

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- · 'Beyond the beach' packages
- Stress-free France
- New generation foodie travel

The number of holidays taken by UK travellers to France fell by an estimated 7.5% in 2019, dropping to 5.5 million trips, as consumers switched to value-formoney package holiday destinations. Since 2014 the number of visits has fluctuated between 6.2 million and 5.5 million. However, the value of holiday visits has steadily increased over this period, with average spend up by an estimated 27%. There has been a strong surge in people taking city breaks. Some 50% of visitors to France in the past five years have taken a city break, an increase from 39% in the five years to November 2017.



"Growing rail connectivity, along with the country's low reliance on fossil fuels for its electricity, offers the opportunity to position France as a low-carbon holiday choice in the era of climate emergency and 'flight shame'."

John Worthington, SeniorAnalyst

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
America	s +1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Table of Contents

OVERVIEW

- What you need to know
- Covered in this Report

EXECUTIVE SUMMARY

- The market
- Trips to France fell in 2019 as consumers turned to value packages in the Med
- Long-term volumes have declined but spending has increased
- Coronavirus likely to impact on market in 2020

Figure 1: Forecast of holidays to France, by volume, 2014-24 Figure 2: Forecast of holidays to France, by value*, 2014-24

- Companies and brands
- Transport developments can open new opportunities
- The consumer
- Consumer penetration remains flat at 21% of adults
 Figure 3: Experience of holidaying in France, November 2015-November 2019
- North East has seen a rise in visits

Figure 4: Regions of France visited for a holiday, November 2019

Surge in visits to French cities

Figure 5: Types of holiday taken in France, November 2017 and November 2019

Mid-market hotels and Airbnb have increased market share

Figure 6: Types of holiday accommodation used in France, November 2017 and November 2019

Solo travellers head to French cities

Figure 7: Main attractions of a holiday in France, November 2019

Lapsed visitors are most likely to see France as expensive

Figure 8: Perceptions of France as a holiday destination, November 2019

Rail travel on track for success

Figure 9: Holiday opportunities in France, November 2019

· What we think

ISSUES AND INSIGHTS

- 'Beyond the beach' packages
- The facts
- The implications

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



- Stress-free France
- The facts
- The implications
- New generation foodie travel
- The facts
- The implications

THE MARKET - WHAT YOU NEED TO KNOW

- Holidays to France fell in 2019 as consumers switched to package holidays
- Italy has taken market share from France
- · Long-term volumes have declined but spending has grown
- Coronavirus uncertainty
- · Lucrative short break market is buoyant in France
- Tunnel crossings have seen an upward trend in the past two years
- New travel possibilities ahead

MARKET SIZE AND FORECAST

 Holidays to France dipped in 2019 as consumers switched to value packages

Figure 10: Holidays to France market, by volume and value, 2014-24

- Volume has declined in the long term but spending has risen
- Forecast

Figure 11: Forecast of holidays to France, by volume, 2014-24 Figure 12: Forecast of holidays to France, by value*, 2014-24

MARKET SEGMENTATION

• France saw package surge in 2019

Figure 13: Volume of holidays to France, independently booked versus package trips, 2014-19

 Tunnel crossings have performed better than air travel over the past two years

Figure 14: Volume of holidays to France, by mode of travel, 2014-19

High-spending short breakers

Figure 15: Holidays to France, by volume, value, number of nights and average spend per night/day, by trip duration, 2018

Spend per trip increases with age

Figure 16: Volume, value and average spend per night/day of holidays to France, by age, 2018

Family drift

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	EMEA	+44 (0) 20 7606 4533
	Brazil	0800 095 9094
	Americas	+1 (312) 943 5250
	China	+86 (21) 6032 7300
	APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 17: Percentage volume of holidays to France, by age, 2014-18

MARKET BACKGROUND

- As one chapter of uncertainty closes another opens
- Travel has been robust despite challenges...
- ...but coronavirus poses a serious and escalating threat Figure 18: Domestic and overseas holiday volume and expenditure, 2014-19
- Swing towards packages on the Eastern Med
- Independent travel destinations struggled in 2019
- The challenge from Italy has grown in recent years
 Figure 19: Top 10 overseas holiday destinations, by number of trips, 2014-18 and estimated annual change for 2018-19
- Pound has risen in early 2020 but further volatility is likely
 Figure 20: Spot exchange rate, Pound Sterling vs euro and
 US\$, June 2016-February 2020
- Resort prices have dropped in France and risen in Italy over the past two years

Figure 21: Holiday costs* for a selection of European resorts, 2016–20

'Secondary cities' in France offer good value
 Figure 22: City break costs for a selection of European cities*,

- New air connectivity for 2020
- · French driving costs have risen

Figure 23: Motoring costs per 1,000 miles, 2016-19

- · French HS rail network is growing
- New Eurostar developments
- Electric France can be the green destination of choice
- New generation of ferries
- Atout France's priorities for UK market

COMPANIES AND BRANDS - WHAT YOU NEED TO KNOW

- Green holidays and gastro-touring
- La Samaritaine re-opens
- France's highest hotel
- Parc Asterix and Disneyland developments
- Major new British war memorial
- Paddock brings new shopping & leisure opportunities to capital
- Paris afloat
- Challenge France

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



LAUNCH ACTIVITY AND INNOVATION

- Green & gastro France
- Height of luxury
- Theme park developments
- History & culture
- Parisian Brooklyn
- Floating Paris
- Active challenge

THE CONSUMER - WHAT YOU NEED TO KNOW

- One in five adults have visited France in the past five years
- Almost half of visitors go to Paris and the North East has seen a rise over the past two years
- City breaks are up 11 percentage points over the past two years
- Mid-market hotel and Airbnb growth
- Gastro-touring has big potential
- Cost perceptions are a key barrier to attracting lapsed visitors
- Fly-free holidays by train

EXPERIENCE OF HOLIDAYING IN FRANCE

 Trips numbers have fluctuated but the underlying consumer trend has been flat

Figure 24: Experience of holidaying in France, November 2015-November 2019

France versus Spain versus Italy demographics

Figure 25: Demographic profile of those who have taken holidays to France, Spain and Italy in the past five years, November 2019

Figure 26: Regional residence profile of those in Great Britain who have taken holidays to France, Spain and Italy in the past five years, November 2019

Potential interest is high but competition is strong

Figure 27: Interest in visiting France on holiday in future, November 2017 and November 2019

REGIONS OF FRANCE VISITED ON HOLIDAY

North East has risen, South of France has fallen
 Figure 28: Regions of France visited for a holiday, November 2017 and November 2019

TYPES OF HOLIDAY TAKEN IN FRANCE

Surge in French city breaks

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
Americas China	+1 (312) 943 5250 +86 (21) 6032 7300

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



- One in six visitors take a coastal holiday
- Active/hobby breaks have risen

Figure 29: Types of holiday taken in France, November 2017 and November 2019

Holiday type demographics

FRENCH HOLIDAY ACCOMMODATION

 Mid-market hotels and Airbnb are the main accommodation trends

Figure 30: Types of holiday accommodation used in France, November 2017 and November 2019

ATTRACTIONS AND PERCEPTIONS OF FRANCE

- Gastronomy is still the biggest draw for France
- Cities for solos

Figure 31: Main attractions of a holiday in France, November 2019

- Flight guilt could benefit France
- · Car travel is less of an attraction for younger generations
- 'Expensive' is the most popular association with France

Figure 32: Perceptions of France as a holiday destination, November 2019

HOLIDAYS TO FRANCE - OPPORTUNITIES

- Age of rail
- Gastro-touring holidays are popular...
- ...but France may need to develop a more flexitarian foodie offer

Figure 33: Holiday opportunities in France, November 2019

- Family touring packages
- · Thrill of the live
- Well France
- Cycling holiday potential
- Elixir of youth

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Definitions
- Abbreviations
- Consumer research methodology

APPENDIX - MARKET SIZE AND FORECAST

Figure 34: Holidays to France, volume forecast, 2019-24 Figure 35: Holidays to France, value* forecast, 2019-24

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.