

### French tourists prefer package holidays when visiting a new destination

In 2015, package holidays accounted for 12% of all trips made by French tourists. Packages were less prevalent among trips to mainland France because many tourists stayed in non-market accommodation, but were much more popular for trips outside France. Tourists booking commercial transport and accommodation were evenly split across package holidays and DIY trips, while the average spend was higher on package holidays. On a like-for-like basis, older tourists preferred package holidays over DIY trips. More than 80% of package tourists resided outside Paris. People who preferred package holidays said it was because they wanted someone else to organise everything and preferred to keep their costs under control, while those opting for DIY trips said they enjoyed having greater freedom and a wider choice of destinations and activities. An overwhelming majority of tourists favoured package holidays when visiting a new destination – a preference that became stronger with age.

**Table 1: Package holidays in 2015**

	Package holidays, overnight stays and spending	Percentage of all trips	Package holidays, overnight stays and spending involving commercial accommodation	Percentage of all trips involving commercial accommodation
<b>Holidays (millions)</b>				
Mainland France	14.8	8.5	10.4	19.6
Outside mainland France	9.0	37.9	8.5	48.1
All destinations	23.8	12.0	19.0	26.7
<b>Overnight stays (millions)</b>				
Mainland France	77.6	8.5	54.6	17.4
Outside mainland France	77.1	3.6	71.5	47.5
All destinations	154.7	13.7	126.0	27.1
<b>Spending (billions of euros)</b>				
Mainland France	7.2	15.5	5.9	22.8
Outside mainland France	13.1	52.2	12.6	59.1
All destinations	20.2	28.4	18.5	39.2

Key: French residents took 14.8 million package holidays in mainland France in 2015, involving 77.6 million overnight stays and total spending of €7.2 billion. Package holidays accounted for 8.5% of trips in mainland France, 8.5% of nights away from home, and 15.5% of spending on such trips. Looking solely at trips involving commercial accommodation, package holidays amounted to 19.6% of trips in mainland France and 48.1% of trips outside France.

Scope: All package holidays.

Source: DGE, SDT survey 2015.

The internet has revolutionised travel, giving people the option to book transport, accommodation and activities online with separate providers and build a DIY trip. Yet many tourists still prefer to book a package holiday<sup>1</sup> via a tour operator, whether in-store or online. French tourists made 198.8 million trips in 2015 (*insert*), including 23.8 million package holidays (12% of the total) (table 1). But drilling down into the figures shows that package holidays are much more popular for trips outside France (37.9%) than for trips in mainland France (8.5%).

#### Tourists booking commercial transport and accommodation are evenly split across package holidays and DIY trips

Package holidays accounted for only a small fraction of trips in mainland France, largely because many tourists stayed in free

accommodation (in second homes, or with family or friends) – arrangements that are unsuited to package offers. Discounting these trips, package holidays amounted to 19.6% of trips in mainland France and 48.1% of trips outside France (26.7% of all trips combined).

Of these 19 million package holidays, 8 million involved commercial accommodation but non-market transport (in most cases, people travelled in their own car and booked a package covering accommodation, food or activities). Almost 90% of trips in this category were made in mainland France.

<sup>1</sup> For the purpose of this study, the term “package holiday” means any trip where at least two of the following services are booked with the same provider: transport, accommodation, food and activities. This differs from the French Tourism Code definition, which falls under a specific legal regime.

The remaining 11 million package holidays involved commercial transport and accommodation – tour operators’ core business activity. By comparison, there were 11.5 million DIY (non-package) trips where tourists could have opted for a package but instead chose to book their transport and accommodation separately.

### French tourists prefer package holidays for trips outside France, especially to remote destinations<sup>2</sup>

Destinations outside France accounted for 70.5% of package holidays involving commercial transport and accommodation, with mainland France destinations making up the remaining 29.5% (table 2). Conversely, there was little difference between these two destination categories for DIY trips (50.7% mainland France, 49.3% outside France). Destinations in Europe represented the lion’s share of all trips outside France, although these destinations were less prominent among foreign package holidays (67.1%) than among DIY trips abroad (74.0%). The opposite was true for remote destinations, however, with Africa accounting for 11.2% of foreign package holidays and just 4.7% of DIY trips abroad. The same rule of thumb held true for the Americas (10.5% vs. 9.7%) and Asia (8.8% vs. 7.3%).

### Package holidays tend to be shorter than DIY trips – to all destination types

Across all destinations the average package holiday was 3% longer than a DIY trip (7.6 nights vs. 7.4 nights), because package holidays were a much more popular choice for trips outside France which, on average, tended to be longer than trips in mainland France. But the trend is reversed when the figures are split by destination type – the average package holiday in mainland France was 8% shorter than an equivalent DIY trip (5.2 nights vs. 5.7 nights), while the difference was 6% for trips outside France (8.6 nights for a package holiday, against 9.1 nights for a DIY trip).

### Package holidays tend to be short breaks in mainland France and last one week or more abroad

Around half of package holidays in mainland France were short breaks (between one and three nights), with only 30% lasting for seven nights or more. Outside France, however, almost three-quarters of package holidays lasted for one week or longer. Longer trips (four nights or more) were more common for remote destinations – only 130,000 of 1.5 million trips outside Europe (less than 10%) were less than a week long.

In terms of duration, trips to Europe were mid-way between those to mainland France and remote destinations. More than 60% of package holidays in Europe lasted for at least seven days, while 20% were short breaks (such as city breaks). French tourists went on just under 1 million European package holidays in 2015 – slightly less than the number of DIY trips to the same destinations (1.4 million).

In 2015, around one-quarter of package holidays (2.7 million trips) were one week long. This format remained especially prominent among people going on sun or ski holidays, although it waned in popularity amid a challenging year for southern Mediterranean destinations. Seven-night breaks accounted for one-seventh of packages holidays to mainland France, one-third to European destinations, and half to Africa.

**Table 2: Package holidays vs. DIY trips**

	Package holiday	DIY trip
Percentage of trips outside France	70.5	49.3
Europe	47.3	36.5
Americas	7.4	4.8
Asia	6.2	3.6
Africa	7.9	2.3
Percentage of trips in mainland France	29.5	50.7
Average travel duration (nights)	7.6	7.4
Mainland France	5.2	5.7
Outside France	8.6	9.1
Average spend per trip (€ per person)	1 289	844
Mainland France	648	556
Outside France	1 558	1 140
Average spend per night (€ per person)	170	114
Mainland France	124	98
Outside France	181	125

Key: Spending covers both the cost of the package and additional expenditure items.  
Scope: Trips where the tourist booked both transport and accommodation.  
Source: DGE, SDT survey 2015.

### French tourists spend €20.2 billion on package holidays

In 2015, French tourists spent €7.2 billion and €13.1 billion on package holidays in mainland France and outside France<sup>3</sup> respectively (€20.2 billion in total across all types). Spending on the package itself amounted to €4.2 billion in mainland France and €9.7 billion outside France – 9.1% and 38.6% of total tourist spend<sup>4</sup>. Outlay on packages with commercial transport and accommodation stood at €14.2 billion (70.3% of total package holiday expenditure), while spending on DIY trips was considerably lower at €9.7 billion.

### Per-night spend is higher on package holidays, especially on long trips to remote destinations

Per-night spend differed markedly according to destination and trip length. On average, spending on package holidays and DIY trips in mainland France (both involving commercial transport and accommodation) stood at €124 and €98 respectively – a difference of 27%. The gap narrowed on trips lasting less than three nights (€191 and €176, 9%) and between four and six nights (€137 and €115, 19%). The biggest difference

<sup>3</sup> The term “spending outside France” refers to spending connected with a trip to another country, including any related spending that actually occurred in France (e.g. the initial booking).

<sup>4</sup> Including DIY trips and trips involving free accommodation.

**Table 3: Tourist profiles: package holidays vs. DIY trips**

	Tourists booking a:		
	Package holiday	DIY trip	
Percentage of women	56	53	
Age brackets (%)	15-24	9	15
	25-39	10	15
	40-54	18	27
	55-64	28	26
	65+	35	17
Socio-professional categories (%)	Managerial-level	9	21
	Intermediate occupations	12	19
	Lower supervisory	21	17
	pensioners	43	23
Paris region residents (%)	17	35	
Monthly household income (%)	€2,699 or less	35	33
	€2,700 to €3,799	34	27
	€3,800 or more	32	38

Key: People aged 65 or over accounted for 35% of package holiday tourists, but only 17% of people taking similar DIY trips.  
Scope: Travellers taking a package holiday (including transport and accommodation at the very least) or arranging DIY trips similar to package holidays (*insert*).  
Sources: DGE, SDT survey, supplementary package holiday survey.

<sup>2</sup> Unless stated otherwise, all subsequent figures and statistics refer to trips involving commercial transport and accommodation.

was observed on one-week trips (€136 and €102, 33%), while there was a smaller disparity on trips lasting in excess of one week (€90 and €71).

Tourists travelling outside France also spent more per night on package holidays than on DIY trips – again with a wider gap on longer trips. For short and mid-length breaks (mainly in Europe), the difference was between 10% and 15%. Per-night spend on longer trips, meanwhile, tapered off at a slower pace on package holidays than on DIY trips. A tourist travelling to Europe spent, on average, almost 50% more per night on a package holiday than on a DIY trip – and even more when travelling to destinations on other continents.

### Package holidays are particularly popular with pensioners

On a like-for-like basis (same destination, duration, and transport and accommodation arrangements), there were clear differences between tourists who opted for package holidays and those who preferred DIY trips. The figures show that 63% of tourists who booked a package holiday were 55 years of age or older, while this same age group accounted for 43% of travellers opting for a DIY trip (table 3). As expected, there was a similar trend among pensioners, who made up 43% of package tourists but just 23% of DIY holiday-makers. Package holidays proved more popular than DIY trips among people living outside the Paris region (83% and 65% of the respective totals). Income was not a clear indicator of inclination across the two formats, however. The data indicate a slight preference for package holidays among middle- and lower-income households (earning less than €3,800 per month)<sup>5</sup>, which accounted for 69% of tourists opting for a package holiday (8 percentage points less than the same group in the DIY trip figures). Moreover, middle-income households (earning €2,700 to €3,799 a month) represented 27% of DIY holiday-makers and 34% of package tourists.

### Package holidays are a stress-free option that helps travellers keep their costs under control

When asked to cite the reasons in favour of the two formats, French tourists fell firmly into two camps. Those who opted for package holidays said they wanted an easy, stress-free experience without any nasty surprises. DIY trip fans, meanwhile, enjoyed having the freedom to custom-build their holiday (including departure point, destination and activities). There was broad consensus on the top five “strong reasons in favour of package holidays” (figure 1), including among travellers who had not booked a trip of this format. In total, 44% of travellers (and 60% of those who had booked a package holiday) pointed to the fact that the provider organised everything for them. The second most popular reason (cited by 37% of travellers and 50% of package tourists) was that the all-inclusive price helped them keep their costs under control. Third on the list was the fact that the provider would step in if something went wrong (35% and 49% respectively). Next came financial

peace of mind – travellers would get their money back if a service provider defaulted (32% and 23%). Rounding off the top five, 32% and 37% of travellers respectively said they preferred a package holiday when travelling to a country where they did not speak the local language (only 14% of tourists aged 15-24 years cited this reason, compared with 48% of those aged 65 or above).

### DIY trips offer greater freedom and choice

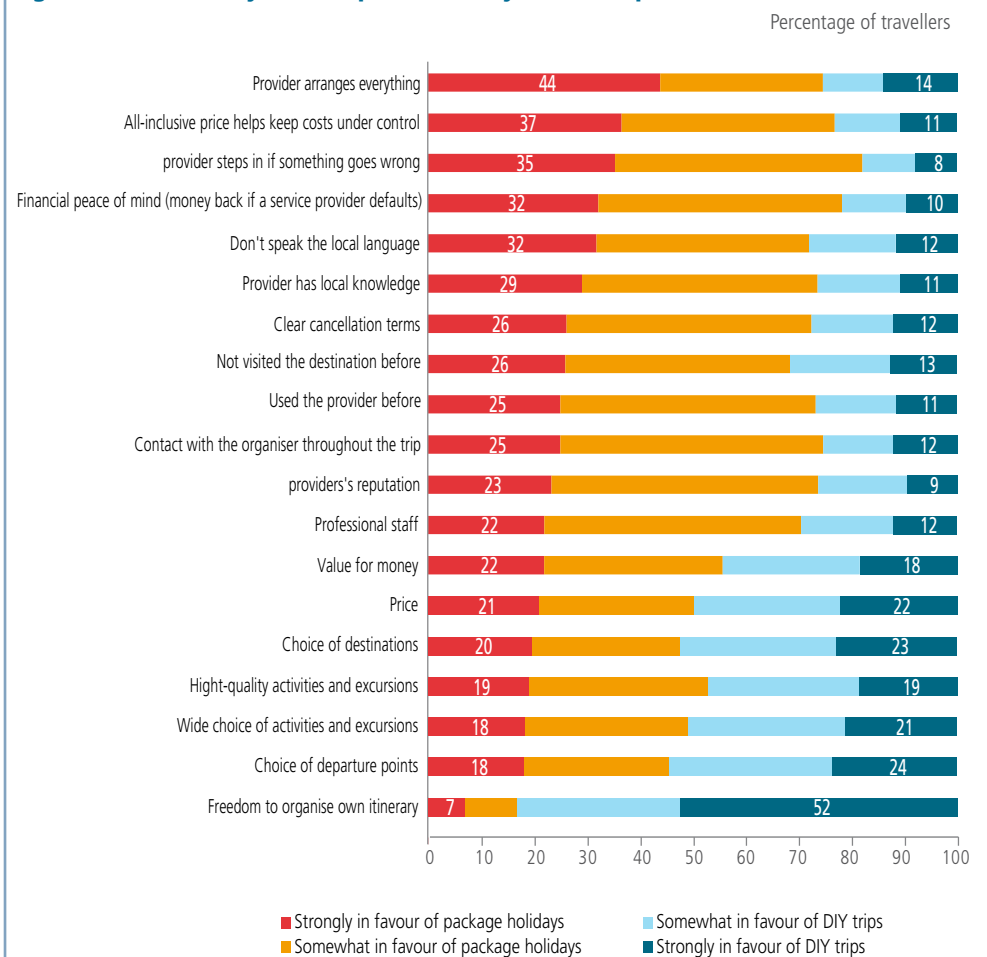
The strongest reason in favour of DIY trips (cited by 52% of all travellers and 62% of those who had booked this type of trip) was that it gave them greater freedom to organise their own itinerary. The respondents also cited other reasons – such as the freedom to select their departure point and destination, and the fact that DIY trips tended to be cheaper – but the positive sentiment was less marked.

For 84% of travellers, the freedom to organise their own itinerary was among the top-three reasons in favour of DIY trips. Yet only one in three respondents cited price, and only one in four mentioned the wider choice of destinations, activities and excursions.

### Most tourists prefer package holidays when visiting a new destination

Familiarity with the destination was a clear indicator of preference between package holidays and DIY trips. When asked about their future travel plans, only 41% of tourists said they were “likely” or “certain” to book a package holiday to

Figure 1: Reasons why tourists prefer holidays or DIY trips



Key: 44% of tourists said that having the provider arrange everything was a “strong reason in favour of package holidays”; conversely, 52% said that having the freedom to organise their own itinerary was a “strong reason in favour of DIY trips”.

Scope: Travellers taking a package holiday (including transport and accommodation at the very least) or arranging DIY trips similar to package holidays (insert).

Sources: DGE, SDT survey, supplementary package holiday survey 2016.

<sup>5</sup> Net monthly household income.

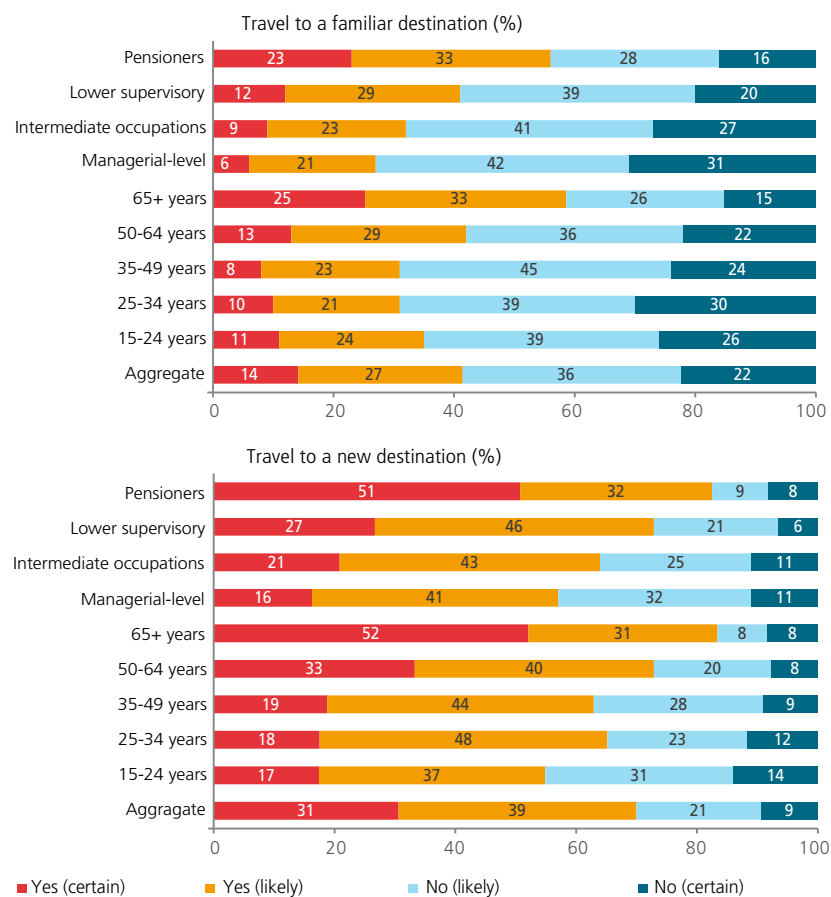
somewhere they had been before. But this figure rose to 70% for a new destination (figure 2), with no obvious differences by socio-professional category and age. In all cases, the overwhelming majority of respondents said they were likely or certain to book a package holiday when travelling to somewhere new – a preference that exceeded 80% among pensioners and people aged 65 and above. Conversely, less than 30% of travellers said they were likely or certain to book a package holiday to somewhere they had already visited – again, across all age brackets and socio-professional categories. Twice as many people (31%) said they would definitely opt for a package holiday to visit a country, region or city for the first time, than to visit a destination they were familiar with (14%). Moreover, just 9% of respondents said they would definitely not to book a package holiday to a new destination.

### Senior tourism: a vital market for travel agencies and tour operators

The data do not reveal a strong correlation between household income and preferred format for a future trip to a familiar destination (although package holidays were less popular among high-income households). Age, however, was a clear determinant of preference – of those who said they were certain to book a package holiday to somewhere they had already been, 51% were pensioners and 44% were aged 65 or above<sup>6</sup>.

Older respondents also expressed a clear-cut preference for the package format when thinking about a new destination – 52% of respondents in the 65+ age group said they were certain to opt for this format, compared with 33% in the 50-64 bracket, and 17-19% of people aged 15-49 (against 25%, 13% and 8-11% respectively for a destination they had visited previously). These figures reveal just how vital the senior tourism market is for travel agencies and tour operators. When asked about their plans for a new destination, higher-income respondents (€3,800+ per month) were less certain about booking a package holiday than those

Figure 2: Likelihood of booking a package holiday in future



Key: 23% of pensioners said they were “certain” to book a package holiday for a future trip to somewhere they had visited before, and 51% said they would do so for a trip to a new destination.  
 Scope: Travellers taking a package holiday (including transport and accommodation at the very least) or arranging DIY trips similar to package holidays (*insert*).  
 Sources: DGE, SDT survey, supplementary package holiday survey 2016..

in lower-income brackets (26% and 34% respectively). A similar trend emerged between Paris region residents and people living elsewhere in France (24% and 33%).

<sup>6</sup> Pensioners and people aged 65 or above represented 31% and 25% of the study sample respectively.

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#### Box: field and sources

This study focuses on personal travel by French residents aged 15 and older. As a general rule, French overseas territories are treated as destinations outside France. Some of the figures and statistics are taken from the ongoing SDT survey – a monthly postal survey to monitor tourist demand. Co-funded by the Directorate General for Enterprise (DGE) and the Banque de France, the survey covers 20,000 people aged 15 or over, chosen as a representative sample of France’s resident population. Other data come from a one-off survey, conducted in Q4 2016, which asked people to cite the reasons in favour of package holidays and DIY trips. The sample included around 2,500 people from the SDT panel who had travelled on a package holiday

(including transport and accommodation at the very least) between September 2015 and August 2016, plus additional SDT panel members who, in the same period, had travelled on a DIY trip that could have been booked as a package (commercial transport and accommodation). The non-package sample group was engineered to reflect the same structure as the package tourist sample (in terms of destination, duration, and transport and accommodation arrangements), to ensure that the answers given by both groups (package and non-package tourists) were comparable. In total, 3,101 usable questionnaires were returned – a response rate of 83%.

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