

## France

### **Key Market Message**

*The steady growth of French visitor arrivals in 2009 is maintained despite the current global economic climate. Visa applications from France grew during February and March 2009 but marginally declined in April compared to the same months in the previous year. Working Holiday Maker visa applications increased by nearly 50 per cent during this period, and this sector represents approximately 15 per cent of French arrivals. Applications for business visas declined during February, March and April 2009, however they represent a small proportion of arrivals.*

*Bookings and enquiries for May and June varied considerably among tour operators selling Australia in the French market, with some down 10 per cent to others up 10 per cent. The trade have not reported any changes in levels of cancellations for this period.*

*Short and medium-haul destinations are being heavily discounted in the market, however direct sellers and operators are using the strong Euro versus Australian dollar and discounted airfares to push sales to Australia. Wholesalers are still reporting a high trend for last minute bookings, making any prediction for summer sales difficult given the volatility.*

### **1. Key Market Results and Achievements**

- An industry meeting took place on the 23 April 2009 with 25 French participants representing tour operators and airlines active in selling Australia.
- The industry meeting was followed by the Ozcars 2009. The awards honour the efforts and initiatives by French tour operators and airlines promoting Australia in the French market and approximately 50 tourism industry delegates attended. The 2009 winners are:
  - Best Website: Australie à la Carte
  - Best Production: Australie Tours
  - Best Australia Retail Trade program: Australie à la Carte
  - Best Brochure: Voyageurs du Monde

## 2. Australian Travel Market

### 2.1 Market performance

- France arrivals in March were 6,600, an increase of 10 per cent relative to March 2008. In the year ending March 2009, there were 87,400 arrivals, an increase of 15 per cent relative to the previous 12 months.
- France arrivals in April were 6,200, an increase of four per cent relative to April 2008. For the four months to April, visitor arrivals totalled 28,500, an increase of eight per cent relative to the same period in 2008. In the year ending April 2009, there were 87,700 arrivals, an increase of 14 per cent relative to the previous 12 months.

### 2.2 Airline Issues/Changes

- Air Austral started services to Australia from Paris to Sydney in April. They are the third European carrier offering scheduled services between Europe and Australia.

### 2.3 Trade Information Summary (including Business Events)

- Afat-Selectour: The creation of a major distribution network in collaboration with two renowned French actors was announced in April. This network will bring together 1,170 sale outlets under one unique brand, and the co-presidency will be held by Jean-Pierre Mas and François-Xavier de Bouard.

*Source: Tourmagazine, 29<sup>th</sup> April*

- Voyageurs du Monde: the group's net profit increased by 15 per cent for the first quarter 2009 compared to 2008. The "à la carte" and adventure travels were the two main activities, equalling 83 per cent of sales. Voyageurs du Monde has plans to expand in 2009, with the creation of new specialised offices such as Islands, Middle-East, and Cuba.

*Source: Tourmagazine, 29<sup>th</sup> April*

- Asia: The tour operator launched a new incentive to boost sales to China. In partnership with Lufthansa, Asia will reward travel agents with a €50 gift token for every client choosing one of the tours in the 'Temptations' brochure.

*Source: Quotidien du Tourisme, 10<sup>th</sup> May*

- Australie Tours: The tour operator has edited their 2009/2010 brochure selection, with new brochures such as the 6 mini itineraries "Australie en puzzle". Brochures dedicated to New Caledonia and Brazil are new, as well as a suggested "9 World Tours" brochure.

*Source: Tourmagazine, 9<sup>th</sup> April*

- As at April 2009, there were 335 Aussie Specialist agents in France with a further 393 agents are in training.

### 3. Current and Upcoming Activities in Market

#### 3.1 Consumer Marketing:

Dates	Project / Event	Partners
May – June 2009	<ul style="list-style-type: none"> <li>SEO and SEM project in France to increase visitor numbers to Australia.com.</li> </ul>	Tourism Australia
18 May – 16 April 2009	<ul style="list-style-type: none"> <li>Tourism Australia and Cathay Pacific joint online advertising campaign.</li> </ul>	Tourism Australia, Cathay Pacific

#### 3.2 Trade Marketing:

Dates	Project / Event	Partners
23 Apr 2009	<ul style="list-style-type: none"> <li>French Industry Meeting: approximately 25 delegates from the main tour operators and airlines attended providing useful feedback.</li> </ul>	Main tour operators and airlines
23 Apr 2009	<ul style="list-style-type: none"> <li>Ozcars ceremony and event to recognise the initiative of French tour operators and airlines promoting / marketing Australia.</li> </ul>	Main tour operators and airlines
1 – 13 May 2009	<ul style="list-style-type: none"> <li>Corroboree Europe '09: 16 qualified French ASPs went on a four day famil in Australia followed by a three day workshop with 136 tourism products and over 170 delegates from all over Australia on Hamilton Island where they joined 291 other Aussie Specialists from UK/Europe and South Africa to develop product and destination knowledge.</li> </ul>	Qantas, Hamilton Island
26 May 2009	<ul style="list-style-type: none"> <li>An Australia workshop was organised in Strasbourg as part of a Destination Australia Partnership (DAP) activity. More than 70 travel agents were expected to attend the workshop. Air Austral is a partner for this event, promoting their new route to Australia since 12 April 2009.</li> </ul>	TQ, TVIC, SATC, TWA, TNT, TNSW, Air Austral
May 2009	<ul style="list-style-type: none"> <li>A 6 page booklet on Australia will be inserted in 250,000 Australia DVDs, including a competition to win a trip to Australia. The promotion will be advertised on the TV station TMC.</li> </ul>	Ethihad, Australie à la carte
May 2009	<ul style="list-style-type: none"> <li>1001 Listes promotion. The honeymoon online leader website will have Australia destination promotions including a competition to win a trip to Australia. The website will direct consumers to Tourism Australia online content such as the Tourism Australia experiences consumer brochure and a three minute video.</li> </ul>	VDM, Qantas

Dates	Project / Event	Partners
May 2009	<ul style="list-style-type: none"> <li>Monceau Fleurs promotion. Tourism Australia and partners are organising a promotion to win a trip in Australia. The promotion will be featured in 130 Monceau Fleurs shop windows and a 4 page booklet describing Australian experiences will be distributed to customers.</li> </ul>	Qantas, Australie à la carte

#### 4. Media Environment

- The major news in the French media has been about the French TV environment with most of the important TV groups under pressure to increase on air documentary programs. The objective for national French TV is to get higher quality and informative content. The documentary development is due to strong requests from the French audience who are seeking interesting content-based programs on travel, culture, and discovery.

For more information on Tourism Australia's publicity, International Media Hosting Program (IMHP) and results, please visit [www.publicity.australia.com](http://www.publicity.australia.com)

Alternatively for general media information visit [www.media.australia.com](http://www.media.australia.com)

#### 5. General Travel Outlook

##### 5.1 Political and Economic Outlook

- The global economic and financial crisis has dramatically changed the political and economic environment facing the French president, Nicolas Sarkozy, who was elected for a five-year term in May 2007.
- The government has introduced or is considering a number of modifications to France's labour market laws and welfare system in a bid to stem rapidly rising unemployment and improve the prospects of the unemployed.
- The budget deficit is expected to rise above 7 per cent of GDP until 2010 as a result of below-trend growth. France will avoid facing any financial penalties under the EU's Stability and Growth Pact.
- Real GDP is expected to shrink by a revised 3.5 per cent in 2009 the first full-year contraction since 1993. Although a gradual recovery will take hold from 2010, annual growth will remain negative.

Source: *The economist*, 5<sup>th</sup> May

##### 5.2 Outbound Travel

- Tahiti: Tahiti launched a campaign dedicated to high-yield newlyweds/ couples, mainly based on viral marketing with the slogan "Invest in Love". The campaign

consists of a dedicated mini-site [www.investinyourlove.fr](http://www.investinyourlove.fr) as well as their social networking website and for consumers to participate in a photo competition.

*Source: Pro-du-tourisme, 6th April*

- Madagascar: The destination is offering a free visa to French visitors until 31 December 2009. The visa fees for Madagascar have been suspended, effective 20 April 2009 until the end of the year in an attempt to revitalise the tourist flow.

*Source: L'Echo touristique, 20th April*

- Morocco: The Moroccan Tourism Promotion Bureau launched an internet campaign "Moroccotherapy" with the objective of giving back the joie de vivre to those Europeans depressed by the economic gloom. This European campaign (France, Germany, Great Britain, Belgium, Netherlands, Spain and Italy) launched on 18 March and will be active until the end of April. A dedicated website has been created, where users can pass a test to determine how important is their 'depression', before a 'doctor' shows five cases of strong illnesses that have been relieved by a trip to Morocco. The user can afterwards access 'treatments': packages to Morocco compiled by tour operator partners. Press and radio campaigns, combined with Metro displays will also support this campaign.

*Source: Quotidien du Tourisme, 17th April*

- Dubai: The French inbound market has grown by 27 per cent in 2008 and the tourism board encouraged by these results will be launching promotional initiatives in France in the coming months.

*Source: L'Echo touristique, 22nd April*

- Air New Zealand: In partnership with Go Voyages, Air New Zealand launched a new buzz campaign based on travel and humour: [bienvenuechezlesblacks.tv](http://bienvenuechezlesblacks.tv). The mini-site URL humorously promotes the destination through the mythic rugby players. The website content enables the user to discover the destination and also to virtually play rugby to win a return flight Paris-Auckland.

*Source: Tourmag, 6th may*

- Air France: Air France will launch an intermediary class called Premium Voyager. This cabin will be progressively available from 1 October 2009 on the entire Air France international long-haul network operated by the Boeing 777, Airbus A340 and A330. The first available destinations will be flights from Paris to New York JFK, Tokyo and Osaka. In this new class, 22 Premium Voyageurs seats will be available on a space previously occupied by 40 economy seats. Comfort and service will be similar to business class, but food and beverage will be the same as economy class. At the airport, Premium Voyageurs will benefit from a service similar to business class with priority check-in counters, 30kgs luggage allowance and a priority delivery of luggage. Air France is offering rates "suitable to small and medium companies". For example, Paris-New York ticket (return) costs from €1038 (€547 in economy and €2612 in business class).

*Source: Quotidien du Tourisme, 7th April*

- Cathay Pacific: For the third time, Cathay Pacific has been designated as "the Best airline company of the World" by Skytrax (UK). They also received the "best Asian Company", as voted by more than 16 million global passengers.

*Source: Tourmagazine, 7th April*

## 6. Next 60 Days

France						
START DATE	END DATE	MARKET	PROJECT/EVENT	TARGET AUDIENCE	LOCATION	PARTNERS
May 2009	June 2009	France	<ul style="list-style-type: none"> <li>L'internaute: online marketing campaign. This online campaign will target 800,000 users that have selected Australia as their number one dream destination. The banner message will lead to Australia.com to discover great offers to Australia.</li> </ul>	Consumer	France	Tourism Australia
May 2009	June 2009	France	<ul style="list-style-type: none"> <li>Opodo web advertising. A dedicated mini-website will be created to feature Australia.</li> </ul>	Consumer	France	Tourism Australia, Qantas
June 2009	July 2009	France	<ul style="list-style-type: none"> <li>Creation of a trade destination supplement in Quotidien du Tourisme. The 18 page supplement includes an Australia quiz where travel agents can answer 15 key questions on the destination.</li> </ul>	Trade	France	n/a
1 June	15 June	France	<ul style="list-style-type: none"> <li>ASP Promotion program online.</li> </ul>	Trade	France	Tourism Australia
13 June	21 June	France	<ul style="list-style-type: none"> <li>Three French journalists and 14 French delegates will attend ATE this year.</li> </ul>	Trade	Australia	Tourism Australia, Qantas