

France

Market Summary

October was another positive month for visitor arrivals from France. This growth was primarily from the largest visitor segment: Holidaymakers. Overall French visitor growth rates for the year to date (YTD) October 2009 continue to be the highest of any European country. YTD arrivals growth is primarily leisure driven from both the Visiting Friends and Relatives segment (VFR) and Holidaymakers. There has been a double digit decline in business travel. Demographically, there are two segments in France showing growth: the youth segment (which represents nearly half of all French visitors) and the 45 to 59 year old visitor group.

Working Holiday Visa grants for the three months to September 2009 are up 29 per cent on the previous year. Industry partners are reporting an increase in enquiries for late 2009 and early 2010 which is a positive indicator for the market going forward. Booking patterns are still unpredictable with the continuing trend towards last minute bookings.

1. Market News

- French household confidence rose for the third straight month in September with more people thinking that now is the time to splash out on major purchases. Coming in the wake of other upbeat indicators on the French economy, the outlook for the fourth quarter is optimistic.
Source: Reuters, October 27 2009
- President Sarkozy has proposed a tax on carbon emitting sources of fuel. If it goes ahead €17 will be levied per tonne of carbon dioxide. Although France isn't the first to introduce a general carbon tax - Sweden, Finland and Norway already have them in place - it would be the largest economy to do so yet.
Source: The Economist, September 11 2009
- The French enjoy the highest quality of life in Europe according to research commissioned by USwitch.com. France has one of the lowest retirement ages, and the longest holidays at 34 days a year compared with 28 days in the UK.
Source: USwitch.com, press release, October 1 2009

- The most favoured long haul destinations for the French are the Americas and Asia.

Source: *Mintel, October 2009*

2. Consumer insights

- French consumers place more emphasis on newspapers and magazines as an information source than any other European market and French consumers under the age of 35 are twice as likely to be influenced by recommendations from friends and family as those over 35.

Source: www.webershandwick.co.uk, October 16 2009

- A record number of tourists from France have visited Australia in the last 12 months and over the first six months of the year.

Source: *Interface Tourism Newsletter, October 2009*

- European travellers are choosing high-speed trains over planes. Approximately 90 per cent of people travelling between London and Paris travel on the Eurostar. There are no longer any flights on the Paris-Brussels route as a result of the rise in popularity of train travel between the two cities. Many now also go by train between London and Brussels.

Source: www.news.com.au October 9 2009

- When asked how they were likely to minimise their impact on the environment, French consumers didn't rate travel and holidays as an environmental priority. The French were hesitant to choose eco holidays and only 19 per cent said they would consider carbon offsetting their travel.

Source: *ecpulse.com, October 26 2009*

3. Trade Update

- **Australie à la carte:** launch of a new up-market brand called *Collections Australes*. This brand has a dedicated website (www.collectionsaustrales.com) and is featuring luxury venues and experiences in Australia, New Zealand and Fiji.

Source: *Tourmag, October 13 2009*

- **Australie Tours:** The French leading wholesaler on Australia has been bought by Travel & Co, part of the private equity Avenir Enterprises. The latter also own the high end wholesaler *Terres de Charmes*. Eric Ridet, founder of Australie Tours, will be working closely with the company's new CEOs Jacques Judéaux and Claude Blanc for the next 12 months.

Source: *Tour Hebdo, October 20, 2009*

- **Nouvelle Frontières:** The TUI French entity is re-launching its "à la carte" production for Australia. In the meantime, they have launched an online consumer competition to win a trip to Australia or the Seychelles.

Source: http://newsletters.rtm.nouvelles-frontieres.fr/res/prod/survey/JEU_SEYCHELLES.jsp, September 1 2009

- As at November 2009, there were 848 Aussie Specialist agents, of which 464

per cent were fully qualified.

4. Airline news

- **Garuda Indonesia:** The airline is returning to Europe effective 1 June 2010 after an absence of five years. Amsterdam will be the first of a number of key European cities including Paris, Frankfurt and London for which Garuda has planned for its expansion over the next few years.
Source: www.asiatraveltips.com, November 12 2009
- **Qatar Airways:** From 5 December 2009, Qatar airways will operate new flights from Paris to Melbourne. French travellers will also be able to fly to Sydney on Qatar in early 2010.
Source: www.laquotidienne.fr, November 2 2009
- **Emirates:** The airline is launching its new A380 one month in advance due to strong demand with flights from Paris to Sydney commencing on 29 December 2009.
Source: pros-du-tourisme.com, November 25 2009
- **Cathay Pacific:** The airline, which has six flights per week to six Australian ports, has launched a new promotion which translates to “*This winter, it is Summer in Australia*”. Until 14 December 2009, French travellers had the opportunity to buy a return ticket to Australia from €955 (inclusive of taxes) with a free stop-over in Hong Kong.
Source: www.cathaypacific.com/fr, November 23 2009
- **Air France:** The airline plans to be the first European carrier to fly the Airbus A380 on the Paris and New York route from 23 November 2009. This will be followed by Paris-Johannesburg during European winter 2009-10.
Source: www.travelmole.com, November 2 2009

5. Competitor news

- The number of European tourists to Mauritius in the first half of this year dropped by 6.9 per cent compared with 2008, while the number of tourists from France climbed 2 per cent (131,000 French tourists in the first half of 2009 compared with 128,000 in 2008).
Source: *Interface Tourism Newsletter*, October 2009
- Mauritius has rebranded and has changed its strapline from ‘Mauritius – unforgettable experience’ to ‘Mauritius – C’est un plaisir’ (Mauritius- It’s a pleasure). However, it has been greeted with scepticism locally, say newspaper reports.
Source: *The Daily Telegraph*, October 27, 2009
- The number of French tourists visiting Indonesia was up by 26.67 per cent between January and September 2009 comparative to the same period in 2008.
Source: *Organisation of Asia Pacific News Agencies*, November 2 2009
- There was an increase of 48.3 per cent in French tourists in the first half of

2009 to Sri Lanka. In July alone, French visitor numbers increased by 81.3 per cent and France was the third country in terms of inbound tourism to Sri Lanka behind the UK and Germany. Sri Lanka will run a marketing campaign in France early next year.

Source: Interface Tourism Newsletter, October, 2009

- The Singapore Tourism Board is developing a new road map for 2020 and will look at specific areas: business, lifestyle, marketing, travel and hospitality. Singapore's tourism industry has been hit hard by the global economic downturn. Tourist arrivals between January and August fell by 9.2 per cent compared with the same period last year to 6.23 million.

Source: Channelnewsasia.com October 12, 2009

- US hotels in the south and west have seen a dramatic drop in rates according to the latest Hotel Price Index data collected by Hotels.com. Orlando, Miami, West Palm Beach and Fort Lauderdale have seen prices drop on average by 14 per cent. In the west, Nevada has seen the greatest fall – 29 per cent – bringing average rates in the state down to \$77 per night.

Source: etravelblackboard.us, October 15, 2009

6. Key Campaigns and Activities in Market

October and November campaigns and activities				
START DATE	END DATE	DESCRIPTION	TARGET AUDIENCE	PARTNERS
1 October 2009	1 October 2009	<i>Quotidien du Tourisme Supplement (Trade)</i> : Launch of an 18-page Australia supplement in the trade publication <i>Quotidien du Tourisme</i> which is distributed to 12,000 travel agents.	Travel Agents	Australie à la carte
15 October 2009	03 March 2010	<i>Training Roadshow</i> : Travel agent training as part of the Tour Operator Asia roadshow: Nancy: 20 travel agents trained Reims: 25 travel agents trained Valenciennes: 15 travel agents trained Paris: 100 travel agents trained Nantes: 40 travel agents trained	Travel Agents	Asia Voyages
20 October 2009	20 October 2009	<i>Havas Voyages Travel Agent Workshop</i> : Travel agents training held in Paris for 15 Havas Voyages travel agents.	Travel Agents	Australia Tours
3 November 2009	11 November 2009	<i>French Press Trip</i> : A group of 5 journalists working for numerous media (including <i>Metro</i> , <i>VSD</i> , <i>Nous Deux</i> & <i>Vie Pratique Madame</i> , <i>Grazia</i> , <i>aufeminin.com</i> & <i>joyce.fr</i>), travelled to South Australia and Victoria on a press trip.	First Time Experience Seekers	Cathay Pacific, SATC, TVIC
11 November 2009	23 November 2009	<i>Aussie Specialist Famil</i> : Tourism Australia, in collaboration with Singapore Airlines, South Australian Tourism Commission and Tourism Northern Territory, hosted a famil for 12 French Aussie Specialists.	Aussie Specialists Travel Agents	Singapore Airlines, South Australian Tourism Commission, Tourism Northern Territory
1 November 2009	1 November 2009	<i>Honeymoon Collateral "Love Australia"</i> : 40,000 copies. The brochure is being distributed to tour operators and partners and is the main collateral piece for the honeymoon segment.	French Honeymooners	N/A

1 November 2009	31 July 2010	<i>Complicité's Honeymoon promotion:</i> Honeymoon campaign launched in partnership with leading French bridal store chain, Complicité (45 shops across France). 15,000 honeymoon "Love Australie" brochures distributed and 20,000 flyers plus an online banner on Complicité's website, where consumers can win a honeymoon trip in Australia.	French Honeymooners	Australie à la Carte, Qantas
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Upcoming campaigns and activities				
START DATE	END DATE	PROJECT/EVENT	TARGET AUDIENCE	PARTNERS
1 December 2009	1 December 2009	<i>Industry Meeting:</i> an informal session to provide to our key industry partners an update on Tourism Australia's 2009-2010 strategic annual plan and to have an open discussion on how to continue to best target the French trade and consumers to maintain high level of interest and bookings.	Trade	N/A
December 2009	Ongoing	<i>Facebook:</i> Launch of the French Facebook page dedicated to the youth target.	Consumer	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
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	N/A
19 January 2010	21 January 2010	<i>DAP workshops:</i> Travel agent workshops targeting travel agents in Paris and Lyon.	Trade	Tourism Queensland, Tourism New South Wales, Tourism Western Australia, South Australian Tourism Commission, Tourism Northern Territory, Tourism Victoria