

# INTERNATIONAL MARKET PROFILE

## FRANCE

### MARKET OVERVIEW

- ▶ France is a small yet reliable market for South Australia.
- ▶ Youth travellers and those visiting on a Working Holiday Visa have a high length of stay and dispersal to the regions.
- ▶ Anecdotal feedback from French distribution partners suggests that the honeymoon and mature experience seeker segments are experiencing growth.
- ▶ 62% of French visitors to South Australia are first time visitors to Australia, indicating that South Australia's product offering has strong appeal.
- ▶ South Australia's nature, wildlife and landscapes are the most appealing features of the state for French visitors.

### FAST FACTS & FIGURES

Data is based on a 3 year annual average for the years ending Dec 2016 - Dec 2018 for all purpose visitors.

| FRANCE              | HOLIDAY   | VFR     | BUSINESS | OTHER     | TOTAL               |
|---------------------|-----------|---------|----------|-----------|---------------------|
| Visits (SA)         | 11,000    | 2,000   | 1,000    | 1,000     | 14,000              |
| Visits (AUS)        | 87,000    | 41,000  | 13,000   | 32,000    | 127,000             |
| Nights (SA)         | 158,000   | 46,000  | 7,000    | 49,000    | 260,000             |
| Nights (AUS)        | 4,055,000 | 804,000 | 160,000  | 1,577,000 | 6,596,000           |
| ALOS - Nights (SA)  | 14        | 23      | 7        | 49        | 19                  |
| ALOS - Nights (AUS) | 47        | 20      | 12       | 49        | 52                  |
| <b>EXPENDITURE</b>  |           |         |          |           | <b>\$16,000,000</b> |

### APPEALING EXPERIENCES

- ▶ Kangaroo Island's diverse and abundant nature and wildlife.
- ▶ Authentic outback and wilderness experiences of the Flinders Ranges & Outback and Eyre Peninsula.
- ▶ Journeys such as the Explorers Way (Adelaide to Darwin) and Southern Ocean Drive (Adelaide to Melbourne).

### TARGET MARKET PROFILE

- ▶ Youth travellers and those visiting Australia on a Working Holiday Visa.
- ▶ The honeymoon segment and the more mature experience seeker markets are experiencing growth.

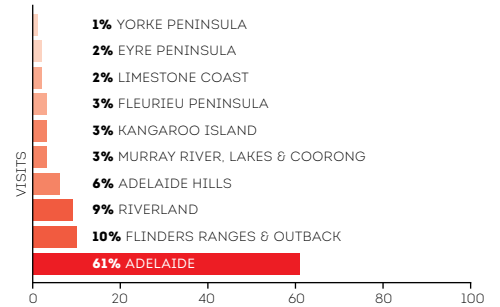
### KEY THEMES

- ▶ Nature & wildlife
- ▶ Outback
- ▶ Coastal
- ▶ Self-drive
- ▶ Soft adventure

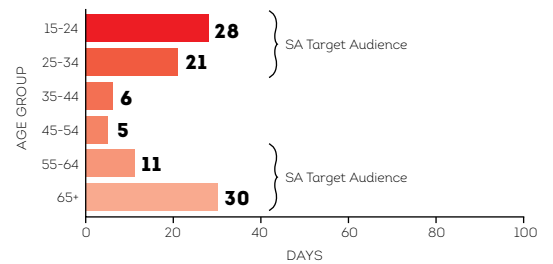
### AIR ACCESS

- ▶ Airlines providing direct access to Adelaide from France with one stopover include Singapore Airlines, Cathay Pacific, Emirates, Qatar Airways and China Southern Airlines.

### KEY SOUTH AUSTRALIAN OVERNIGHT DESTINATIONS

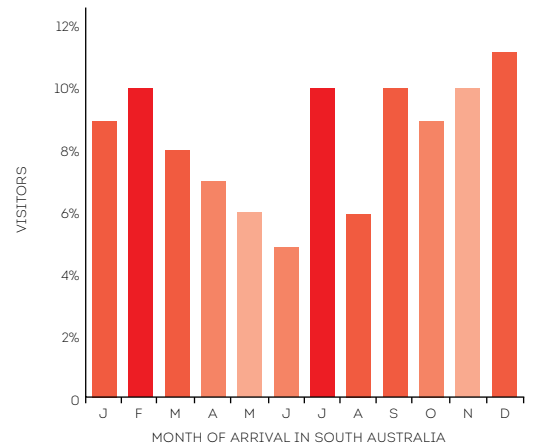


### LENGTH OF STAY IN SOUTH AUSTRALIA BY AGE GROUP



\*Average length of stay is influenced by longer staying education and VFR sectors

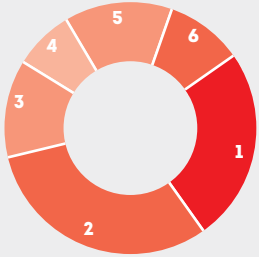
### SEASONALITY



# INTERNATIONAL MARKET PROFILE

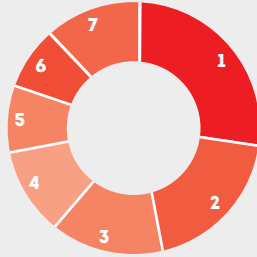
## FRANCE

### VISITOR AGE PROFILE



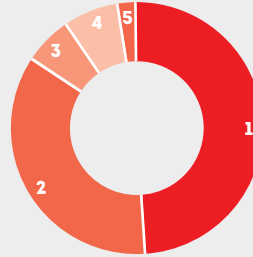
- 1 15-24 24%**
- 2 25-34 32%**
- 3 35-44 13%**
- 4 45-54 8%**
- 5 55-64 14%**
- 6 65+ 10%**

### ACCOMMODATION USED



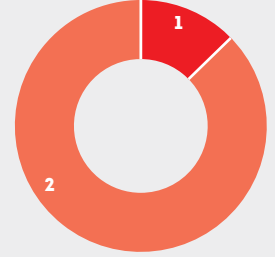
- 1 Rented house/apartment/unit/flat 28%**
- 2 Home of friend/relative 20%**
- 3 Caravan/camping 14%**
- 4 Backpacker/hostel 11%**
- 5 Homestay 8%**
- 6 Hotel/resort/motel/motor inn 8%**
- 7 Other 12%**

### TRAVEL PARTY DESCRIPTIONS



- 1 Unaccompanied 49%**
- 2 Adult couple 34%**
- 3 Family group 6%**
- 4 With friends/relatives travelling together 9%**
- 5 Business 2%**

### PACKAGE TOURS



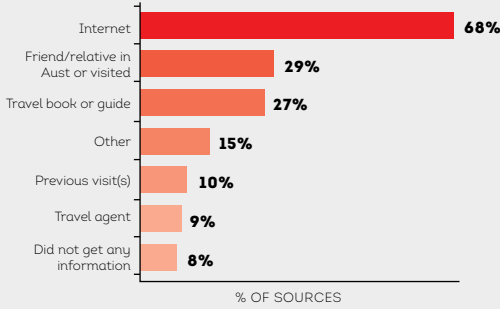
- 1 Package tour 11%**
- 2 Non-package tour 89%**

### MARKET INSIGHTS

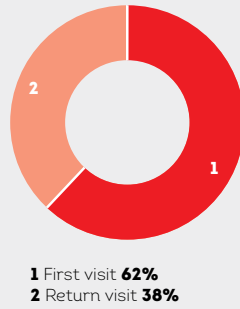
- ▶ The SATC works closely with airlines on consumer direct activities.
- ▶ SATC has strong relationships with the major wholesalers to promote to the honeymoon and older FIT travellers and continues to engage in trade activities with both airlines and tour operators. This allows South Australia to maximise its presence across all trade channels whilst still increasing demand via consumer digital engagement.
- ▶ The best time to visit the market is October to early December. If you are unable to visit the market, make contact with wholesalers during this time of year.
- ▶ Australia is perceived as an expensive destination compared to other long-haul destinations.
- ▶ The Australian Government's contract with French company Naval Group to build submarines in Adelaide is likely to increase visitation from the French market over the coming years.

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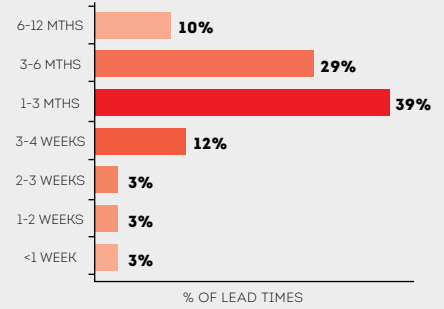
## INFORMATION SOURCES



## FIRST OR RETURN VISIT



## BOOKING LEAD TIMES



## KEY DISTRIBUTION PARTNERS

| KEY WHOLESALE PARTNERS  | INBOUND REPRESENTATIVE COMPANY IN AUSTRALIA |
|---|---|
| EAST WEST TRAVEL GROUP: AUSTRALIE TOURS (W) - AUSTRALIE AUTREMENT (D) | AOT   |
| AUSTRALIE À LA CARTE (D)  | PAN PACIFIC                                 |
| ASIA VOYAGES (W)  | PAN PACIFIC                                 |
| VOYAGEURS DU MONDE (VOYAGEURS GROUP) (D)                              | PAN PACIFIC                                 |
| COMPTOIR DES VOYAGES (VOYAGEURS GROUP) (D)                            | PAN PACIFIC                                 |
| MARCO VASCO (LE FIGARO GROUP) (D)                                     | AOT, ACROSS AUSTRALIA                       |
| CERCLE DES VACANCES (D)   | AUSTRALIA ONE                               |
| LES MAISONS DU VOYAGE (LE FIGARO GROUP) (D)                           | AOT, ACROSS AUSTRALIA                       |
| OCEANIE SPIRIT (D)  | AOT   |
| TUI FRANCE (D)  | ACROSS AUSTRALIA                            |
| MELTOUR (D)   | AOT   |
| MONDE AUTHENTIQUE (D)   | ACROSS AUSTRALIA                            |
| ROUTE DES VOYAGES (D)   | ACROSS AUSTRALIA                            |
| FARE VOYAGES (D)  | ACROSS AUSTRALIA                            |
| STA TRAVEL (D)  | VIA STA AUSTRALIA                           |
| VISITEURS (W)   | ACROSS AUSTRALIA                            |
| VOYAMAR COLLECTION (FORMERLY AILLEURS - AUSTRALIE AUTHENTIQUE) (W)    | ACROSS AUSTRALIA, AOT                       |
| REVES D'AUSTRALIE (D)   | APTC  |
| CLUB MED (W)  | ACROSS AUSTRALIA                            |
| TERRES LOINTAINES (D)   | ACROSS AUSTRALIA                            |

W = Wholesale, D = Direct

## CONTRACTING & BROCHURE TIMES

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

## TOP TRAVEL WEBSITES

|             |              |
|-------------|--------------|
| OUI.SCNF*   | TRIPADVISOR  |
| BOOKING.COM | AIRBNB       |
| AIR FRANCE  | BLABLACAR    |
| ACCORHOTELS | EASYVOYAGE   |
| ROUTARD.COM | VOYAGE PRIVÉ |

\*Originally French Railways website, now a full-service OTA.

## SOCIAL MEDIA

Find our Facebook page at [SeeSouthAustralia](#)

## CONTACTS

### MARKETING

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### DISTRIBUTION

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Source: International Visitor Survey Dec 16, Dec 17 & Dec 18 conducted by Tourism Research Australia. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from Dec 2016 to Dec 2018. Totals may not add to 100% due to rounding. np = not published due to small sample size. VFR = Visiting Friends and Relatives, ALOS = Average Length Of Stay (Nights). Definition of Package Tour: Where the international airfares plus some other travel component (transport, accommodation, tour) are paid for before arrival in Australia. Disclaimer: This summary has been prepared by the South Australian Tourism Commission (SATC) in good faith. While every care has been taken in preparing the information, the SATC does not represent or warrant that it is correct, complete or suitable for the purposes for which you wish to use it. By using this information you acknowledge that it is provided by SATC without any responsibility on behalf of the SATC and agree to release and indemnify the SATC for any loss or damage that you or any third party may suffer as a result of your reliance on this information. Produced by the South Australian Tourism Commission April 2019.

