

# CONSUMER PROFILE FRANCE



## SUMMARY

### Traveller Profile

#### Motivations for travel

French travellers choose a destination based on history and heritage, world-class nature, friendly citizens and aquatic and coastal experiences. A destination must also satisfy the rational factors of safety and security and value for money.

#### Where are they going?

The most visited destination for French travellers is the USA. Australia is 25th on the list in terms of trips taken in 2016, following India, Mauritius and Brazil.

#### Where do they want to go?

The USA, Canada and the Caribbean are most definitely on their to do list in the next two years. Australia makes it onto the aspiration list for the next four years, at sixth position, but the USA and Canada are the priority for French travellers.

#### Who do they travel with?

Over half of French consumers travel as a couple.

### Perceptions of Australia

While Australia is strongly associated with importance factors which are highly valued among French travellers such as safety and world-class nature, its association with history and heritage and value for money falls behind that of competitive long-haul destinations.

### Traveller Behaviour

#### How do they prefer to travel?

- › Trip length is longer than the average of international travellers, at 13 nights featuring an average of five destinations.
- › Preferred styles of travel include resort holidays and visiting family and friends.
- › Less than one-third of trips are tour groups, with the majority of trips involving semi-independent or fully-independent travel.

#### When do they travel?

April, July and August are the peak travel months for French consumers, with lead times typically falling between three to six months.

For travel to Australia, specifically, July and October-February are the peak travel periods for French travellers.

#### How do they plan to travel?

For early planning and inspiration, French travellers are using a combination of online and offline sources including talking to family and friends, general internet searching and reading travel and guide books.

#### How do they book travel?

When it comes to booking, the majority are doing so via a travel agent, either in person, by telephone or online.



### TripAdvisor Facts

France is the thirteenth largest international market viewing Australia on TripAdvisor, at 2.0% of all sessions. In 2016 this figure grew 2.1% year-on-year. With France's position as the thirteenth largest market viewing Australia, this represents a small percentage of all the other international destinations they are searching.

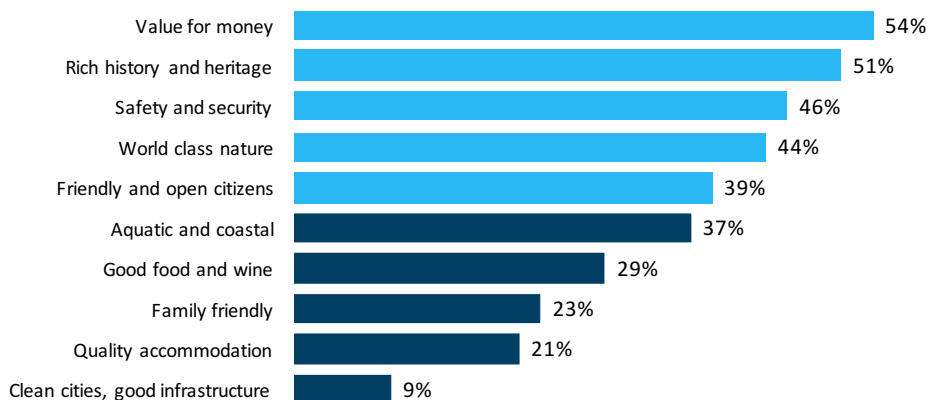
# FRENCH TRAVELLER PROFILE



The information in this fact sheet comes from Tourism Australia’s (TA) international consumer research study the ‘Consumer Demand Project’ (CDP). The CDP was set up in 2012 to look into how global consumers view Australia and what most motivates them to visit.

Insights from the CDP have been used extensively to inform and support development of TA’s strategic direction, campaign development as well as to inform the tourism industry of potential opportunities to build the value of Australian tourism. The research is used to help shape the future marketing of Australia and identify opportunities to make the country’s tourism offering more attractive to overseas visitors.

## Most important factors when selecting a holiday destination



Read as: 54% of respondents rate ‘value for money’ among the top five most important factors when choosing a holiday destination.

Notes: \*Average nights: the sum of all nights divided by the sum of all visitors. \*\*Median nights: represents the midpoint length of stay for which 50% of visitors stay less and 50% stay longer, removing the impact of very long stay visitors. † Data refers to an average of 2012-2016. ‡ Refers to share of arrivals of respective purpose. \* Other includes education, employment and others. Sources: 1. Department of Immigration and Border Protection, December 2016. 2. Tourism Research Australia, International Visitor Survey, December 2016

## MARKET OVERVIEW

In 2016, France was Australia’s 15th largest inbound market for visitor arrivals and total visitor spend and 12th for visitor nights.



Holiday<sup>o§</sup>

53%



Visiting friends & relatives<sup>o§</sup>

19%



Business<sup>o§</sup>

9%



Other<sup>o§\*</sup>

20%



\$0.7bn

Total spend<sup>2</sup>  
(↓15 per cent)



Average nights stayed<sup>o</sup>



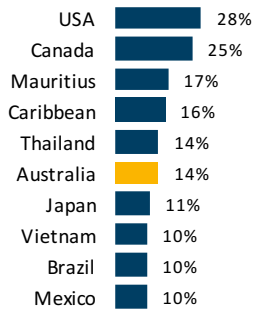
Median nights stayed<sup>o</sup>

# AUSTRALIA'S POSITION AND OPPORTUNITY

## Purchase funnel

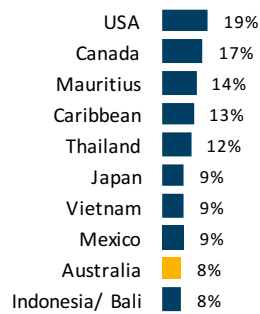
### Aspiration

Which of the following destinations are you *considering travelling to* in the next 4 years?



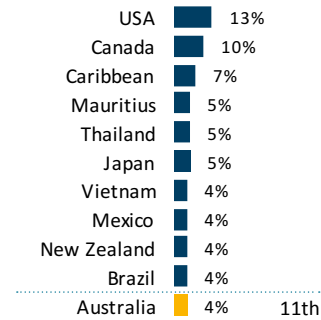
### Awareness of holiday experiences

How aware would you say you are of the holiday experiences on offer in the following destinations?



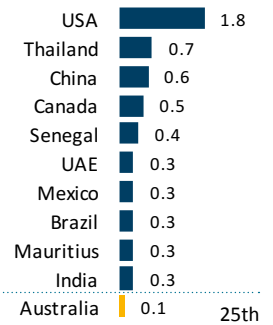
### Intention

Which of the following destinations are you *actively planning to visit for* a holiday in the next 2 years?



### Visitation

Millions of trips in 2016<sup>1</sup>



Read as: 14% of French consumers are considering travel to Australia in the next 4 years, while 4% are intending to visit in the next 2 years. Australia is ranked #25 for visitation against other out-of-region (OOR) destinations for French travellers.

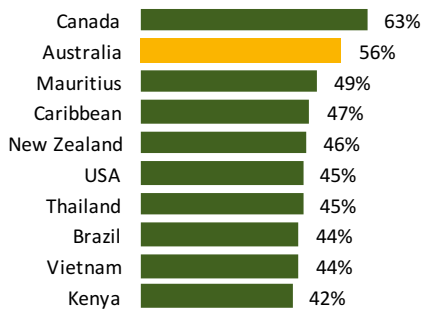
Notes: \*Hawaii is included in US for visitation figures as cannot be separated. Sources: 1: Tourism Economics, YE 2016

# HOW DOES AUSTRALIA RATE?

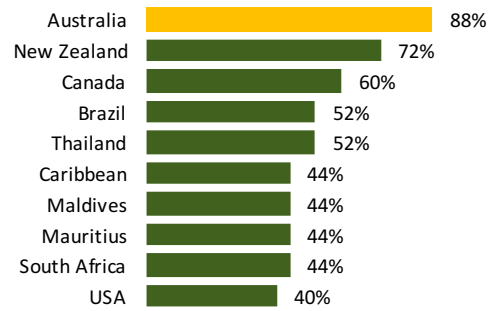
Respondents were asked to indicate which destinations they associated with the following factors. Each respondent was provided with a list in excess of 50 international destinations.

## World class nature

### Respondents who have not visited Australia



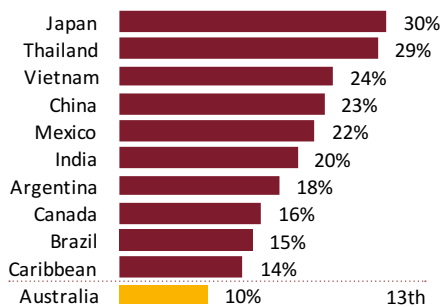
### Respondents who have visited Australia



Read as: 56% of respondents who have not visited Australia associate Australia with 'world class nature.' This figure rises to 88% among those who have visited.

## Good food and wine

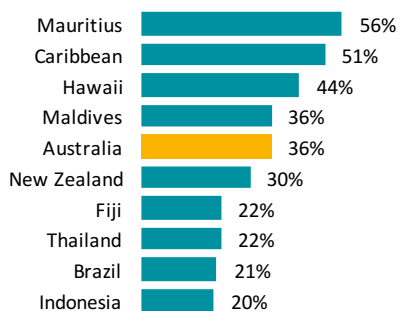
### Total respondents



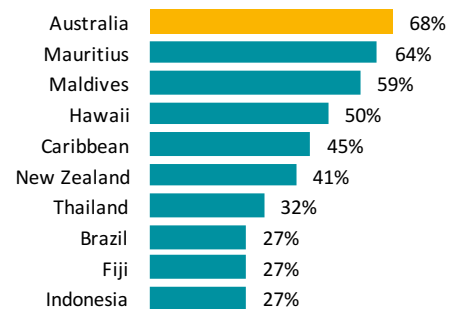
Read as: 10% of total respondents associate Australia with 'good food and wine.'

## Aquatic and coastal

### Respondents who have not visited Australia



### Respondents who have visited Australia



Read as: 36% of respondents who have not visited Australia associate Australia with 'aquatic and coastal' experiences. This figure rises to 68% among those who have visited.

# PLANNING AND BOOKING INFORMATION SOURCES

The following charts highlight the information sources that French consumers use to plan and book their holidays.

## Preferred sources for *early planning and holiday inspiration*



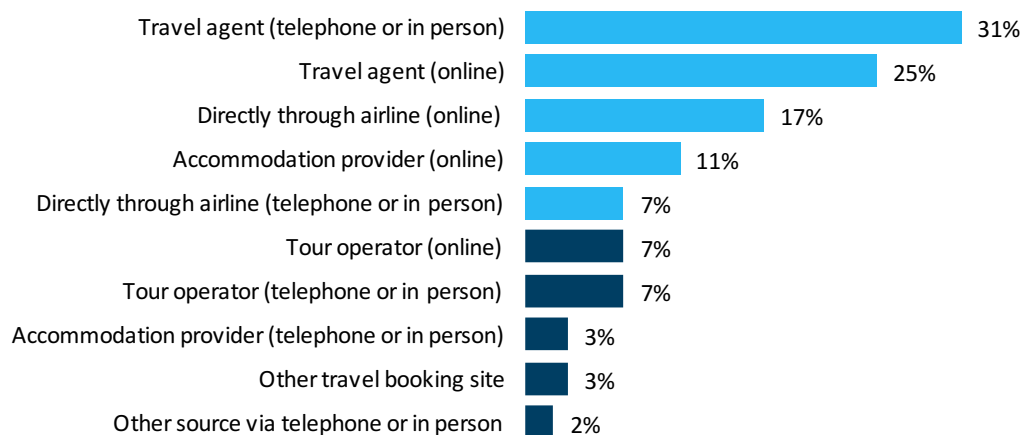
Read as: 21% of respondents indicate 'friends or relatives that have been before or live there' as a preferred source during the early stages of planning a holiday.

## Preferred sources for *seeking information about a holiday destination*



Read as: 18% of respondents indicate 'friends or relatives that have been before or live there' as a preferred source for seeking information about a holiday destination.

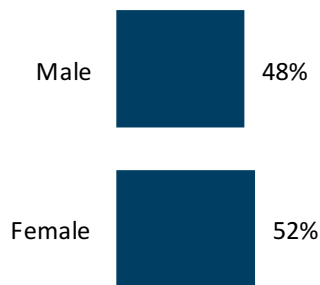
## Preferred sources used to *book a holiday*



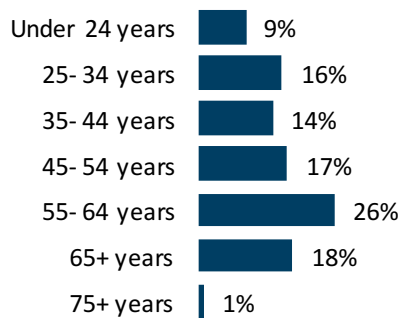
Read as: 31% of respondents indicate booking via a 'travel agent (telephone or in person)' as a preferred source when booking a holiday.

# RESPONDENT PROFILE

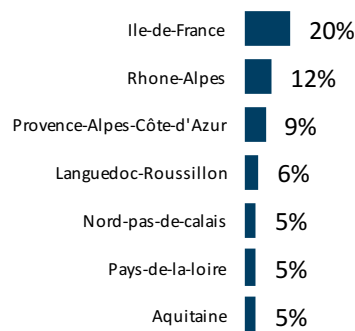
## Gender



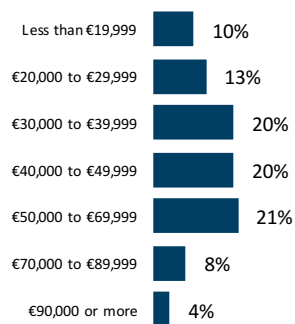
## Age



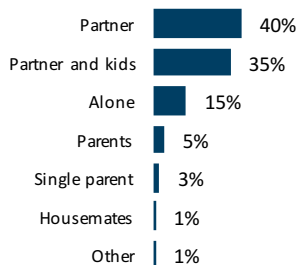
## Place of residence



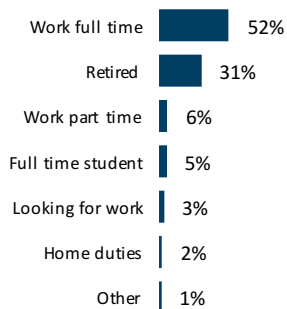
## Income



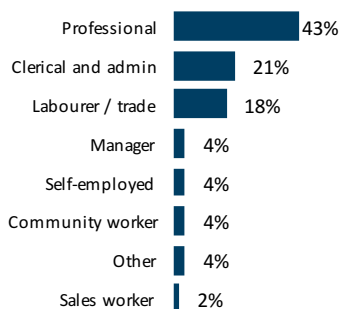
## Living situation



## Employment status



## Occupations



## ABOUT THE RESEARCH

The Consumer Demand Project (CDP) research is carried out by BDA Marketing Planning, a consultancy who specialise in international demand side strategy development and consumer research. It helps determine the strategic priorities to achieve the Tourism 2020 goal, by providing a comprehensive assessment of Australia's current destination appeal and the latent demand potential. The research is conducted annually across eleven of Australia's key tourism markets: China, Germany, India, Indonesia, Japan, Malaysia, New Zealand, Singapore, South Korea, UK and USA. In 2016, the following markets were integrated into the program: Hong Kong, Taiwan, Canada, Brazil, France and Italy. Over the last five years, Tourism Australia have spoken to over 90,000 international long-haul travellers via online research panels.

## WANT TO KNOW MORE?

Fact sheets for seventeen of Australia's key tourism markets can be accessed at: <http://www.tourism.australia.com/statistics/consumer-demand-research.aspx>

**For more information, please contact:**

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