

FRANCE

MARKET PROFILE 2023



INBOUND TOURISTS

The island of Ireland welcomed more than 395,000 French tourists who spent over €362/£315 million and stayed 3.9 million nights in 2023. This makes France the island's fourth-largest source of overseas revenue, nights and tourists.



WHERE DID OUR TOURISTS COME FROM?

Almost half (46%) of French tourists came from Paris (23%) and the South-East (23%).

| Paris | South - East | West | South - West | North | East | Corsica |
|-------|--------------|------|--------------|-------|------|---------|
| 23% | 23% | 16% | 16% | 11% | 10% | 0.1% |

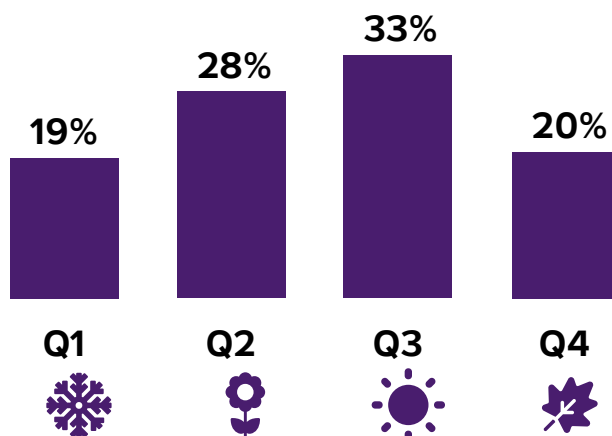
WHERE DID OUR TOURISTS VISIT?



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

WHEN DID OUR TOURISTS VISIT?





Around six-in-ten (61%) French tourists visited the island during Q2 and Q3 (April - September).



INBOUND TOURISTS

WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Around half (49%) of French tourists visiting the island of Ireland in 2023 came for a holiday, accounting for 52% of French tourism revenue. Nearly three-in-ten (28%) were visiting friends and/or relatives (VFR).

| | REVENUE | SHARE | TRIPS | SHARE | NIGHTS | SHARE |
|--|------------|-------|-------|-------|--------|-------|
|  HOLIDAY | €189/£164m | 52% | 196k | 49% | 1.6m | 40% |
|  VFR | €44/£39m | 12% | 111k | 28% | 815k | 21% |
|  BUSINESS | €66/£57m | 18% | 57k | 14% | 672k | 17% |
|  OTHER | €63/£55m | 17% | 34k | 9% | 876k | 22% |







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

On average, French tourists spent €916/£797 per trip or €92/£80 per night and stayed 10 nights on the island of Ireland in 2023.



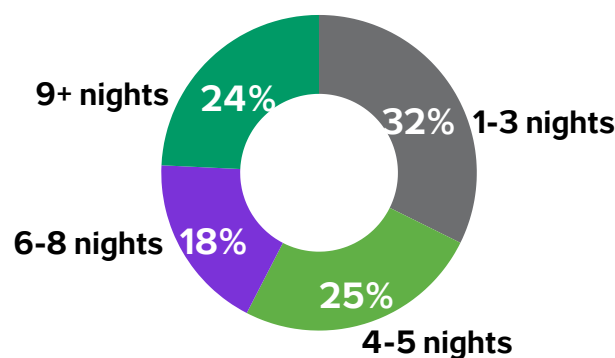
HOW DID OUR TOURISTS SPEND THEIR MONEY?

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

| | | |
|---|--|--|
| Accomm.  34% | Food & Drink  33% | Shopping  12% |
| Transport  12% | Entertainment  7% | Misc.  2% |

HOW LONG DID OUR TOURISTS STAY?

Around two-thirds (68%) stayed four or more nights on the island of Ireland.



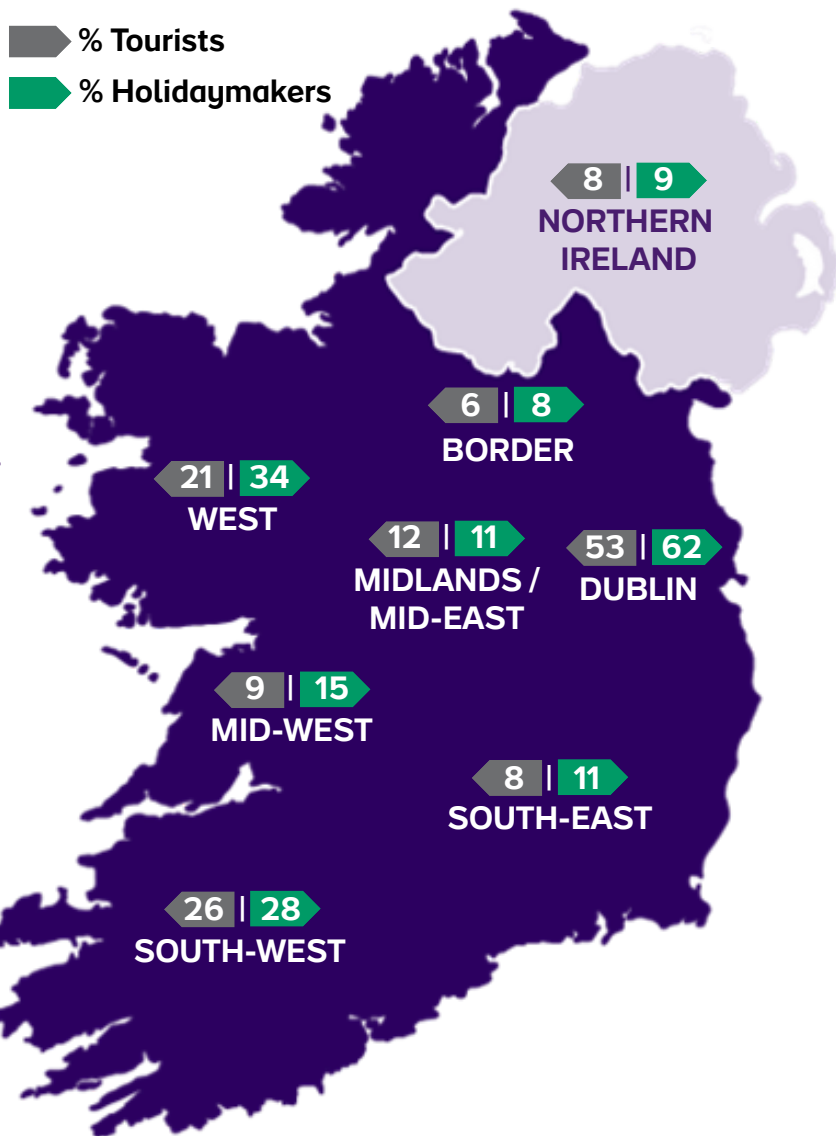
INBOUND TOURISTS AND HOLIDAYMAKERS

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.

Almost 22,000 French tourists and 13,000 holidaymakers overnighted on both sides of the border.

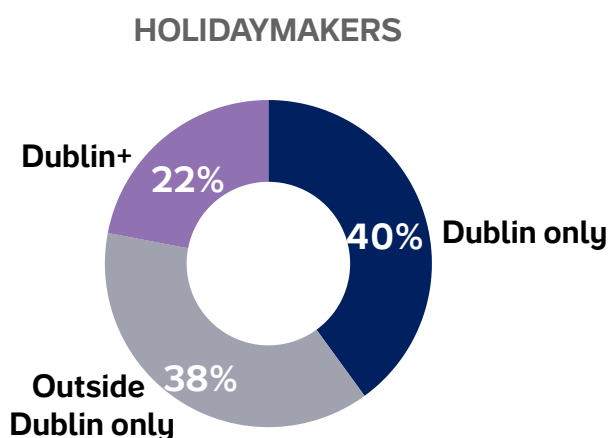
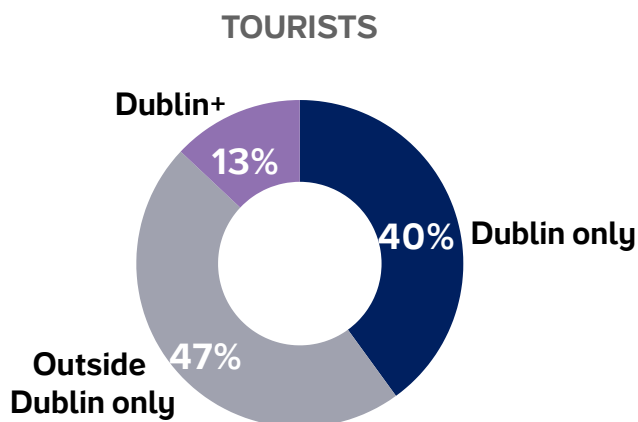
| Rank | Tourists | Holidaymakers |
|------|------------|---------------|
| #1 | Dublin | Dublin |
| #2 | South-West | West |
| #3 | West | South-West |



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

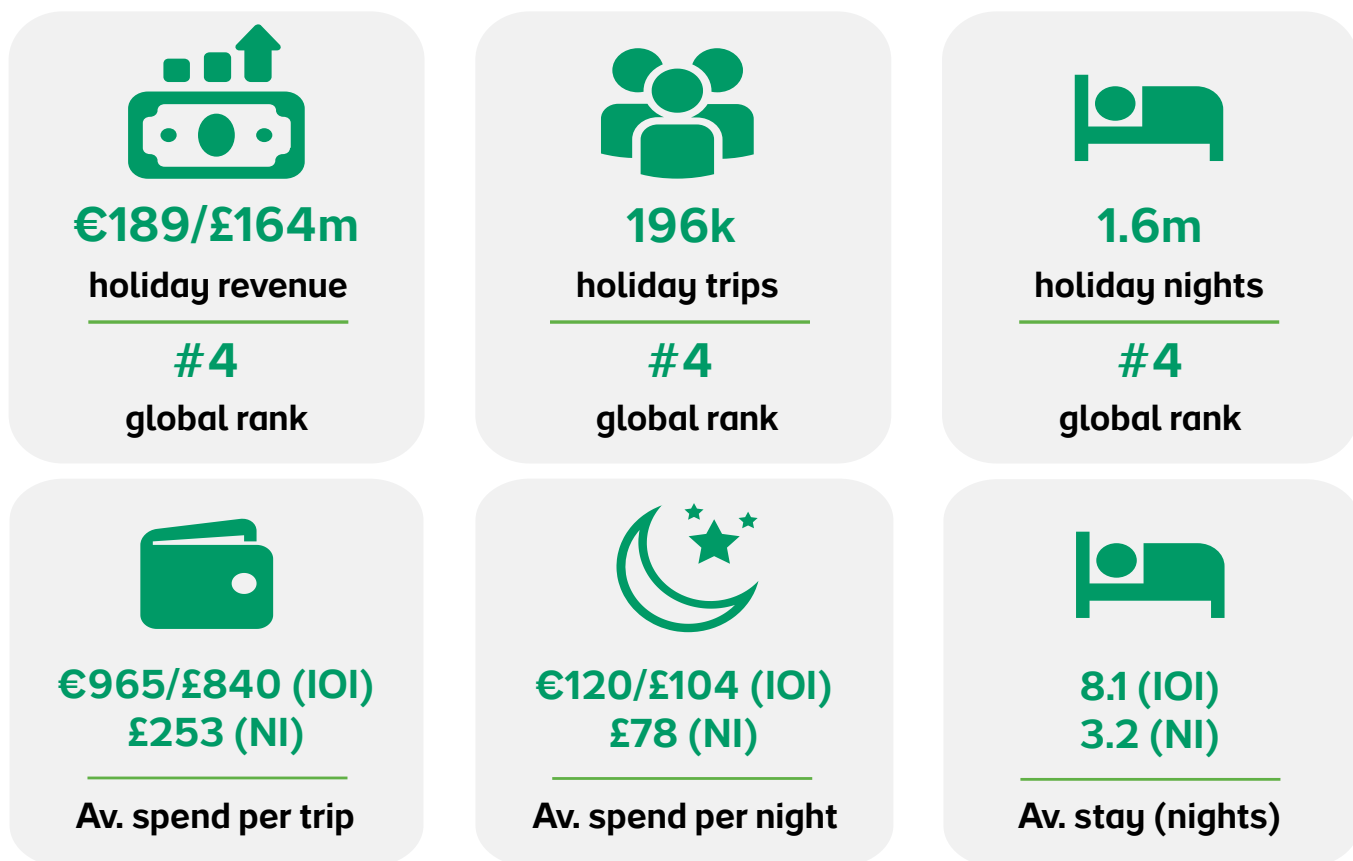
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

French tourists were more likely to overnight in areas outside Dublin (47%) than Dublin only (40%). French holidaymakers were more likely to include Dublin as part of their trip (62%).



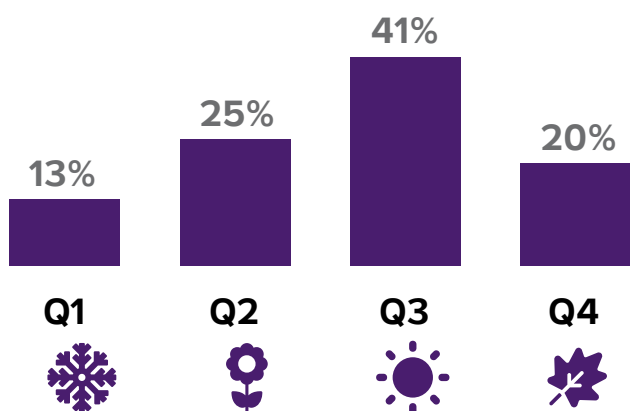
INBOUND HOLIDAYMAKERS

France was the island of Ireland’s fourth-largest source of holiday nights, holiday revenue and holidaymakers. French holidaymakers stayed for an average of 8.1 nights on the island of Ireland. Those visiting Northern Ireland stayed for an average of 3.2 nights.



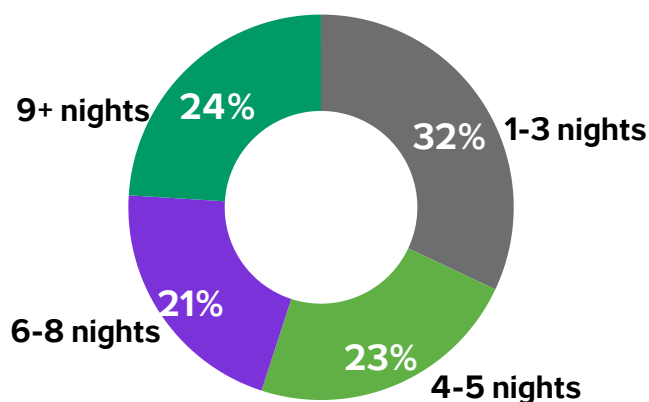
WHEN DID OUR HOLIDAYMAKERS VISIT?

Two-thirds (66%) of French holidaymakers visited during Q2 and Q3 (April - September).



HOW LONG DID OUR HOLIDAYMAKERS STAY?

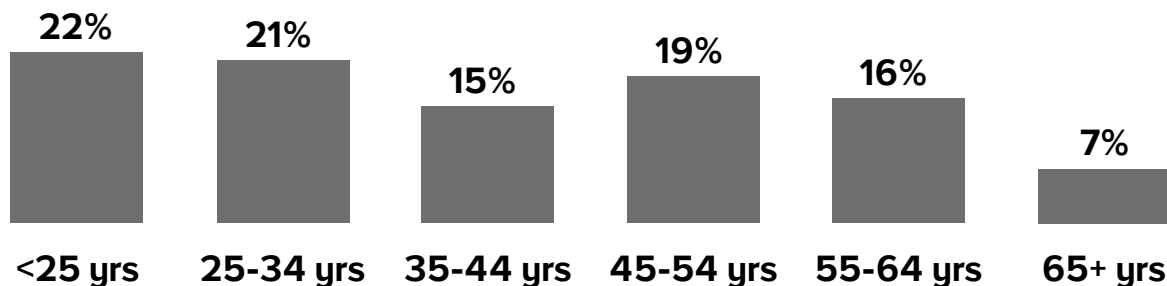
The majority (68%) of French holidaymakers stayed four or more nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

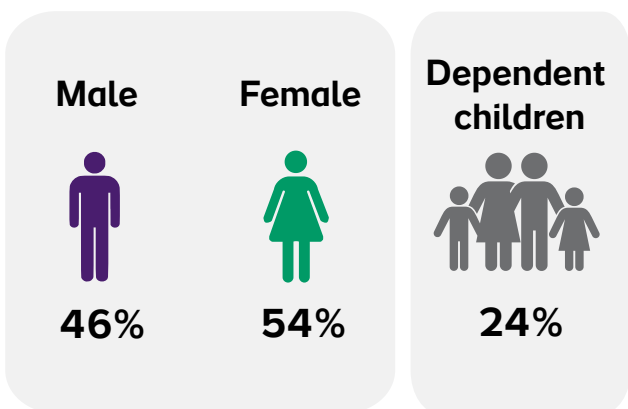
WHAT AGE WERE OUR HOLIDAYMAKERS?

Around two-fifths (42%) of French holidaymakers were under 35 years old.



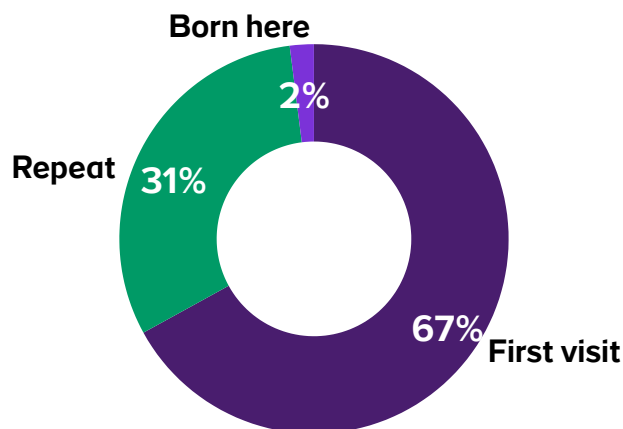
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

Over half (54%) of French holidaymakers were female. One-in-four (24%) holidaymakers visiting the island of Ireland had dependent children in their household (whether empty nesters or pre-children).



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

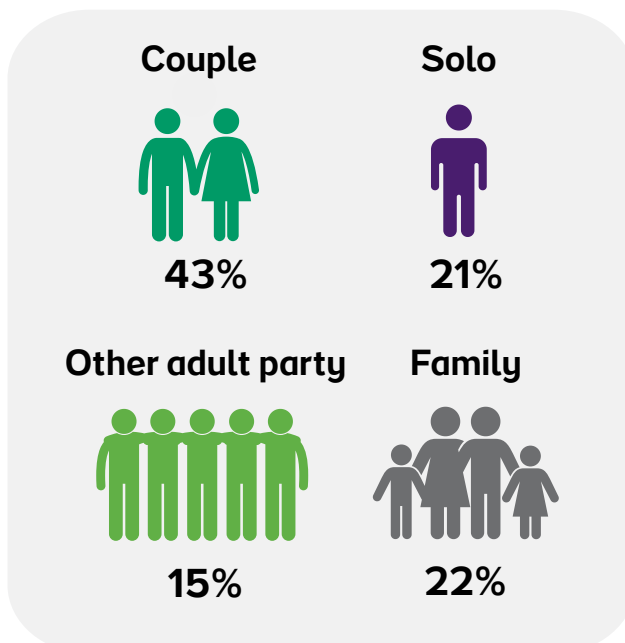
It was a first visit for seven-in-ten (67%) French holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Two-fifths (43%) of French holidaymakers visited with their partner/spouse.

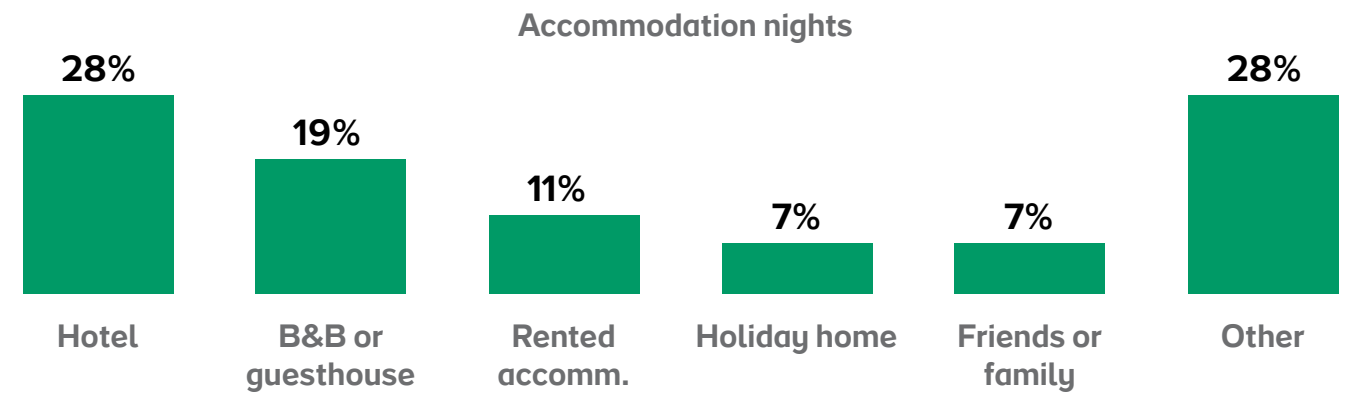
One-fifth (22%) travelled with family or alone (21%).



INBOUND HOLIDAYMAKERS

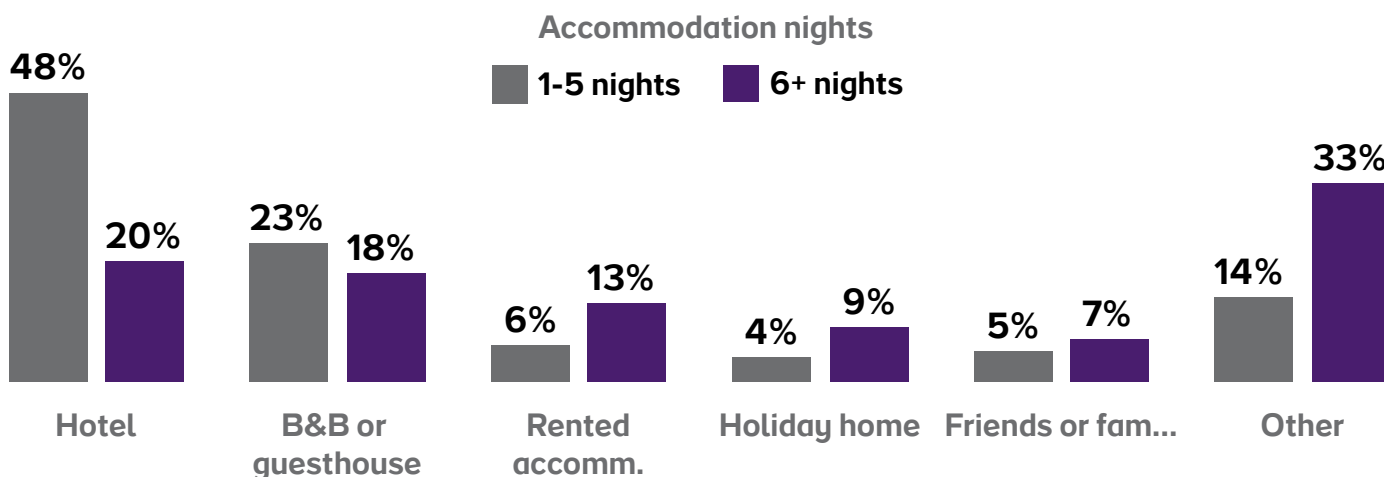
WHERE DID OUR HOLIDAYMAKERS STAY?

Almost three-in-ten (28%) nights stayed by French holidaymakers were in hotels, while around a fifth (19%) of nights were spent in B&Bs or guesthouses. Nights spent by French holidaymakers in "other" (28%) accommodation were driven by camping (12%) and campervans/motor homes (11%).



HOW DID LENGTH OF STAY AFFECT ACCOMMODATION TYPE?

Hotels (48%) are especially popular among French holidaymakers on short breaks (1 - 5 nights), while those staying 6+ nights were much more likely to stay in other (33%) accommodations (driven by camping, campervans and motorhomes).



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

The majority (94%) of French holidaymakers travelled independently and two-fifths (40%) used a car while on the island of Ireland.

93%
Travelled independently

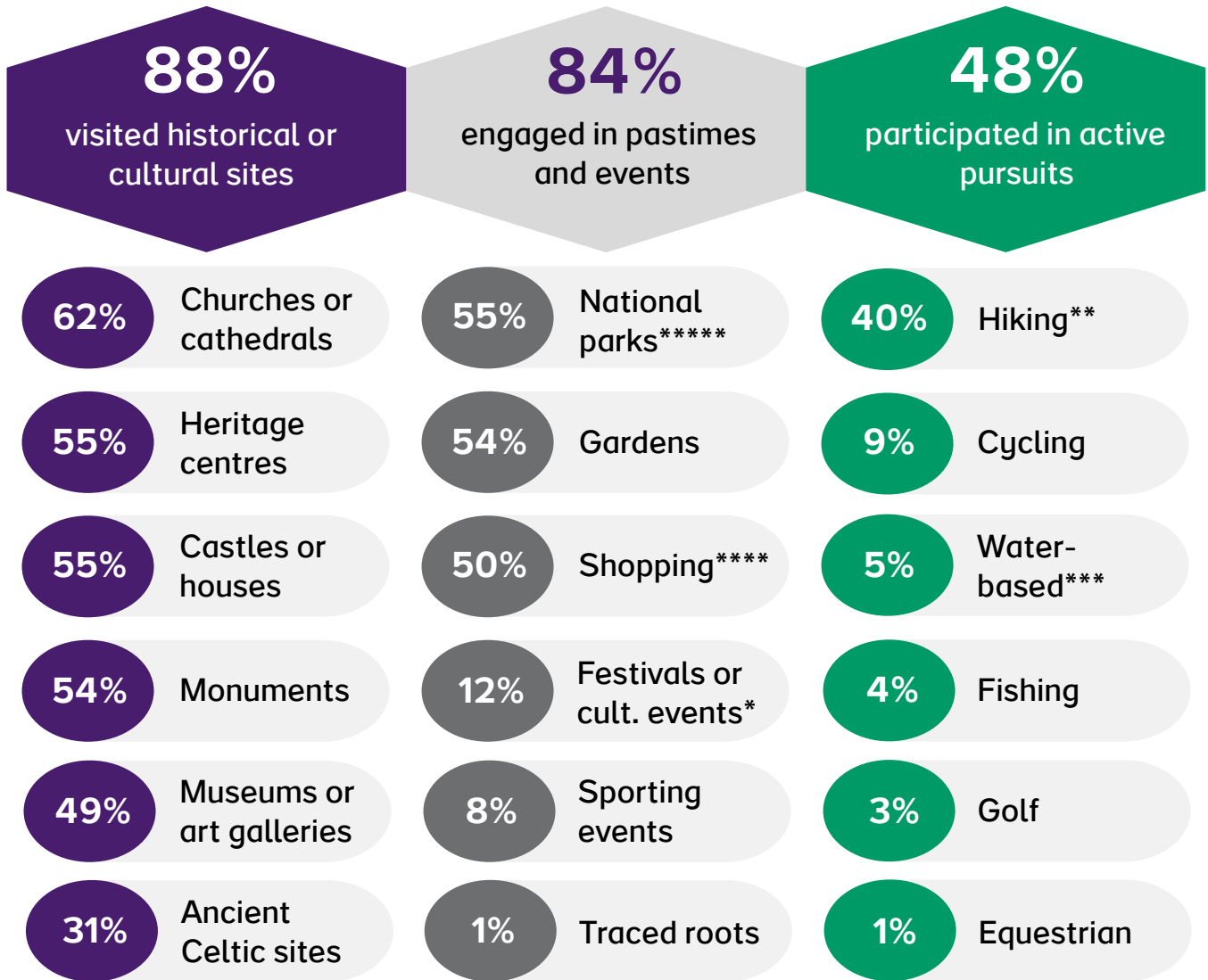
7%
Travelled as part of a package

45%
Used a car
25% Rented
17% Brought
2% Borrowed

INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

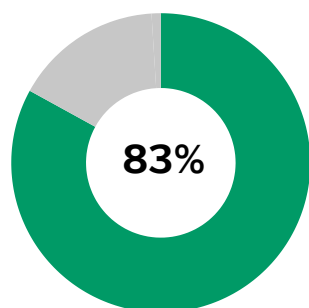
French holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



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

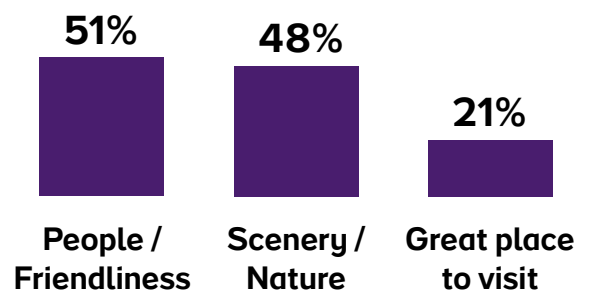
LIKELIHOOD TO RECOMMEND A HOLIDAY IN IRELAND TO OTHERS

The majority (83%) of French holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (51%), scenery and nature (48%) and that it's generally a great place to visit (21%).



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





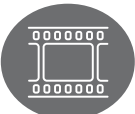




OUTBOUND HOLIDAYMAKERS

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.



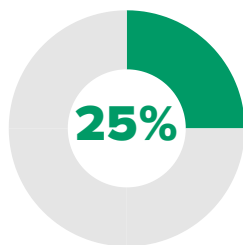
-  **43%** family and friends' recommendations
-  **39%** online search
-  **28%** films, TV shows, travel shows
-  **24%** social media
-  **23%** travel websites*
-  **20%** travel articles e.g. magazines, websites
-  **17%** travel blogs

-  **51%** online search
-  **29%** guidebooks
-  **28%** destination websites
-  **25%** travel websites*
-  **25%** family and friends' recommendations
-  **17%** online travel agencies
-  **16%** travel articles e.g. magazines, websites

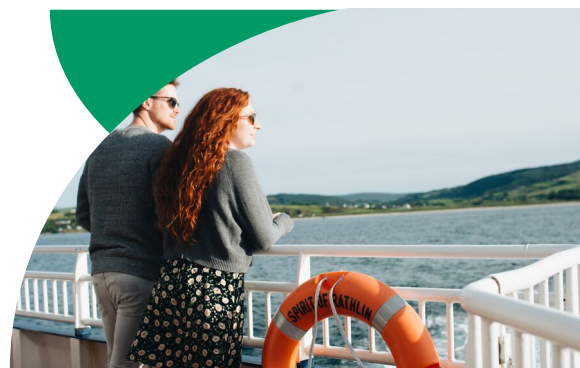
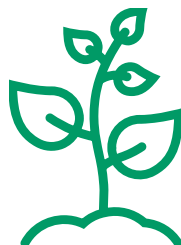
*Travel websites include company websites and booking platforms

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

- | | |
|---|--|
| <p>1  To feel connected to nature</p> <p>2  To broaden and stimulate my mind</p> <p>3  To feel the character of the place and people</p> <p>4  To appreciate historical/modern architecture</p> <p>5  To experience the vibrancy of the place and people</p> | <p>6  To experience living like a local</p> <p>7  To enjoy authentic moments with friendly locals</p> <p>8  To be transported back in history</p> <p>9  To discover and explore somewhere new</p> <p>10  To enjoy the beauty of the landscape</p> |
|---|--|

OUTBOUND TOURISTS

France was the world's fifth-largest outbound market in 2023 and 72% of all outbound trips from France were to other parts of Europe.

ACCESS BY AIR

There were 1.5 million direct one-way air seats available on almost 9,000 flights from France to the island of Ireland in 2023. There were 24 gateways from France to airports on the island of Ireland.



1.5 million seats



8,713 flights



24 FR airports



7 carriers

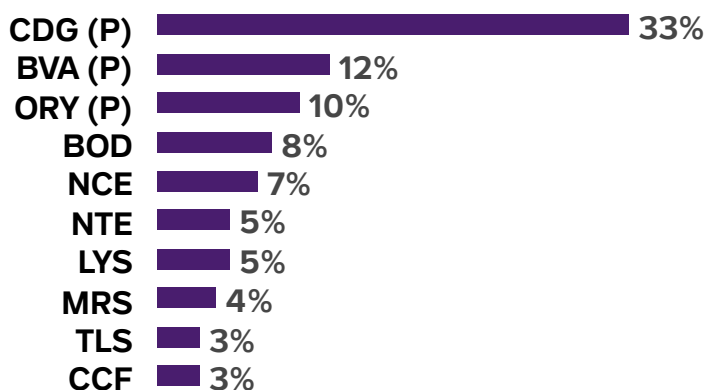


5 IOI airports

WHERE CAN OUR TOURISTS FLY FROM?

The top ten French airports accounted for the majority (91%) of seats in 2023. More than half (55%) of seats were delivered by Paris-based airports (CDG, BVA, ORY).

Share of seats by airport (Top 10)

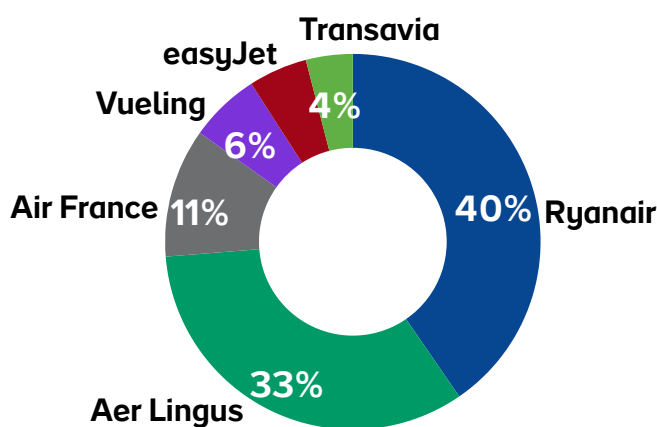


CDG: Charles de Gaulle, BVA: Beauvais-Tillé, ORY: Orly Apt, BOD: Bordeaux Mérignac, NCE: Nice, NTE: Nantes Atlantique, LYS: Lyon-Saint-Exupéry, MRS: Marseille Provence, TLS: Toulouse, CCF: Carcassonne

WHO CAN OUR TOURISTS FLY WITH?

Seven carriers operated between France and the island of Ireland. In 2023, around seven-in-ten (73%) seats were delivered by Ryanair (40%) and Aer Lingus (33%).

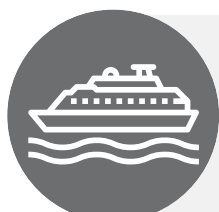
Share of seats by carrier



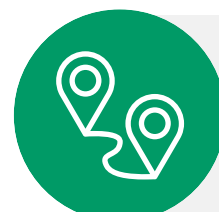
ACCESS BY SEA



1,300 sailings



3 carriers



4 routes