

FRANCE

INTERNATIONAL MARKET UPDATE 2026

MARKET OVERVIEW

- France is South Australia's 9th largest inbound market and is ranked 15th for expenditure as of March 2026.
- 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 disperse to the regions.
- Feedback from French distribution partners suggests that the honeymoon and mature experience seeker segments are experiencing growth.
- 35% of French visitors to South Australia have been to Australia previously.*
- 82% of visits are for the purpose of Holiday, 12% for Visiting Friends and Relatives (VFR).*



FAST FACTS & FIGURES

Data is an annual average over 2 years ending March 2025-March 2026

FRANCE	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
VISITS (SA)	10,000	2,000	1,000	1,000	13,000
VISITS (AUS)	88,000	40,000	10,000	35,000	134,000
NIGHTS (SA)	238,000	38,000	3,000	93,000	371,000
NIGHTS (AUS)	6,872,000	840,000	185,000	2,603,000	10,500,000
ALOS - NIGHTS (SA)	23	25	5	94	30
ALOS - NIGHTS (AUS)	78	21	19	74	78
EXPENDITURE (SA)					\$31m

ALOS = AVERAGE LENGTH OF STAY. VFR = VISITING FRIENDS AND RELATIVES.
*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING MARCH 2025-MARCH 2026.

SNAPSHOT OF CURRENT STATISTICS – MARCH 2026

VISITORS

 13k

NIGHTS

 451k

AVERAGE LENGTH OF STAY

 34 nights

EXPENDITURE

 \$36m

AVERAGE SPEND

 \$79 per night \$2,720 per visitor

INTERNATIONAL RANKING IN SOUTH AUSTRALIA

 #9 for visitors
#10 for nights
#15 for expenditure

AIR ACCESS

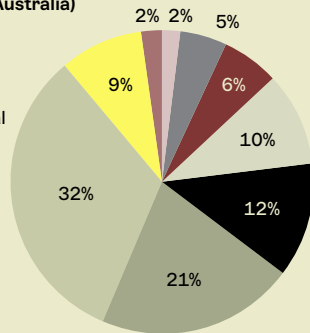
KEY CONNECTING AIRLINES

- Qatar Airways (QR)
- Emirates (EK)
- Singapore Airlines (SQ)
- Malaysia Airlines (MH)
- Cathay Pacific (CX)
- Qantas Airways (QF)
- Multiple airlines offering connections via other Australian airports

VISITOR ACCOMMODATION TYPE AND TRAVEL PARTY DESCRIPTIONS*

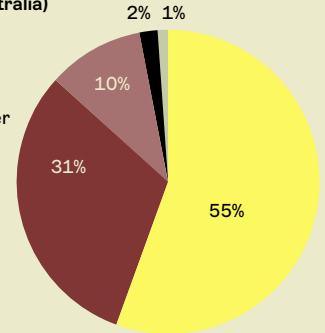
Visitor accommodation type (in South Australia)

- Other commercial accommodation
- Other accommodation
- Caravan or camping - non-commercial
- Other private accommodation
- Friends or relatives' property
- Hotels and similar accommodation
- Backpacker or hostel
- Rented house/apartment/flat/unit
- Caravan park or commercial camping ground



Travel party description (to South Australia)

- Travelling alone
- Adult couple
- Friends or relatives travelling together
- Family group - parents and children
- Other travel party

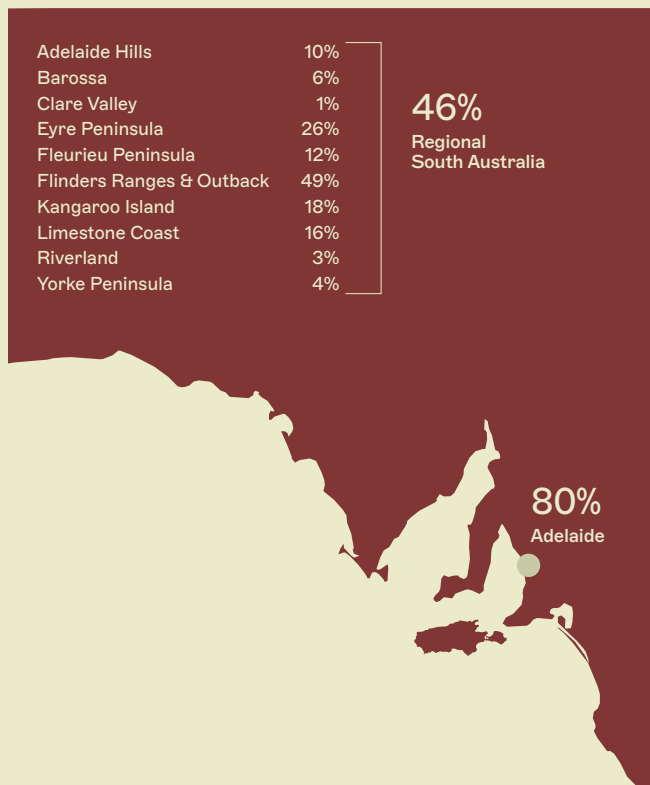


MARKET INSIGHTS

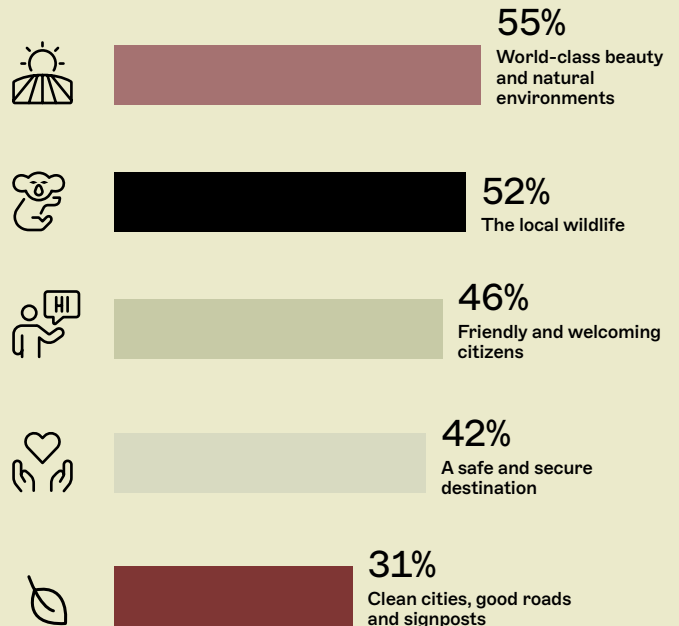
- The South Australian Tourism Commission (SATC) services the French market from the SATC London office and has relationships with key distribution partners to ensure South Australia stays top of mind.
- The SATC works closely with Tourism Australia on their visiting media strategy to drive demand and widen audience reach.
- France is an important market for the Working Holiday Maker (WHM) to Australia. At March 2026 France was the 2nd largest market in Australia and 2nd in South Australia.
- 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 Free Independent Travellers (FITs).
- 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.
- A high percentage of the French market now book via Online Travel Agents (OTAs) such as eDreams and Skyscanner compared to traditional travel agents.

VISITOR DISPERSAL**



FACTORS FOR CHOOSING TO VISIT SOUTH AUSTRALIA*



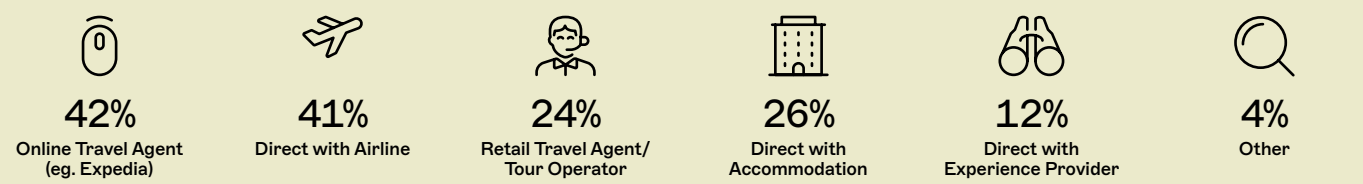
TARGET MARKET PROFILE



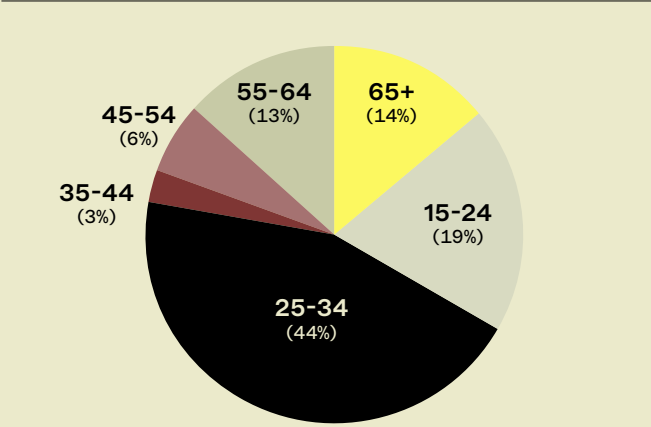
Youth travellers and those visiting Australia on a Working Holiday Visa. The honeymoon and the luxury market are growing segments in the French market.

*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING MARCH 2025-MARCH 2026.
+DATA INCLUDES VISITORS WHO TRAVELLED TO MULTIPLE REGIONS FOR ALL PURPOSES.

BOOKING PREFERENCES



FRENCH VISITORS TO SOUTH AUSTRALIA BY AGE GROUP*



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 the Great Ocean Road or Explorers Way.

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 Asia
Marco Vasco	AOT
Les Maisons du Voyage	Across Australia
	Terra Australia
Australia Tours	AOT
	Goway
Across Australia	Goway
Cercle des Voyages	Goway
NAAR	AOT
	Goway

TOP TRAVEL WEBSITE & APPS

Booking.com

eDreams

routard.com

Skyscanner

Tripadvisor

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SOUTH AUSTRALIA



Government of South Australia
South Australian Tourism Commission

*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING MARCH 2025-MARCH 2026.
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