

Outlook for Travel to Britain

- Last minute holiday bookings are still popular and Britain is well placed to continue to benefit from this trend.

Britain in the News

- From now until 2012, 13,300 guest houses should open in London and more than €12 billion will be invested in the capital before the beginning of the Olympic Games (Tour Hebdo).

General Market Mood

- Last minute holiday bookings are expected to continue to thrive this winter. It's also anticipated that those French consumers who are in the habit of holidaying will continue to treat themselves but will strongly scrutinise what is and isn't essential. Consumers want to be in control of their money and know the exact cost of their trip hence the all inclusive package will hold strong this winter. Cruises and short haul destinations that provide a real change of scenery will be most popular. In particular destinations that find themselves in close proximity to France.
- France Sport International has been named as the official ticket provider for the Vancouver Olympic Games in 2010. FSP will sell tickets as well as the packages (tickets + hotel stay). By all accounts this is a good indication as to who will be the official provider for the London 2012 games. (Le Quotidien du Tourisme)
- 84% of the French are rather satisfied with their life. This figure has increased by 4% compared to the autumn 2008 and is better than the European average. Yet there are more pessimistic about their future than their European neighbours. (the Eurobarometer, TNS Sofres).

Consumer Behaviour

- Adventure tour operators notice an increase of 'a la carte' itineraries, short and proximity breaks, cultural exchanges. People tend to book at the last minute and grown fond of sustainability. Hence an offer which will be more diverse. (reduce of paper use, communication on social networks). (Adventure Travel Trade Association (ATTA))
- A survey of 112 companies in all B2B sectors found the use of the Web 2.0 in marketing and B2B communication will grow faster in 2010. A third of the managers have already created platforms where videos and content are shared or share directly with communities via blogs and chat platforms. From now until next year 60% of companies will be using these methods. (Journal du Net)
- The French cut down on their hotel budgets and spend on average €108 per person in foreign hotels. A survey carried out by HPI d'Hotels.com confirms that the French rank 3rd place after the Finnish and the German market in terms of spend. (Le Quotidien du Tourisme)
- French e-traders have registered a €5.54 billion turnover during quarter 3, reaching a total of €60 millions transactions (+38% in one year). The average basket has reached €159. (Journal du Net)

Media Matters

- New monthly news urban magazine: Aperçu Magazine €3 (circulation of 15,000).
- Gross tariffs of the press for 2010 have been stable with an average increase of +1.35%.
- Platinum: a new quarterly luxury and lifestyle magazine. (circulation of 40,000).

Routes and Fares

- Since 14 November Euroferries has been offering crossings from Boulogne to Ramsgate.
- Norfolkline wins stakes in the channel market: sales are up by 28% compared with 2008. This equates to 2.5 million passengers and 800,000 cars during 2009.
- Brittany Ferries has cut the daily service from Roscoff to Plymouth during the winter months due to slow business
- Gaeland Ashling tour operator offered a Pop Art week end in London 2 days/1 night at €225 until 31 October.
- Bourse des Voyages has offered since October 2009, a Harry Potter auto tour in Scotland of 8 days/7 nights at 922€.
- SeaFrance has stopped its tour operating from the 1 October.
- Brittany Ferries has targeted couples and families with special sailing offers to England and Ireland thereby boosting autumn sales. Reductions anywhere from €50 to €150 on trips to England or Ireland. Also on offer is a 2 day/1 night trip to Devon and Cornwall from €241 instead of €291; and a Toussaint trip to Londres for the family, including 2 days and 1 night at the Park Plaza County Hall 4star from €119 per person.
- Eurostar has launched its new website Trip Planner www.eurostartripplanner.com, which provides travellers with the best ideas on where to go, what to do, where to shop in London. Ideas on breaks will be provided in themes such as "London for 0 Euros", "Movie London", and "London in one day".
- Ryanair arrives in Bordeaux on 17 December with the opening of 4 routes including Edinburgh from March 2010. In response to them pulling out of Bale-Mulhouse on 2 December (serving London Stansted) easyjet will be adding a 5th plane based out of the airport from summer 2010. No details on routes served as yet.
- Air France has revisited its European pricing strategy to counter attack the effect of the economic crisis and low cost airlines but without cutting back on the quality of the service. Source: Le Quotidien du Tourisme.

Business Tourism

- Nouvelles Frontières tour operator has launched an iPhone application and bids on last minute sales. They have also developed a geolocation service which enables an individual to find the closest travel agency and last minute/flash promotions. Note that 2 million French use the iPhone.
- A new trade show for business tourism called 'Market Place du Voyages d'Affaires' will take place on 31 March and 1 April 2010 at Porte de Versailles, Paris, hosting around 4,000 visitors from large companies, PME and PMI, associations amongst others.
- Business trip spending has decreased by 18% compared to 2008, 66% of the companies have decreased their travel budget by 31%. (19th American Express Business Tourism Barometer).

Leisure Travel Trade

- Expedia experienced a 25% increase on Toussaint holiday bookings this year compared to 2008. The key destination is the United Arab Emirates. On the European market the winners are Germany (Berlin) (20th anniversary of the fall of the Berlin wall), an increase of 114%; Sweden saw an increase of 110%; United Kingdom(London) an increase of 92%; Italy an increase of 56%. However Spain bookings are down by 5%.

Competitor Activity

- The NTO for Belgium organised a treasure hunt on the Flemish coast in September. The aim was to look for a diamond pipe of a value of €10,000 hidden on the coast. The destination created a micro site where you can look for the treasure online thanks to multiple choice questions. You can

also download 3 itineraries which you would use on site. The correct answers will enable them to elucidate a final riddle which they will find the solution on the site from 30 October. The first one to input the correct answer will win the prize.

- The Moroccan tourist board has developed a new campaign to highlight Marrakech and targeting families, couples and singles. A new content site has been created and is very innovating www.marrakech.travel. It combines a virtual and an interactive immersion within the city. A PR campaign and an online advertising with a competition complete the campaign.
- France regions promotions:
 - *'L'île-de-France, so close to Europe'*: Paris was used as the key hook in enticing European visitors to Greater Paris. The campaign targets young tourists and city-break aficionados. Key selling points: dynamic, and geographical & cultural proximity. The campaign was rolled out in 13 European cities with the slogan "You've never been so close".
 - *'Corsica – a heart taken by nature'*: With a budget of 1 million € per year, Corsica plays on it's strength of flora and fauna and quality, thus positioning itself at length from the mass market destinations. It's slogan is "Qualité Corse. Réserve naturelle de vacances".
 - *'L'Aisne'*, located in the county of Picard, previously welcomed very few visitors until 2006. After which for 5 consecutive years now Aisne has communicated under various banners and slogans using a play on words with the letter 'N'. EG 'Changer d'air pour l'N' and 'L'N, quand on y goûte, on l'M'. Activity included a website www.aisne-open.com and tarpaulins placed along the Parisian ring road. Budget: €1 million over the course of 3 years.
- The Netherlands NTO partnered with Monop supermarkets with a competition promoted in 41 shops.
- The Parisian Chamber of Commerce and the City of Paris will launch a domestic campaign in January 2010 to encourage people to shop in Paris. January is traditionally known as a key down time for tourism in the capital so the aim is to combat this slow period. 'Atout France' will head up the international French marketing campaign in January 2010 to encourage the British, Germans, Dutch, Lux, Italians, Spanish etc. to Paris.
- The Tourist office of Paris and Ile de France have launched a new campaign to entice French people to visit or revisit the capital. This activity has been brought on following a 10% decline in visitors to the capital due to the economic crisis, strongly felt in Spain and in England. Outdoor advertising will take place in Lyon, Strasbourg, Nantes and Marseille, as well as Brussels, Geneva and Lausanne. The theme of the TV and posters: kissing in Paris!

VisitBritain Activity Update

- VisitBritain had a stand at Top Resa travel show from 22 to 25 September with the theme of cinema. 26,000 participants attended the show, 40% of visitors were travel agents. We held meetings with agency networks plus key tour operators and 2 new programs are pending as a result.
- Face to face meetings with key operators to gather intelligence and qualify attendees at future events.
- 5 group press trips held in partnership with industry, including Spa, Oscar Wilde and Sherlock Holmes . 10 individuals.
- Facebook press group developed, daily postings and content already converted into trade press.
- Online shop promotions with Destination Magazine (September) and Accor Hotels (December).

Upcoming activity

- Meet the French Trade – 9 February 2010. 25 UK trade Partners will attend a workshop with local operators EFL companies and select travel agents.
- Attending Adonet (Foreign Tourist Office Assn) Press Workshop 11 January 2010.
- 2 group press trips on the themes of Green Wales and Yorkshire
- French operator group attending Best of Britain & Ireland with associated familiarisation trip.
- Attending the key business tourism show, Meedex, March 2010.

Who's in Town?

- Alice Russell is in concert.