

## FRANCE

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## General Market Overview

- Population: + 62 Million
- Unemployment rate: +/- 11%
- Leave entitlement: 25 days/year (standard). The "35-hour/week" law can lead to 40-50 days/year of paid holidays.
- French visitors to Australia for year ending 31 August 2008: 81,600 (represents a 15% increase from previous year).
- French visitors to South Australia for year ending 30 March 2008: 11,500 (a 12% decrease from previous year). SA's market share is 15%.
- Internet access: around 70%
- Inflation is 3.6% and rising (highest rate in 17 years)

## Industry Overview

- There are approximately 25 tour operators / wholesalers selling Australia in France, half of which are important players, generating big numbers.
- Internet sales continue to grow. Key wholesalers are constantly improving their user friendly sites and up to date search engines that allow for tailor made itineraries and instant confirmation (VdM was first, Asia Voyages and Kuoni followed, Australie à la Carte will launch its new merchant website soon).
- Direct sellers are a feature in the French market, with four of the key players for Australia (Voyageurs du Monde, Aventuria-Objectif Australie, Australie Autrement, Nouvelles Frontières) focusing on direct sales only and other big brands (Australie Tours, Asia Voyages, Australie à la Carte) selling both direct and through contracted distribution networks.
- Consolidation and mergers keep on transforming the French tourism industry, however the majority of Australian wholesaler specialists remain French-owned
- Newcomer, Les Maisons du Voyage, an upmarket direct seller strongly established in China and other long haul destinations (Americas, Africa, India) starts programming Australia for FITs this season.
- Yoketai, a small boutique operator focusing on high-end tailor made itineraries will expand their offer on Australia this season.
- New online operator Asiaveo will soon launch Australia under a new brand, Pacificveo.

## Market Trends

- Working holiday visas (WHV) continue to be successful in France, with an ongoing growth of WHV makers since the visa was introduced 4 years ago.

2003-04	2004-05	2005-06	2006-07	2007-2008
1,601	4,550	6,126	+8,000	+10,000 TBC

- Some prominent wholesalers (Australie Tours, Australie à la Carte, Australie Autrement) sell special WHV packages (airfare, accommodation, language classes & help finding employment etc.). Language and studies operators (Languages & Travel, Francaustralia) have reported strong growth which leads to a growth in numbers of relatives travelling Down Under to visit.
- Honeymoon travel to South Australia continues to grow. Australia has easily switched from "dream" destination to an enviable honeymoon option, next to French Polynesia or the Maldives. This is partly due to a stronger euro making the "dream" more affordable, and also thanks to travel standing high on the modern days "liste de mariage" – newly-wed wish list. VdM, Australie Tours, Asia, Australie à la carte, Kuoni plus other smaller specialists are capitalising on the ongoing growth of this segment.
- Packaged holidays also show strong growth, particularly self-drive. Escorted tours, an enduring part of the French tourism traffic to SA, continue to do well, especially with seniors due to the language barrier.

- Sustainable / equitable tourism is getting attention. French tourists are interested in getting information regarding sustainable tourism and favour holidaying in environmentally friendly destinations which is good news for SA.
- Luxury touring shows have great growth potential with more operators targeting this promising segment. Several websites dedicated to luxury travel have been successfully set up lately.
- Approximately 70% of the French population is now web connected. French consumers have become increasingly confident in buying most things online. More French visitors find their own airfares and ground content on the Internet. A study from Mediametrie / Netratings shows that 6 out of 10 French web users plan their holidays on the Internet and 23% of French web users purchase their holidays entirely online. There is growth potential here for SA operators, provided they 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 to promote SA regions.

### **Market Intelligence**

- International air access into Adelaide from France will benefit from the introduction of French company Air Austral flights to Sydney starting April 2009, in cooperation with Virgin Blue on the Sydney/Adelaide leg.
- The main competitive long haul destination continues to be the US.
- For honeymoons, French Polynesia but also the French Caribbean and Indian Ocean Islands (Mauritius, Seychelles and Maldives) are the main long haul competitors. East and South Africa are also doing well and get lots of honeymooning French adventure seekers and nature lovers.

### **Press Trends**

- Strong consumer travel segment
- Successful women’s magazines
- Wide range of targeted niche publications: travel, nature lovers, seniors oriented
- Growing free press
- Increasing Internet usage: national dailies are developing online content
- Developing mobile media

### **Key Marketing Successes in 2007/08**

- SATC/Promovacances - Opodo/CX co-op campaign was an overall success. According to CX figures released end July 2007, SA's gained 35-37% on the same booking period for the previous year.
- SATC/SQ MOU campaign. Excellent performances for this online campaign promoting Adelaide as Australia’s gateway, which aired from early November 2007 for 3 weeks on consumer websites [www.msn.fr](http://www.msn.fr), [www.lemonde.fr](http://www.lemonde.fr), [www.lifestyle.com](http://www.lifestyle.com), and [www.routard.com](http://www.routard.com).
- Lonely Planet - SATC - TNT - QF / Explorer's Way co-operative initiative - March 2008 – Objective to promote the EW as a key Australian experience, strengthen destination knowledge and grow visitation to SA. Set up was a competition to win a trip along the EW. A bookmark advertising the contest was inserted in all 10,000 copies of the new French LP Australia edition, and a poster advertised the contest in 1,000 major bookstores around France.
- Boomerang Language & Studies co-operative activity. This L&S company based in Sydney with a branch in Lyon worked together with Australie à la Carte. SA was introduced in their 2007/08 programs. The SATC logo and branding featured on their flyer.

- Francaustralia co-operative activity. Francaustralia is the L&S partner for australia-australie.com which has 40,000 hits/month and is dedicated to the WHV market. SA was introduced in francaustralia.com programs for the first time in 2007. A 2D/1N KI Adventure Tour package was offered to the first two registered students to ADL.
- Food & Wine “SA Week” at Australie Autrement’s Paris restaurant. In conjunction with the Rugby World Cup, a long “SA Week” was organised from 1 to 15 Oct 2007. Featured SA wines, SA foods, and an SA setup with large pictures from the media gallery on the restaurant walls. The event received very good feedback from customers.
- Marions Nous Campaign – Nov 2007 to Feb 2008. SATC in partnership with Tourism NT – 4-page advertorial spread in the December issue of Marions-Nous bridal magazine, released late November 2007 and on sale for 3 months. Marions-Nous circulation is 60,000 (readership 100,000). Featured products were Southern Ocean Lodge, Rawnsley Park, The Prairie, Seascape and Gawler Ranges Safaris – with support from SATC France. Also displayed on www.lesitedumariage.com. Publicity generated per ROI was AUD\$6 million.
- Participation in roadshows, and trade and consumer shows including MAP, TOP RESA, ILTM.

#### **Famils to SA**

- 12 Aussie Specialists visited SA – Adelaide, KI, Fleurieu Peninsula, and Flinders Ranges. Excellent feedback from agents.
- 9 Product Managers visited SA - Adelaide and KI - on the occasion of Southern Ocean Lodge opening. This co-hosted famil -SATC France, TNSW and SQ France - proved very successful.
- In addition to this, around 10 agents benefited from self-famil support by SATC France.

#### **SATC Operator Roadshow, Paris - 17 to 19 September 2008**

- One agent workshop presentation organised on 17 September followed by food and drinks - around 50 agents attended.
- A happy hour organised on the Australia stand at Top Resa trade show on 18 September – a festive crowd attended.
- A Product Managers dinner organised with 8 SA operators in a private room in a high-end restaurant -15 Product Managers (representing all major preferred partners) attended.

#### **Key PR Successes in 2007/08**

- Organisation and assistance on famils
  - TV : Les Nouveaux Explorateurs, Les Routes Mythiques, Thalassa
  - Print : Ouest France, Var Matin, L’Est Républicain, La Voix du Nord, Le Monde 2, Ulysse
- PR Coverage: 31,104,401 (total audience reached)
- PR Ad. Equivalency: AUD \$7, 853,960
- SA promotion in *Buffalo Grill* restaurant chain
- Double-page advertorial on KI’s natural beauties in *Grands Reportages* travel consumer magazine

### **Major Marketing Activities Planned in 2007/08**

- Asia Voyages Roadshow – September 2008 to March 2009. Participation in 5 agent training workshops in Paris, Lille, Lyon, Nantes and Strasbourg (average 120 agents attending), co-hosting 4 agent dinners, and training activities coupled with online exposure on the event's website.
- SQ MOU – January 2009. Online campaign with Adelaide as port of entry on leading French travelsite, [www.opodo.fr](http://www.opodo.fr), as well as mainstream sites, [www.hotmail.fr](http://www.hotmail.fr) and [www.lemonde.fr](http://www.lemonde.fr) targeting upmarket professionals.
- Mariages - December 2008. Advertorial campaign in bridal magazine. Circulation: 120,000. Readership: 140,000. Highlighting SA as a unique Australian honeymooner destination. 10-page advertorial in partnership with DAP (TA and other STOs). Call to action: main wholesaler websites and [southaustralia.com/fr](http://southaustralia.com/fr).
- International Luxury Travel Market – 8 to 11 December 2008, Cannes. Euro/SATC attendance and collateral distribution.
- DAP training events – January 2009. Agent presentations in Strasbourg, Paris.
- EW campaign in partnership with Australie à la Carte Tourism NT and QF - March 2009. Online component – [opodo.fr](http://opodo.fr), [routard.com](http://routard.com), [lonelyplanet .fr](http://lonelyplanet.fr) - and participation in MAP consumer show with dedicated EW booth within Australie à la Carte stand.

### **Major PR Activities Planned in 2008/09**

- Group media famil from 10 to 16 November 2008 – 5 journalists/editors of up-market news, women and men's magazines will discover Kangaroo Island and Southern Ocean Lodge.
- TV famil in December 2008 for 52-min documentary on SA's Outback to be broadcast in January 2009.
- Promotion of the Explorer's Way - end of March 2009.

### **Key Issues and Challenges**

- The current economic crisis might lead to serious changes in consumer trends. Travel will no doubt be affected.
- Lack of consumer awareness is an issue. This is due to SA's poor visibility compared to competing destinations. Budget allocation for France remains limited and does not allow for SA to access cable / online TV to get wider exposure and reach access to targeted high yield consumers.
- International air access, although improving, remains an issue with limited seat capacity.

### **Active Inbound Companies**

- JCM Destination Australia - main clients are Voyageurs du Monde, Nouvelles Frontieres, Transunivers (ad hoc groups wholesaler)
- Pacific Spirit - main clients are Australie Tours (owner), Meltour and possibly Les Maisons du Voyage TBC
- ATS Pacific - Australie à la Carte, Asia
- AOT - Aventuria, Kuoni
- Across Australia - growing market shares with various wholesalers using Across for some of their programs (Asia, Les Maisons, Yoketai)

### **Airlines Flying Direct to South Australia**

- Singapore Airlines and Cathay Pacific operate direct daily flights from 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 good on the Paris/Adelaide leg, 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 CDG/Singapore and CDG/Hong Kong routes. Their connections to Adelaide are poor out of Singapore with only a few direct flights. Most Qantas travellers have to fly to Adelaide via Melbourne or Perth.
- French airline Air Austral will start operating twice weekly flights between Paris and Sydney as of 11 April 2009, via their hub at St Denis on Reunion Island. Air Austral has signed a co-op agreement with Virgin Blue to be able to offer rates from Paris to any major Australian city, including Adelaide.

## **Useful Tips – Working in the French Market**

### **Marketing and selling your product**

- Best time to approach the market is from October to early December when most Product Managers are into revamping their programs for next years's brochures. If you cannot make it in market, make sure you get in touch with your preferred wholesalers at that time of year and send them fresh information on your product. Avoid coming in June and July as wholesalers are busy selling the summer season. In August many of them are also on leave.
- When setting up appointments always call well ahead and reconfirm in writing!
- Attend ATE as this is your best chance of making an initial contact.

### **Getting your product into brochures**

- Call on the relevant inbound tour operator to supply them with your product information.
- Presentation is important. A shoddy looking brochure will not go down well.
- Remember European consumer laws are strict 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 tour operators know asap.
- French consumers – and travel trade too – are shy with English. Having French-language collateral produced 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 (eg 10% discount on tour for the bride, free spa treatment etc).

### **Things to know before you go**

- The French like to eat late (eg 8:30 pm) and like to spend time at the dinner table.
- 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 a reply to an email for an appointment or with regard to a query, resend or pick up the phone rather than assume that all is lost. A delayed reply does not mean that they are not interested in your product.

### **PR / Media**

- French journalists are independent travellers who want to meet with "characters".
  - French journalists need to have an "experience" to tell a story.
- Be nice to media and host them. They can play a very important role in promoting your product.