

FRANCE

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GENERAL MARKET OVERVIEW

- Population: 62 million+
- Unemployment rate: approx. 11%
- Leave entitlement: 25 days/year (standard). The "35-hours/week" law can lead to 40+ days/year.
- French visitors to Australia year ending 30 June 2009: 89,500 arrivals, a 16% increase relative to 2008.*
- French visitors to South Australia year ending 30 June 2009: 13,200 arrivals, a 12% increase relative to 2008.*
- Internet access: around 70%
- The national deficit is close to €127 billion, one of the largest in Europe.
- At 0,1%, the French inflation rate is at its lowest in 52 years.

* Source: International Visitor Survey (SA estimates, persons 15+ years)

INDUSTRY OVERVIEW

- There are around 30 travel companies selling Australia in France, half of which are important players, generating big numbers. All are doing relatively well with a couple of exceptions.
- Key wholesalers are Australie-Tours, Australie-à-la-Carte, Asia-Voyages and Jetset.
- Main direct sellers are VdM, Australie-Autrement, Australiaveo, Aventuria/Objectif-Australie and Nouvelles-Frontières.
- Smaller direct sellers are Yoketai (Kuoni Grp), Meltour, Maison-de-l'Océanie, Cercle-des-Vacances, Route-des-Voyages and Légendes Australiennes.
- Internet sales continue to grow; key wholesalers are constantly improving their sites and updating search and booking engines that allow for tailor made itineraries and instant confirmation (VdM was first, Asia Voyages followed, Australie à la Carte just launched its new merchant website as well as Jetset).
- Direct sellers are a feature of the French market, with some of the key players for Australia (Voyageurs-du-Monde, Australie-Autrement, Aventuria, Nouvelles Frontières) focusing on direct sales only and other big brands (Australie-Tours, Asia-Voyages, Australie-à-la-Carte, Jetset) selling both direct and through contracted distribution networks.
- Kuoni-France stopped producing an Australia brochure in 2009; they do keep on selling the destination via their boutique brand Yoketai, part of "Les Ateliers du Voyage", a small high-end operator specialised in tailor made luxury travel, bought by Kuoni-France in 2008.
- Notable newcomer on the destination, Jet Set just launched its new online Oceania brochure, with 48 pages dedicated to Australian products and also featuring New Zealand and French Polynesia. The brochure is available to travel trade and consumers on www.jetset-voyages.fr. A hard copy should follow by the end of the year.

MARKET TRENDS

- **Working Holiday Visa (WHV)** continues to be successful in France, with an ongoing growth of WHV makers since this visa was introduced 6 years ago.

2004-05	2005-06	2006-07	2007-2008	2008-2009
4 550	6 100	+ 8000	+ 10 000	+ 15 000

Some leading specialists do offer special WHV packages (airfare + accommodation + language class + help to find job). Australie-Autrement is the trade partner of australia-australie.com and the leader on the French market for airline tickets sales to WHV holders. Language and studies specialists also report strong growth; this also leads to a growing number of relatives travelling Down Under to visit their Working Holiday Maker.

- **Honeymoon Travel** continues to grow. Australia has now durably switched from “dream” destination to an enviable honeymoon option, next to French Polynesia or the Maldives. This is due to a stronger Euro making the “dream” affordable, and also thanks to travel standing high on the “liste de mariage” – newly-wed wish list.
- **Packaged holidays** show a growth, particularly with self-drive itineraries. Escorted tours keep on doing well, due to the language barrier, especially with seniors.
- **Sustainable / Equitable Tourism** is getting more attention; French tourists like to be informed on sustainable tourism and will favour holidaying in an environmentally friendly destination. All this sounds good for SA.
- **Luxury touring** is rising; more operators are targeting this segment. To note: Nosylis, the French “luxury specialist” wholesaler should launch a brochure on Australia in 2010. Nosylis currently offers a large range of luxury destinations with a selection of outstanding hotels around the world.
- **Internet access:** +70% of the French population is now connected. French consumers are increasingly confident in searching/buying online. More French consumers look for airfares and ground content on the Internet. A study from Mediametrie/Netratings shows that 6 out of 10 French web-users do plan their holidays on the Internet. 23% of French web-users buy their holidays entirely online. Also, travel blogs, travel forums and community sites are expanding very much lately. Growth potential is here for SA operators who do upload a French version of their online offer.

KEY THEMES/ EXPERIENCES PROMOTED IN THE MARKET

Nature and Wildlife are key areas. Indigenous culture, coastal lifestyle, “Good Living” and “Outback in Style” are also used in promoting SA regions.

MARKET INTELLIGENCE

- The US continues to be the main competitive long haul destination.
- Honeymoon-wise, French Polynesia, French Caribbean and Indian Ocean Islands (Mauritius, Seychelles and Maldives) are the main long haul competitors. East and South Africa are also doing well with honeymooning French adventure seekers and nature lovers.

PRESS TRENDS

- Strong consumer travel segment.
- New lifestyle and women's magazines.
- Wide range of targeted niche publications: travel, nature lovers, seniors oriented.
- Many websites for consumers and travel trade e-newsletters leading to many opportunities with online tools.
- Social media: Facebook.fr is widely used - Twitter is not as it has no French version.
- On-going development of mobile media.

KEY HIGHLIGHTS OF MARKETING ACTIVITIES IN 2008/09

SQ co-op Campaign – Feb 2009

Online quiz and SA microsite on Opodo.fr. Online banners on tripadvisor.fr, lonelyplanet.fr, and msn.fr. In total, the SA/SQ campaign resulted in 130 bookings to Adelaide on SQ during the period.

Explorer's Way Campaign - Mar 2009

250,000 rotating banners on lonelyplanet.fr, together with editorial content on lonelyplanet.fr. Online competition and microsite on Opodo.fr in partnership with Tourism NT and Qantas.

Explorer's Way booth at MAP (major tourism consumer show in France). Booth shared with Australie-à-la-Carte. 95,000 visitors attended this 4 day consumer show. In partnership with Tourism NT.

Francaustralia co-operative activity

Francaustralia is the language and studies partner for australia-australie.com which has 40,000 hits per month and is dedicated to the WHV market. SA has been featured in francaustralia.com programs since 2007. A 2D/1N KI Sealink/Adventure Tours package was offered to 2 students.

Targeting the Honeymoon Segment

Co-op activity with wholesalers: VdM incentive, "stay 6 nights in SA and get a Euro 100 voucher", bridal consumer show with Australie-Autrement. Participation in wholesalers road shows (Asia-Voyages, Australie-Tours). Participation in trade and consumer shows including MAP, Mariée&Marié, Top Resa and ILTM.

MAJOR PLANS FOR 2009/10

- Honeymoon segment: participation in bridal fairs, features in bridal magazines/websites.
- WHV segment: online activity with Youth Travel specialist australia-australie.com.
- International Luxury Travel Market, Cannes, 7-10 December 2009. Euro-SATC attendance, plus collateral distribution.
- Co-op activity with airline (Cathay Pacific TBC).
- Co-op activities with wholesalers (Australie-Autrement, Voyageurs-du-Monde, Asia-Voyages, Australie-Tours, Australie-à-la-Carte, Jetset).
- Agent training around France, including Asia-Voyages roadshow – Oct-Nov 2009. Participation in workshops in Paris (400 agents), Bordeaux, Biarritz, Toulouse and Tours (around 200 agents total).
- Organisation of one Trade group famil (Aussie Specialist agents) in Nov 2009 in conjunction with Tourism NT and Singapore Airlines.

MAJOR PR ACTIVITIES PLANNED IN 2009/10

- Individual families (Le Monde/RFI in August 09) / in partnership with TA.
- PR support for the Nov "Eurotoques" (20 French chefs visiting Australia) family organised by CleanSEAS with SA government assistance.
- PR promotion for the release of the "The Boys are Back" in France – date TBC.
- Tentative PR activity with a women's magazine print and web targeting honeymooners.
- PR activity targeting young WHV holders with australia-australie.com.

KEY ISSUES AND CHALLENGES

- The Global Financial Crisis and the fear of a Swine Flu pandemic do affect French consumer travel trends. Decline in long haul travel and growth in short haul travel (within France and to neighbouring destinations) has been observed.
- Lack of consumer awareness is a challenge; this is due to SA's low visibility compared with competing destinations, including other Australian states.
- International air access, although improving, remains an issue, with limited seat capacity compared to other Australian states.

ACTIVE INBOUND COMPANIES IN THE FRENCH MARKET

- JCM-Destination-Australia: main clients are Voyageurs-du-Monde, Nouvelles-Frontières, Jetset.
- Pacific Spirit: main clients are Australie-Tours (owner), Meltour and Maison-de-l'Océanie
- ATS Pacific: Australie-à-la-Carte, Asia-Voyages.
- AOT: Aventuria
- Across-Australia: growing market shares with wholesalers using Across for part of their programs (Asia, Yoketai, Australiaveo)

AIRLINES FLYING TO SOUTH AUSTRALIA

- Singapore Airlines and Cathay Pacific do operate daily direct flights out of Paris to Adelaide via Singapore / Hong Kong. Both Paris offices are quite supportive in promoting Adelaide as a gateway, even though connecting times in Singapore / Hong Kong are not favourable on the way in, as compared with other Australian entry points.
- Malaysia operates 4 flights weekly to Adelaide out of Paris.
- Qantas is off-line and operates out of Paris via a code share agreement with Air France on the CDG/SIN and CDG/HKG routes. The connections to Adelaide are poor, with few direct flights. Most Qantas travellers have to fly in Adelaide via Melbourne or Sydney.
- French airline Air Austral started operating twice weekly flights between Paris and Sydney in April 09, via their hub of St Denis, on Reunion Island. Air Austral has an agreement with Virgin Blue to offer rates from Paris on major Australian cities, including Adelaide.

USEFUL TIPS FOR WORKING IN THE FRENCH MARKET

Marketing and selling your product

- Best time to come up to the market is October to early December when most PMs are working on their programs for next year's brochure. If you cannot make it in market, make sure you get in touch with your preferred wholesalers/inbounders at that time of year and send them fresh information on your product. Avoid coming in market in June and July as the wholesalers are busy selling the summer season. In August most of the industry is on annual leave.
- When setting up appointments, always call well ahead and reconfirm in writing.
- Do attend ATE, as this is your best chance for making an initial contact.

Getting your product into brochures

- Do call on the relevant inbound operators to supply them with your product information.
- Presentation is important. A shoddy looking brochure will not go down well.
- Remember strict European consumer laws when preparing product information for wholesalers. What is delivered has to match what was offered. If you make changes to a product already brochured, let wholesalers and inbound operators know asap.
- French consumers – and travel trade, too – are shy with English; having collateral produced in French and setting up a French version of your website can greatly improve the way your product is perceived.
- Think of special honeymoon offers. This is a booming area for packages (e.g 10% discount on tour for the bride, free spa treatment etc).

Things to know before you go

- The French like to eat late (e.g. 8:30 pm) and like to spend time at the dinner table; do take this into account.
- Spend time getting to know your French clients. They are relationship oriented and will respond better when they know you.
- If you don't get an immediate reply to an email, resend or pick up the phone rather than assume all is lost. A delayed reply does not mean that they are not interested in your product.

PR – Media

- French journalists are independent travellers. They are interested in "culture & lifestyle".
- Journalists focus more on the characters they meet than on the activities experienced.
- French journalists are increasingly interested in "green initiatives".
- Hosting media is an easy way to promote your product but you must spend some time with your "special" guest.