

FRANCE

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GENERAL MARKET OVERVIEW

- **Population:** 64.7 million
- **Unemployment rate:** approx. 10% as of July 2010.
- **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 2010:** 92,600 arrivals, a 10% increase relative to 2009.*
- **French visitors to South Australia year ending 30 June 2010:** 13,800 arrivals, a 5% increase relative to 2009.*
- **Visitor nights in South Australia year ending 30 June 2010:** 163,000 a 65% increase relative to 2009.*
- **Internet access:** 70%+

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

INDUSTRY OVERVIEW

There are around 30 travel companies actively selling Australia in France, half of which are important players, generating big numbers. All are doing relatively well with a couple of exceptions.

Prominent wholesalers are Australie-Tours, market leader, Australie-la-Carte and Asia-Voyages.

Australie-tours is under new ownership since September 2009. The new owner is Travel & Co, a company run by Claude Blanc and Jacques Judeaux, already operating Terres-de-Charme, high end FIT specialist. Australie Tours is willing to consolidate its offer and will intensify its development with the French trade retail networks.

Jetset, a major wholesaler for The Americas, who started Australia in 2009, has not delivered the expected numbers so far.

Smaller direct sellers include Meltour, Australie-Authentique, Maison-de-l'Océanie, Cercle-des-Vacances, Route-des-Voyages, Legendes-Australiennes and Yoketai (part of Kuoni France).

Internet sales keep on growing; key wholesalers do constantly improve their sites and update search and booking engines allowing for tailor made itineraries and instant confirmation.

Direct sellers are a feature of the French market, with some of the key players (Voyageurs-du-Monde, Australie-Autrement, Aventuria, Nouvelles-Frontieres) focusing on direct sales only and other big brands (Australie-Tours, Asia-Voyages, Australie-la-Carte) selling both direct and through contracted distribution networks.

Terres-de-Charme started offering high-end Australian experiences in March 2010.

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.

2005-2006: 6 100

2006-2007: 8 000

2007-2008: 10 000

2008-2009: 15 000

2009-2010: 21 700

Some leading specialists do offer 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 do also report strong growth.

This also leads to a growing number of relatives/friends travelling Down Under to visit their Working Holiday Maker.

Honeymoon Travel continues to grow. Australia has now durably switched from a dream destination to a realistic and enviable honeymoon option, next to French Polynesia or the Maldives, thanks to the voyage de nocces standing high on the the newly weds' wish-list.

Packaged holidays do show a continuous growth, particularly with self-drive itineraries. Tour series keep on doing relatively well, especially with seniors.

Sustainable / Equitable Tourism is getting more attention lately; French tourists like more and more to be informed on sustainable tourism and will favour holidaying in an environmentally friendly destination, if it does not cost them more!

Luxury touring is doing well, despite the Global Financial Crisis. The unfortunate fact that Nosylis, a French Luxury wholesaler, went bankrupt in October 2010 does not reflect the actual trend, with a number of smaller companies specialising in the Luxury niche claiming good results in the past months.

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 motivational drivers for the French traveller and are therefore highly promoted as SA major features.

Good living and Holidaying in style, Coastal lifestyle, Indigenous culture, are also used in promoting SA regions.

MARKET INTELLIGENCE

One of the most important trends that emerged from the French market in these times of recession has been the search for value for money and an increase in more frugal living.

More and more tourists are travelling closer to home, booking a three-star instead of a four-star package, reducing expenses on non-essentials and choosing low-cost providers.

The French are increasingly booking their holidays at the last-minute and using the web, and as a result, online travel agencies are benefiting from the crisis and gaining market share. Source: Euromonitor, April 2010

COMPETITION

A vast majority of French consumers tend to choose to travel in France or in neighbouring countries; in 2009, the top five outbound destinations were Spain, Italy, the UK, Morocco and Tunisia.

The US and Canada continue to be French travellers preferred long-haul destinations.

Other long-haul destinations popular in 2009 – 2010 include Asian countries such as Thailand, Vietnam and Indonesia, particularly Bali.

South-American destinations like Peru and Brasil are also current favourites of the French long-haul travellers.

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

MEDIA TRENDS

- Strong consumer travel segment.
- New lifestyle and women 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 2009/10

Direct Consumer online co-op activity with Cathay Pacific consisting in an emailing to qualified prospects selected from CX plus other high yield consumer databases. Allowed for recruitment of more than 18 000 contacts that were added to SATC France consumer database, regularly addressed with quarterly newsletters.

WHV online activity with Youth Travel specialist australia-australie.com, direct seller Australie-Autrement, SQ and YHA to raise awareness on the WHV job opportunities existing in SA, promoting Adelaide as a desirable, affordable, fun WHV destination.

Promotion of **special WHV deal** including SQ return flights to ADL plus 3 YHA nights on arrival. Prize-draw to win SQ return flights to ADL plus YHA nights in Adelaide and Port Elliot held during G'day Sunday March 10.

Event announced on australia-australie.com homepage, forum and newsletter sent to their entire database.

Honeymoon activity with VdM, incentive stay 6 nights in SA / receive a Euro 100 voucher Bridal. consumer shows with Australie-Autrement, Australie-Authentique.

Organisation of a **Trade famill** (12 Aussie Specialist agents) in Nov 09 in conjunction with Tourism NT and Singapore Airlines.

Participation in **Trade and Consumer shows**, including G'day Sundays (Youth, Consumer) Bridal shows (Consumer), Top Resa (Trade) and ILTM (Trade, Luxury segment).

KEY HIGHLIGHTS OF PR ACTIVITIES IN 2009/10

Eurotoques in Adelaide 30 Oct 9 Nov 2009. Event celebrating good living and international gastronomy. Leading up-market food & wine magazine Saveurs journalist and photographer travelled to SA to cover the event.

The itinerary included Adelaide, Port Lincoln, the Fleurieu Peninsula, Kangaroo Island. Feature is to come out early 2011.

WHV online activity with Youth Travel specialist australia-australie.com,

SATC PR team participated in populating the site with SA facts, tips and tricks relevant to WHV holders.

Group famill – 2-12 Nov 2009. Organized with TA and Cathay Pacific.

The itinerary included Adelaide and Kangaroo Island.

Individual famills

Le Figaro, L'Express, leading news publications, August 22nd-27th, 2009

L'Echo Touristique / L'hôtellerie, trade press, March 11th-16th, 2010

Hotel & Lodge, lifestyle magazine, June 3rd-5th, 2010

TOTAL MEDIA COVERAGE 2009 / 2010

Results for 2009/2010 = Euro 6,890,090

MAJOR MARKETING ACTIVITIES PLANNED IN 2010/11

SQ/SATC – MOU Campaign / Consumer direct Jan – Feb 11. Online campaign on targeted sites (routard, tripadvisor, le monde, msn)

Youth Campaign / Consumer direct, G'day Sunday consumer show lucky draw to win a return ticket to ADL + accommodation in partnership with SQ, YHA and australia-australie.com (March 2011)

Petit Fute Activity / Consumer direct Sep/Oct 10 and Mar/Apr 11. Online / Print campaign on petitfute.com in Petit Fute Magazine in Sep Oct 10 highlight on KI and Mar Apr 11 Highlight on the Outback.

Organisation of a **Trade group famill** in Mar 11, for 12 Aussie Specialist agents, in conjunction with Tourism Australia, Tourism NT. Airline partner TBC.

Agent training / presentations around France, year round, including Australie-Tours Sep-Oct 2010 and Asia-Voyages Oct 10-Mar 11 roadshows. Participation in workshops in Paris (600 agents in total) + Lyon, Versailles, Metz, Bordeaux, Toulouse, Annecy, Grenoble, Rennes, Marseille, Lille, Aix-en-Provence (around 300 agents in total).

MAJOR PR ACTIVITIES PLANNED IN 2010/11

New adventure reality show to be filmed in Nov 2010 in Coober Pedy and Port Lincoln. Program of 9 episodes of 90 minutes each scheduled prime time on French leading TV channel TF1 in March 2011. This new program follows 5 families -of 2 parents and 2 children each- sent out together in a remote camp in the wilderness. During 20 days, the families will participate in physical challenges and take part in expeditions to discover the surroundings. Episode after episode, the families will have to accept the elimination of some of their members. The viewers will vote to designate which family will win the adventure and pocket up to \ Euro150,000.

Individual Famil: Grands Reportages, monthly travel consumer magazine – Oct 2010

Group Famil with TA December 2010, TBC.

Buffalo Grill restaurant chain promotion: promote SA Outback with 12-minute long video clip running on Buffalo plasma screens, in 130 restaurants: Winter 2010 / Spring 2011.

KEY ISSUES AND CHALLENGES

The Global Financial Crisis is not over yet and has durably affected the French consumer's travel patterns. Less long haul travel and more short trips (within France and to neighbouring destinations) is becoming the general trend.

Lack of consumer awareness keeps on being 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 poor connections and limited seat capacity compared to other Australian states.

ACTIVE INBOUND COMPANIES IN THE FRENCH MARKET

- JCM-Destination-Australia: main clients are Voyageurs-du-Monde, Jetset.
- Pacific Spirit (now AOT): main clients are Australie-Tours (former owner), Meltour, Maison-de-l-Oceanie, Aventuria.
- ATS Pacific: main clients are Australie-la-Carte, Asia-Voyages.
- Across-Australia: main clients are Nouvelles Frontieres, Asia-Voyages, Australiaveo, Monde Authentique.
- Rendez-Vous Fut A newcomer. Main clients are Route-des-Voyages and Cercle-des-Vacances.

AIRLINES FLYING OUT OF PARIS TO ADELAIDE

Singapore Airlines and Cathay Pacific do operate daily direct flights out of Paris to Adelaide via Singapore / Hong Kong. Both Paris offices are 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.

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 QF travellers having to transit via Melbourne or Sydney.

Malaysia operates 4 flights weekly to Adelaide out of Paris.

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 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 do not 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 and 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.