

Governor's Conference Massachusetts – March 24th 2010

FRENCH MARKET PROFILE

General Overview

- French population: 65 million
- 5th largest international industrialized economy
- 2nd European industrialized economy
- Capital: Paris (pop. 2.1 million)
- Main cities: Lyon, Marseilles, Lille, Bordeaux, Strasbourg, Toulouse, Nice, Nantes

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FRENCH MARKET PROFILE

French traveller profile

- USA : favorite long haul destination
- Average of 25-45 years old
- 74% of repeat travellers for the US
- Average visitor spending: \$1,640
- Average length of stay in the US: 15.8 nights
- Number of States visited in one trip: 1.6

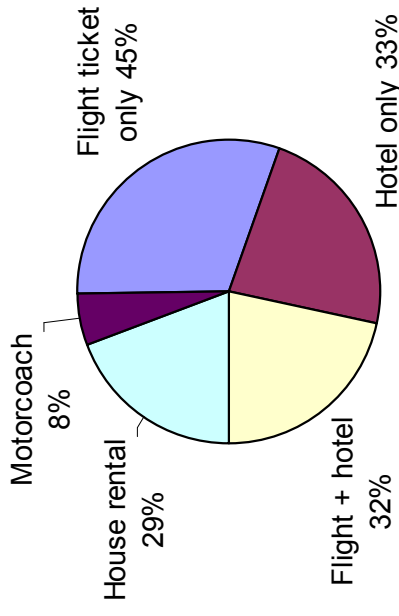
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French traveller profile

- **Internet:** primary source of information
- *Online sales have increased by 33% in 2009 vs. 2008. In 2009 the French market was one of the most dynamic markets in Europe with € 24,7 billion turnover*

- **Steady increase in purchases on the web:**



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Travel market overview

- 5 to 9 weeks paid vacations per year
- 12 public holidays per year
- 24% of French intend to increase their holiday budget in the following months
- 60% of French web users purchase their travel packages and flight tickets exclusively on the Internet, and 83% have booked a trip online in the last 12 months which makes Internet the first purchasing channel in France

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Travel market overview - USA

- 1,245 million French travellers in the US in 2008
- 1,112 million French travellers in the US from January to November 2009
- France: 3rd largest European market for the number of visitors and the 4th overseas market after Japan, UK and Germany
- Peak months for travel to the US: April, July-August & October

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Travel market overview – Massachusetts

- 1 daily non-stop flight Paris-Boston with Air France
- 1 seasonal flight Paris-Boston with American Airlines (from April to November 2010)
- Average of 75,000 French travellers in MA per year

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Travel market overview – Massachusetts

- In MA, French travellers are looking for:
 - Cultural activities
 - Charming accommodation (B&Bs, historic hotels)
 - Gastronomy
- Massachusetts and New-England have a strong visibility on French market because of history, heritage and all cultural assets of the region

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French travel professionals

- Almost 70 French tour operators feature MA 11% increase between 2008 & 2009 / 74% increase in the number of products featuring MA
- French professionals are confident for 2010: high number of quotes and bookings
- Tour operators are printing less brochures and developing websites
- Only 12% of the French travellers use travel professionals but they use tour operators' brochures to prepare their vacation

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Activities – Media

FY09/10

- 2 individual press trips: Sud-Ouest and L'Express Styles + 1 to be scheduled before June 2010
- 1 group press trip in October 2009: Télé 7 jours, La Montagne, Tour Hebdo, Luxe Magazine, L'Est Républicain
- Monthly press releases
- Yearly media coverage (from July 2009 to February 2010): \$5,078 million

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Activities – Trade

- Bi-monthly newsletters
- 9 training session from September 2009 (total of 117 pax)
- 10 sales calls per month
- 1 trade fam planned with Jetset in May 2010

Activities – Consumer

- Web site www.massvacation.fr

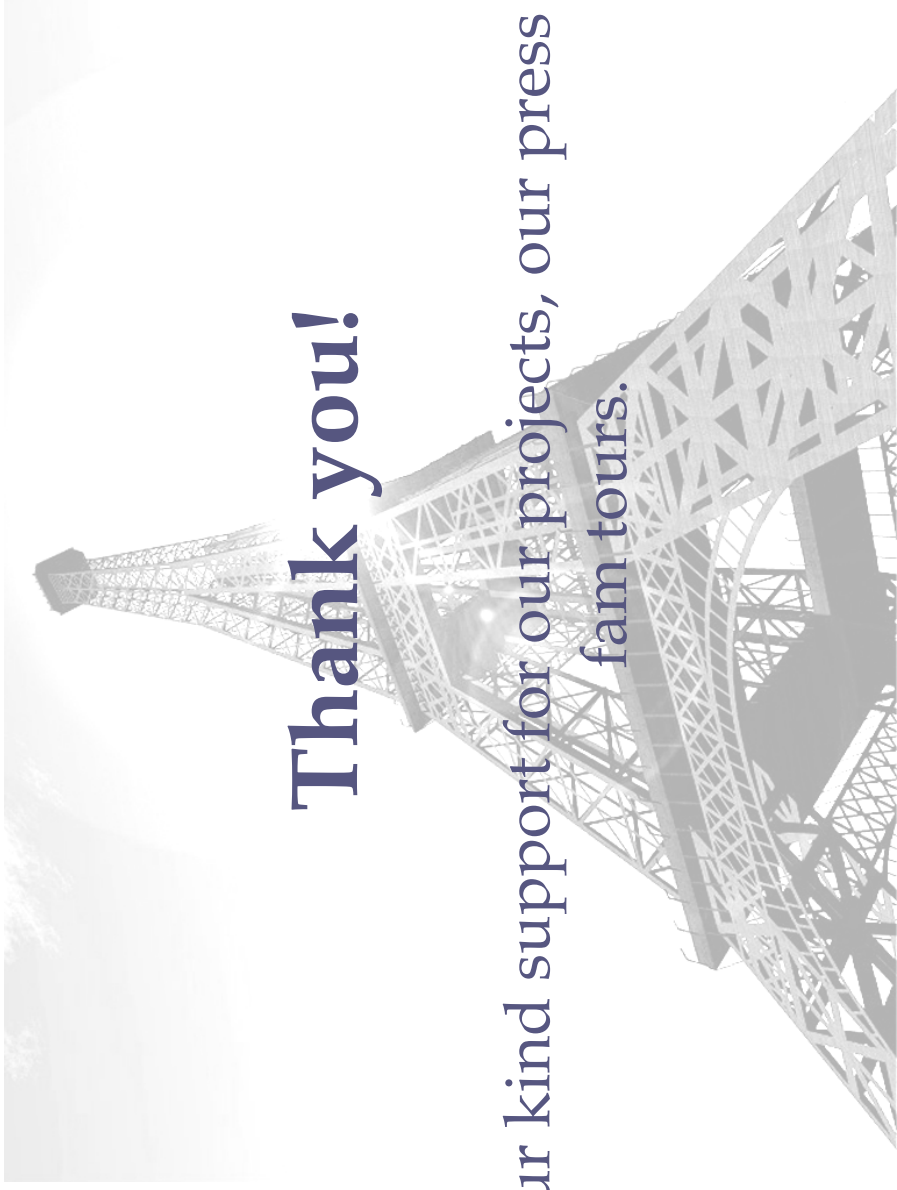
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Competitive destinations

- New England States
- Montreal
- United Emirates such as Dubai and Abu Dhabi

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