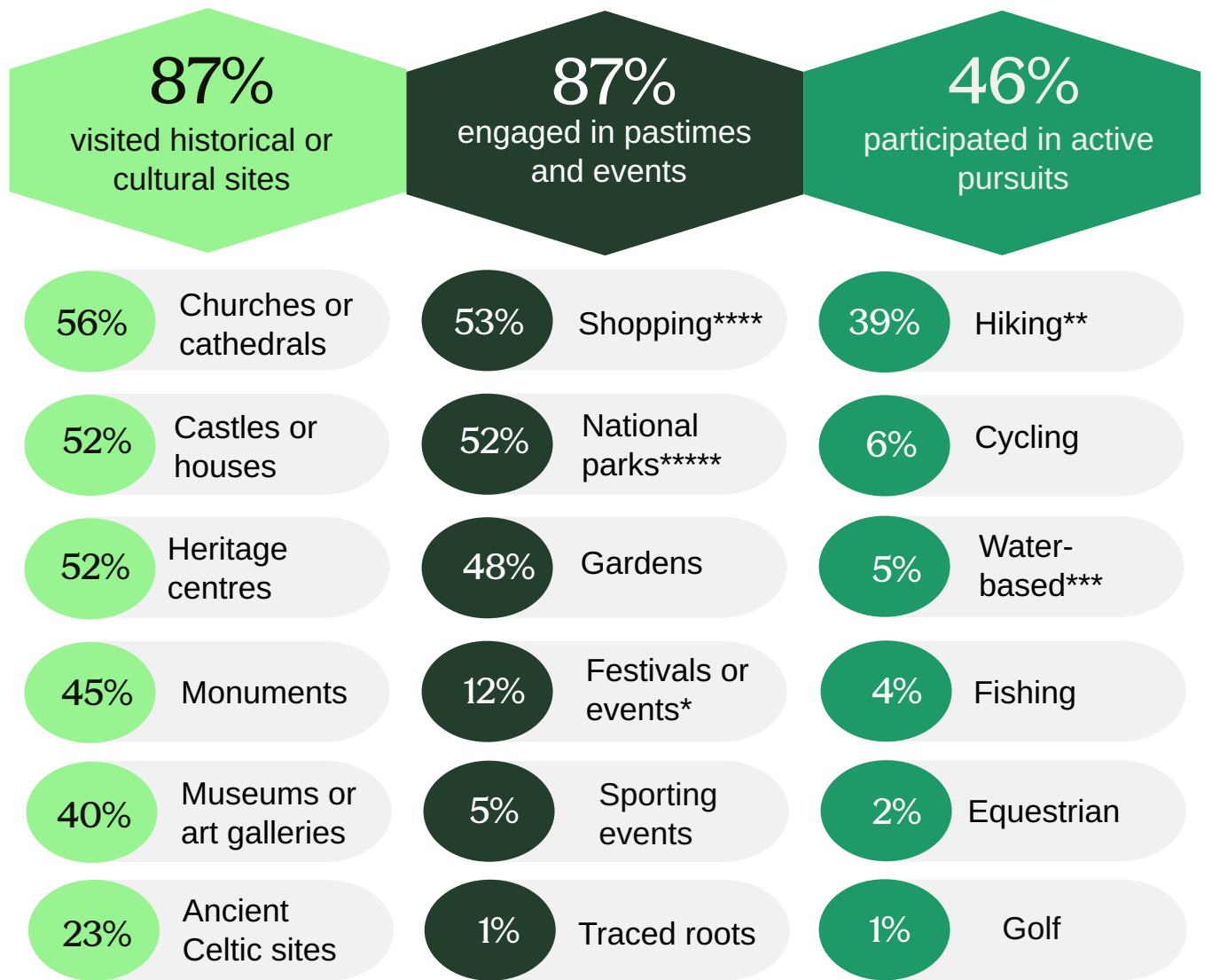
The majority (96%) of French holidaymakers travelled independently and two in five (44%) used a car while on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

French holidaymakers are engaged tourists. They explored our historical sites and engaged in multiple pastimes 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*

Four in five French holidaymakers would highly recommend Ireland, citing the people and the scenery as their main reasons why.



OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers from France use multiple sources of inspiration when choosing a holiday destination, including family and friends' recommendations and general online searches.

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.

French holidaymakers are most often inspired by people they trust when choosing where to go

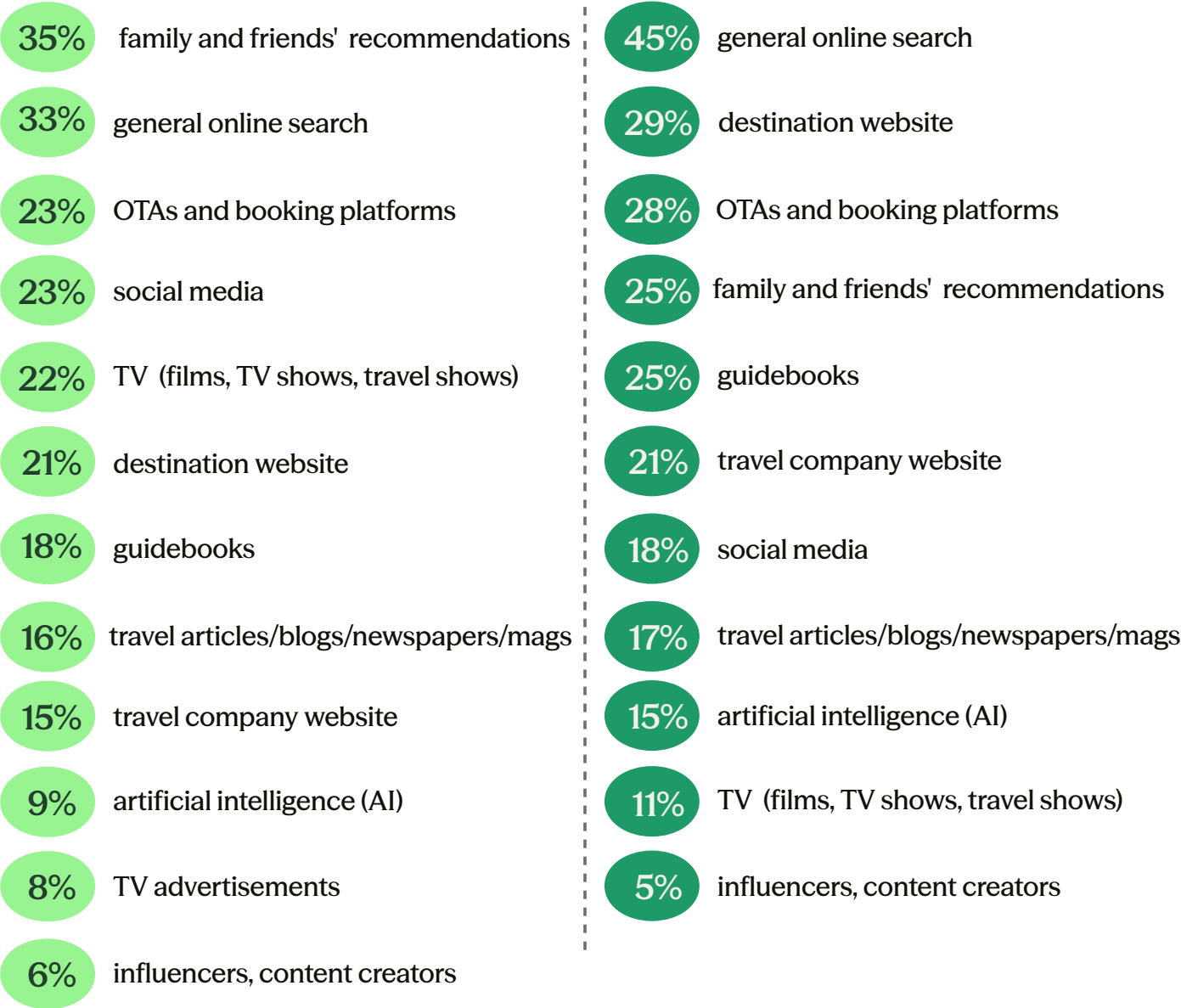
But most often turn to online search when planning their trip

DREAMING



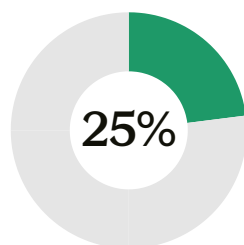
RESEARCH AND PLANNING

BASED ON RESPONDENTS' TOP 3 SOURCES

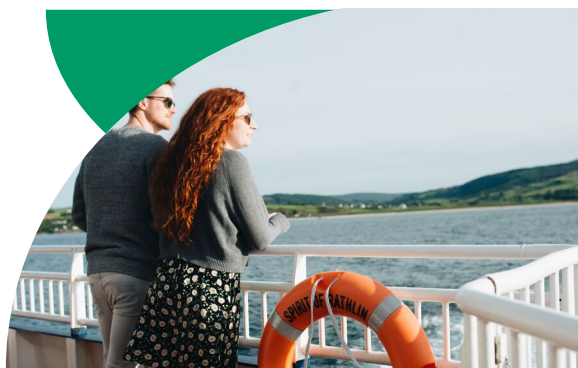


ENRICHMENT EXPLORERS

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

2



To broaden and stimulate my 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



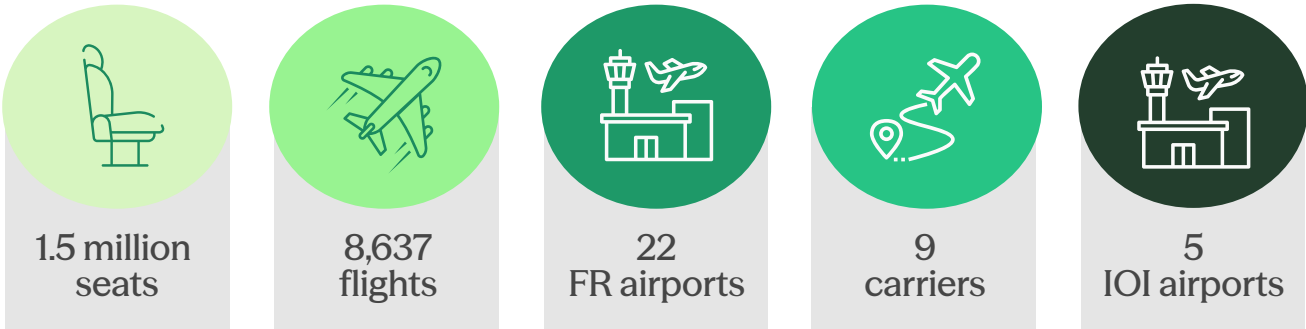
To enjoy the beauty of the landscape

OUTBOUND TOURISTS

In 2025, France was the world's fifth-largest outbound market, with 68% of its outbound trips going to other parts of Europe.

ACCESS BY AIR

In 2025, more than 8,637 flights from 22 gateways in France provided 1.5 million direct one-way air seats to the island of Ireland.



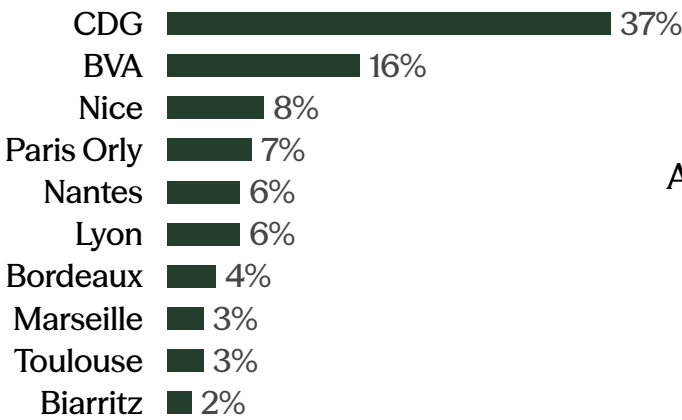
WHERE CAN OUR TOURISTS FLY FROM?

WHO CAN OUR TOURISTS FLY WITH?

In 2025, the top five French airports accounted for most seats (74%). Three in five seats (60%) were from Paris-based airports (CDG, BVA and ORY).

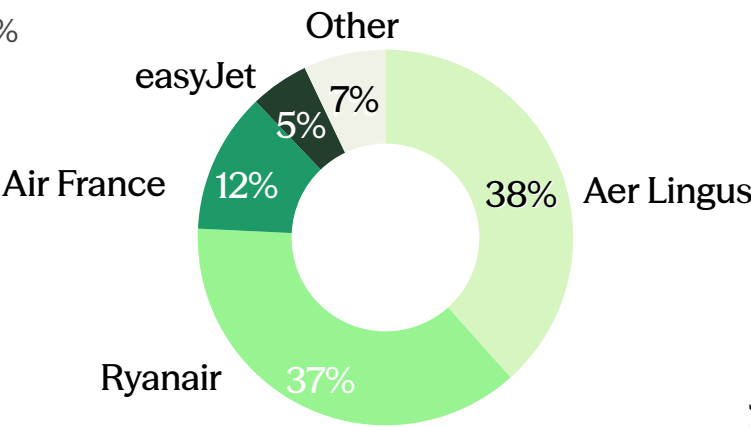
Nine carriers operated routes between France and the island of Ireland. Three key carriers provided most seats (87%): Aer Lingus (38%), Ryanair (37%) and Air France (12%).

SHARE OF SEATS BY AIRPORT (TOP 10)



CDG: Charles de Gaulle; BVA: Beauvais Tille

SHARE OF SEATS BY CARRIER



Other: Transavia, Vueling, Chailair, TUI, Smartwings

ACCESS BY SEA (Based on 2026 data)

