

The French Traveller:

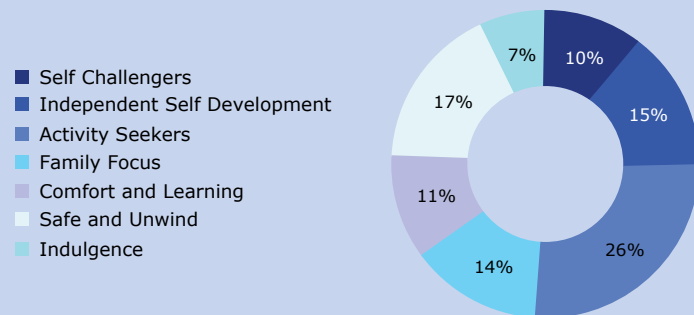
A segmentation of the French Market

A segmentation study was undertaken on the French long haul traveller market to provide Tourism Queensland with a better understanding of their attitudes and motivations toward long haul travel¹. The study also allowed for the identification of the global Experience Seeker² market within the French long haul market.

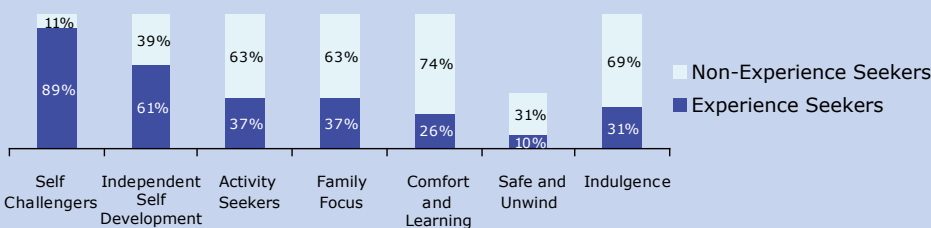
The study identified 4.8 million long haul travellers within the French population (10% of the adult population). Within this long haul market, six distinct segments were revealed: Self Challengers (10%), Independent Self Development (15%), Activity Seekers (26%), Family Focus (14%), Comfort and Learning (11%), Safe and Unwind (17%) and Indulgence (7%). Further, the proportion of global Experience Seekers² within each segment was identified.

Tourism Queensland has identified Self Challengers and Independent Self Development as key targets for Queensland, representing 1.2 million travellers.

French Traveller Segments



Proportion of Experience Seekers²



Overall, findings indicate that:

- French long haul travellers are defined by a number of needs including: the need for sun, relaxation and nature; the need to get off the beaten track; and the need for indulgence.
- There appears to be a generational divide with younger travellers looking for a quintessential beach holiday which offers an opportunity to immerse in nature and self exploration; and older travellers looking to see more of the world within the comfort of a group tour.

The key characteristics that set each segment apart from the average French long haul traveller are contained in the following profiles.

Self Challengers



Travel is a big part of their life and they are confident travelling to new places. They like to immerse themselves in the local culture and focus on self discovery during their travels. They often use local transport and will stay in smaller accommodation places as they want to blend in with the locals and learn some of the language.

Self Challengers like to step into the unknown. They want to explore new cultures and meet new people. On holidays they want to feel enriched, alive, sociable and carefree.

Profile

- Tend to be fluent in English
- Mostly couples (either without children or with children under 16 years)
- More likely to be under 55 years
- Tend to travel for two to four weeks
- Prefer to stay in moderate to luxury accommodation – however are more likely to stay with friends or in self catering apartments, B&B's and backpackers
- Medium to high spend
- Most are planning to visit Australia, however are unsure when they will visit

Trip planning

- They start planning their trip one to six months in advance, though bookings are made closer to the departure date
- More likely to book their flights through the airline website
- More likely to plan the entire trip on their own and book their accommodation as they go – therefore are more open to using travel guides for planning accommodation

Holiday activities

Self Challengers want to participate in significantly more activities including:

- Trying new/local cuisine
- Visiting local markets
- Meeting locals/new people
- Visiting historical places
- Exploring the back streets
- Visiting world heritage sites
- Shopping
- Spending time in the wilderness

¹ The study format replicated recent market segmentation studies by Tourism Australia in Germany, the United Kingdom, China, Japan and the USA.

² Experience Seekers are a global consumer target identified by Tourism Australia. For more information see www.tourism.australia.com

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Independent Self Development



Independent Self Development are confident travellers who like to do their own thing and explore new places autonomously. They will return to a location they've visited before, however the unknown is part of the challenge and they prefer their destination to be undiscovered.

Independent Self Development want to explore the world, challenge themselves and have an adventure. They desire travel that is educational so they can learn new things and grow as a person. They want to be active and to feel excited, alive and lively.

Profile

- Intermediate English skills
- Mostly singles (without children)
- Tend to travel for two to three weeks
- Prefer to stay in moderate to luxury hotels or all-inclusive resorts
- Low to medium spenders
- Australia is an appealing holiday destination, with just under half intending to visit within five years

Trip planning

- Tend to plan their trip one to six months in advance
- They are more likely to book their flight close to the date of departure (sometimes only three weeks in advance) and tend to book accommodation one to three months in advance
- They are happy to do their own research and are more likely to use internet travel sites

Holiday activities

Independent Self Development travellers enjoy fun and adventure activities as well as relaxing in the sun on the beach. They are more likely to go to theme parks, take photos, spend time in the wilderness, enjoy the nightlife, go diving/snorkelling, sailing, four wheel driving, meet new people, visit famous sites and get close to the natural environment.

Activity Seekers



Activity Seekers enjoy a challenge, want to make new friends and like to have a variety of activities available. A well planned holiday is important as they prefer to avoid areas frequented by tourists; unless there's something in particular they want to see.

Activity Seekers like to test themselves through physical activity, having an adventure and may also participate in their favourite hobby or sport (but all in a very controlled and comfortable manner). They want holidays to make them feel bold, connected, inspired and balanced.

Profile

- Basic English skills
- More likely to be under 34 years of age
- Mostly travel with their partner, sometimes with children
- Tend to travel for two to three weeks
- Prefer to stay in moderate to luxury hotels, however are more likely to stay in all-inclusive resorts and on cruise ships
- Low spenders
- Not as deterred by the expense or distance to get to Australia. Almost half would like to visit within the next 5 years

Trip planning

- Tend to plan and book their trip two to six months in advance
- Flights are booked one to six months in advance, while accommodation tends to be booked closer to departure (one to three months in advance)
- Travel on all-inclusive group tours
- They are less likely to use travel websites, books, guides or local tourist offices as sources of information

Holiday activities

Overall Activity Seekers are interested in exercise and physical activity, which they do in a more controlled way (not through extreme sports but through golf, fishing, cycling). They choose activities that can be enjoyed by their friends, family or travel group.

Family Focus



Family Focus enjoy doing their own thing, driving around independently, exploring the destination and trying to blend in with the locals. They don't mind visiting the same place more than once as they are not very confident travelling to new destinations. The threat of terrorism is an important consideration when choosing their holiday destination.

Family Focus want to bond and reconnect with family and friends. They want to feel nurturing, caring, carefree as well as in tune with nature.

Profile

- Basic to intermediate English skills
- Mostly travel with their spouse, family or with friends
- Tend to travel for three to four weeks
- Prefer to stay with family/ friends or in budget hotels
- Low spenders

Trip planning

- Trip planning/booking occurs one to six months in advance
- A key planning source is friends or relatives who either live at the destination or have visited before

Holiday activities

Activities that can be undertaken with family and friends are paramount. Family Focus travellers are more likely than the average French traveller to visit famous landmarks, historical places, natural world heritage sites and national parks or botanic gardens.

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Comfort & Learning



Comfort and Learning desire holidays that are educational. They are interested in other cultures and seeing the famous sites, however they prefer to travel with a guide and to have all their activities organised for them.

Comfort and Learning enjoy a well planned, organised and ordered holiday that allows them to see more of the world, visit the famous sites and explore new cultures from the comfort of a group tour. Holidays allow them to satisfy their curiosity and feel enriched.

Profile

- Nil to basic English
- More likely to be 50 years or older
- Mostly travel with their partner
- Tend to travel for two weeks
- Prefer to stay in luxury hotels
- Medium to high spenders
- They are more likely to mention time, distance and cost as barriers of travelling to Australia

Trip planning

- Trip planning occurs one to six months in advance, with bookings often made six months in advance
- They are more likely to use a travel agent when planning and booking their trip
- They tend to travel on all-inclusive group tours

Holiday activities

Comfort and Learning are interested in cultural and natural experiences including visiting historical places, world heritage sites and famous landmarks. They enjoy group tours and are interested in experiencing indigenous culture. They are less likely to be interested in relaxing in the sun or at the beach, or in visiting or spending time with friends and family.

Safe and Unwind



Safety and budget are key priorities for Safe and Unwind travellers – the threat of terrorism is a major influence on their travel decisions and they will shop around for the best holiday deals.

Safe and Unwind enjoy a well researched and planned holiday in a safe destination that allows them to feel relaxed, comfortable, organised, happy and secure. They seek to relax, unwind and disconnect from the rest of the world.

Profile

- Nil to basic English skills
- Travel with their partner, friends or relatives
- Tend to travel for one to two weeks
- Prefer to stay in moderate to luxury accommodation
- Low spenders

Trip planning

Safe and Unwind plan and book their trip one to six months in advance. They tend to travel on all-inclusive group tours and customised tours. They prefer to use the internet to investigate accommodation options and will use a travel agent to book their flight.

Holiday activities

Safe and Unwind travellers are more likely to plan their holidays around spending time in the sun and relaxing by the pool or at the beach. They are also more interested in spending time with family, enjoying the nightlife, going on guided day tours and visiting tropical islands.

Indulgence



Indulgence travellers are more likely than other travellers to be concerned with safety and choose holiday destinations that are safe. They are much less interested in challenging themselves, looking for adventures or immersing in the local cultures.

Holidays are about indulging, relaxing, unwinding and feeling free.

Profile

- Basic to intermediate English skills
- Travel with their partner or as a family
- Tend to travel for one to two weeks
- Prefer to stay in luxury accommodation
- High spenders

Trip planning

Indulgence plan and book their trip two to six months in advance. They tend to travel on all-inclusive group tours and customised tours. They are more likely to use travel review websites when planning their trip, however prefer to use a travel agent or internet travel site when arranging accommodation

Holiday activities

Indulgence travellers want to spend time on the beach and relax in the sun. They are also more interested in shopping and casinos than other travellers.