

enjoyEngland ™

France market profile
updated January 2006



FRANCE

Market profile

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1) Market snapshot

GENERAL MARKET CONDITIONS

- Population 60.4 million – slight growth and ageing
- IMF Forecasts 2006: GDP (based on PPP per capita) USD\$30,152. GDP Growth Rate 1.8%. Unemployment 9.6%. Inflation 1.8%

ACCESS OVERVIEW

- NO visa required
- By Air – around 30 French airports offer daily services to England
- By Tunnel – Paris and Lille have frequent daily Eurostar departures serving Ashford and London Waterloo
- By Sea – Calais and Dunkerque – Dover; Dieppe – Newhaven; Cherbourg, Le Havre, Caen and St Malo – Portsmouth; Roscoff – Plymouth

MARKET SIZING / MARKET SHARE

- 29.6 million outbound in 2004. England has 8% market share
- England ranked 2nd outbound destination
- 2.5 million visits in 2004 (+5% on 2003)
- £665m spent in 2004 (+8% on 2003). AEV £267; AED £43

MARKET SHAPE / MARKET DYNAMICS

- 33% are HOLIDAY visitors; 27% BUSINESS
- 66% stay 1-7 nights
- Top Towns = London, followed by Brighton & Hove, Oxford, Birmingham and Manchester

PRODUCT / MARKET FIT

- History / Heritage / Culture, Countryside, Short Breaks, Shopping

DEMOGRAPHICS / POTENTIAL CONSUMER SEGMENTS

- Youth / EFL, Seniors, DINKS / SINKS, Gay, Families

REACHING THE FRENCH CONSUMER

- Internet access 42%

2) General market conditions

Population / languages

The US Census Bureau puts the population of France at 60.4 million in 2004.

The population is forecast to grow slightly to 62.2 million by 2014.

The proportion of the population aged 55-69 is forecast to increase slightly, while the proportion aged 30-39 is forecast to decline slightly.

Language: French (official), regional dialects and languages (Provençal, Breton, Alsatian, Corsican, Catalan, Basque and Flemish).

Economics / politics

The hard-line French Interior Minister, Mr Sarkozy, continues to enjoy widespread public support following his zero-tolerance approach to the recent rioting that sprang up in urban centres across France. Many of the economic woes in France are part of the explanation for the recent unrest, although addressing long-standing social issues are considered key in resolving the discontent.

France remains one of the main protagonists in the ongoing dispute over EU financing due to its reluctance to tackle the failed Common Agricultural Policy.

Despite the many political distractions there remain fragile signs of economic revival in France, with unemployment now falling slowly. Nevertheless, growth rates in the foreseeable future predicted by the Economists are, at best, modest. The French economy is highly diversified, with agriculture, manufacturing, services and tourism all playing an important role.

Consumer confidence took a knock following the recent riots, and although now recovering remains below levels seen during last summer.

The UK is the third biggest export market for France.

Holidays / annual leave

French employees receive a standard 25 days annual leave.

However, the 35-hour-week law means that those who exceed this limit gain additional days of holiday.

3) Access overview

Political situation

No political issues currently exist to restrict travel to England from France.

Passport and visa issues

French visitors do NOT require a visa to visit England.

Gateways / access to England

In 2004 (IPS), 38% of visitors from France travelled to England by tunnel, 36% by air and 26% by sea.

Eurostar has enjoyed unprecedented levels of reliability and punctuality in recent months and has decided that all services to London will travel to St Pancras once the second phase of the High Speed Link is open in 2007 with the Waterloo Terminal closing. This will greatly improve rail access to the north of England from France, with an easy change of train to domestic services serving St Pancras, Kings Cross and Euston.

By tunnel

Paris and Lille have frequent daily Eurostar departures serving Ashford and London Waterloo, with a journey time of 2 hours 40 minutes from Paris to London.

Eurotunnel offer frequent services for those traveling with their own vehicle on Le Shuttle.

By sea

Ferry services link Calais and Dunkerque with Dover, Dieppe with Newhaven, Cherbourg, Le Havre, Caen and St Malo with Portsmouth, Roscoff with Plymouth.

By air

Around 30 French airports offer daily services to England, with a good mix of flights servicing regional destinations within England as well as London area airports. Journey time is typically 1 to 2 hours.



4) Market sizing/share

Current & forecast market size

Global Insight estimates that there were 29.6 million outbound overnight visits from France in 2004.

There are forecast to be 36.4 million such trips by 2010, an increase of 23%.

England currently accounts for around 8% of outbound trips from France.

Current volume and value statistics / trends

	2003	2004	Change year on year
Total Visits	2,372,000	2,494,000	+5%
Visits Rank (League Table No. Visitors to England)	2	2	No change
Total Spend	£617m	£665m	+8%
Spend Rank (League Table £ Spend in England)	3	3	No change
Average Spend per Visit (AEV)	£260	£267	+3%
AEV Rank	Outside top 30 rankings		
Average Spend per Day (AED)	£49	£43	-12%
AED Rank	Outside top 30 rankings		
<i>Source: IPS</i>			

Key competitor destinations – actual

Although this does not separate out England, the Global Tourism Navigator shows us that the UK was 2nd in the actual ranking of top destinations (short and long haul included) for French outbound travel in 2004.

1	Spain	6	Turkey
2	UK	7	Tunisia
3	Italy	8	Belgium
4	Germany	9	Portugal
5	Morocco	10	Greece

Key competitor destinations – aspirational

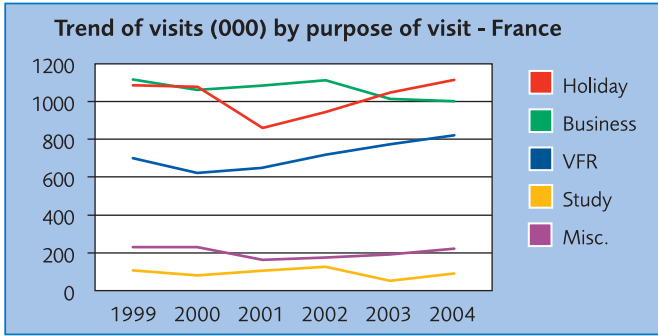
Again although this does not separate out England, the Anholt-GMI Nation Brands Index (Wave 3 2005), which surveys a representative n=1000 sample of the online population in France, UK is ranked 17th out of 24 (i.e. not all potential are asked about) destinations that they would be most likely to visit for a leisure holiday 'if money were no object'.

1	Canada	11	Egypt
2	Australia	12	Japan
3	Italy	13	Switzerland
4	Spain	14	United States
5	Brazil	15	Germany
6	Ireland	16	China
7	Mexico	17 UK	
8	Sweden	18	India
9	New Zealand	19	South Africa
10	The Netherlands	20	Russia



5) Market shape/dynamics

Purpose of visit

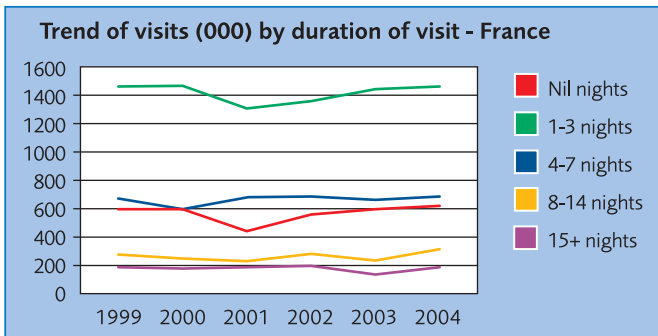


33% of the visitors from France to England come for the purpose of holiday.

31% come for visiting friends or relatives. This proportion has increased in the past 6 years.

27% come for business.

Length of stay



85% of French visitors stay in England for less than 8 nights with 45% coming for a short break (1-3 nights) and 19% being day trippers.

87% of holiday visitors stay in England for 7 nights or less. The holiday short-break market accounts for 39% of Holiday visits and the holiday one-day visits for 22%.

1-3 night duration of stay also accounts for the biggest proportion amongst VFR visitors (43%).



Regional spread/top towns

Top Towns for French visitors in 2004 were:

		Visits (000)
1	London	1258
2	Brighton/Hove	50
3	Oxford	49
4	Birmingham	48
5	Manchester	48

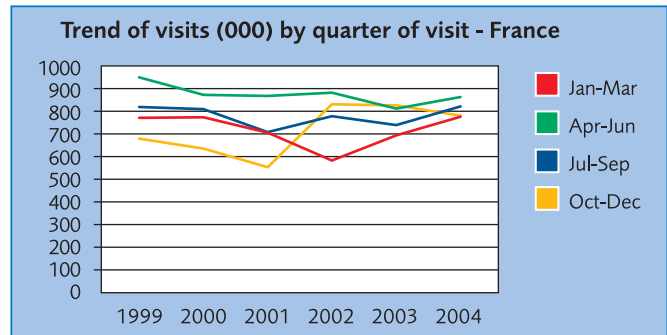
The top regions for French visitors are as follows:

South East – 534,000 visitors

South West – 265,000 visitors

East of England – 197,000 visitors

Seasonal spread

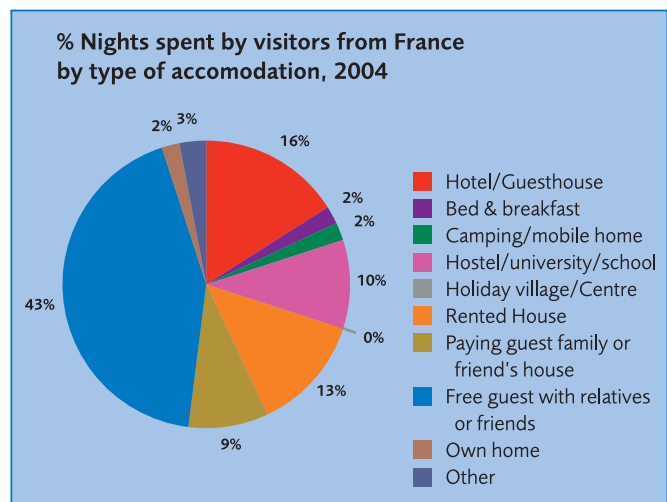


Overall visits from France to England are evenly seasonally spread.

The months April-June are the most popular period for holiday visitors (32%).

The last 3 months of the year are the most popular period for VFR visitors as 29% of them travel to the UK in October-December.

Accommodation Type



42% of French visitors stay as free guests with relatives or friends when they visit England, which accounts for 43% of nights spent.

41% of holiday visitors stay in a hotel/guesthouse, 28% as free guests and 14% as paying guests.

87% of VFR visitors are free guests.

59% of business visitors stay in a hotel or guesthouse.

6) England's brand image in France

The main pillars of the England brand in France are Discover, Fun and Indulgent. The England brand model can be said to be describing 3 key Need states ('The 3 Pillars'):

Discover: 'To absorb, learn and experience'.

Fun: The need 'To Do', to be active and proactive, avoiding sitting around doing nothing, bonding with friends and family, letting off steam, etc.

Indulgent: The need to 'Reward yourself' to counter act the stresses and strains of modern everyday life.

These elements of the brand are shown in the brand wheel below:

Perceptions of England

Project Lion Brand Development Research carried out in France in 2002 discovered that although many French people had a number of criticisms to make about England as a holiday destination, and were wary of English people, they did remain positive about certain aspects. It is a neighbour that they could visit quickly and cheaply, with little inconvenience.

For the most part English culture, together with its eccentricities, was considered familiar to them and they felt that it did have a certain charm.

Most of the negativity towards England was towards the English people, and what was described as their reserve, or arrogance.

In contrast, many respondents described the Irish and the Scots as being more open and friendly – Ireland and Scotland might be places for a holiday, England, or rather London, might be a place for a brief 'escapade'.

For many, England was somewhere they might have visited on a school trip, so they might not necessarily want to go for a holiday.



7) Product / market fit

Which products/experiences are most attractive to French visitors?

History / Heritage / Culture

England's history, heritage and cultural attractions are key motivators for the French visitor.

Countryside

England's natural scenic beauty and countryside is frequently highlighted in research as being of interest on a visit to England.

Short breaks

England increasingly seen as a short-break holiday. French market opting for more long weekends breaks rather than 3-4 week holidays in August.

Shopping

Shopping for traditional English products or trendy items is often a secondary reason for the French to visit England.

London and the rest of England

For the French, the distinctions between London and England are not as great as amongst some other visitors. Their perceptions and associations are summarised as follows:

London	England
• Culture – museums and galleries	• History – castles and cottages
• Architecture – Buckingham Palace, Big Ben	• Events – Sports e.g. Rugby
• Shopping – Christmas shopping trips	• Culturally Traditional – Royal Family, formality
• Accessible – Eurostar	• Architecture
• Cosmopolitan and trendy	• University towns – Cambridge
• Eccentric – punk rock	• Historic towns – Bath
• Cultural diversity	• Food – afternoon tea or pub lunch
• 'Once's the worlds capital'	• Countryside – Cotswolds, Lake District, Shakespeare country
	• Sports activities – walking

Source: *England Brand Communication Overseas, Qualitative Study May 2005, CRAM Research*

Key strengths and weaknesses

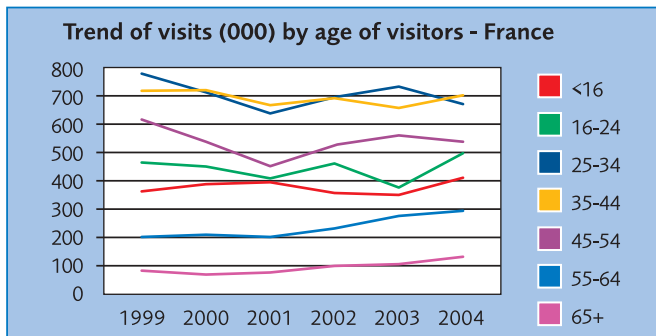
The key strengths and weaknesses of England as perceived by the French are shown in the table below:

Strengths	Weaknesses
• Close geographically	• Expensive
• An island culture	• Terrible food
• 'Its Europe without being European'	• Bad weather
• History – colonial past means excellent museums and galleries	• Not attractive, dull, melancholic
• Educational – especially for the children	• People are shy, cold and hidden or arrogant
• Learn English – especially for the children	
• Good for a weekend away	



8) Who is the French visitor?

Demographics



46% of visitors from France are aged less than 35. The proportion of young visitors is even bigger amongst Holiday visitors (62%). The under 35 accounts for 46% of VFR visitors.

Overall, 56% of visitors are male and 44% female.

Age Group	Male %	Female %
0 - 15	9	17
16 - 24	12	20
25 - 34	20	21
35 - 44	26	16
45 - 54	19	13
55 - 64	9	9
65+	4	5

Key market segments

All groups travel to England from France, due to the ease and proximity. Enjoy England has conducted some specific research (England Brand Communications Overseas 2005) amongst the high income young families and middle income couples French holiday segments examining their main motivations for visiting England.

The details are summarised below:

French Holiday Maker Segment	Characteristics of Segments	Key drivers of Segment	Motivations for Visiting England
High Income Young Families	Social class B Have children under the age of 16	'To do' and 'To feel and sense'	To teach the children about another culture For the children to practice English To visit historical sites
Middle Income Couples	Social Class C1 25+ years old No Children	'To do' and 'Reward Oneself'	To visit London To go to Scotland

1st Timers & repeat visitors

In 2004, 79% of visitors from France had visited England previously within the last 10 years (IPS).

Travelling Group 2003	% of Visits
Lone traveller	47
As a couple/with partner	14
Group of friends	7
Family group	15
Business colleagues	7
Tour group	10
Other	0
Don't know	1

In terms of Travelling Group – 47% of the French visitors were lone travellers in 2003.

Visitors travelling as a family were the next largest segment of group composition (15%).



9) Caring for the French consumer

Language/information provision

The French are reluctant to speak English out of embarrassment. If you can welcome them with a few basic French words, they will appreciate your efforts and will be happy to answer in English.

French people look for good deals when they are shopping. Advise them on shops or restaurants where they can find special promotions or discounts. They will be grateful to you for these 'bons tuyaux' (good tips).

Accommodation

The French prefer to stay in mid-range accommodation.

Country house hotels are popular in France (Relais et Chateaux, etc), but an English equivalent must be similar in terms of value for money.

Bed and breakfasts are popular, but mid-range and above rather than budget.

Youth travellers prefer to opt for youth hostels or university accommodation, again because price is an issue.

In a hotel, they expect a clean bedroom with private bathroom and toilet. Their own hotel bedrooms tend to be functional, clean and good value.

As in many Latin countries, many French people are smokers. A designated smoking area in public places is appreciated.

Food and drink

Food is extremely important to the French. Although they like to change their habits during their holidays (even when it comes to food), there are some areas where the French will not make concessions. Provide them with bread during lunch or dinner, and don't take it away until the end of the meal. If they ask for water, provide a carafe (not glasses) without ice and lemon. Their preferred coffee is espresso (short and strong) and they like to spend time over their meals.

Undoubtedly used to good service and hard to please, they criticise easily. Be patient, smile and offer explanations and a helping hand should a problem arise. Food and drink quality will always be compared with France.



10) Reaching french consumers

Deciding, planning & booking patterns

Online / Offline Research was carried out in 2003 to gain a brief insight into consumers' current usage of the Internet and their preferred method for receiving brochures. Half of the French respondents intend to travel internationally in the next 3 years and just over half of (55%) have access to the internet either at home and/or work. When focussing on those who intend to travel internationally in the next 3 years 71% have access to the Internet.

Source of information

Travel agents are the most common source of information used by consumers throughout the stages of planning a trip. The Internet is second choice when deciding on the destination (42%) and booking the trip (34%). Brochures are not so popular following as the third choice (38%) for the preferred source of information when deciding on a destination (38%) and when booking a trip (30%). This dropped to fourth choice when planning an itinerary (31%).

Rank	Deciding on a destination	Planning an itinerary	Booking a trip
1	Travel Agent 57%	Travel Agent 52%	Travel Agent 59%
2	Internet 42%	Guidebook 39%	Internet 34%
3	Brochure 38%	Internet 37%	Brochure 30%
4	Guidebook 38%	Brochure 31%	Guidebook 30%
5	NTO 27%	NTO 28%	NTO 27%
6	Travel offers 26%	Travel offers 24%	Travel offers 25%

Brochure users

Looking at those who use brochures in more detail, around a quarter of consumers are between 35-44 regardless of the stage of planning.

In terms of occupation around a quarter of consumers are middle executives and a fifth are unemployed/student/retired. **Internet users**

Around a third of consumers using the Internet as a source of information are between 25-34 regardless of the stage of planning.

In terms of occupation just over a quarter of consumers are middle executives, a fifth executives/independent professions and a fifth not working.



Brochure preference

The majority of consumers prefer to receive a printed brochure (83%), 11% prefer to download a version online and 5% prefer both.

Online environment

42% of the French population are currently online.

The French are less likely to book their holiday online than via a travel agent or tour operator.

Media habits

Major national media

Daily newspapers:

Le Monde (385,000), Le Figaro (360,450), Le Parisien-Aujourd'hui (473,000), Libération (172,000).

News magazines:

L'Express (540,000), Le Point (315,000), Le Figaro Magazine (494,000), Nouvel Observateur (472,000).

Travel magazines:

Géo (482,000), l'Art de Voyager (97,000), Grands Reportages (84,500), Bon Voyage (210,000).

Travel trade publications:

L'Echo Touristique (14,800 weekly), Tour Hebdo (12,120 weekly), Le Quotidien du Tourisme (9,700), Univers des Voyages (9,000 monthly).

TV channels:

TF1, France 2, France 3, Canal+, La Cinquième/Arte, M6; on cable and satellite only: Voyage, Planète.

Radio stations:

RTL, RTL 2, Europe 1, Europe 2, RMC, France Inter, France Info, France Culture, NRJ.

Working with Enjoy England

Taking part in the Enjoy England marketing campaigns is the ideal way to make your marketing budget work harder. Combining detailed knowledge of proven routes to market, with innovative promotional channels and a fresh campaign look and feel, ensures that your brand obtains maximum cut-through in today's crowded market-place.

Different campaign participation levels are available depending on preferred promotional channels and budget available. The packaged opportunities below are designed to offer you maximum exposure for your money, but there is some room for flexibility, according to your needs. Please enquire for further information.

shortbreakEngland (Sept – Dec 06)

Highlighting the excellent accessibility to England from France, England's Short Breaks campaigns will showcase the diversity and value for money of England as a short break destination. Focusing on England's dynamic towns and cities, with their blend of the historical and the modern, and the stunning countryside just a stone's throw from England's city centres, the campaigns will use a strong tactical message to encourage consumers to take a short break in England.

Web listing: £3,500

Only available to commercial partners.

Level 1: £6,500

Activity	Details
Website	<ul style="list-style-type: none"> Enhanced presence on website Online competitions
Online advertising	<ul style="list-style-type: none"> Search Engine Marketing Generic campaign advertising on key travel and lifestyle websites e.g. Le Monde, Telerama, Yahoo, Lastminute. Techniques to include pop unders, pop-ups and I-leads Promotion of campaign website on VisitBritain.com/fr Campaign e-viral
Press & PR	<ul style="list-style-type: none"> Presence in generic press & PR work for the campaign
E-direct mail	<ul style="list-style-type: none"> Presence in e-DM to England database E-direct mail to 45,000 contacts on the VisitBritain France database Follow-Up E-Mailing to all new contacts

Level 2: £13,000

Activity	Details
Website	<ul style="list-style-type: none"> Maximum presence on website Online competitions
Online advertising	<ul style="list-style-type: none"> Search Engine Marketing Generic campaign advertising on key travel and lifestyle websites e.g. Le Monde, Telerama, Yahoo, Lastminute. Techniques to include pop unders and I-leads Promotion of campaign website on VisitBritain.com/fr Campaign e-viral Partner branded online advertising
E-direct mail	<ul style="list-style-type: none"> Presence in e-DM to England database Presence in TWO E-direct mails to 45,000 contacts on the VisitBritain France database Follow-Up E-Mailing to all new contacts
Press & PR	<ul style="list-style-type: none"> Presence in generic press & PR work for the campaign Inclusion in campaign press trip, subject to newsworthines

tourEngland (Jan – Apr 07)

Focusing on the highlights of quintessential England, the touring campaign will aim to raise awareness of England's regional diversity - and to showcase what there is to see and do beyond the capital city. With suggested driving tours, featuring key sights throughout the country, this year's campaign will also incorporate a strong walking element, as well as partner-led tactical offers to drive bookings.

Level 1: £6,500

Activity	Details
Website	<ul style="list-style-type: none"> Presence on website Online competitions
Online advertising	<ul style="list-style-type: none"> Search Engine Marketing Generic campaign advertising on key travel and lifestyle websites e.g. Le Monde, Telerama, Yahoo, Lastminute. Promotion of campaign website on VisitBritain.com/fr
E-direct mail	<ul style="list-style-type: none"> Presence in e-DM to England database Presence in TWO E-direct mails to 45,000 contacts on the VB France database Presence in follow up mailing to campaign respondents
Brochure fulfilment	<ul style="list-style-type: none"> Quarter page advert in 52-page Touring brochure. 80,000 copies will be produced and distributed.
Press & PR	<ul style="list-style-type: none"> Presence in generic press & PR work for the campaign

Level 2: £13,000

Activity	Details
Website	<ul style="list-style-type: none"> Enhanced presence on website Online competitions
Online advertising	<ul style="list-style-type: none"> Search Engine Marketing Generic campaign advertising on key travel and lifestyle websites e.g. Le Monde, Telerama, Yahoo, Lastminute. Promotion of campaign website on VisitBritain.com/fr
E-direct mail	<ul style="list-style-type: none"> Presence in e-DM to England database Feature in e-DM to 45,000 contacts on the VB France database Presence in follow up mailing to campaign respondents
Brochure fulfilment	<ul style="list-style-type: none"> Half page advert in 52-page Touring brochure. 80,000 copies will be produced and distributed.
Press & PR	<ul style="list-style-type: none"> Presence in generic press & PR work for the campaign
Direct Mail	<ul style="list-style-type: none"> Presence in touring themed mailing to 30,000 customers on VB database Presence in touring themed mailing to 20,000 contacts on external database

Level 3: £20,000

Activity	Details
Website	<ul style="list-style-type: none"> Maximum presence on website Online competitions
Online advertising	<ul style="list-style-type: none"> Search Engine Marketing Generic campaign advertising on key travel and lifestyle websites e.g. Le Monde, Telerama, Yahoo, Lastminute. Promotion of campaign website on VisitBritain.com/fr Partner branded online advertising
E-direct mail	<ul style="list-style-type: none"> Presence in e-DM to England database Feature in e-DM to 45,000 contacts on the VB France database Presence in follow up mailing to campaign respondents
Brochure fulfilment	<ul style="list-style-type: none"> Full page advert in 52-page Touring brochure. 80,000 copies will be produced and distributed.
Press & PR	<ul style="list-style-type: none"> Presence in generic press & PR work for the campaign Inclusion in campaign press trip, subject to newsworthiness
Direct Mail	<ul style="list-style-type: none"> Presence in touring themed mailing to 30,000 customers on VB database Presence in touring themed mailing to 20,000 contacts on external database
Offline advertising	<ul style="list-style-type: none"> Feature in full colour supplement with reply postcards in lifestyle magazines as well as regional press. e.g. Ouest France, La Voix du Nord

Additional opportunities

In addition to the Enjoy England consumer campaigns, a number of other marketing activities are available through VisitBritain (e.g. brochure distribution, presence at consumer exhibitions). Please contact VisitBritain for further details.



11) The trade

Overview of trade structure

The French travel trade is made up of tour operators, coach operators, and travel agencies. In addition, associations such as walking clubs or evening colleges will also organise holidays for their members, as will the Comités d'Entreprises (every company with 50 or more employees must give 3% of turnover to this "social club", which then organises staff trips).

- **Tour operators** sell their product through their own or independent travel agencies. Increasingly, they also sell directly to the consumer through the internet (although for holidays to England, number of direct sales are probably not significant).
- **Coach operators** usually sell their products (coach tours) through their own or independent travel agencies.
- **Travel agencies** usually sell products produced by tour or coach operators. Some travel agencies, however, also have a group department that organises holidays for associations.

French tour operators

In 2001, there were about 250 tour operators in France, of which around 60 regularly operate tours to England. There are four types of French tour operator:

1. 'Généralistes' – top national tour operators who produce one or more large brochures (e.g. Nouvelles Frontières). England as a destination is included in these. However, a separate brochure on England is produced in some cases. These packages are sold through their own network of travel agencies, as well as through independent travel agencies. Clientele: mostly individuals although the larger operators will have a groups department.
2. 'Spécialistes' – smaller operators who specialise in specific destinations or in specific activities. Most carriers, whether air or sea, have their own tours. They sell directly as well as through some independent and networked travel agencies. Clientele: mostly individuals.
3. Coach operators – there are about 2,500 coach operators in France, 400 of which are registered through SNET (Syndicat National des Entreprises de Tourisme). Approximately 350 sell England to various degrees. Clientele: groups (à la carte or with pre-determined date departures).
4. Associations – they sell to their own club members or defined market segments (e.g. comités d'entreprise, school groups, groups with a cultural interest). Clientele: groups only.
5. Agency networks: sell their own products as well as others e.g. Thomas Cook (ex. Havas), Carlson Wagonlit. Clientele: mostly individuals.

Tour operators prepare their spring/summer brochures in November/December and their autumn/winter brochures in June/July (to be out for TOP RESA – a major travel trade exhibition usually in September each year).

French travel agencies

Their primary aim is to sell transport and packages set up by tour operators. In 2000 there were about 5,000 points of sale in France, of which approximately 250 were tour operators. 1,600 licensed agencies (3,100 points of sale) are members of SNAV (Syndicat National des Agences de Voyages) with nearly 40% of the agencies concentrated in the Paris area. Travel agents sell only 12% of packages/transport to England. Otherwise bookings are made by the client themselves direct with the accommodation provider and carrier.



Hypermarkets

These travel agency outlets in supermarkets have proliferated over the last few years. They sell through dedicated Internet sites and/or call centres. Some examples: Leclerc Voyages (travel agent with 117 outlets); Vacances Carrefour: (travel agent with 87 outlets); Auchan Voyages: (call centre and website only) Casino Group: phone-sales-only-points for the group's brands (Géant Vacances, Leader Price Voyages, Monoprix Voyages, Mousquetaires).

All the above are members of SNAV. The tendency has been for them to offer time-restrictive but very attractively priced offers to supermarket clientèle. British Airways and SNCF have both seen excellent sales growth through this distribution channel.

Key carriers for the market

Budget airlines	Major airlines
Ryanair	British Airways
EasyJet	Air France
Bmibaby	BMI
Flybe	
Jet2.com	
Ferry companies	Train
P&O Ferries Ltd.	Eurostar
Norfolkline	Eurotunnel
Seafrance	
Transmanche Ferries	
Brittany Ferries	
Condor Ferries Ltd.	
Emeraude Lines	

Reaching the French travel trade

Sales Calls

Timing

July and August are quiet months for travel agents. However, the contacts you wish to see may well be on holiday! Tour operators prepare their spring/summer brochures in December/January and their autumn/winter brochures in June/July.

Public holidays 2006

Fixed public holidays in France	
1 January	New Year's Day
1 May	Labour Day
8 May	Fête de la Victoire 1945 (WWII Victory Day)
14 July	Bastille Day (Fête nationale)
15 August	Assumption of the Blessed Virgin Mary (Assomption)
1 November	All Saints Day (La Toussaint)
11 November	Armistice Day (Jour d'armistice)
25 December	Christmas Day (Noël)
26 December	2nd Day of Christmas (in Alsace & Lorraine-only)

Note that holidays falling at the weekend are not moved

Moveable public holidays in France	
Good Friday	14 April
Easter (Pâques)	16 April
Easter Monday	17 April
Ascension (l'Ascension)	25 May
Whit Sunday (la Pentecôte)	4 June
Whit Monday	5 June

Note that when a holiday falls on a Tuesday or Thursday, many French people may take the respective Monday or Friday off as well. This is not official and does not apply to institutions such as banks or government, but can cause difficulties doing business on occasions.

Transport

Allow plenty of time between appointments, especially in Paris and Ile de France. Remember to ask for the nearest Metro station – this will help you to locate the address more easily and avoid traffic jams.

Transport in Paris: the underground system is very good and easy to use. You can get a daily pass but make sure you buy one that covers the zones you are planning to visit. Taxis are easily found everywhere (average cost for a ride in the centre of Paris is 20 Euros, much higher if you go out to the suburbs). From Roissy airport, you can use the Roissybus, which will drop you behind the Opera, or the RER - suburban express to Auber – both in the heart of Paris.

Etiquette

Make an appointment well in advance and reconfirm a few days before. Never turn up without an appointment. Be punctual in case your contact has a tight schedule but be prepared to wait at least 15 minutes.

Personal relationships are very important to the French and take time to build. Be patient. Give your contact the impression he/she is getting special attention. Make sure you follow up on your visits. Your future business depends on that as much as on the visit itself. If you are asked for a quote, send it straight away.

Do not be offended by direct talk (e.g. 'the food is disgusting', 'hotels are outrageously expensive'...). Just be prepared for it! Likewise, do not be taken aback if (when!) you are constantly interrupted while talking – it means you generate interest!

Travel agents and tour operators are reluctant to sell London due to a lack of beds and long delays in getting replies from English suppliers. Prove them wrong.

Language/currency

Use your French or come along with someone who speaks French. It is likely that your contact will be happy to speak English with you, after you have made an effort in French.

It is highly recommended that you have brochures in French or at least a fact sheet presenting your product.

Remember to quote your prices either directly in Euros or in £ with current Euro equivalent.



12) Business visits/events

Business visits statistics

27% of travel from France to England is for business purposes, and this accounted for 30% of spend (IPS).

Business visitors France	Visits 2004 (000)	% Business visits	Spend 2004 (£m)	% Business spend
Trade Fair / Exhibition	25	2.5	9	3.9
Conference / Large Meeting	72	7.3	19	8.6
Other Business	901	90.3	195	87.6
Business visitors France	AEV (£)	AED (£)	ALS (days)	
Trade Fair / Exhibition	351	167	2.1	
Conference / Large Meeting	264	125	2.1	
Other Business	217	73	3.0	
<i>Source: IPS</i>				

French Business visits are made up of 10% Conferences, Large Meetings, Trade Fairs or Exhibitions and 90% individual business travel.

Meet England – business visits & events opportunities

Hospitality England campaign - Winter 2006

Sponsorship Packages **from £1000**

Dedicated campaign to promote the wide range of sporting and non-sporting hospitality activities geared towards the corporate and incentive markets.

Suitable for Venues & Attractions offering corporate hospitality packages, Corporate Hospitality Agencies, Ticket Agents, Hotel Groups (offering bespoke packages).

English country conferences - Sprint 2007

Sponsorship Packages **from £1000**

Business Meetings, Conferences and Incentives at countryside venues are the theme of this campaign, which will include Country House Hotels, Conference Centres and Stately Homes.

Destination features

England corporate hospitality in voyages d'affaires (or similar) **on request**

CRM

E-mail blast to qualified French database **£100**
(Per article based on a minimum of **6 company features**)



13) Enjoy England in France

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Further information

(Syndicat National des Entreprises de
Tourisme) – www.snet.fr

SNAV (Syndicat National des Agents de
Voyages) – www.snav.org

For any further information relating to the Irish market, please contact the London-based International Markets Team (see above), or visit VisitBritain's dedicated website for the UK tourism industry: www.tourismtrade.org.uk/englanddomesticalandinternational/

VisitBritain publishes a quarterly round-up of its research and intelligence called Visitor's Voice. To receive it, subscribe to the UK Industry eNewsletter at www.visitbritain.com/ukindustry.

To find out more about VisitBritain's research visit www.visitbritain.com/research.

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Information sources used to compile this report

- International Passenger Survey figures (IPS) 2004 (Office for National Statistics)

NB: Data from International Passenger Survey has been made available by the Office for National Statistics and has been used by permission. The ONS do not bear any responsibility for the analysis or interpretation of the data reported here.

- Anholt-GMI Nation Brands Index – Waves 2 & 3 2005 (Quantitative)
- Foresight - July 2005
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- IMF / Economist / US Census Bureau
- BBC websites
- Global Tourism Navigator
- FCO (Foreign & Commonwealth Office)
- ETC (European Travel Commission) and ETC New Media Review
- VisitBritain France Business Plans, Insights and Intelligence Reports 2005