

Market insight



France

Analysis of tourist profiles, traveler flows, transportation and target groups

October 2019



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PROMOTE ICELAND

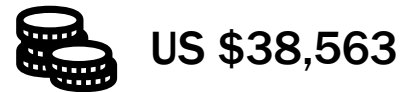
Market profile

Economy

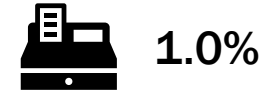
Real GDP Growth



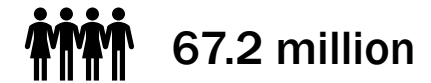
GDP per capita



Consumer price inflation



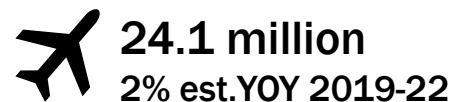
Population



Travel & Tourism

GLOBAL

Total Outbound Trips

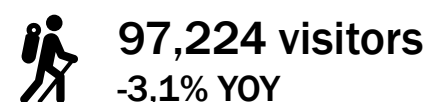


Average spend per trip



ICELAND

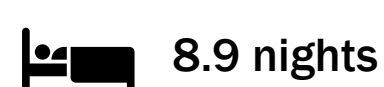
US visitors to Iceland 2018



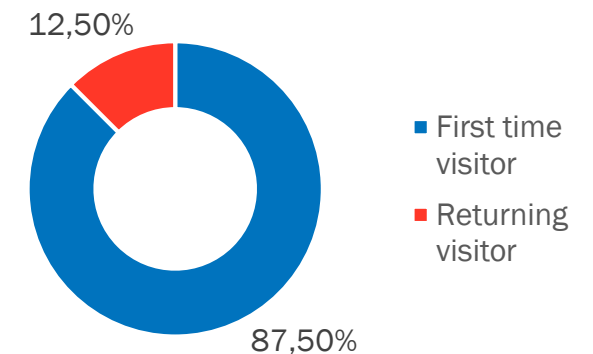
Share of guest nights



Average length of stay



Likelihood of return visit




Air Transportation

All year direct flights

- Paris (CDG)

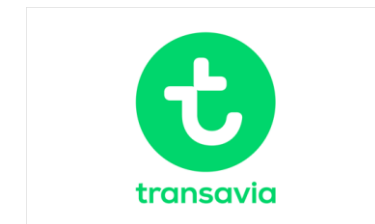
Air capacity to Iceland 2018

 **626.059 seats**
-2,4% YOY

Seasonal direct flights

- Paris (CDG)
- Paris (Orly)
- Marseille

Airlines



Seasonality

As flight availability increases greatly during the summer months a greater seasonality is to be expected

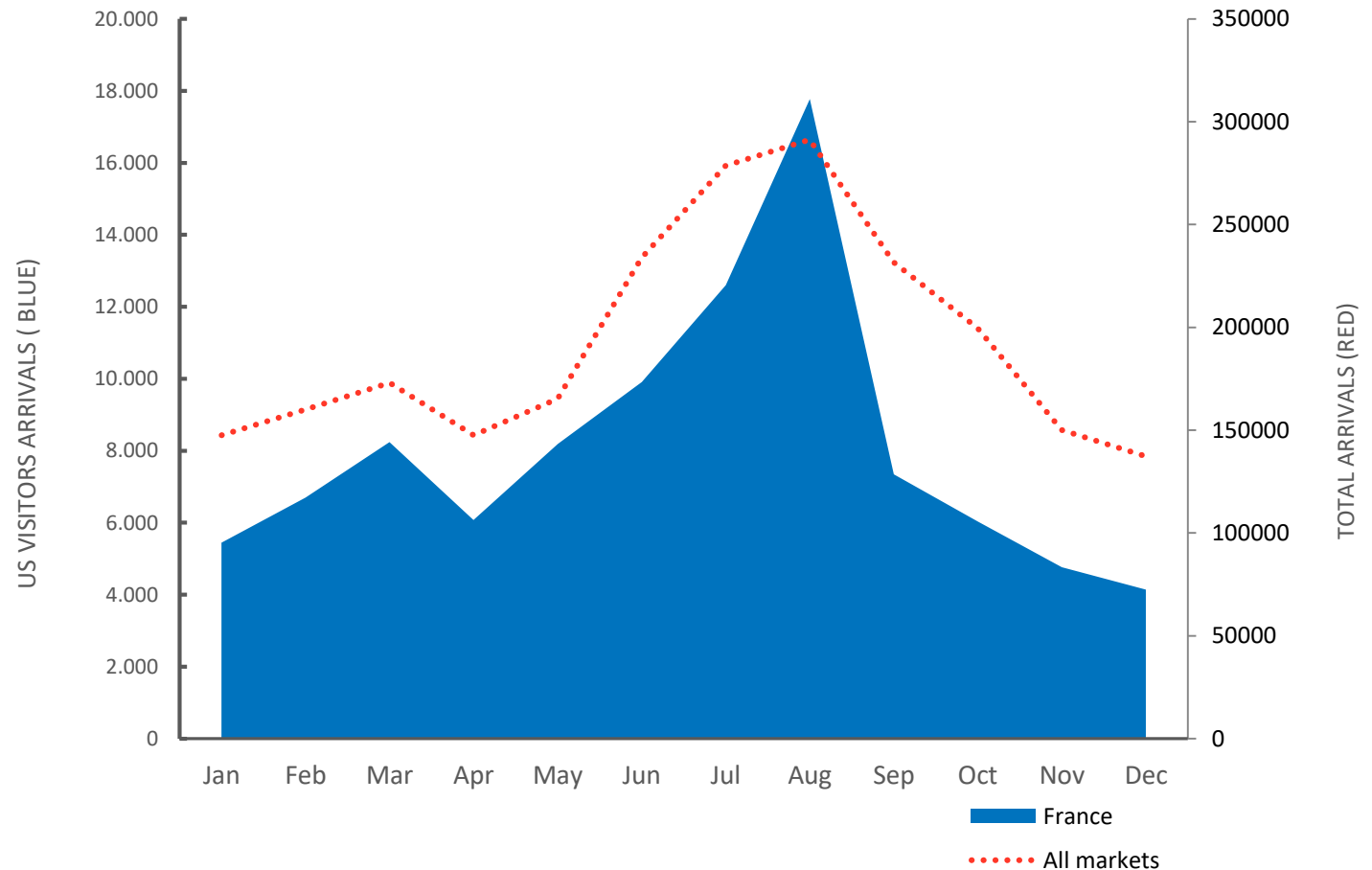
COME DURING

SUMMER: 41%
(JUNE – AUGUST, ALL MARKET AVG 35%)

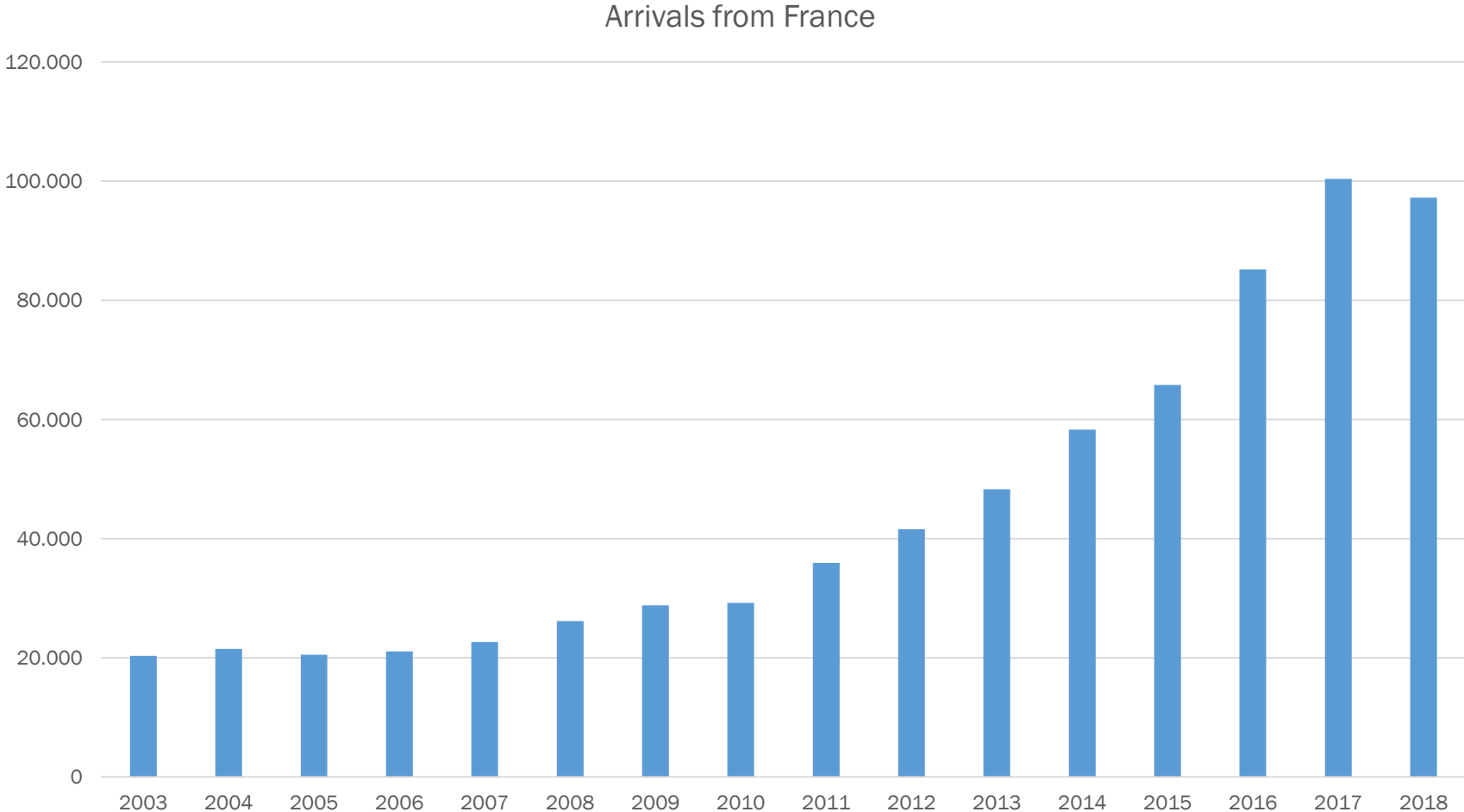
WINTER: 30%
(JAN – MARCH, NOV – DEC
ALL MARKET AVG 33%)

SPRING: 15%
(APRIL – MAY, ALL MARKET AVG 14%)

AUTUMN: 14%
(SEPT – OCT, ALL MARKET AVG 19%)



Arrivals over time

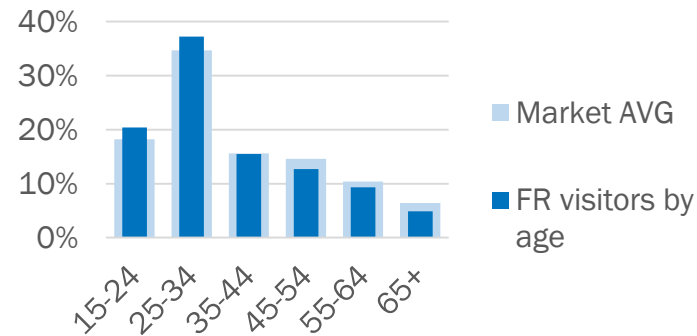


Source: Icelandic Touris Board

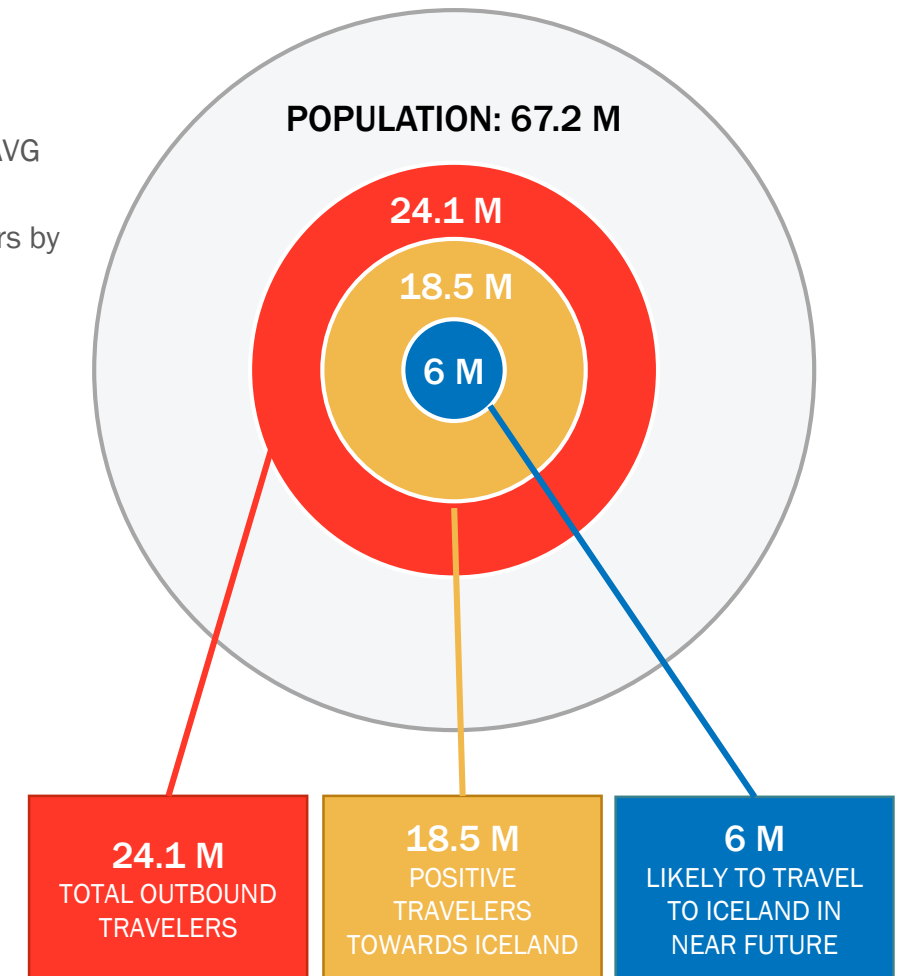
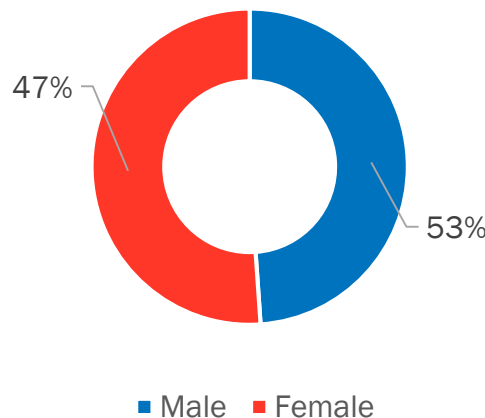
Traveler profile

- Following several years of stagnant economic growth, the outlook for the French economy is positive. Increased consumer confidence is expected to be translated into more international trips.
- Total outbound spending will grow as the French are both willing to travel and spend more.
- The majority of holidaymakers in France are baby boomers. The figures are in line with the general trend across Western Europe, under which older demographics tend to travel more than younger cohorts.
- The majority of French people travel abroad for leisure, yet, business travel is expected to grow the fastest going forward.
- Given their interest in art and culture, the French often organize trips to destinations characterized by a strong cultural and historical character and are willing to spend a substantial amount of their time exploring and visiting museums. Some travelers from France even visit destinations to attend specific cultural events such as exhibitions and festivals.

FR visitors by age



FR visitors by gender



MARKET SNAPSHOT PREPARED BY PROMOTE ICELAND

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Promote Iceland aims to enhance Iceland's good image and reputation, to support the competitive standing of Icelandic industries in foreign markets, to attract foreign tourists and investments to the country, and assist in the promotion of Icelandic culture abroad.

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