

France

Market Summary

Total French arrivals grew by nine per cent for the 2009 calendar year, compared to 2008. The French market continues to represent one of Australia's fastest growing inbound markets, with growth from the youth and honeymoon segments showing resilience during the tough economic times.

Current and upcoming activities with trade, media and major airlines (Qantas and Singapore Airlines) are expected to drive further interest and encourage French consumers to book their holidays to Australia. In addition, targeted youth and honeymoon promotions are being implemented in response to the resilience of these segments.

1. Market News

- French business confidence rose more than economists forecast in January on signs that the recovery is gaining pace after the worst recession in six decades. France's economy emerged from the slump last year, growing 0.3 per cent in the second and third quarters of 2009. The Finance Ministry predicts that the economy will expand 1.4 per cent in 2010.
Source: www.businessweek.com 22 January 2010
- French consumer confidence unexpectedly slipped in December for the first time in fourth months according to the National Institute of Statistics and Economic Studies. Households were more pessimistic about both their future financial situation and the general economic situation in France. Moreover, the number of households believing that now is a good time to make a major purchase – such as a big holiday - fell slightly compared with November.
Source: IHS Global Insight 5 January 2010
- French unemployment currently is currently 10 per cent.
Source: www.tradingeconomics.com 25 January 2010
- Advertising revenue through traditional media in France continued to grow last year. Estimates from Yacast, a media monitoring agency, show that ad revenues increased by 6.2 per cent on an annual basis in 2009, to €14.6 billion.
Source: www.warc.com/News 8 January 2010

2. Consumer insights

- French consumers are keener than ever to shop online. Internet sales have grown at double-digit percentage rates. French online retailing however still lags behind Germany and the UK, with the German online retail market worth €31.3 billion in 2009 and Britain's worth £37.9 billion.

Source: Reuters, 23 December 2009

- French consumers have responded to the economic crisis by changing their financial behaviour. France is now the European leader in mobile payment technology and retailers are increasingly challenging traditional banks by providing credit cards – the latter never having previously been popular with French consumers, says a new report.

Source: www.euromonitor.com, 21 January 21 2010

For the latest in visitor arrivals, please visit 'Research & Statistics' at www.tourism.australia.com

3. Trade Update

- Nouvelles Frontières (TUI) is opening its agency network to feature products from other tour operators' brochures. Tour operator Asia's "a la carte" programme will for the first time be integrated in Nouvelles Frontières' brochure.

Source: Pros du Tourisme, 13 January 2010

- Monde Authentique has officially launched its new brand for Australia: Australie Authentique: www.australie-authentique.com.

Source: Anecdotal feedback

- As at December 2009, there were 900 Aussie Specialist agents in France, of which 45 per cent were fully qualified

4. Airline news

- Qantas has launched a tactical airfare starting at €997 (inclusive of all taxes and surcharges) including two domestic flights at €57 each. Those offers have been advertised in an online promotion in collaboration with Tourism Australia from 11 to 27 January 2010.

- Singapore Airlines has launched a tactical airfare of €1032 (inclusive of all taxes and surcharges) as part of an online promotion in collaboration with Tourism Australia from 27 January to 21 February 2010.

5. Competitor news

- With 78.45 million international travelers in 2008, France still remains the world's most visited destination, ahead of the United States (58.03 million) and Spain (57.3 million).
Source: www.eturbonews.com 29 December 2009
- Air France will make travel easier between Metropolitan France and its outposts abroad - Noumea (New Caledonia) and Papeete (French Polynesia) by offering 15 per cent of its overall capacity in economy class at the lowest available fare on the date of travel excluding special offers during peak travel periods.
Source: www.asiatraveltips.com 22 January 2010
- With more than 217,568 French visitors to Hong Kong in 2009, France is still the second biggest inbound European market for Hong Kong after the UK. According to Hong Kong Tourism Board, the growth of 2.7 per cent in December seems to confirm a forecasted positive trend for the French market in 2010.
*Source: *Echo Touristique* 12 January 2010*
- The number of French arrivals to Sri Lanka has increased by 53 per cent in 2009, with the destination welcoming more than 15,866 French visitors.
Source: www.pros-du-tourisme.com 19 January 2010

6. Key Campaigns and Activities in Market

December and January campaigns and activities				
START DATE	END DATE	DESCRIPTION	TARGET AUDIENCE	PARTNERS
December 2009	Ongoing	<i>Facebook:</i> Launch of the French Facebook page dedicated to the youth segment.	Consumer	N/A
1 December 2009	1 December 2009	<i>Industry Meeting:</i> An informal session to provide our key industry partners an update on Tourism Australia's 2009-2010 Annual Operating Plan and to have an open discussion on how to continue to best target the French trade and consumers to maintain the high level of interest and bookings.	Trade	N/A
1 December 2009	28 February 2010	<i>Print advertising:</i> One page advertising in the wedding magazine <i>Mariée</i> Magazine (circulation 49,271).	Consumer	Australie à la carte
30 December 2009	Ongoing	<i>1001 Marriages:</i> Six editorial articles published on a weekly basis about honeymooning in Australia.	Consumer - Honeymoon	Voyageurs du Monde
06 January 2010	27 January 2010	<i>Facebook:</i> Advertising campaign on Facebook to increase the fan database.	Consumer - Youth	N/A
11 January 2010	21 February 2010	<i>Aussie Specialist re-launch:</i> Online promotion targeting online leading trade publication to promote the new version of the Aussie Specialist Program and help increase the base of registered agents. Trade media targeted: Tourmag, PromoAGV and Quotidien du Tourisme.	Trade	N/A
11 January 2010	26 January 2010	<i>Two Week Walkabout:</i> Online campaign with Qantas including tactical offers on international and domestic flights, connecting consumers to a dedicated campaign page on Australia.com.	Consumer	Qantas
27 January 2010	21 February 2010	<i>Singapore Airlines:</i> Online campaign advertising a Singapore Airlines' tactical offer, connecting consumers to a dedicated campaign page on Australia.com.	Consumer	Singapore Airlines

19 January 2010	21 January 2010	<i>DAP workshops</i> : 172 travel agents attended the workshops in Paris and Lyon.	Trade	Tourism Queensland, Tourism New South Wales, Tourism Western Australia, South Australian Tourism Commission, Tourism Northern Territory, Tourism Victoria
24 January 2010	07 February 2010	<p><i>IMHP Flavor and Beachbrother</i>. Two media trips with:</p> <ul style="list-style-type: none"> - <i>Flavor</i>: a bi-monthly young women's magazine (core target audience 18-25 year old females) - <i>Beachbrother</i>, a bi-monthly young men's magazine (core target audience 18-25 year old males) <p>Both magazines will be 100 per cent dedicated to Australia, and will be distributed during a University Roadshow organised by Tourism Australia in March 2010.</p>	PR	N/A
25 January 2010	18 February 2010	<i>IMHP Les Nouveaux Paradis</i> : Press trip for the French TV program <i>Arte</i> . The show has an average viewership of 900,000, and is dedicated to destinations where nature has a great importance. The itinerary features the states of New South Wales and Queensland.	PR	N/A

Upcoming campaigns and activities				
START DATE	END DATE	PROJECT/EVENT	TARGET AUDIENCE	PARTNERS
04 February 2010	27 February 2010	<i>1001 listes</i> : Online Honeymoon competition on 1001 listes (wedding list website) targeting couples that are planning a honeymoon in 2010.	Consumer - Honeymoon	Voyageurs du Monde
23 February 2010	23 February 2010	<i>Gallerie Lafayette training</i> : Training evening of Gallerie Lafayette's travel agents in the Paris area, in partnership with Australie Tours.	Trade	Australie Tours
01 March 2010	26 March 2010	<i>Youth Promotion in university</i> : University roadshow in 10 French universities promoting working holidays in Australia. The promotion will be strengthened by a concurrent radio promotion.	Consumer - Youth	TBC
21 March 2010	31 March 2010	<i>Aussie Specialist Famil</i> : Tourism Australia in partnership with Air Austral will host a famil for 10 travel agents.	Trade	Tourism New South Wales, Tourism Queensland, Air Austral
March 2010	March 2010	<i>Austratical</i> : Promotion targeting French consumers who need a break from their daily routine and local environment; promotes Tourism Australia's core message of Immersion (discovering a new outlook on life) and the rejuvenating aspect of a holiday in Australia.	Consumer	Australie Tours
March 2010	March 2010	<i>DAP Mailing</i> : Direct mailing of the 'Love Australie' brochure targeting 5,000 key contacts who are planning their honeymoon in 2010.	Consumer - Youth	Tourism Queensland, Tourism New South Wales, Tourism Western Australia, South Australian Tourism Commission, Tourism Northern Territory, Tourism Victoria