France Market Profile

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Size of the French market to the island of Ireland

	2005	2006	2007	2008	2009	2010e	2011e
Outbound holiday trips (000)	21,365	21,738	24,224	24,320	24,787	24,276	24,802
Total visits (000)	320	370	407	423	402	356	417
Holiday visits (000)	146	183	210	199	195	166	205
Promotable visitors (000)	176	211	244	236	231	204	248

All Euro (€) / Sterling (£) conversions have been carried out at a rate of €1 = £0.86798
(Revenue does not include carrier receipts or international air and sea fares)
Promotable visits = Holiday, Conference/Incentive & EFL (English as a foreign language)

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

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Holidaymakers at a glance ...

August is the most popular (20%) month to visit Ireland and more than two-thirds of our French holidaymakers arrived between May and September in 2011.

More than one-fifth (22%) of French holidaymakers travelled to the island of Ireland by sea, the only other market apart from GB to enjoy direct sea services.

Holidaymakers from France typically stayed for approximately 8 nights.

One-third of French holidaymakers opted to stay in a Guesthouse/B&B during their holiday making this type of accommodation by far the most popular among these visitors.

More than two-in-five (42%) French holidaymakers hired a car during their stay, an increase over 2010 (37%).

Most French holidaymakers travel independently (81%) and use the internet (80%) to book some element of their trip to the island of Ireland.

More than one-third (35%) of 2011 French holidaymakers had visited the island previously.

Most (88%) holidaymakers from France were from the ABC1 socio-economic group but were fairly even split in terms of age (under 35 vs. 35+ years (47:53)).
French holidaymakers are most likely (45%) to visit the island of Ireland with a partner or spouse than any other nationality.
With the exception of Australian holidaymakers, the French are the least likely (18%) to visit Dublin only.
Hiking/cross-country walking continues to be the most popular active pursuit among French holidaymakers in 2011 (32%).
The Paris region, the West and the South East generated the most holidaymakers for the island of Ireland in 2011.

When do holidaymakers arrive?

Month Of Arrival	2005	2006	2007	2008	2009	2010	2011
January - March	***12%***	***11%***	***10%***	***10%***	***12%***	***11%***	***10%***
January	2%	1%	3%	2%	2%	1%	2%
February	3%	2%	3%	3%	3%	5%	2%
March	7%	8%	4%	5%	7%	5%	6%
April	12%	11%	7%	10%	12%	8%	12%
May	8%	12%	12%	16%	12%	13%	11%
June	15%	9%	19%	12%	10%	10%	15%
July	17%	21%	17%	17%	18%	21%	16%
August	17%	19%	17%	14%	19%	17%	20%
September	7%	5%	7%	9%	8%	10%	6%
October	7%	6%	6%	7%	5%	4%	6%
November	4%	3%	2%	3%	2%	3%	2%
December	1%	2%	2%	3%	2%	3%	1%
October - December	***12%***	***12%***	***11%***	***12%***	***9%***	***10%***	***9%***

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Jump into Ireland

When did holidaymakers decide to visit?**

Month Decided to visit	2005	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%

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

When did holidaymakers make a reservation?**

Month reserved part of trip	2005	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	2005	2006	2007	2008	2009	2010	2011
Air	72%	77%	82%	86%	86%	79%	78%
Sea	28%	23%	18%	14%	14%	21%	22%

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

Length of stay	2005	2006	2007	2008	2009	2010	2011
1-5 nights	27%	28%	25%	36%	35%	28%	31%
6-8 nights	37%	38%	47%	37%	37%	40%	38%
9-14 nights	23%	27%	20%	18%	19%	21%	23%
15+ nights	13%	7%	7%	9%	9%	11%	9%
Average number of nights	*9.0*	*8.2*	*8.8*	*8.3*	*8.6*	*9.4*	*8.3*

Where do holidaymakers stay? (Distribution of bednights)

Accommodation	2005	2006	2007	2008	2009	2010	2011
Hotels	28%	24%	17%	13%	17%	14%	18%
Guesthouses & B&B's	18%	43%	27%	30%	27%	28%	34%
Rented	20%	7%	23%	16%	12%	21%	10%
Caravan/Camping	3%	2%	9%	7%	8%	8%	8%
Friends & Relatives	26%	22%	12%	13%	14%	12%	9%
Other	5%	3%	12%	21%	22%	18%	20%

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Where do holidaymakers visit on the island of Ireland?

Regions visited	2005	2006	2007	2008	2009	2010	2011
Dublin	47%	56%	52%	57%	60%	54%	57%
Midlands East	7%	11%	9%	8%	10%	11%	8%
South Eastern	20%	19%	15%	9%	13%	13%	16%
South West	44%	47%	44%	46%	38%	42%	46%
Midwest	23%	30%	32%	26%	25%	30%	28%
Western	41%	56%	46%	40%	46%	51%	54%
Northwest	8%	12%	9%	9%	10%	11%	12%
Northern Ireland	5%	5%	6%	6%	8%	10%	14%

How many holidaymakers use a car?

Car Usage	2005	2006	2007	2008	2009	2010	2011
Car Not Used	46%	38%	48%	50%	51%	45%	40%
Car Hire	28%	40%	35%	38%	37%	37%	42%
Car Brought	26%	22%	17%	11%	12%	18%	19%

How do holidaymakers make their travel arrangements?

Travel Arrangement	2005	2006	2007	2008	2009	2010	2011
Package	20%	22%	27%	28%	19%	20%	19%
Independent	80%	78%	73%	72%	81%	80%	81%

Use of internet to book part of trip**

	2005	2006	2007	2008	2009	2010	2011
Yes		61%	70%	73%	80%	80%	80%
No		39%	30%	27%	20%	20%	20%

Items booked online**

	2005	2006	2007	2008	2009	2010	2011
Air-Sea tickets		61%	63%	69%	77%	77%	75%
Accommodation		23%	42%	44%	53%	55%	59%
Car hire		20%	19%	26%	26%	25%	30%
Other		1%	1%	1%	1%	2%	2%

Sites visited if using the internet**

	2005	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	2005	2006	2007	2008	2009	2010	2011
First visit	61%	66%	62%	61%	67%	67%	63%
Repeat visit	37%	33%	37%	39%	33%	32%	35%
Born on the island of Ireland	2%	2%	1%	1%	0%	1%	2%

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What is the social class profile of holidaymakers?

Social Class	2005	2006	2007	2008	2009	2010	2011
AB	17%	27%	27%	21%	20%	24%	27%
C1	64%	62%	61%	67%	67%	60%	60%
C2	17%	8%	7%	10%	11%	11%	10%
DEF	2%	3%	6%	3%	3%	5%	3%

What age are holidaymakers?

Age	2005	2006	2007	2008	2009	2010	2011
Under 16	7%	34%	9%	13%	7%	5%	10%
16-24	21%	9%	24%	15%	19%	21%	17%
25-34	20%	17%	17%	26%	22%	24%	20%
35-44	20%	13%	14%	12%	13%	15%	15%
45-54	16%	13%	15%	17%	12%	18%	19%
55+	16%	14%	22%	17%	28%	16%	19%

Who do holidaymakers travel with?

Party Composition	2005	2006	2007	2008	2009	2010	2011
Alone	22%	19%	21%	25%	21%	23%	19%
Couple	43%	42%	33%	35%	40%	41%	45%
With family	17%	17%	25%	18%	16%	13%	18%
Other Adult Party	18%	21%	22%	23%	23%	23%	19%

Segments

Best Description of Holiday Needs	2005	2006	2007	2008	2009	2010	2011
S&CS's	74%	73%	72%	69%	68%	70%	73%
Outdoor Actives	4%	7%	7%	5%	4%	8%	6%
Family & Loved Ones	7%	4%	7%	4%	4%	3%	6%
Affinity Groups	1%	1%	1%	5%	4%	5%	4%
Luxury Lovers	0%	0%	0%	0%	0%	0%	1%
Relaxers	10%	12%	11%	11%	12%	8%	6%
Social Adventurers	3%	2%	2%	6%	8%	6%	4%

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

	2005	2006	2007	2008	2009	2010	2011
Any Of The Below		81%	80%	73%	81%	81%	88%
Historic Houses/Castles		67%	65%	62%	69%	69%	76%
Monuments		56%	58%	53%	60%	58%	61%
Heritage/Interpretative Centres		34%	37%	38%	40%	37%	45%
Museums/Art Galleries		46%	41%	40%	43%	45%	50%
Other Sites Of Cultural Historical Interest		4%	10%	8%	8%	5%	17%
None Of These		19%	20%	27%	19%	19%	12%

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

	2005	2006	2007	2008	2009	2010	2011
Visited Gardens		37%	30%	36%	47%	45%	48%
Visited National Parks/Forests		n/a	n/a	n/a	51%	56%	62%
Attended An Organised Sporting Event		2%	3%	3%	2%	4%	5%
Tracing Roots/Geneology		0%	0%	1%	1%	0%	1%
Attended Cultural Event/Festival		9%	6%	5%	7%	12%	13%
Used Spa Facilities		0%	0%	1%	2%	3%	2%
None Of These		n/a	n/a	61%	34%	29%	29%

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What activities do our holidaymakers engage in?**

	2005	2006	2007	2008	2009	2010	2011
Fishing		6%	3%	7%	4%	6%	5%
Equestrian Pursuits		2%	3%	1%	1%	2%	2%
Cycling		4%	5%	4%	6%	8%	6%
Golf		3%	1%	3%	4%	4%	3%
Hiking/Cross-Country Walking		23%	29%	19%	36%	37%	32%
Other Water Based Activities		1%	3%	1%	2%	2%	5%

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

Regionality Segments	2005	2006	2007	2008	2009	2010	2011
Dublin Only		21%	21%	25%	25%	21%	18%
Tourer		43%	36%	30%	32%	38%	41%
Static Regional		18%	24%	26%	23%	23%	20%
Two Bases		17%	17%	18%	19%	17%	20%

Where do our holidaymakers come from?**

	2005	2006	2007	2008	2009	2010	2011
Paris Region	30%	34%	34%	24%	27%	25%	23%
Paris Basin East	5%	5%	6%	7%	4%	3%	6%
Paris Basin West	8%	8%	11%	9%	9%	5%	8%
North	4%	3%	0%	2%	3%	3%	1%
East	11%	3%	4%	6%	5%	6%	6%
West	13%	13%	17%	18%	16%	20%	16%
South East	8%	14%	11%	17%	14%	14%	15%
South West	9%	10%	12%	12%	12%	12%	14%
Mediterranean	14%	9%	6%	5%	10%	11%	10%

sources: Failte Ireland's Survey of Travellers (SOT) and NITB / NISRA's Northern Ireland Passenger Survey (NIPS)
** Tables annoted with two stars are extracted from the SOT only ,so while they include holidaymakers who travel to Northern Ireland via the Republic of Ireland, holidaymakers using air or sea ports in Northern Ireland are not included in the statistics.

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Ireland's Image

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

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 doesn't exist.

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 - authenticity.

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

source: Tourism Ireland's PromEx study 2007

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Jump into Ireland