

## 2023 INTERNATIONAL MARKET UPDATE

# FRANCE

### MARKET OVERVIEW

Results based on year ending June 2023

- France is South Australia's eleventh largest inbound market and is currently 50% down on pre-Covid visitation levels, and 60% down on expenditure levels.
- Key demand-driving experiences include nature, wildlife, and diverse landscapes.
- France is a small yet reliable market for South Australia.
- Youth travellers and those visiting on a Working Holiday Visa have a long length of stay and dispersal to the regions.
- Feedback from French distribution partners suggests that the honeymoon and mature experience seeker segments are experiencing growth.
- 52% of French visitors to South Australia have been to Australia previously.

### SNAPSHOT OF CURRENT STATISTICS

Results based on year ending June 2023

#### VISITORS



#### NIGHTS



#### EXPENDITURE



#### AVERAGE SPEND



#### AVERAGE LENGTH OF STAY



#### INTERNATIONAL RANKING IN SOUTH AUSTRALIA

**#11** FOR VISITORS  
**#16** FOR NIGHTS  
**#15** FOR EXPENDITURE

### AIR ACCESS

FRANCE



#### Key Connecting Airlines

Qatar Airways (QR)  
Singapore Airlines (SQ)  
Malaysia Airlines (MH)

Multiple airlines offering connections via other Australian Airports

### FAST FACTS & FIGURES

Annual average of 2017-2019 figures - current year samples not yet sizeable enough

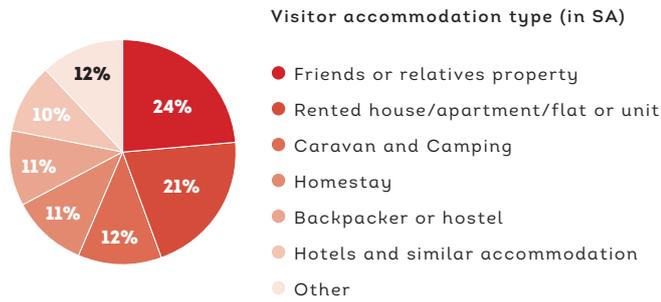
FRANCE	HOLIDAY	VFR <sup>^</sup>	BUSINESS	OTHER	TOTAL
<b>Visits (SA)</b>	<b>10</b>	<b>2</b>	<b>2</b>	<b>1</b>	<b>14</b>
<b>Visits (AUS)</b>	<b>91</b>	<b>41</b>	<b>14</b>	<b>31</b>	<b>131</b>
<b>Nights (SA)</b>	<b>148</b>	<b>58</b>	<b>11</b>	<b>70</b>	<b>287</b>
<b>Nights (AUS)</b>	<b>4,209</b>	<b>815</b>	<b>153</b>	<b>1,499</b>	<b>6,675</b>
<b>ALOS<sup>^</sup> - Nights (SA)</b>	<b>15</b>	<b>29</b>	<b>6</b>	<b>70</b>	<b>21</b>
<b>ALOS<sup>^</sup> - Nights (AUS)</b>	<b>46</b>	<b>20</b>	<b>11</b>	<b>48</b>	<b>51</b>
<b>Expenditure</b>					<b>\$20M</b>

(s,000)

<sup>^</sup> ALOS = Average Length Of Stay. VFR = Visiting Friends and Relatives.

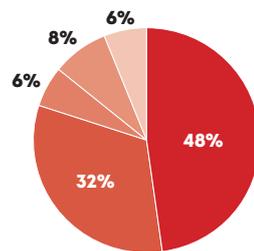
## VISITOR ACCOMMODATION TYPE & TRAVEL PARTY DESCRIPTIONS

Annual average of 2017-2019 figures - current year samples not yet sizeable enough



### Travel party description (to SA)

- Unaccompanied
- Adult couple
- Family group
- Friends/relatives travelling together
- Business

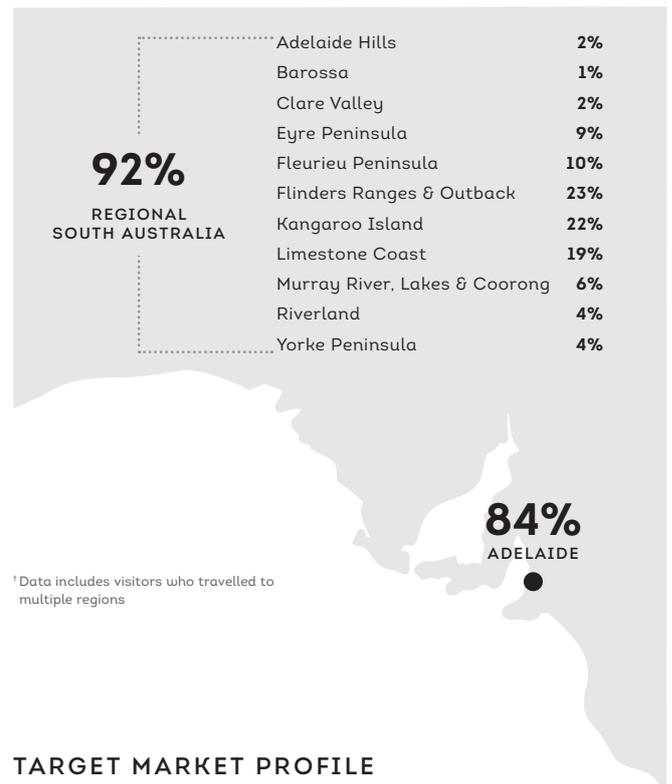


## MARKET INSIGHTS

- The SATC services the French market from the SATC London based office and has relationships with key distribution partners to ensure South Australia stays top of mind.
- The SATC works closely with Tourism Australia on their visiting media strategy to drive demand and widen audience reach.
- France is an important market for the Working Holiday Maker (WHM) to Australia, second largest market behind the UK. Almost 80% of WHM's have a University degree.
- Australia is perceived as an expensive destination compared to other long-haul destinations.
- The SATC has strong relationships with the major wholesalers to promote South Australia to the honeymoon and older FIT travellers.
- The SATC engages in trade activities with both airlines and tour operators. This allows South Australia to maximise its presence across all trade channels whilst still increasing demand via consumer digital engagement.

## VISITOR DISPERSAL<sup>†</sup>

Annual average of 2017-2019 figures



## TARGET MARKET PROFILE



Youth travellers and those visiting Australia on a Working Holiday Visa. The honeymoon and the luxury market are growing segments in the French market.

## KEY TRADE PARTNERS

### KEY WHOLESALE PARTNERS

### INBOUND REPRESENTATIVE COMPANY IN AUSTRALIA

Australie a la Carte

• Pan Pacific

Voyageurs du Monde

• Pan Pacific

Asia

• Pan Pacific  
• Across Australia

Marco Vasco

• AOT

Les Maisons du Voyage

• Across Australia  
• Terra Australia

Australie Tours

• AOT  
• Goway

Across Australia

• Goway

Cercle des Voyages

• Goway

## INFORMATION SOURCES

Annual average of 2017-2019 figures – current year samples not yet sizeable enough



62%

Internet



30%

Friend/relative in Australia or visited



22%

Travel book or guide



20%

Other



10%

Travel agent



9%

Previous visit(s)



7%

Did not get any information

## CONTRACTING & BROCHURE TIMES

July–October although less trade partners are producing traditional print brochures.

## FRANCE CHECKLIST

Consider the following points when targeting travellers from France:

- ✓ **Highlight accessibility from Adelaide.**  
For example, Kangaroo Island is a short 30-minute flight from Adelaide or Flinders Ranges is an easy 5-hour drive from Adelaide via the wineries of the Clare Valley or Barossa.
- ✓ **Ensure website and training includes any French language tours** that are available or if you have **French speaking staff.**
- ✓ **Showcase wildlife in the wild experiences** (land and sea) and the great South Australian outdoors.
- ✓ **Highlight if owner operated or using local guides** – it's a key unique selling point in South Australia and provides guests with an authentic experience.
- ✓ **Self drive and campervan hire** is popular among French visitors. Demonstrate how your product might fit into a road trip itinerary such as Great Ocean Road or Explorers Way.

## TOP TRAVEL WEBSITES & APPS

**Booking.com**

**Tripadvisor**

**routard.com**

**eDreams**

**Skyscanner**

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Source: International Visitor Survey Dec 17, Dec 18, Dec 19 and June 23 conducted by Tourism Research Australia, Consumer Demand Project (CDP) Aug 23. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from Dec 2017 to Dec 2019. Totals may not add to 100% due to rounding. VFR = Visiting Friends and Relatives. ALOS = Average Length of Stay (Nights).

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