



The French Market Profile 2007

Marketing Insights



The Size and Value of the French Market

2006 saw the island of Ireland record unprecedented visitor growth rates from France of +16%. The number of holidaymakers visiting the island grew even faster than visitors at +26% after a weak 2005 performance, whereas revenue grew slightly behind visitors at +14%.

French trips to the island of Ireland								
	2000	2001	2002	2003	2004	2005	2006	06/05 % Change
Total Visits (000s)	294	288	309	331	309	320	370	+16%
Holiday Visits (000s)	158	154	149	161	162	146	183	+26%
Promotable Visits (000s)*	174	171	170	189	171	167	203	+22%
Revenue (€M)	125	167	192	152	165	185	211	+14%
Revenue (£M)	86	115	132	105	114	127	146	+14%
All French outbound** trips								
Total Visitors (000's)	24,802	24,364	24,492	23,991	26,249	28,434	29,747	+4.6%
Holiday Visitors (000's)	16,300	16,500	17,933	16,043	18,128	21,365	21,738	+1.7%

The general outbound market from France is performing well and grew by almost +5% in 2006. In contrast to the island of Ireland's situation, the outbound holiday market is growing slower than the overall visitor market.

*Promotable visits include holidaymakers, conference and incentive visitors and those who come to study English as a foreign language (EFL).
**Outbound trips are trips taken by French residents to any destinations outside France.
Exchange rate used to convert Euro to Sterling is 1 Euro = 0.69 Sterling

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The age of the French holidaymaker to the island of Ireland

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Air access capacity between the island of Ireland and France has soared over the last few years. In Summer 2006 it **grew by +25%**

France is the **4th largest generating region** for visitors to the island of Ireland. The average spend per trip in 2006 was **€570/£393**

The French spent **4.4 million nights** on the island in 2006. Almost 3 million of these were for holidays, with the average **holiday trip lasting 8.1 nights**



The French Travel Market

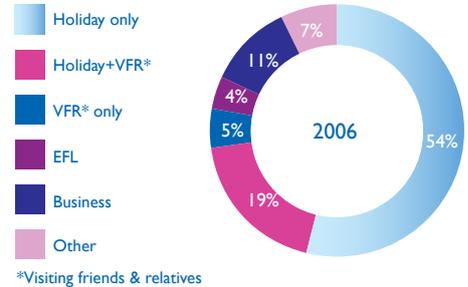
Profile of French travellers abroad



- The **mean spend per night** of French on holiday abroad is €71, leading to a mean spend per holiday of €841.
- **October to December** is the most popular period (41%) for **short breaks** (1-3 nights). Over a quarter of long holidays are taken in August.
- The greater **Paris region** is the largest generating region for **holiday trips abroad**.
- Staying in **hotels or with friends and relatives** are the most common forms of accommodation for French holidays abroad.
- **Internet usage** is growing in France. Overall Internet usage has risen to **48% of the total population** and travel products are the second most popular item bought online.

Why the French travel abroad

Over half (54%) of all general outbound trips from France are taken for a holiday, with a further 19% incorporating some VFR (visiting friends and relatives) into their holiday time. Just 5% of trips abroad are purely for the purpose of VFR, and 11% for business.



Where the French go on holidays

French outbound holidays have increased to all world regions over the last 4 years, but some areas are performing comparatively better than others, with short haul travel growing faster than long haul. World events, together with a downturn in the economy over the same period may have impacted on this trend.

	Holiday Trips (millions)		Share of trips (%)		Share Change
	2002	2006	2002	2006	
Total Holidaymakers	17,933	21,783	100%	100%	
Europe (Short Haul)	14,509	17,890	81%	82%	+1%
North Europe	223	279	1%	1%	=
West Europe	2,360	2,508	13%	12%	-2%
Central Europe	1,373	1,782	8%	8%	+1%
South West Med	8,983	10,583	50%	49%	-2%
South East Med	1,306	2,381	7%	11%	+4%
East Europe	510	612	3%	3%	=
Long Haul	3,433	3,852	19%	18%	-1%
Africa	805	970	4%	4%	=
Americas	1,509	1,393	8%	6%	-2%
Asia Pacific	1,120	1,489	6%	7%	+1%

Western Europe, which includes the island of Ireland, has seen a drop in share of French holiday trips abroad (-2%) since 2002, whereas the South East Mediterranean has seen a growth in share (+4%). The South West Mediterranean (Spain, Portugal, Italy, Malta, Morocco and Tunisia) has always been the most popular region for French holidaymakers. While the number of trips is still increasing to this region it has lost -2% share since 2002. Spain, Italy and Great Britain are still the 3 most popular destinations visited by French holidaymakers, accounting for 28%, 8% and 7% of all holiday trips respectively.

How long French holidaymakers stay on holidays abroad

The average length of stay of French outbound holiday trips was bucking the international trend at the start of the Millennium and growing instead of decreasing. While it has decreased over the last 2 years it still remains very high at 12 nights.

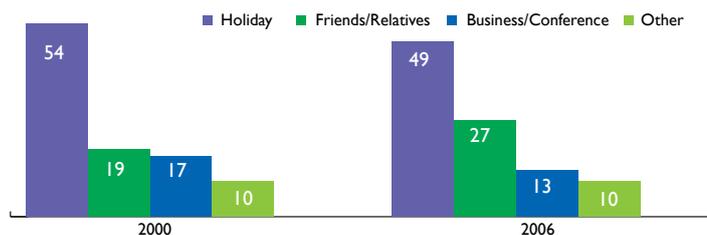


French policy on annual leave most likely impacts on the higher length of stay. French employees receive 25 standard days annual leave - one of the highest amounts of paid leave amongst developed nations. A survey conducted by Expedia in 2006 concluded that 32% of French employed adults anticipate using their holiday time to take at least one 2 week holiday, while a further 40% planned to take at least 3-4 weeks during the Summer.

The French Market to the island of Ireland

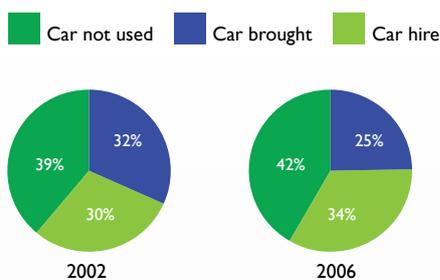
Why the French come to the island of Ireland

Over the past 6 years the island of Ireland has seen an increase in the number of French who come to the island to visit their friends and relatives (VFR). Today over a quarter of all visits are for this purpose. The proportion of holiday visits has declined slightly over the same period but holidays still account for almost half of all trips.



How they get there

In general over the last 4 years, the trend has been towards less car usage amongst French holidaymakers. The fall off has been in the number of holidaymakers bringing their own car, as the popularity of air travel increases over sea and low air fare access expands. This has also meant that car hire has become increasingly popular with the French, and in 2006 over a third hired a car.

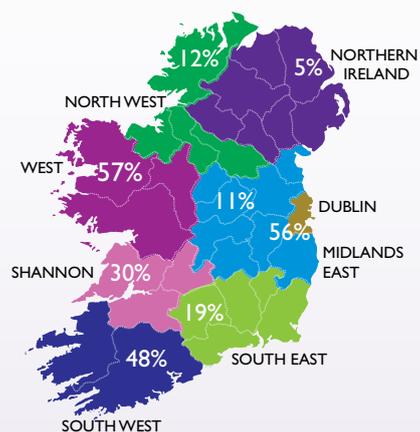


please note that these figures are based on a 3 year average

Where they go on the island of Ireland

French holidaymakers on the island are less Dublin-centric than other Europeans. The West is the most popular area for French holidaymakers, and in 2006 57% of French holidaymakers overnighted there. Dublin is a very close second with 56% spending at least a night there. 2006 saw French holidaymakers touring more. This could be linked to the recent return to growth of car hire and air access developments.

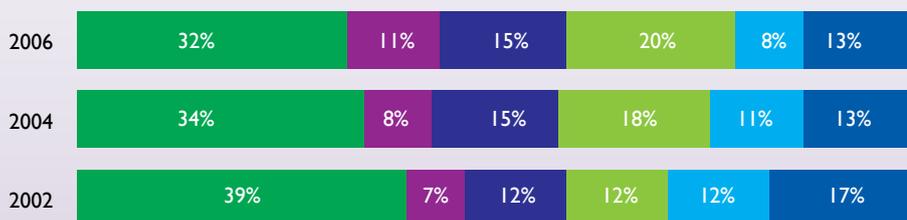
Holiday-Areas Visited (%)				
	2000	2002	2004	2006
Dublin	48	44	42	56
Midlands/East	15	10	9	11
South East	30	11	17	19
South West	57	49	46	48
Shannon	37	25	30	30
West	61	53	50	57
North West	14	10	9	12
Northern Ireland	6	5	5	5
Average No. of areas Visited	2.68	2.07	2.08	2.38



Profile of French holidaymakers to the island of Ireland

- In line with the general outbound trends and as school holidays occur in July and August, **40%** of French holidaymakers arrived on the island in **July and August in 2006**.
- **Air travel** continues to grow and in 2006 it was the mode of transport used by **78%** of French holidaymakers to the island.
- The **Paris region** generates over a third of all visits to the island.
- 2006 saw an increase in the proportion of **first time visits (67%)** from France.
- **79%** travel here **independently** (i.e. not on a pre paid package).

Legend: Guesthouse/B&Bs (Green), Hotels (Purple), Friends/Relatives (Dark Blue), Rented (Light Green), Caravan/Camp Site (Cyan), Other (Dark Blue)



please note that these figures are based on a 3 year average

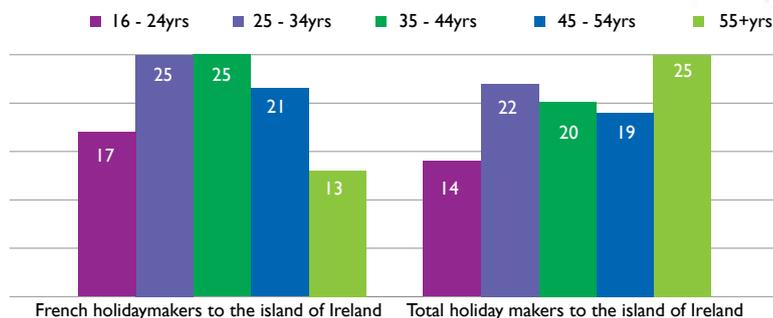
What accommodation they use

In recent years the overall trend evident amongst French holidaymakers is towards increased hotel and rented accommodation usage and a slight fall-off in Guesthouses / B&Bs and caravan & camping. Guesthouses / B&Bs are still the most popular accommodation type amongst French holidaymakers.



Age of French holidaymakers to the island of Ireland

In common with other European markets, the island of Ireland attracts a younger holidaymaker from France. In 2006 42% were under 34 years of age compared to just 36% of all holidaymakers on the island.



The full French report contains over 100 pages of invaluable information. Everything you need to know about French visitors to the island of Ireland and how to avail of promotional opportunities **with Tourism Ireland in the market place.**

Contents of the full French report can be downloaded at www.tourismireland.com/corporate

Country Profile:

Background information on the country.



France travel profile:

Statistical information illustrated by charts including size of market and profile of general outbound holidaymaker.



The French market to the island of Ireland:

Detailed breakdown including market size and a profile of the motivations and attitudes of holidaymakers visiting the island.



Car touring to the island of Ireland:

A brief synopsis of the car touring market to the island of Ireland in general (not only French visitors).



Sightseers and Culture Seekers:

Tourism Ireland's key target segment in 2007, this section gives an overview of who they are and what messages motivate them.



Trade Structure:

How the trade operate on our behalf in the market place.



Tourism Ireland Activities:

Lists advertising and promotional activity in the market along with cooperative opportunities.



Tourism Ireland Contacts:

Details of who's who in the French office.



Market Profiles are also available for Great Britain, USA, Germany, the Netherlands, Italy, Canada, Australia, Spain and the Nordics



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Statistical Sources: French outbound market statistics are based on The European Travel Monitor 2006. French inbound to the island of Ireland statistics are based on the Central Statistics Office Country of Residence Survey, Fátile Ireland's Survey of Overseas Travellers and Visitor Attitude Survey, the Northern Ireland Tourist Board's Passenger Survey and Visitors Attitude Survey.