France Market Profile

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Size of the French market to the island of Ireland

	2006	2007	2008	2009	2010	2011	2012
Total visits (000)	370	407	423	402	356	399	404
Holiday visits (000)	183	210	199	195	166	199	222
Promotable visitors (000)	211	244	236	231	204	237	268
Revenue (€mn)	209	211	264	247	205	200	200
Revenue (£mn)	170	172	215	201	183	178	178

All Euro (€) / Sterling (£) conversions have been carried out at a rate of €1 = £0.815
(Revenue does not include carrier receipts or international air and sea fares)
Promotable visits = Holiday, Conference/Incentive & EFL (English as a foreign language)
Data sources: Tourism Ireland fact card 2012.

Holidaymakers at a glance ...

When do holidaymakers arrive?

Month Of Arrival	2006	2007	2008	2009	2010	2011
January - March	***11%***	***10%***	***10%***	***12%***	***11%***	***10%***
January	1%	3%	2%	2%	1%	2%
February	2%	3%	3%	3%	5%	2%
March	8%	4%	5%	7%	5%	6%
April	11%	7%	10%	12%	8%	12%
May	12%	12%	16%	12%	13%	11%
June	9%	19%	12%	10%	10%	15%
July	21%	17%	17%	18%	21%	16%
August	19%	17%	14%	19%	17%	20%
September	5%	7%	9%	8%	10%	6%
October	6%	6%	7%	5%	4%	6%
November	3%	2%	3%	2%	3%	2%
December	2%	2%	3%	2%	3%	1%
October - December	***12%***	***11%***	***12%***	***9%***	***10%***	***9%***

%'s may not add to 100% due to rounding

When did holidaymakers decide to visit?**

Month Decided to visit	2006	2007	2008	2009	2010	2011
Pre-September (previous year)	5%	7%	5%	5%	5%	4%
Oct-December (previous year)	13%	14%	13%	14%	13%	13%
January	10%	10%	10%	11%	11%	15%
February	12%	12%	12%	12%	11%	12%
March	14%	12%	13%	11%	14%	14%
April	12%	15%	11%	11%	11%	12%
May	8%	9%	7%	11%	8%	6%
June	10%	10%	12%	7%	7%	6%
July	6%	5%	5%	8%	9%	8%
August	4%	2%	6%	5%	5%	5%
September	4%	4%	4%	4%	3%	4%
October	1%	1%	0%	1%	1%	1%
November	1%	1%	1%	0%	1%	0%
December	0%	0%	0%	0%	0%	0%

** In all cases, tables with two stars indicates that data excludes direct holidaymakers to Northern Ireland.

When did holidaymakers make a reservation?**

Month reserved part of trip	2006	2007	2008	2009	2010	2011
Pre-September (previous year)	2%	2%	2%	1%	1%	0%
Oct-December (previous year)	10%	10%	14%	12%	9%	8%
January	6%	10%	9%	12%	8%	13%
February	12%	11%	11%	10%	13%	12%
March	15%	14%	15%	14%	16%	15%
April	12%	12%	11%	11%	11%	13%
May	12%	16%	8%	13%	9%	9%
June	12%	12%	13%	9%	8%	9%
July	7%	6%	7%	8%	10%	10%
August	5%	2%	5%	6%	7%	4%
September*	4%	3%	4%	4%	4%	5%
October*	1%	1%	0%	0%	1%	1%
November*	1%	1%	1%	0%	1%	0%
December*	0%	0%	0%	0%	0%	0%

* some misattribution into previous year (Pre September and Oct-December)

How do holidaymakers travel to the island of Ireland?

Air vs. Sea	2006	2007	2008	2009	2010	2011	2012
Air	77%	82%	86%	86%	79%	79%	66%
Sea	23%	18%	14%	14%	21%	21%	34%

What is the length of stay for holidaymakers on the island of Ireland?

Length of stay	2006	2007	2008	2009	2010	2011	2012
1-5 nights	28%	25%	36%	35%	28%	31%	35%
6-8 nights	38%	47%	37%	37%	40%	37%	31%
9-14 nights	27%	20%	18%	19%	21%	23%	22%
15+ nights	7%	7%	9%	9%	11%	9%	12%
Average number of nights	*8.2*	*8.8*	*8.3*	*8.6*	*9.4*	*8.3*	*8.9*

%'s may not add to 100% due to rounding

Where do holidaymakers stay? (Distribution of bednights)

Accommodation	2006	2007	2008	2009	2010	2011	2012
Hotels	14%	17%	13%	17%	14%	18%	20%
Guesthouses & B&B's	44%	27%	30%	27%	28%	34%	23%
Rented	17%	23%	16%	12%	21%	10%	13%
Caravan/Camping	9%	9%	7%	8%	8%	8%	8%
Friends & Relatives	11%	12%	13%	14%	12%	9%	13%
Other	6%	12%	21%	22%	18%	20%	24%

Where do holidaymakers visit on the island of Ireland?

Regions visited	2006	2007	2008	2009	2010	2011	2012
Dublin	56%	52%	57%	60%	54%	57%	65%
Midlands East	11%	9%	8%	10%	11%	8%	13%
South Eastern	19%	15%	9%	13%	13%	16%	20%
South West	47%	44%	46%	38%	42%	46%	46%
Midwest	30%	32%	26%	25%	30%	28%	19%
Western	56%	46%	40%	46%	51%	54%	47%
Northwest	12%	9%	9%	10%	11%	12%	8%
Northern Ireland	5%	6%	6%	8%	10%	12%	9%

How many holidaymakers use a car?

Car Usage	2006	2007	2008	2009	2010	2011	2012
Car Not Used	38%	48%	50%	51%	45%	40%	48%
Car Hire	40%	35%	38%	37%	37%	41%	24%
Car Brought	22%	17%	11%	12%	18%	19%	28%

How do holidaymakers make their travel arrangements?

Travel Arrangement	2006	2007	2008	2009	2010	2011	2012
Package	22%	27%	28%	19%	20%	19%	21%
Independent	78%	73%	72%	81%	80%	81%	79%

Use of internet to book part of trip**

	2006	2007	2008	2009	2010	2011	2012
Yes	61%	70%	73%	80%	80%	80%	86%
No	39%	30%	27%	20%	20%	20%	14%

Items booked online**

	2006	2007	2008	2009	2010	2011	2012
Air-Sea tickets	61%	63%	69%	77%	77%	75%	83%
Accommodation	23%	42%	44%	53%	55%	59%	52%
Car hire	20%	19%	26%	26%	25%	30%	15%
Other	1%	1%	1%	1%	2%	2%	0%

%'s may not add to 100% due to rounding

Sites visited if using the internet**

	2006	2007	2008	2009	2010	2011
Travel Agent's website	6%	4%	5%	8%	8%	5%
Specific accommodation provider's website	13%	12%	15%	20%	15%	12%
Specific Air/Sea Carrier's website	48%	43%	49%	59%	57%	55%
General holiday search portal	10%	18%	19%	8%	12%	15%
Tourist Board's website	16%	17%	9%	13%	12%	20%
Other site with general info on Irish holidays	7%	9%	5%	5%	6%	5%
User Generated Sites e.g. Blogs / Trip Advisor	n/a	1%	1%	1%	3%	3%
Car Hire Website	n/a	9%	10%	12%	11%	11%
Social Networking Sites e.g. Facebook	n/a	n/a	n/a	n/a	n/a	0%
Other	9%	4%	2%	1%	1%	2%

Have holidaymakers been to the island of Ireland before?

Familiarity	2006	2007	2008	2009	2010	2011	2012
First visit	66%	62%	61%	67%	67%	63%	65%
Repeat visit	33%	37%	39%	33%	32%	35%	34%
Born on the island of Ireland	2%	1%	1%	0%	1%	2%	2%

What is the social class profile of holidaymakers?

Social Class	2006	2007	2008	2009	2010	2011	2012
AB	27%	27%	21%	20%	24%	27%	29%
C1	62%	61%	67%	67%	60%	60%	58%
C2	8%	7%	10%	11%	11%	10%	11%
DEF	3%	6%	3%	3%	5%	3%	2%

What age are holidaymakers?

Age	2006	2007	2008	2009	2010	2011	2012
Under 16	34%	9%	13%	7%	5%	10%	12%
16-24	9%	24%	15%	19%	21%	17%	20%
25-34	17%	17%	26%	22%	24%	20%	22%
35-44	13%	14%	12%	13%	15%	15%	19%
45-54	13%	15%	17%	12%	18%	19%	12%
55+	14%	22%	17%	28%	16%	19%	15%

Who do holidaymakers travel with?

Party Composition	2006	2007	2008	2009	2010	2011	2012
Alone	19%	21%	25%	21%	23%	19%	20%
Couple	42%	33%	35%	40%	41%	45%	36%
With family	17%	25%	18%	16%	13%	18%	25%
Other Adult Party	21%	22%	23%	23%	23%	19%	19%

What sites of historical interest do our holidaymakers visit?**

	2006	2007	2008	2009	2010	2011	2012
Any Of The Below	81%	80%	73%	81%	81%	88%	88%
Ancient Celtic sites	N/A	N/A	N/A	N/A	N/A	N/A	30%
Churches/Cathedrals	N/A	N/A	N/A	N/A	N/A	N/A	47%
Historic Houses/Castles	67%	65%	62%	69%	69%	76%	58%
Monuments	56%	58%	53%	60%	58%	61%	45%
Heritage/Interpretative Centres	34%	37%	38%	40%	37%	45%	39%
Museums/Art Galleries	46%	41%	40%	43%	45%	50%	39%
Other Sites Of Cultural Historical Interest	4%	10%	8%	8%	5%	17%	23%
None Of These	19%	20%	27%	19%	19%	12%	12%

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What pastimes/events do our visitors engage in?**

	2006	2007	2008	2009	2010	2011	2012
Visited Gardens	37%	30%	36%	47%	45%	48%	44%
Visited National Parks/Forests	n/a	n/a	n/a	51%	56%	62%	46%
Attended An Organised Sporting Event	2%	3%	3%	2%	4%	5%	3%
Tracing Roots/Geneology	0%	0%	1%	1%	0%	1%	0%
Attended Cultural Event/Festival	9%	6%	5%	7%	12%	13%	12%
Used Spa Facilities	0%	0%	1%	2%	3%	2%	1%
None Of These	n/a	n/a	61%	34%	29%	29%	32%

What activities do our holidaymakers engage in?**

	2006	2007	2008	2009	2010	2011	2012
Fishing	6%	3%	7%	4%	6%	5%	3%
Equestrian Pursuits	2%	3%	1%	1%	2%	2%	4%
Cycling	4%	5%	4%	6%	8%	6%	8%
Golf	3%	1%	3%	4%	4%	3%	2%
Hiking/Cross-Country Walking	23%	29%	19%	36%	37%	32%	18%
Other Water Based Activities	1%	3%	1%	2%	2%	5%	5%

How much travelling do our holidaymakers do in Ireland?**

Regionality Segments	2006	2007	2008	2009	2010	2011	2012
Dublin Only	21%	21%	25%	25%	21%	18%	26%
Tourer	43%	36%	30%	32%	38%	41%	39%
Static Regional	18%	24%	26%	23%	23%	20%	20%
Two Bases	17%	17%	18%	19%	17%	20%	15%

Where do our holidaymakers come from?**

	2006	2007	2008	2009	2010	2011	2012
Paris Region	34%	34%	24%	27%	25%	23%	28%
Paris Basin East	5%	6%	7%	4%	3%	6%	5%
Paris Basin West	8%	11%	9%	9%	5%	8%	7%
North	3%	0%	2%	3%	3%	1%	1%
East	3%	4%	6%	5%	6%	6%	3%
West	13%	17%	18%	16%	20%	16%	22%
South East	14%	11%	17%	14%	14%	15%	7%
South West	10%	12%	12%	12%	12%	14%	17%
Mediterranean	9%	6%	5%	10%	11%	10%	9%

sources: Failte Ireland's Survey of Travellers (SOT) and NITB / NISRA's Northern Ireland Passenger Survey (NIPS)

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What do Holidaymakers think of Ireland?

What are the top things French people hope to see, do or experience in Ireland?

source: Tourism Ireland's Global Brand Tracker 2012 - 1000 French people surveyed at home

Did the desire for these experiences influence French holidaymakers' decision to visit?*

source: Failte Ireland's Visitor Attitude Survey 2012

* NB: Northern Ireland attractions such as the Giant's Causeway not included in this question

% Holidaymakers who said yes	France
	%
An Irish pub	88%
An Irish castle	78%
Connemara	64%
The Ring of Kerry	59%
The Cliffs of Moher	58%
Dublin's heritage and culture	54%
The Rock of Cashel	21%

The Irish countryside is hugely iconic for the French. Especially Connemara. They are drawn to coastal villages and food or craft markets too - and Irish pubs with the promise of live music .

Did you experience any of the following on your holiday in Ireland?*

source: Failte Ireland's Visitor Attitude Survey 2012

* NB: Northern Ireland attractions such as the Giant's Causeway not included in this question

% Holidaymakers who said yes	France
	%
Have you listened to live music in a pub?	92%
Have you tasted Guinness?	86%
Have you visited coastal towns?	92%
Have you visited food or craft markets?	72%
Have you took part in a city tour?	41%
Have you followed a literary trail?	12%

%'s may not add to 100% due to rounding

After their first holiday in Ireland, what do French holidaymakers say makes Ireland unique?

source: Tourism Ireland's PromEx study 2007

What have first-time holidaymakers from France said about their holiday in Ireland?

source: Tourism Ireland's PromEx study 2007

Ireland is even more beautiful than I could have imagined, the Irish are very warm, and you can really unwindi n this country where stress just

What makes Ireland memorable? Landscapes that are found nowhere else, preserved historical sites, and the possibility of discovering the country by ourselves.

The landscapes , the colours, the friendliness of the Irish, the ambience of the pubs... everything is truly magical and mystical in Ireland.

The landscapes, the youthful population, the dynamism of the country, all of this is nice.

Ireland has an identity that is unique and not found elsewhere. We feel that the Irish love their country and this is really felt.

Ireland is unique in its natural landscapes , its creative nature (architecture, culture, society) and its friendliness.

What makes Ireland unique? The landscapes and nature -

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