

Case Study

Atout France Maximizes the Travel Agency Channel Using ARC & IATA's Global Agency Pro

Access to Air Ticketing Data Helps Tourism Development Agency
Optimize Destination Growth



About the Organization:

Atout France is responsible for developing worldwide travel and tourism to France. In the U.S. market, Atout France USA is the sole operator responsible for the promotion of all aspects of tourism to France. The organization provides support and services to tourism professionals as well as information to consumers.



Challenge:

Atout France needed a more efficient and accurate way to monitor the travel agency sales channel from the United States to France, benchmark against other destinations and connect with high-quality agents. The organization relied on partners to supply their own sales data on a monthly basis. Atout France would then compile the sales data into performance reports – a very manual and time-consuming process – which often provided an incomplete view of channel activity.



Strategy:

Atout France could use Global Agency Pro, a business intelligence tool created by ARC and IATA, to get a worldwide view of flights ticketed through the global travel agency channel. Atout France could then accurately analyze France's performance and gain agency sales insights to inform strategy, strengthen partner relationships and improve ROI on marketing initiatives.



Result:

Using comprehensive, trustworthy data, Atout France now has a clearer picture of tickets and departures to France as well as accurate benchmarking data on other destinations. Monthly sales reports take a third of the time to complete, while channel performance reports and ROI tracking on marketing initiatives takes half the time it used to. Global Agency Pro has aided in uncovering not only travel market trends but also new sales strategies based on agency type, as well as helped build new relationships with agency partners.

As the head of market research and strategic development at Atout France, the country's official tourism development agency, Veronique Amato is charged with many of the same responsibilities as other managers at destination marketing organizations and tourism boards ... and is faced with many of the same challenges.

Keeping a close watch on the market, quickly reporting on France's tourism performance, as well as the performance of like destinations, determining the timing and audiences for various promotions, and where to host training seminars and press conferences are just a few of the duties she oversees in her all-encompassing role. And critical to completing them all: obtaining accurate, timely and trustworthy travel data.

In the past, Amato relied heavily on her preferred suppliers, travel agencies, tour operators and other trade partners to give her sales data on a monthly basis. After collecting these numbers, she'd undergo a manual process of compiling the data into digestible status reports for her corporate headquarters in Paris – and hope that by the time she submitted them, the data would still be accurate and relevant.

But Amato's job got a lot easier when Atout France purchased Global Agency Pro – a business intelligence tool, created by ARC and IATA, that offers destination marketing organizations and tourism boards a worldwide view of flights ticketed through the global travel agency distribution channel to help analyze destination performance as well as market potential. As the financial settlement link between travel agencies and airlines, ARC and IATA maintain the largest, most comprehensive set of settled data on passenger air travel.

Now, Amato explained, "Global Agency Pro is at the core of our assessment and has become the main data source fueling our business." The tool has saved her exorbitant amounts of time and given her the confidence she needs to know her work is not only valuable, but also accurate. "It is so much easier to do reporting now," she said. "I can judge our business week to week. Before Global Agency Pro, reports would sometimes take me five weeks to pull together. Now, I can do reporting on a weekly basis, with

ease – and with numbers I know are real," she continued. "Global Agency Pro has become essential for our everyday work."

Atout France's U.S. office uses Global Agency Pro for three main purposes: to measure visitors to France; flag and respond to travel trends; and identify who the country's biggest tourism sellers are and where they're located – for the purpose of targeted promotions and training opportunities.

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Surveying the Landscape

Like most Global Agency Pro customers, Atout France primarily uses the tool to get a good assessment of travel to France and to see the full market landscape of travel agency sales. "Weekly, we look at year-over-year figures and analyze the number of tickets issued and the number

Key Product Uses

- Measure passengers ticketed through the agency distribution channel
- Find high-quality travel agents and measure destination loyalty
- Target promotions, including fam trips, to the right agents and measure ROI on these initiatives
- Uncover the best locations for training opportunities
- Identify new sales strategies and channels
- Recognize and track travel trends, including market seasonality
- Benchmark destination performance against like destinations

of departures to France sold by all U.S. agencies. We then filter down specifically by online travel agencies (OTAs) and traditional agencies, as well as look at sales to each destination within France.”

Amato uses this data as the basis for her status reports that she sends to Atout France’s corporate office. “The tool gives us a true, full picture of our market to better identify trends,” she said.

An example of this occurred after the 2015 terrorist attack on Paris and 2016 terrorist attack on Nice. The press reported tourism numbers had dropped dramatically, and partners were worried. Amato explained, “We went straight to Global Agency Pro to verify the situation, and as we expected, it was much less dramatic than what was

reported. Using real data, we were able to reassure our partners and release accurate numbers to the press.”

Atout France was also able to further analyze the figures by locating passengers’ points of origin and end destinations, and identify length of stays to understand trends in traveler behavior during this time. She said, “Paris is usually 70 to 80 percent of our business from the United States, but last year we were able to actually watch a shift happen. Americans were still going to France after the terrorist attacks, but they were going to what I would call secondary destinations in France.”

Using the tool, Atout France could see that Paris’s passenger counts registered a small increase of 0.4 percent in ticketing but were down 2 percent in departures, while Nice decreased by 2 percent in ticketing and 1 percent in departures. However, ticketing to destinations in the southwestern part of the country were way up: Biarritz up 194 percent, Nantes up 88 percent and Montpellier up almost 14 percent, for example.

After this trend was communicated to headquarters, the Paris office was able to strategically partner with officials in secondary destinations to run promotions in the United States to capitalize on the travel shift. “Because of Global Agency Pro, we were able to adjust our sales strategy to keep France’s tourism numbers consistent during a tough time,” Amato said.

The tourism organization also uses point-of-origin data in the tool to analyze patterns surrounding travelers’ full trip details. “Americans often go to one to two destinations when traveling to France,” Amato explained. “Using Global Agency Pro, we’re able to see what the whole trip looks like.” This opens the door for joint campaigns – packages with the right destination partners that can better target and attract travelers. She continued, “There’s no more second guessing on success when it comes to these initiatives.”

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A Weekly Glance

Atout France uses Global Agency Pro on a weekly basis to analyze:

- Volume of tickets issued and departures through the agency channel to France and its territories [from the United States]
- Volume of tickets issued and departures through the agency channel to each popular destination within France [from the United States]
- Traffic [from the United States] to like destinations, including the U.K., Germany, Italy and Spain
- Performance of top agencies selling France’s primary cities
- Performance of agency channel types, such as OTAs, meetings and incentives, traditional agencies and cruise companies

The organization compares this data to the same week and/or month from each year prior to track seasonality, spot trends and flag decreases.

Sizing Up the Market

Using Global Agency Pro, Atout France is now confident in their knowledge of the country's air travel performance, but beyond that, equally confident in where the country stands in comparison to similar destinations by examining benchmarking data available in the tool.

"I look at data on flights to countries France considers comparable, such as the U.K., Italy, Germany and Spain. The goal is to make sure France is in line with these destinations – or that there are no drastic disparities in our benchmarks," she said. For example, she now knows the usual ebb and flow of her sales in comparison to these countries. So, if the U.K. is suddenly climbing in sales and France is suddenly dropping, that's a red flag that needs to be analyzed further.

The result? Increased visibility into sales and agency trends over time, benchmarked against comparable destinations, helps Atout France better measure their own agency loyalty, identify new agencies to target based on who's selling like destinations, and recognize market and travel trends to take advantage of.

Identifying High-Quality Agents

The tourism organization profits on understanding these trends by running more targeted, and therefore more successful, promotions and hosting more effective training visits to the United States – no more wasted funds or unknown ROI.

Amato looks at year-over-year sales data in the tool to identify the top agency performers as well as those not meeting their quotas. "The tool has definitely helped us identify high-quality agencies. We know who our best producers are now," Amato stated.

Global Agency Pro offers a full view of agency ticketing data, reducing effort and dollars spent on finding the right destination advocates, freeing up more time to focus on proactive marketing. Furthermore, the tool provides contact information for every agency pinpointed. She said, "We now have a list of the agencies we need and their contact information, and we use this information to connect with our U.S. partners, in more ways than one."

Headquarters often asks the U.S. office to identify locations with the highest growth potential. "I'm now able to confidently tell them which locations are worth their time," Amato explained, "and when they come to the United States to do an event, I can pull listings for that region to help them reach those agents."

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Amato has been able to pivot corporate visits away from just the popular U.S. destinations to those actually driving the most sales using Global Agency Pro's data. For example, she said, "California used to be a top state for issuing tickets to France, but in 2016, we saw a rise in Florida." From this finding, Atout France was able to redirect a corporate visit to Florida and also realign marketing efforts to this region. Additionally, they were able to identify the exact sellers

Time Savings Testimony

Amato reports that assembling monthly sales reports now takes her one third of the time thanks to Global Agency Pro. The tool provides year-over-year comparisons, which eliminates the need to compile and sort sales data every time.

The agency grouping component, which segments agency sales by agency type, has cut the time it takes her to report on channel performance and track ROI for sales and marketing initiatives in half.

"Because we get more insight from Global Agency Pro than ever before, and are saving more time using the tool, we now have the data and extra time for deeper analysis to increase our destination's success," Amato stated.

located in Florida to offer one-to-one promotions, including familiarization (fam) trips. The organization now knows they are supplying fam trips to the right agents – and can track their return on these investments from directly within the tool.

Piloting Sales Strategies

Global Agency Pro also allows users to drill down into agency details, outside of sales numbers and contact information, including what types of agencies are selling the destination.

Amato said, “Because of the increase of ticket issuance from Florida we noted in the tool, we dug deeper to see what the cause could be, and we uncovered that sales to France by cruise companies, from Florida ports, were on the rise. From this, we were able to identify a new distribution strategy, targeting and tracking the cruise channel.”

Atout France now attends cruise trade shows, including Seatrade and Cruise360, on a regular basis to get face to face with these partners – a tactic they weren’t engaging in before. The organization saw France’s cruise channel performance increase significantly: 22.4 percent year-over year, from 2015 to 2016.

Global Agency Pro allows users to take all the agencies in ARC and IATA’s database and create categories, such as cruise companies, OTAs, meetings and incentives, etc., to isolate sales activity. She said, “Being able to separate the data helps us to show proof for investing in specific groups. After marketing efforts, I can confidently measure sales and say whether a channel or initiative is responsible for an increase in visitors.”

From March 2015 to March 2017, France’s overall agency channel sales increased a total of 28.4 percent. Amato confidently concludes that Global Agency Pro has given her the ability to better analyze the market and target strategies for increased destination success.

“The total volume to France has increased, and we can now pinpoint the exact agencies and tour operators, such as Expedia and Viking Cruises, contributing to that success – and reward them,” she said.

Amato can also see that each visitor is now staying an average of 10 days per visit. This data has helped her prove the real value of investing in the travel agency channel, which has not only brought France more business overall, but also increased the quality of the visitors traveling to the country.

About ARC:

Airlines Reporting Corporation (ARC) is the premier driver of air travel intelligence and commerce in the travel industry, with leading business solutions, travel agency accreditation services, process and financial management tools, and high-quality data. ARC settles \$86 billion in air ticket transactions annually for more than 9,400 travel agencies. Established in 1984, ARC is headquartered in Arlington, Virginia, with offices in Louisville, Kentucky, Tampa, Florida and San Juan, Puerto Rico. For more information, please visit www.arccorp.com.

About IATA:

IATA (International Air Transport Association) represents nearly 260 airlines comprising 83% of global air traffic. Each year IATA processes over \$387 billion within the travel industry. IATA’s network of travel agencies includes over 100,000 travel agencies worldwide.

About Atout France USA:

Atout France is the official government agency whose mission is to develop worldwide travel and tourism to France. In the U.S. market, Atout France USA / the France Tourism Development Agency, is the sole operator responsible for the promotion of all aspects of tourism to France. It provides support and services to tourism professionals (press, tour operators and travel agents as well as event planners) as well as information to the general public. Atout France USA works in partnership with public or private organizations involved in the tourism industry, including over 1,100 members of France’s tourism sector, as well as with partners based in the United States.

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