

# FRANCE

INTERNATIONAL MARKET UPDATE 2025

## MARKET OVERVIEW

- France is South Australia's 10th largest inbound market and is ranked 15th for expenditure as of June 2025.
- 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.
- 52% of French visitors to South Australia have been to Australia previously.\*
- 52% of visits are for the purpose of Holiday, 14% for Visiting Friends and Relatives (VFR) and 8% for Education.\*



## FAST FACTS & FIGURES


Data is an annual average over 2 years ending June 2024-June 2025

FRANCE	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
VISITS (SA)	7,000	2,000	1,000	2,000	10,000
VISITS (AUS)	78,000	38,000	11,000	37,000	122,000
NIGHTS (SA)	115,000	29,000	4,000	187,000	335,000
NIGHTS (AUS)	4,944,000	778,000	187,000	2,927,000	8,836,000
ALOS - NIGHTS (SA)	16	19	6	122	34
ALOS - NIGHTS (AUS)	63	21	17	79	73
EXPENDITURE (SA)					\$41m


ALOS = AVERAGE LENGTH OF STAY. VFR = VISITING FRIENDS AND RELATIVES.  
\*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING JUNE 2024-JUNE 2025.  
^RESULTS BASED ON YEAR ENDING JUNE 2025.

## SNAPSHOT OF CURRENT STATISTICS – JUNE 2025


### VISITORS

 11k


### NIGHTS

 326k


### AVERAGE LENGTH OF STAY

 30 nights


### EXPENDITURE

 \$29m

### AVERAGE SPEND

 \$90 per night      \$2,686 per visitor

### INTERNATIONAL RANKING IN SOUTH AUSTRALIA

 #10 for visitors  
#12 for nights  
#15 for expenditure

### AIR ACCESS

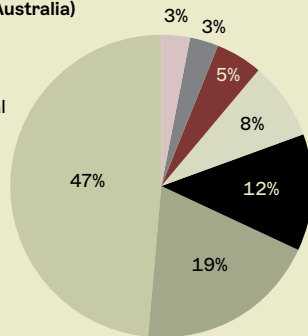
#### KEY CONNECTING AIRLINES

- 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\*

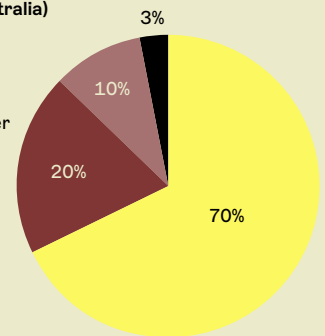
### Visitor accommodation type (in South Australia)

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



### Travel party description (to South Australia)

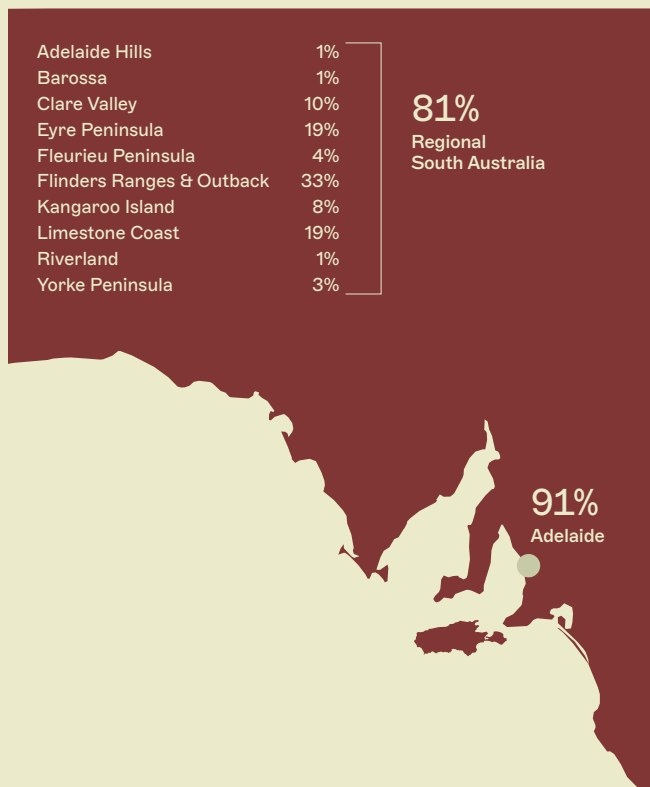
- Travelling alone
- Adult couple
- Friends or relatives travelling together
- Family group - parents and children



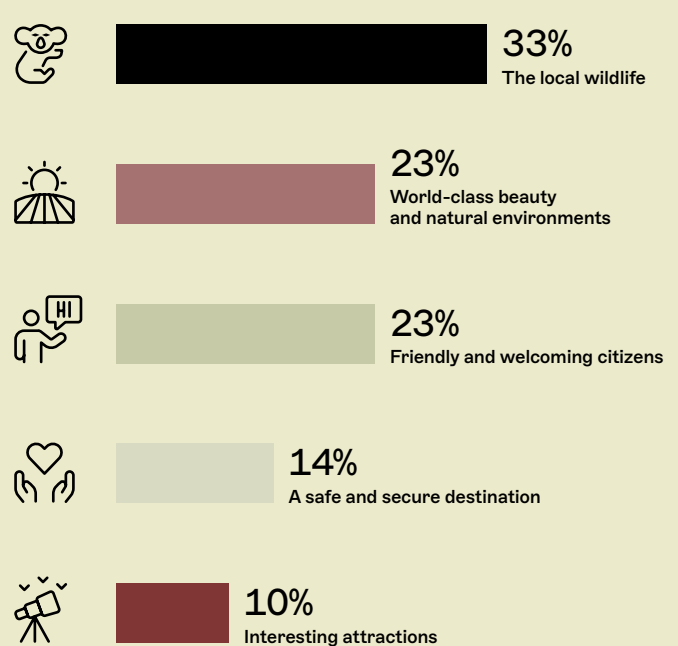
## MARKET INSIGHTS

- 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 June 2025 France was the 3rd 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\*

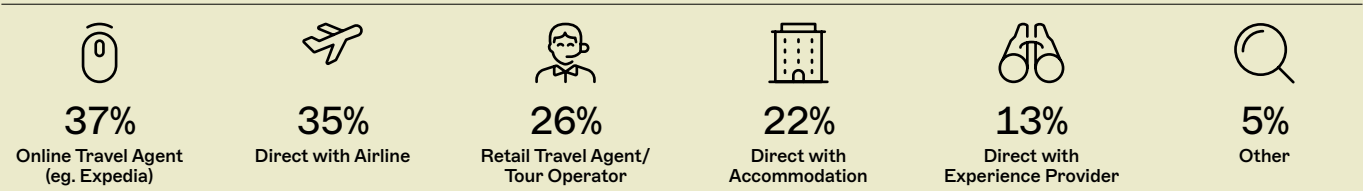


## TARGET MARKET PROFILE

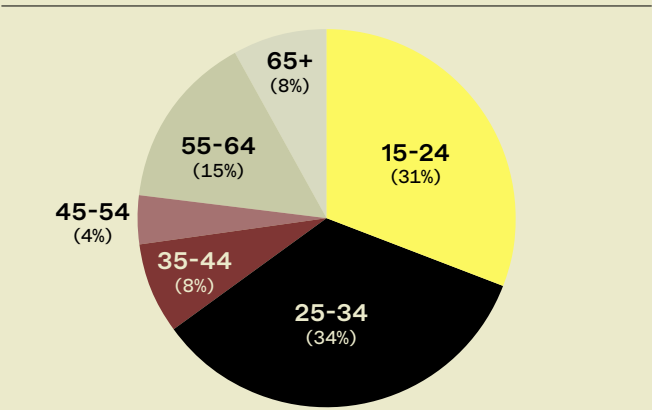
- Youth travellers and those visiting Australia on a Working Holiday Visa. The honeymoon and the luxury market are growing segments in the French market.

\*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING JUNE 2024-JUNE 2025.  
+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
Esprit Libre Voyages	TBC

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 JUNE 2024-JUNE 2025.  
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