

France

Key Market Message

Anecdotal trade feedback has confirmed that short and medium haul destinations are being heavily discounted for Summer 2009. From a long haul perspective, the latest tactical promotions by tour operators and heavily discounted airfares to Australia have been very effective. Airlines and tour operators report that summer departures for Australia are performing better than other Asia/Pacific destinations, and that sales for July, August and September 2009 are still increasing due to last minute bookings.

Sources: Anecdotal feedback from trade, and IMF the Concluding Statement of the 2009 Article IV Consultation, <http://www.imf.org/external/np/ms/2009/061609.htm>, accessed 15 July 2009

1. Key Market Results and Achievements

- Four industry partners have been involved in association with Tourism Australia and Twentieth Century Fox for the launch of the *Australia* the movie DVD. Activities were on a national level and included TV coverage, online promotions, and displays in more than 150 key French retail stores.

2. Australian Travel Market

2.1 Market performance

- French arrivals in May were 4,900 representing an increase of 34 per cent relative to May 2008. In the year ending 31 May 2009, there were 88,900 arrivals, an increase of 15 per cent relative to the previous 12 months.
- French arrivals in June were 5,700, an increase of 11 per cent relative to June 2008. For the six months to June, visitor arrivals totaled 39,100, an increase of 11 per cent relative to the same period in 2008. For the year ending 30 June 2009, there were 89,500 arrivals, an increase of 15 per cent relative to the previous 12 months.

- The Department of Immigration and Citizenship reported an increase of 51 per cent in Working Holiday Visas for French nationals for the year to date May 2009, bringing the total number of visas granted to 15,071.

2.2 Airline Issues/Changes

- **Qantas:** The airline has launched a promotional airfare starting from €900 (inclusive of taxes) to seven Australian cities. The booking period has been extended until September 2009, and is valid for departures prior to 1 March 2010. They also offer two additional domestic flights for €120 (inclusive of taxes).

Source: Industry feedback

- **Malaysia airlines:** Between 15 to 22 July, the airline is offering return airfares from Paris to Adelaide, Brisbane, Melbourne, Perth and Sydney for €760 (inclusive of taxes).

Source: <http://www.malaysiaairlines.com/>, 30 June 2009

2.2 Trade Information Summary (including Business Events)

- **Jet Set:** This tour operator has just launched its new online brochure Oceania (including Australia for the first time), and also featuring New Zealand and French Polynesia. 48 pages are dedicated to Australia with “à la carte” products. The brochure is available for travel agents and general public on its website. A hard copy should be available by the end of the year.

Source: Industry feedback

- **Nosylis:** The luxury tour operator is going to launch a brochure on Australia in 2010. Nosylis currently sells a large range of luxury destinations with a collection of outstanding hotels around the world.

Source: Tourmagazine, 18 May 2009

- **Asia:** For its eleventh edition of the Australia challenge “Défi Australie”, Asia will reward their Australia top selling travel agents with an outstanding familiarisation trip to Australia in November 2009.

Source: L'écho touristique, 4 June 2009

- **Australie à la carte:** In partnership with Tourism Australia, the tour operator has launched a package with Qantas from €1990 (inclusive taxes) on Opodo. This promotion will last for three weeks.

Source: Industry feedback

- **Australie Tours:** Australie Tours are organising “La nuit du Pacifique” (The Night of the Pacific) which is an event dedicated to Pacific destinations.

Source: Tourmagazine, 21 June 2009

- As at June 2009, there were 350 qualified Aussie Specialist agents in France with a further 449 agents are in training.

3. Current and Upcoming Activities in Market

3.1 Consumer Marketing:

Dates	Project / Event	Partners
May – July 2009	<ul style="list-style-type: none"> • SEO and SEM project in France to increase visitor numbers to Australia.com. 	None
18 May – 8 June 2009	<ul style="list-style-type: none"> • Internaute campaign targeting 800,000 web users who have voted for Australia as their dream destination. 	None
30 Jun – 21 Jul 2009	<ul style="list-style-type: none"> • Opodo dedicated destination website feature tactical offers on airline tickets and packages. 	Qantas, Australie à la carte
17 Jun – 07 Jul 2009	<ul style="list-style-type: none"> • International Media Hosting Programme (IMHP) with the TV program “Destination Terre” for the TV station France Five. 	None
22 Jun – 5 July 2009	<ul style="list-style-type: none"> • Australia the movie DVD launch promotion on TV station TMC. A competition was also featured in a Tourism Australia eight page destination booklet, inserted in 250,000 DVD covers. 	Etihad, Australie à la carte
24 Jun – 15 July 2009	<ul style="list-style-type: none"> • Australia the movie DVD launch promotion in 140 outlets of Monceau Fleurs shops including window displays, a destination booklet, and a competition. 	Qantas, Australie à la carte

3.2 Trade Marketing:

Apr – Jun 2009	<ul style="list-style-type: none"> • Australia tactical offers and branding displayed in 200 agencies of the Tourcom retail network. 	Air Austral
4 May – 1 Jun 2009	<ul style="list-style-type: none"> • Partnership with Australie Tours to support their best selling agencies, and top selling 10 Aussie Specialists; press coverage has resulted in 10 articles on Echo Touristique. 	Australie Tours
15– 19 Jun 2009	<ul style="list-style-type: none"> • 14 French buyers attended ATE 2009 in Melbourne as well as three journalists from the trade publication Tourmag, Tour Hebdo and l’Echo Touristique. 	None

4. Media Environment

- The national French public audiovisual reform has been well received according to the survey agency GroupM. All advertising on public TV channels is banned after 8pm, and result of the survey show that the French TV audience appreciate this reform as they can watch their shows without interruption.

Source: *CB News*, 10 July 2009

- Online advertising sales have risen by six per cent for the first 2009 semester, with sales expected to remain positive for the rest of the year, according to Capgemini Consulting and SRI.

Source: *CB News*, 13 July 2009

- The weekly women's magazine ELLE is going to decrease its sale price from the 14 August 2009. The new price will be between €1.80 and €2.30. The objective is to increase sales and to reach a younger target (25 and 34 years old).

Source: *CB News*, 7 July 2009

- Radio consumption has gone down for five consecutive years, however average listening times are increasing. Music radio stations are the most affected, with a decrease in audience of 3.6 per cent compared to 2004.

Source: *CB News*, 6 July 2009

Please visit www.media.australia.com for details about Tourism Australia's International Media Hosting Program (IMHP) and general media information.

IMHP supporters can access publicity results at www.publicity.australia.com

5. General Travel Outlook

5.1 Political and Economic Outlook.

- The Finance Minister announced in June that the national public deficit will increase to 7 per cent of the Gross Domestic Product and will remain so for at least the next two years. The national deficit is close to €127 billion, one of the largest in Europe.

Source: *Les échos*, 22 June 2009

- According to Insee, France's national statistical agency, there have been 700,000 redundancies to date in 2009. Hervé Novelli, French Tourism Minister, is expecting the creation of 500,000 companies in 2009, thanks to the launch of the new 'self-entrepreneur' employment status.

Source: *La Tribune*, 26 June 2009

- At 0.1 per cent, the French inflation rate is at its lowest since 52 years. Consumption increased by 0.2 per cent in April. The current account deficit decreased slightly by €2million in March 2009 to €2.2billion, compared to February.

Source: *La Tribune*, 13 June 2009

5.2 Outbound Travel

- **New Caledonia:** The destination attracted 11,200 Europeans for the first quarter 2009, of which 9,928 were French visitors.

Source: Pro-du-tourisme, 29 June 2009

- **South Africa:** South African Tourism Board has launched an online consumer campaign on their website whereby they are publishing ten testimonials of previous visitors, who describe their South African experience and post pictures of their holiday. Internet users are then able to vote for their favorite story and enter in a competition to win trip to South Africa.

Source: Pro-du-tourisme, 8 June 2009

- **Mauritius Island:** The destination has decided to make its “Mauritius without passport” campaign permanent. French citizens will be able to enter Mauritius with only their French ID card.

Source: Tourmag, 29 June 2009

- **Air Austral:** The airline has recently published its annual results, reporting a net profit of €12.8million.

Source: L'écho touristique, 5 June 2009

6. Next 60 Days

France						
START DATE	END DATE	MARKET	PROJECT/EVENT	TARGET AUDIENCE	LOCATION	PARTNERS
28 August	28 August	France	<ul style="list-style-type: none"> IMHP: broadcast of a TV documentary called: "Les Nouveau Paradis" on the French/German TV channel Arte featuring Tasmania. 	Consumer	National coverage	None
01 September 2009	30 September 2009	France	<ul style="list-style-type: none"> Window display in 200 travel agencies from Tourcom retail promotion. 	Trade and Consumer	Nationwide	Air Austral
10 September 2009	10 September 2009	France	<ul style="list-style-type: none"> Participation in Australie Tours Oceania workshops. 	150 travel agents	Various, France	Australie Tours
22 September 2009	25 September 2009	France	<ul style="list-style-type: none"> IFTM Top Resa: French major travel trade fair. Tourism Australia will host a 40m² booth. 	Trade	France	Australie Tours, JCM Destination, AOT, Pacific Spirit, Qantas, Tourism Queensland, Tourism Victoria, South Australia Tourism Commission, Tourism Northern Territory, Tourism New South Wales