



French Consumer Trends Report

A social media analysis of French consumers' opinions on gastronomy, tourism, entertainment and transport



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Introduction

France is famous for many things, most notably food, fashion and fine wines. But these associations only offer a surface-level view of what France is really all about. In reality, France in the 21st century is a dynamic blend of cultures, habits and ways of life, resulting in nuances that go far beyond the old stereotypes. France has a long history, full of deeply established habits, norms and values.

Many of these have shaped the traditional industries for which the country is best known. But technological advances, including the rise of the sharing economy, have shaken up the traditional. From new angles on food delivery to fresh approaches to tourism, and everything in between, what might these technology challengers mean for French industries, and how can brands adapt?

Today's France is becoming more diverse, and companies can no longer rely on existing knowledge. For those wishing to delve deeper into the French consumer mindset, social listening provides a valuable way to gain insights into what people are really talking about; collecting their opinions as they are shared via social media on a daily basis.

In this report, we use this immense pool of unsolicited French conversations and opinions to uncover the freshest insights about consumer attitudes in France. We analysed billions of French-language social media posts on a variety of topics, between 2012 and 2016, across Twitter, Facebook, blogs and forums. The goal was to filter the massive dataset down to pull out the most pertinent trends in the conversation and explore what those trends could signify for brands looking to engage with French consumers.

We also examined shifts in trends over that four-year period, comparing past and present to discover how the conversation has changed and what these changes reveal about the priorities of French consumers. Through our analysis of the conversations, we narrowed down four key topic areas undergoing significant change and which were likely to produce actionable insights for companies wishing to better understand French consumers.

The four areas we focused our analysis on were:

1. Gastronomy
2. Tourism
3. Entertainment
4. Transport

Read on to learn what our social media analysis revealed about these important topics.

Methodology

For this report, we analyzed Crimson Hexagon's library of more than one trillion posts from sources like Twitter, Facebook, Tumblr, blogs and forums between 2012 and 2016.

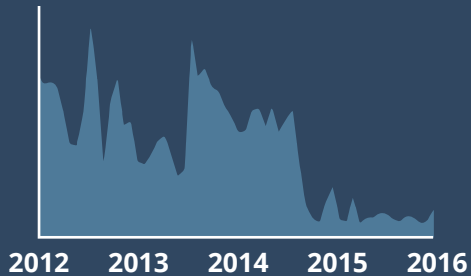
By analyzing historical social media data about the four industries that make up this report — gastronomy, entertainment, travel and transportation —we were able to track emerging trends and evolving consumer sentiment.

Key Findings

Gastronomy

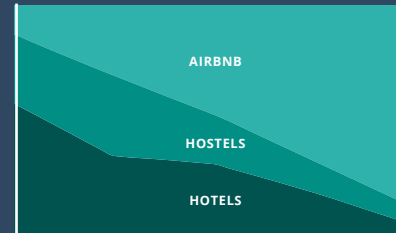
Food and France go hand in hand, but French eating habits are changing.

Cooking at Home Discussion Trend



Conversations around cooking at home plummeted by 89% between 2012 and 2016

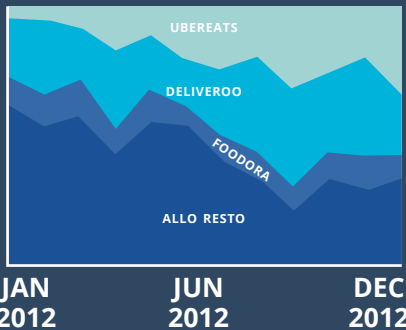
Hotels, Hostels, Airbnb Comparison Share of Voice



Airbnb conversation has soared since 2012, now accounting for 88% of all discussions about travel accommodation conversation

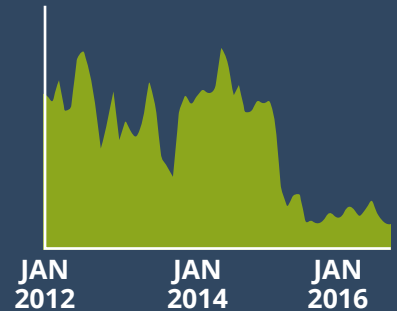
Food delivery apps are growing in popularity, and AlloResto is leading the way, but UberEats is gaining ground

Delivery Services Share of Voice



Domestic or International Travel Discussion Trend

Recent terrorist attacks have soured the social conversation around travel within France, and the discussion of domestic travel has declined significantly



Red vs White Wine Share of Voice



White wines are discussed more than reds, and Chardonnay is the most talked about wine by far

Entertainment

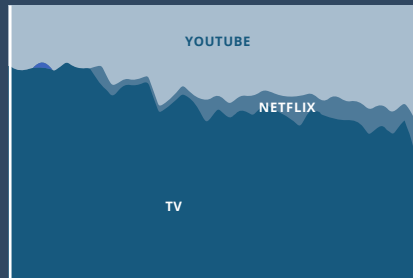
The rise of streaming services has infiltrated France, but traditional TV still holds the pole position

Media Sentiment

Year	Service	Negative Sentiment	Positive Sentiment	Change
2012	NETFLIX	53%	38%	-15%
	TV	30%	64%	+34%
	YOUTUBE	14%	62%	+48%
2016	NETFLIX	26%	66%	+40%
	TV	24%	71%	+47%
	YOUTUBE	10%	61%	+51%

Netflix has significantly increased its positive sentiment over the last two years, from 38% in 2014 to 66% in 2016

TV, Netflix, Amazon, YouTube Share of Voice Comparison



Despite that, Netflix still trails TV and YouTube in terms of overall conversation

2012 2013 2014 2015 2016

Transport

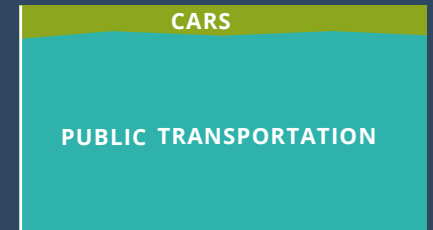
France is adapting to the on-demand economy, and Uber is leading the way

Taxis vs Uber Share of Voice



Uber has steadily expanded in France since 2012, now owning 45% of the overall transport conversation on social

Public Transportation vs Cars Share of Voice



Public transit dominates the travel conversation

2012 2013 2014 2015 2016

Cars vs Public Transportation Sentiment

Year	Mode	Negative Sentiment	Positive Sentiment
2012	PUB. TRANSIT	-38%	38%
	CARS	-47%	38%
2016	PUB. TRANSIT	-38%	26%
	CARS	-32%	32%

Both cars and public transit elicit a significant amount of negative sentiment from French consumers, but cars have become more popular since 2012.



Beyond bon vivant

Mobile apps, celebrity chefs, and other evolving gastronomy trends

The French phrase, “le bon vivant,” means someone who enjoys the good things in life; namely one who likes to eat and drink well. It’s a perfect representation of French culture, which holds food in high regard. The French attitude to food is reflected in its food industry, which is the country’s **second largest export sector**. It provides 500,000 industrial jobs and supports 11,000 companies, 98% of which are small businesses. Clearly, food plays a central role in French culture, and so it comes as no surprise that France also has some of the world’s finest restaurants.

In this section, we analyse conversations in social media that answer important questions about changing French habits and opinions around gastronomy.

- How are people responding to the rise of on-demand delivery?
- Do many people still cook at home, and are men or women more likely to do so?
- How are people’s wine preferences changing?

We use Crimson Hexagon to dig deep into social data and discover the answers to all these questions and more.

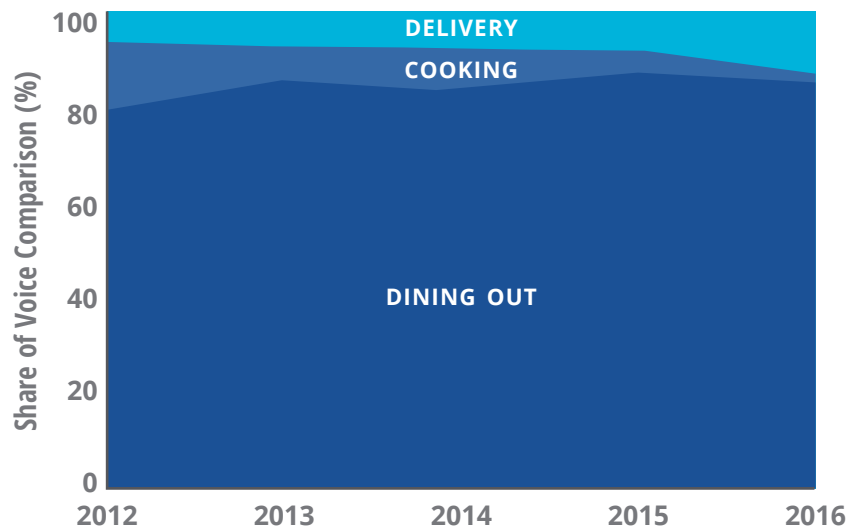
The new home cooking

How delivery services are changing the way French consumers think about eating

The rise of delivery

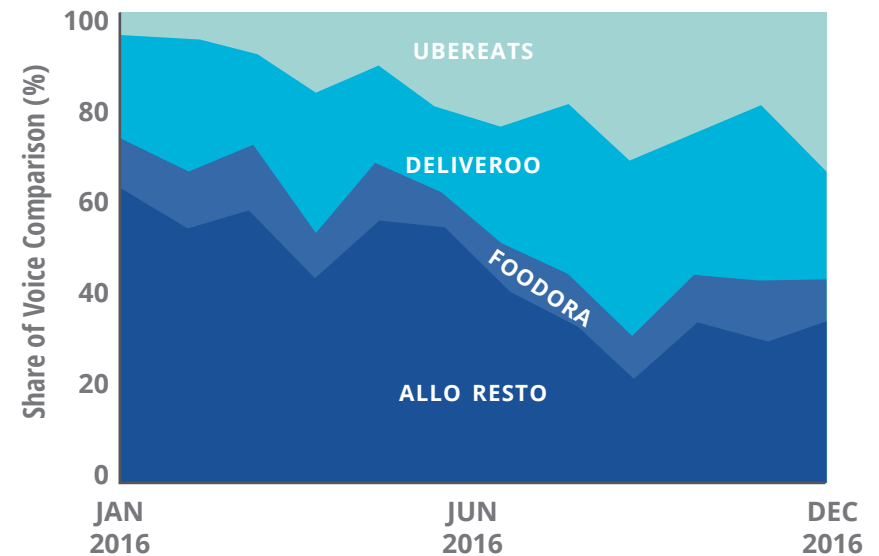
Despite France's reputation for fine dining, French consumers are not immune to the global sweep of on-demand food delivery services, which increased their foothold during 2016.

Dining Out vs Cooking vs Delivery Share of Voice



The conversation around food delivery doubled between 2012 and 2016, which could be partly explained by the recent rise of mobile-based delivery services, including UberEats, Foodora, Deliveroo, and Allo Resto. The latter dominates the conversation around food delivery in France, accounting for 47% of related conversations. Deliveroo trails in second place with 24%, followed by UberEats with 19% and Foodora with 9%. As all four of these delivery services are new to France, we focused our analysis on 2016.

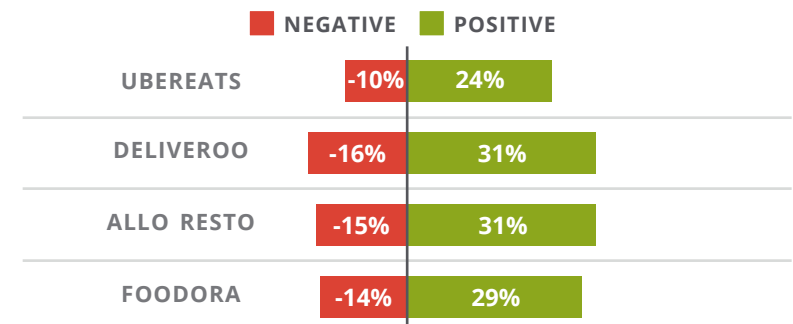
Delivery Service Share of Voice



This chart helps us see how the conversation around the top food delivery services has changed over time, but what do the conversations themselves look like? How do consumers feel about each of these options?

Consumer sentiment is largely positive towards all four, suggesting that French consumers are embracing the services, and that the industry overall has room to grow in the coming years.

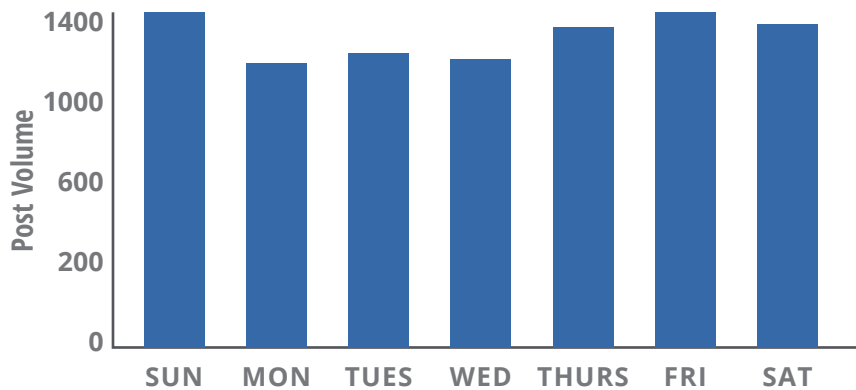
Delivery Services Sentiment



Dining out holds strong

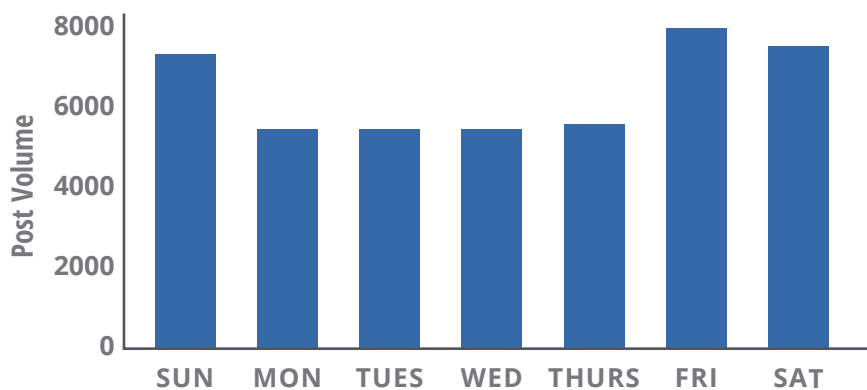
Despite the new challenge posed by delivery apps, eating at restaurants has continued to hold firm among French consumers, experiencing a slight rise in overall conversation volume from 81% in 2012 to 86% in 2016. The data also shows a distinct change in when people are most likely to eat out. In 2012 conversations around eating out remained at steady levels throughout the week, suggesting that going to restaurants was an everyday activity.

Eating Out Conversation by Day of the Week (2012)

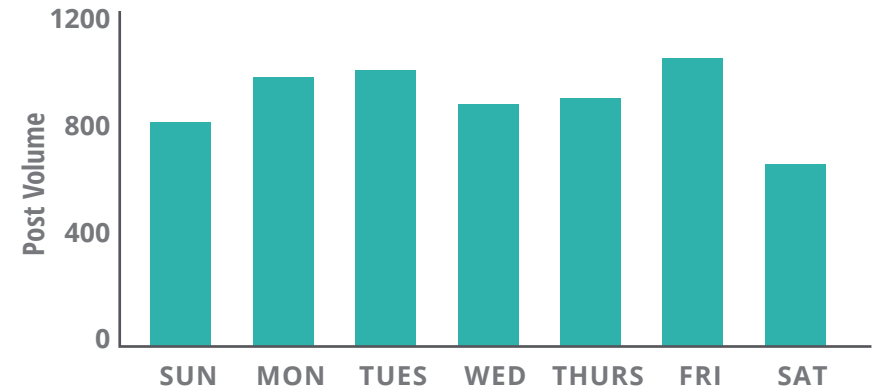


But in 2016, conversation levels around eating out were higher at the weekends, particularly Fridays.

Eating Out Conversation by Day of the Week (2016)



Delivery Conversation by Day of the Week (2016)



In contrast, delivery services dominated the conversation during the week, because people generally feel too tired to cook or go out to restaurants. Instead, they are keen to take advantage of the new crop of convenient delivery services.

Souf
@Souf_Stl

Petite commande à comicile on avais trop la flemme de faire a manger on joue les pacha ce soir

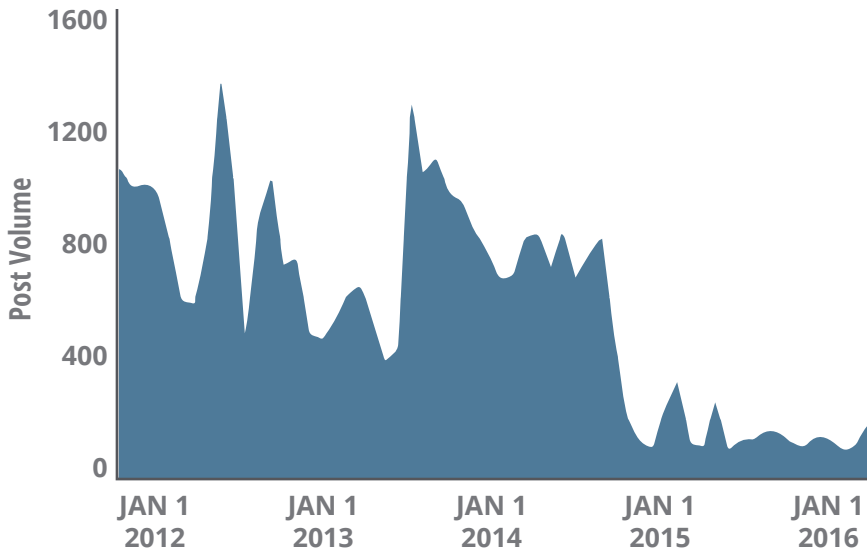
TRANSLATION

Booked a delivery. I didn't feel like cooking, I want to relax tonight

Convenient delivery options are cutting into home cooking

Cooking at home has been the biggest loser here, with conversations showing French consumers largely giving up on the home-cooked meal and replacing it with the convenience of delivery apps and eating out. Conversations around cooking at home fell by an enormous 89% from 2012 to 2016.

Cooking at Home Discussion Trend



French consumers are leaning towards delivery mainly because of its ease and convenience, and because they often 'don't feel like cooking', as comments on social media show. The desire to relax is important here, and is the main driving factor pushing people towards delivery apps over home cooking.

NONA
@Nonaa_Ndoye

La flemme de faire à manger DONC livraison de Sushi.

TRANSLATION
Don't feel like cooking, ordering sushi

Jérémy Jean
@akaDouble_J

C'est grave si ce soir c'est la quatrième fois consécutive que je me fais livrer des pizzas? #Flemme

TRANSLATION
Is it bad if it's the 4th time in a row that I order pizza on delivery?

Dada
@DadaisteRealist

J'ai tellement la flemme de cuisiner que je commande des repas pour deux pour me faire livrer. Team ami imaginaire ouais ouias :-)

TRANSLATION
I don't feel like cooking at all so I order meals for two to be delivered

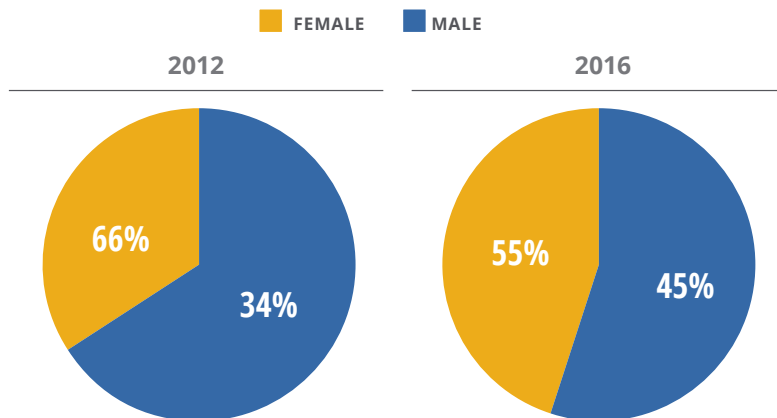
Who's cooking?

Shifting views about the breakdown of household tasks

When it comes to who does the actual cooking at home, conversations related to so-called 'traditional' gender roles saw some changes between 2012 and 2016. In 2012, women generated 66% of the conversation around cooking, while men lagged behind with just 34%.

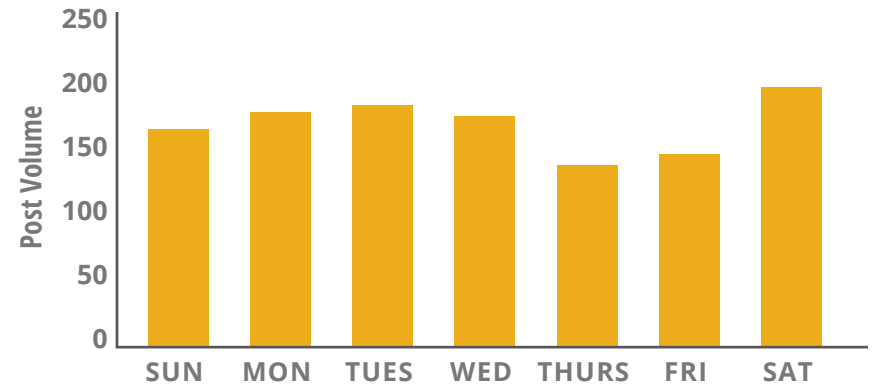
Fast forward four years and the cooking conversation has become more balanced, with men generating 45% of the cooking conversation, and women 55%.

Cooking at Home Discussion by Gender

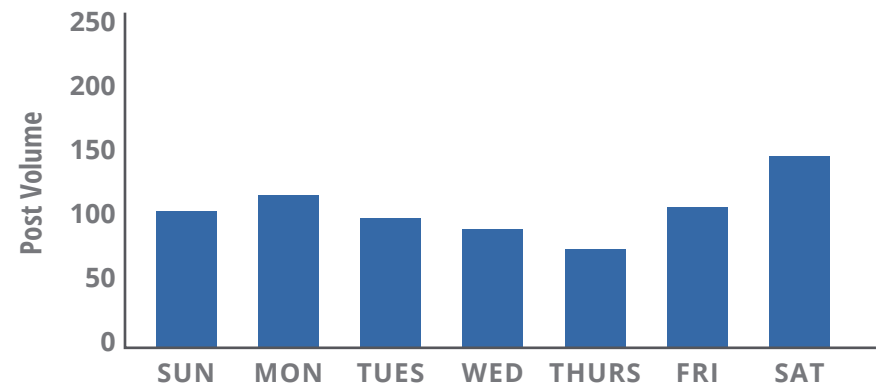


This shift could reflect changing social norms, where cooking in 2016 is viewed as a fashionable activity rather than a necessary chore. The timing patterns of when men and women talk about cooking also reveal some interesting insights. Cooking-related conversations from men are more common on the weekends, whereas women tend to talk about cooking during the weekdays.

Cooking at Home: Women Conversation by Day of Week



Cooking at Home: Men Conversation by Day of Week



This ties in with our previous theory of men approaching cooking as a weekend activity or hobby, while women may still view it as a necessary daily chore, not just something for the weekend.

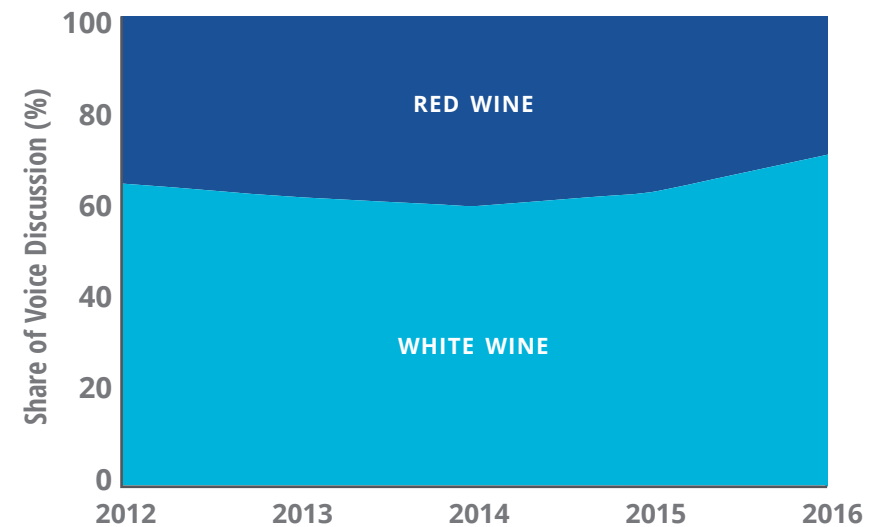
A long history of wine

Are consumer views on France's most famous export changing?

France is also famous for its wines. Wine heritage in France is **exceptionally strong**, dating right back to the 6th century. The country is the world's largest wine producer, making more than 50-60 million hectolitres per year and exporting its wines all over the world. No wonder wine has become such an integral part of France's reputation for gastronomy. France has an excellent natural environment for wine-making, so the diversity and range produced is very broad.

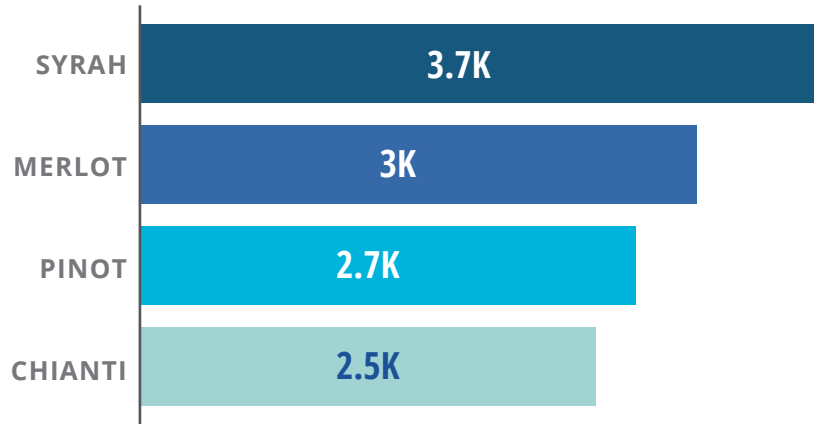
The question is, what's more popular, red wine or white? Between 2012 and 2016, social media conversations showed that greater numbers of French consumers were talking about white wine, as compared to red. White wine held a fairly consistent 65% share of voice, with a slight dip to 60% in 2014 and then a slight rise to 70% in 2016.

Red vs White Wine Share of Voice

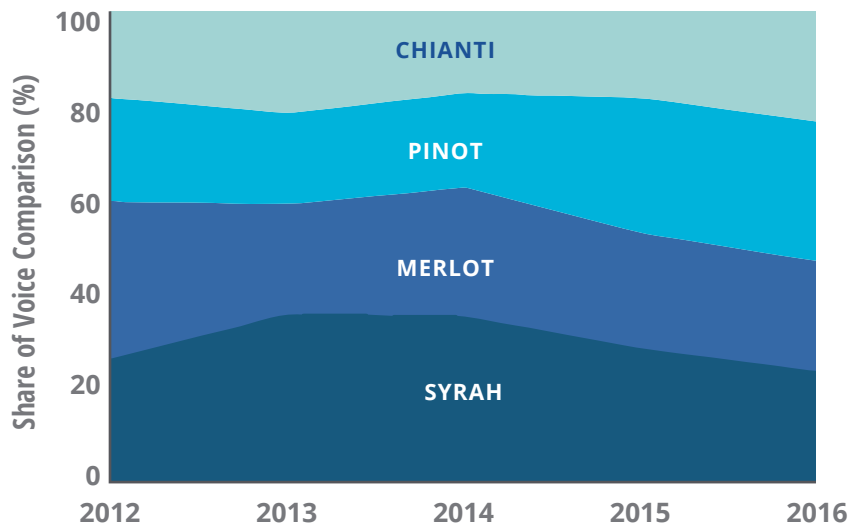


Narrowing it down further, we can see that specific types of wines are discussed more than others, suggesting changing preferences among the consumer population. The most-discussed red wine was Syrah, featured in 3.7 thousand conversations and capturing 35% of the share of voice in 2013, at its peak, followed by a slight drop in 2016 as Pinot began to catch up.

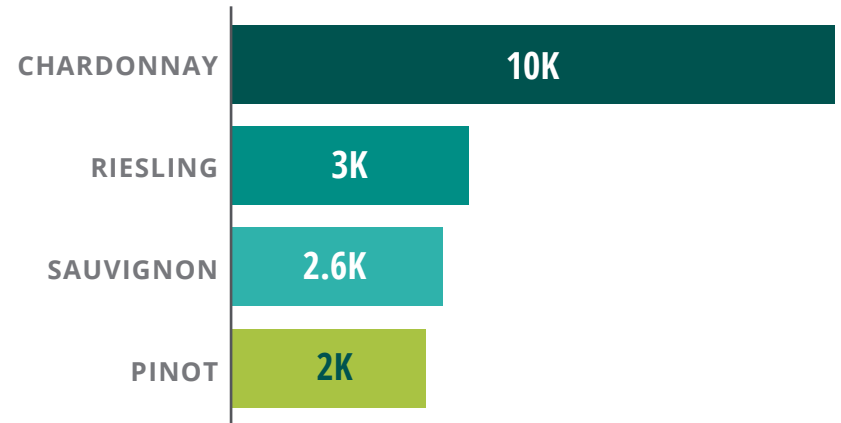
Most Discussed Red Wines



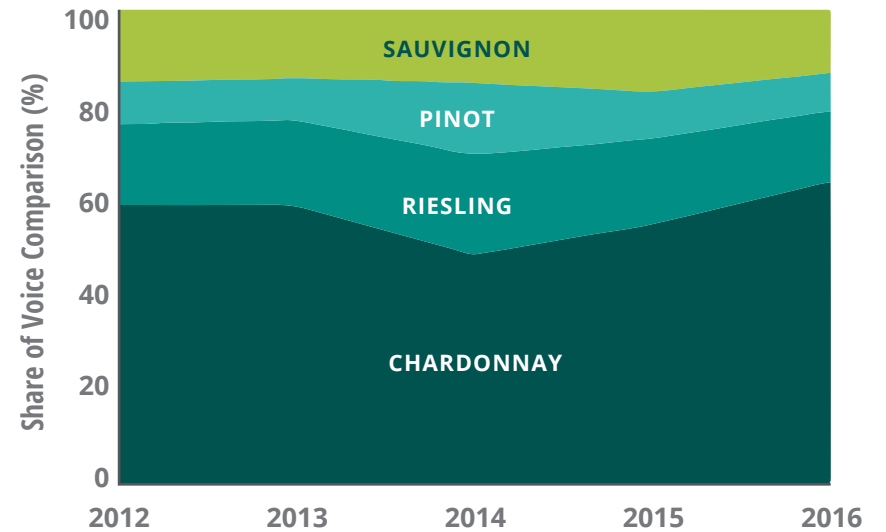
Most Discussed Red Wines Share of Voice



Most Discussed White Wines



Most Discussed White Wines Share of Voice



As the data shows us, Chardonnay is the most-discussed white wine. It features in 10 thousand conversations, with its closest competitor, Riesling, mentioned in only three thousand. For share of voice, Chardonnay consistently captures the lion's share, peaking at 60% in 2016. In a country that knows its wine intimately, Chardonnay is clearly one of France's favourite tipples.

Conclusion

French culture has centred around gastronomy for centuries, and that's unlikely to change anytime soon. But, while the centrality of gastronomy in France is unlikely to change, the specifics might. The rise in tech-driven services, namely mobile food delivery apps, brings additional convenience. Evolving lifestyles and gender norms affect traditional French attitudes toward food preparation. Trends may come and go, but staple French habits like eating out in restaurants remain common. Conversations around wine are also affected by shifting trends, such as the rising popularity of white over red, but heavyweight players, such as Syrah, just keep hanging on.

The French 'bon vivant' is still alive and well, it's just keeping up with the times.

For brands, social media data can help them predict where the market is heading next, drawing out insights to help shape consumer strategy in key French sectors. With this in mind, we move on to the next section, which delves into another major French asset - its tourism industry. We analyse conversations around domestic tourism to gain more understanding of how technology and current events have driven changes in the market, in particular around hotels.





Tourism shifts

New trends in French domestic travel

As well as being famed for food and wine, France is also one of the **world's most popular tourism destinations**. From the historic sights of Paris to the Alps for skiing, and the natural beauty of the south of France, the country has attracted tourist dollars for many decades. But the French are also dedicated tourists, both within their own country and abroad. **A recent report from Statista** shows that French domestic tourists in fact spend substantially more than international tourists in France, although both are forecast to increase.

Domestic tourism expenditure is estimated to reach 112.5 billion euros in 2017, an increase from spending in 2016. It is expected to continue increasing up until 2027. There's much potential here for brands to capture a share of the French domestic tourism market, but to do so, they need to understand the key trends. In this section, we examine the conversations around the latest tourism trends in France, discovering how they have responded to incursions from our rapidly-changing hi-tech world, along with the challenges and the opportunities.

In particular, we use social media analysis to answer questions like:

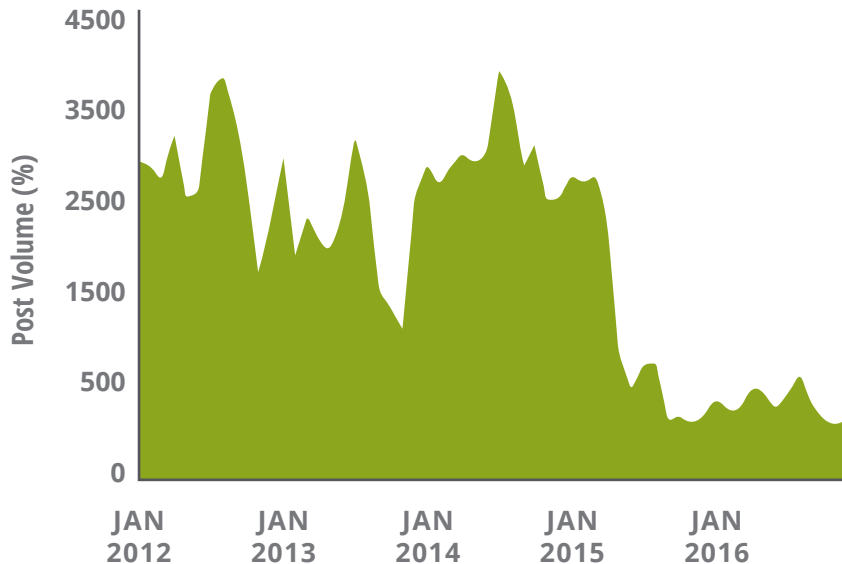
- Has terrorism had an impact on French travel?
- How has the growth of Airbnb affected French tourism?
- What does the future hold for France's hotels?

A fearful year

French travel slows in shadows of attacks

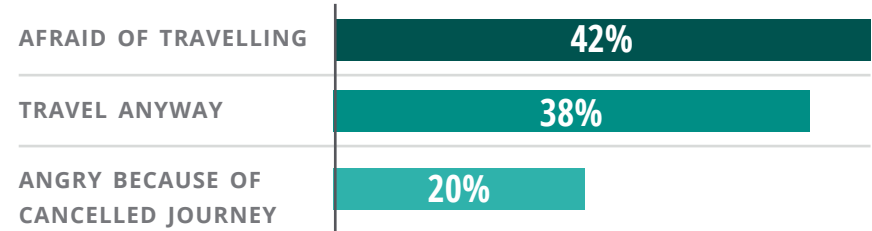
Both inbound and outbound tourism in France experienced a knock in 2015. Our data showed a distinct decline in conversation levels around tourism during this year, particularly from July onwards.

Domestic or International Travel Discussion Trend



This decline could be attributed to a spate of terrorist attacks during 2015, beginning with the Charlie Hebdo shootings and culminating in the Paris Bataclan attacks. Between January 2015 and December 2016, 42% of the terrorism-related discussion around travelling in France was related to 'fear' of travelling.

Terrorism in France Opinion Analysis: Jan 1 2015 to Dec 31 2016



Delving deeper into the comments around travel and terrorism, we can see that people expressed a range of opinions. Some remained defiant and determined to keep travelling:

Julien M
@m_julien

Hé les terroristes, on continuera à voyager, sortir, aller aux concerts. A #Bruxelles ou ailleurs.

TRANSLATION

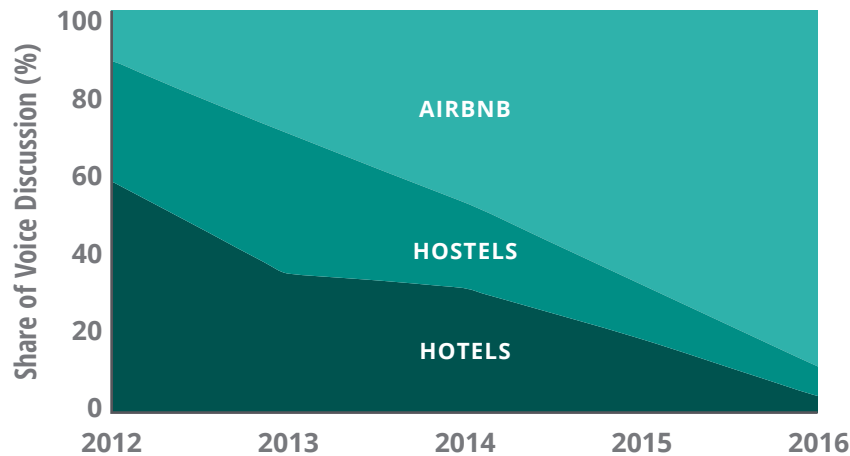
Terrorists, we'll keep on travel, go out, go to concerts. In Bruxelles or elsewhere.

There was a marked difference in sentiment according to age, with older people (aged 35 and above) comprising 79% of the conversation about being 'afraid' of travelling. Despite their fears, this age group made up 64% of the conversation relating to 'travelling anyway', and 54% of that around 'anger at cancelled bookings'.

Airbnb takeover

After exploring the wider context around French tourism, we focused our analysis on the hotel industry, examining how conversations around hotel stays have been affected by the rise of Airbnb. We found a dramatic shift over the last four years, showing that Airbnb has captured the market in a big way. In 2012, Airbnb was a new player, capturing only 13% of the share of voice around tourist accommodation, compared to 58% captured by hotels and 29% by hostels.

Hotels, Hostels, Airbnb Comparison Share of Voice



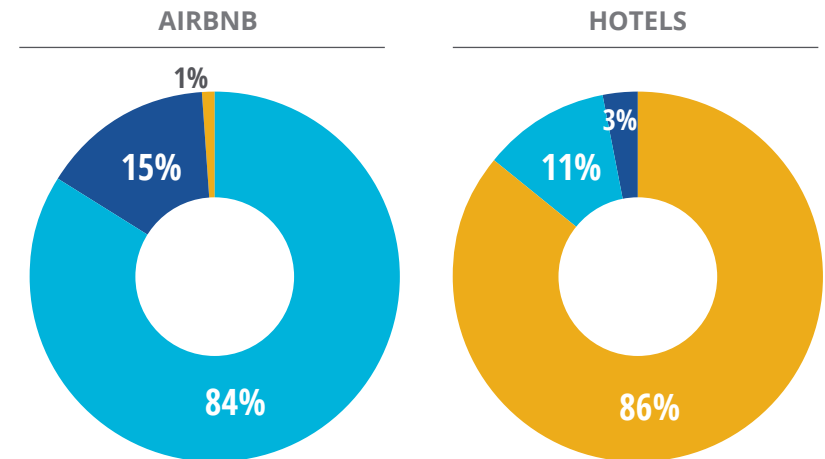
But in 2016 the sharing economy emerged and it completely disrupted the industry. Airbnb became responsible for a whopping 88% of conversations around travel accommodation in France. Hotels and hostels were left trailing in its wake, attracting 5% and 7% of share of voice respectively. This was reflected in the state of the French hotel industry, which has **lost a great deal of business to Airbnb**.

Research conducted in 2015 showed that France is the second largest world market for Airbnb after the US. Airbnb has attracted its fair share of controversy, with **Paris in particular** taking a hardline stance on those Airbnb hosts who flout the rules. Let's take a look at what social media users in France are actually saying about Airbnb, hotels and hostels.

We discovered that Twitter was by far the biggest platform for conversation around Airbnb. In contrast, conversation around hotels took place mainly in forums.

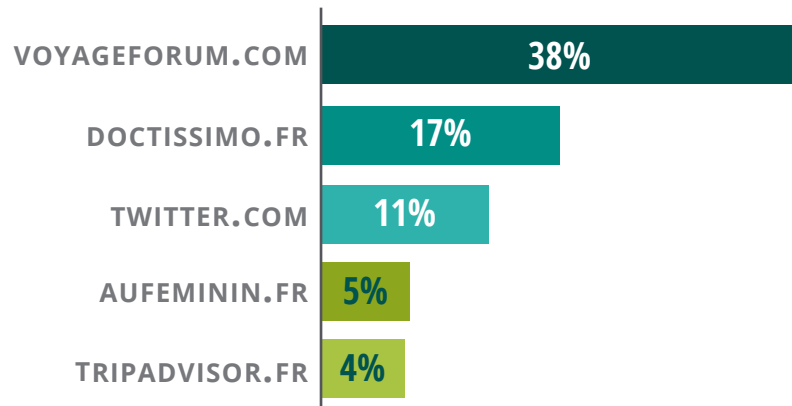
Conversation Source Breakdown

FACEBOOK TWITTER FORUMS



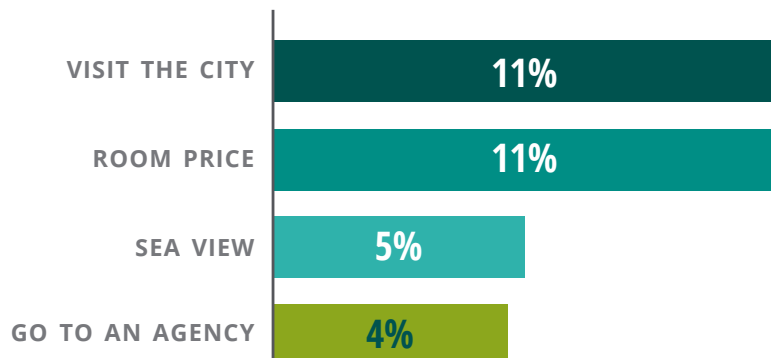
As forums are more specialised platforms than Twitter, this trend suggests people interested in hotels are seeking deeper insights from a community of experts and like-minded individuals. Voyageforum.com was the top site for hotel-related conversation, with 38% of the conversation taking place there. Doctissimo.fr was second most popular, with 17%, along with aufeminin.fr (5%) and tripadvisor.fr (4%).

Top 5 Sites for Hotel Conversation



This could be a good opportunity for savvy hotel brands to leverage forums for their promotion efforts, as well as Facebook and Twitter. By offering useful advice and actionable insights they could attract a loyal following, helping them gain an edge over Airbnb.

Forums Topics Hotels Discussions



In the forums, the most commonly discussed topics are 'visit the city' and 'room price'. The second is of significance for hotels in their fight against Airbnb domination, as accommodation costs are clearly a matter of concern for many French travellers.

SelmaaTLBC
@SelmaTLBC

@addline J'y vais cette semaine, on a pris un Airbnb pour 2 (moins cher que bcp d'hôtels et plus flexible pour les horaires)

TRANSLATION

I'm going this week, we reserved an Airbnb for 2 - cheaper than most of hotels and more flexible with time

Souris
@ZeDiabliesse

@CarrementBrunet @pascalperrie j'utilise Airbnb. Moins cher et mieux. Je vais faire+sieurs étapes pour mes vacances et que de location Airbnb

TRANSLATION

I use Airbnb. Cheaper and better. I'm gonna do several stops during the journey with different Airbnb

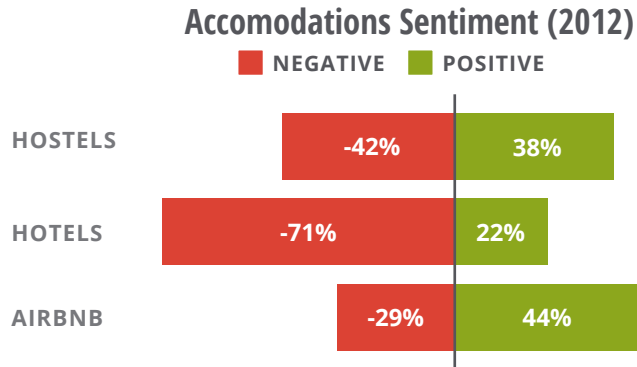
Kelly
@Outfitteuze

Poir le logement on a réservé un appart sur AIRBNB dans le centre ville pour pas cher et l'appart est super propre et lumineux

TRANSLATION

We reserved an apartment on Airbnb in the city centre because not expensive and super clean and bright

Sentiment around hotels was largely negative in 2012 (-71%), compared to 44% positive sentiment for Airbnb. This could represent Airbnb's early days, where it was gaining a foothold and people were talking about it as being the 'next big thing'.



In 2016, despite the ongoing popularity of Airbnb, negative sentiment around it has increased while positive sentiment has decreased. This shift is reflected in some of the opinions we pulled from the conversations around Airbnb, which show people complaining about last-minute booking cancellations that left them in the lurch. There were also problems with security, scams and fake accommodation, and people also feeling that the app had invaded their privacy with the large amount of personal data it requests.

Alexis Blanvillain
@AlexBlan

Annulation d'un réservé 1 semaine avant. Cela ne devrait pas être possible pour le loueur. Décevant @airbnb

TRANSLATION

Cancellation of a booking 1 week before. This should not be possible. Disappointing

Alert pratiques Airbnb: non respect de la vie privée

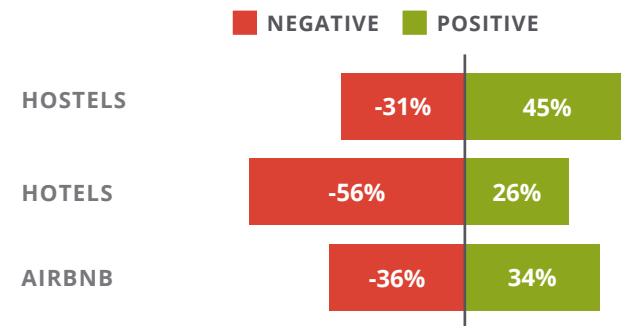
Bonjour, Je viens de tenter une première inscription sur airBnB. C'est proprement scandaleux le nombre d'informations demandées, je confirme la longue liste citée au démarrage de ce post jusqu'à la vidéo où j'ai abandonné! Et en effet, on ne sait qu'après le dépôt de notre carte ce qui nous attend ! C'est presque pire que la police. Heureusement que lorsque on réserve un hôtel ce nest pas aussi compliqué. Est-ce que quelqu'un connait un ou des concurrents à airbnb car je trouve le principe génial mais pas dans des conditions abusives ? A bientôt, Complément : Pire que tout, il n'est même pas possible de supprimer son compte.

TRANSLATION

Alert Airbnb: no respect for privacy - Morning, I was trying to register on Airbnb. The amount of info requested is shocking... I gave up... Worse than the police...

In contrast, hotels are regaining ground. Positive sentiment around hotels has increased, while negative sentiment has decreased. Also, hostels, for which Airbnb is a key competitor, attracted 44% net positive sentiment in 2016, beating Airbnb's 34%.

Accommodations Sentiment (2016)



Conclusion

Overall, the popularity of Airbnb represents a major shake up for the hospitality industry in France. It would be wise for for companies with interests in this field to conduct deeper research with this in mind before entering the market. Clearly, the French hospitality industry has changed beyond recognition, thanks to technology. The effect of this shift on traditional hotels and hostels remains to be seen.





Viewing habits

How on-demand entertainment is playing out in France

As recently as 2014, traditional TV dominated the entertainment landscape in France.

With popular made-in-France dramas, such as the internationally-successful Versailles, earning big money for production companies, France has been making its mark in the entertainment world. So far, the content has mainly been produced in French, but the dropping value of the British pound, plus the desire for international impact, has caused some French production companies to look to [English-speaking markets](#) for their next big hits.

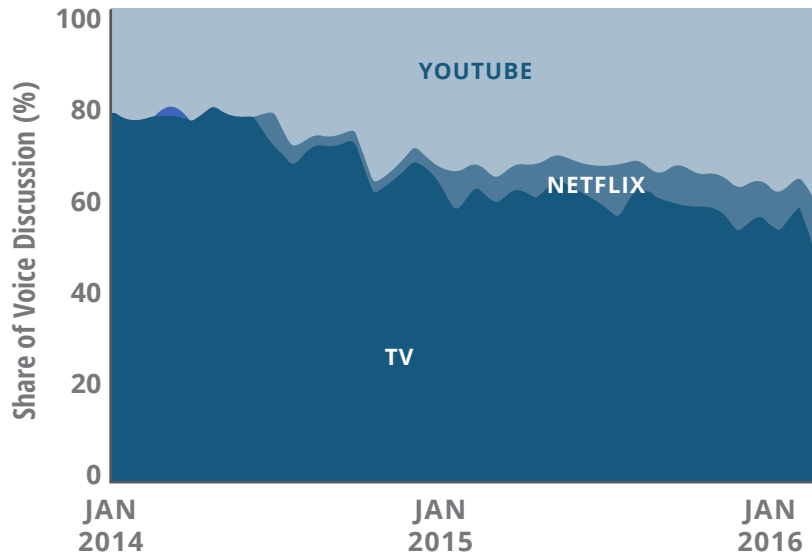
In this section, we explore the French entertainment landscape to find out how social media data can help us answer questions like:

- Traditional TV versus new on-demand services such as Netflix
- Are consumers seeking more entertainment variety?
- What effect programme language has on French audiences?

Traditional TV vs. On-Demand Options

Our data shows that conversations around traditional TV made up three-quarters of the total entertainment-related discussions in 2014. The rest was mainly captured by YouTube, with a tiny amount by new players Amazon Video and Netflix.

TV, Netflix, Amazon, YouTube Share of Voice Comparison

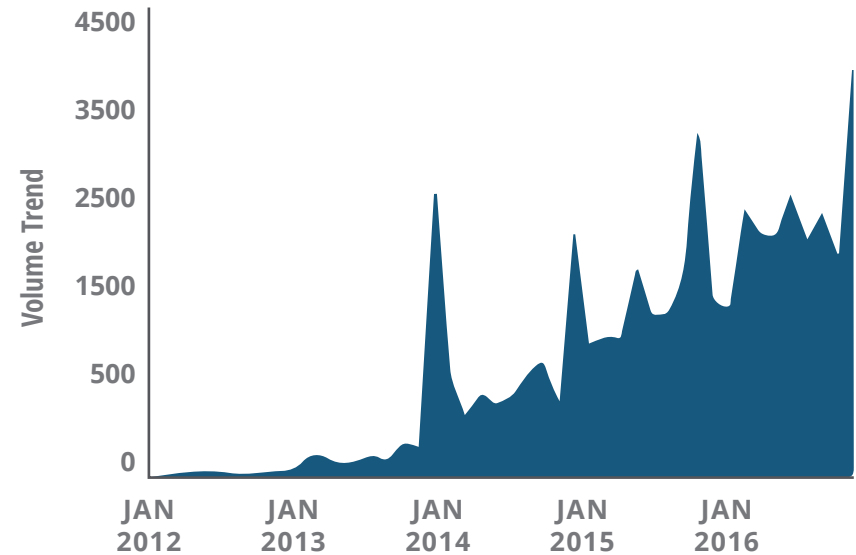


But fast forward to 2016 and the scene is beginning to shift. TV-related conversations have fallen to 57%, as YouTube grabs a bigger share (35%) and Netflix starts to gain traction (8%). In contrast, Amazon Video continues to fare poorly, accounting for less than 1% of the conversation both in 2014 and 2016.

Language matters

The rise of Netflix is the most interesting here, so let's dig deeper. France was one of the most challenging markets for Netflix to crack, with the platform facing 'massive resistance' after launching in France in 2014. This was partly due to local regulations delaying the streaming of new films. But Netflix persevered and its tenacity seems to be paying off in 2016.

Netflix Discussion Volume

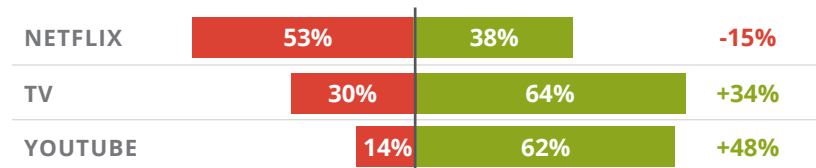


For starters, Netflix has massively increased its positive sentiment over the two-year period, from 38% in 2014 to 66% in 2016. Negative sentiment has also decreased substantially, reflecting that Netflix is establishing a firmer foothold on the French entertainment market.

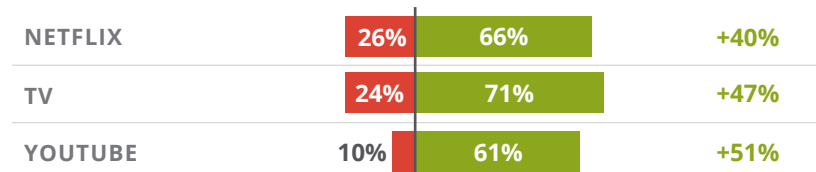
Media Sentiment

NEGATIVE POSITIVE

Net Sentiment in 2012



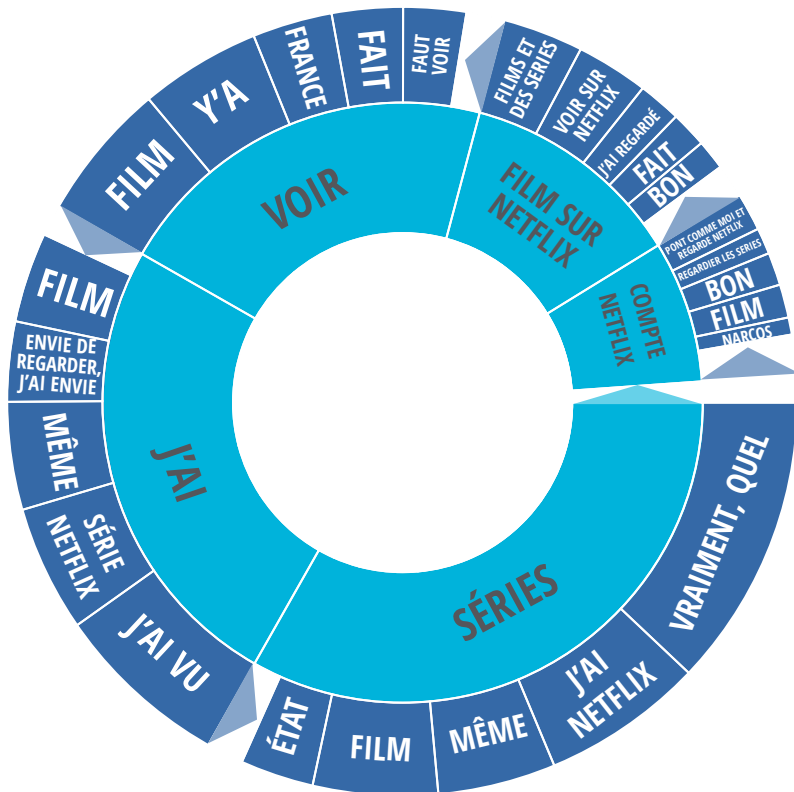
Net Sentiment in 2016



Part of Netflix's success in France has been due to expanding its offering of French language content **in response to EU legislation**. Prior to that, far fewer consumers showed an interest in using the product, suggesting that localisation remains a key factor for any brand planning to enter the French market.

For French audiences, one of key strengths of Netflix is its wide variety of films and TV shows.

Netflix Topic Discussion



Many people turn to Netflix for 'binging' on their favourite series, perhaps over weekends or holidays, while still using the traditional TV for viewing during a night in, while cooking, or for general relaxation. This is reflected in the range of verbatims that we pulled from Twitter, giving a snapshot of the population's views.

Alexia
@AlexiaMcy

Déjà que je passais ma vie à regarder des series mais maintenant que j'ai Netflix c'est encore pire

TRANSLATION

I was already spending my life watching series, but now with Netflix it's gonna be much worse

Fanfan
@LyonForLife69

#LesVacancesCest le moment pour regarder le maximum de serie et fil sur @NetflixFR #Netflix

TRANSLATION

Holidays are the right time to watch as many series and films as possible on Netflix

No19
@leeo91g

Je sui rentrée j'ai manger et maintenant je regarded la télé

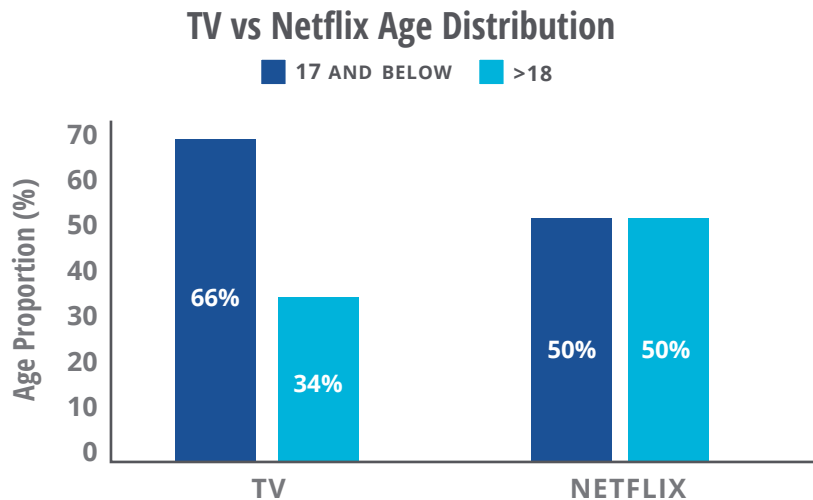
TRANSLATION

I am back home and I'm eating while watching tv

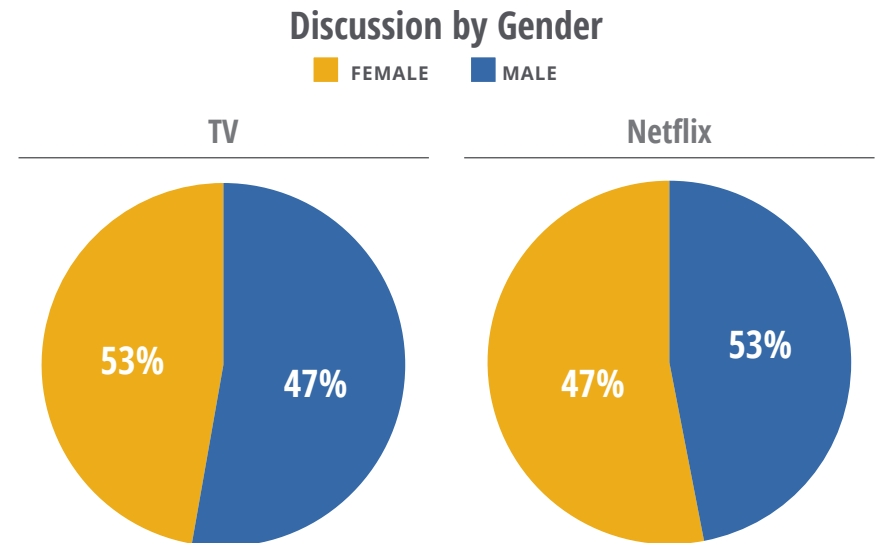
Although traditional TV is standing its ground and maintaining popularity among French viewers, there remains a risk that Netflix may overtake it. We noted people mentioning that Netflix was 'preventing' them watching TV, and as there was 'nothing interesting' on TV they were going to watch Netflix instead.

<p>Bastien Metallo @SuperMetallo</p> <p>C'est assez incroyable comment Netflix ne me fait plus du tout regarder la télé : </p>	<p>TRANSLATION</p> <p>It's unbelievable how Netflix is preventing me from watching TV</p>
<p>I'mDifferent @Cambelo_</p> <p>Il y a rien à la télé je vais mettre Netflix et regarder une série</p>	<p>TRANSLATION</p> <p>Nothing interesting on TV, I'm gonna watch Netflix</p>

Age also plays an important role in shaping the audiences for both Netflix and TV. Those younger than 17 account for 66% of the conversation around TV (compared to 34% of those over 18), while conversation around Netflix is split equally between the two groups: 50% each.

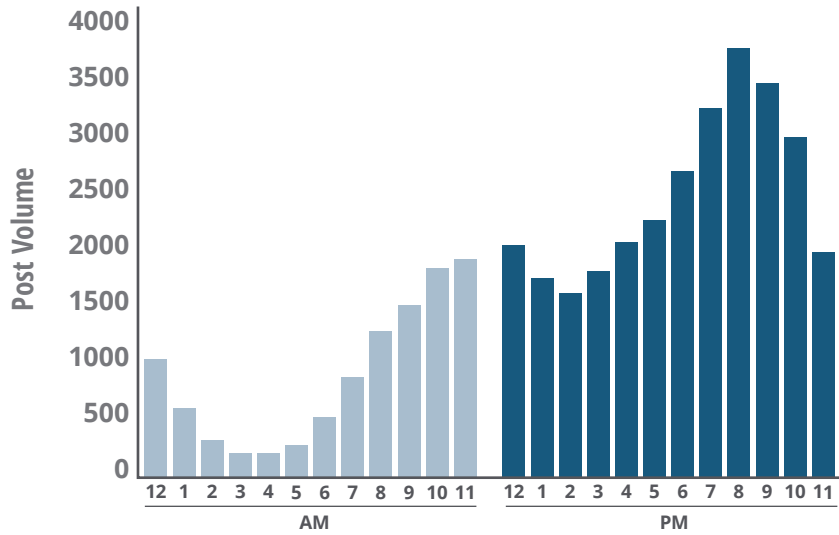


However, the male and female split is fairly balanced for both offerings, veering slightly in favour of more females for TV and more males for Netflix.

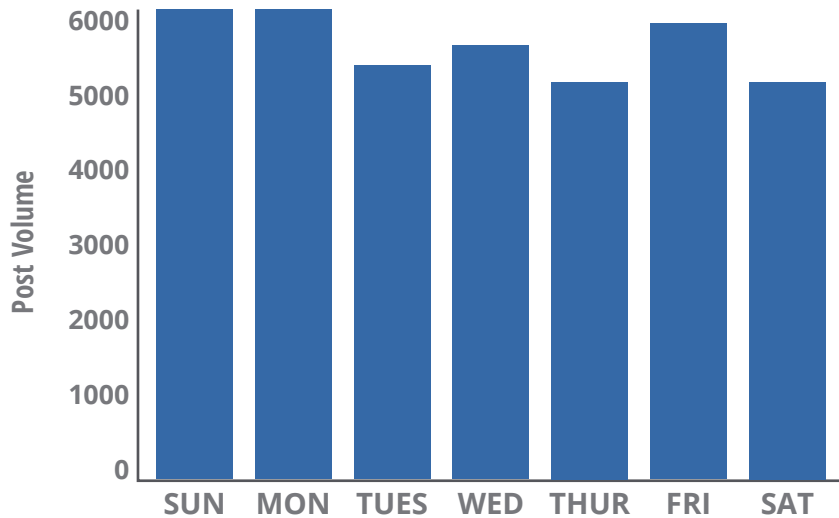


Our data suggested an interesting pattern: Netflix and TV appear to play complementary roles. Both peaked in conversation during the evenings and on Sundays.

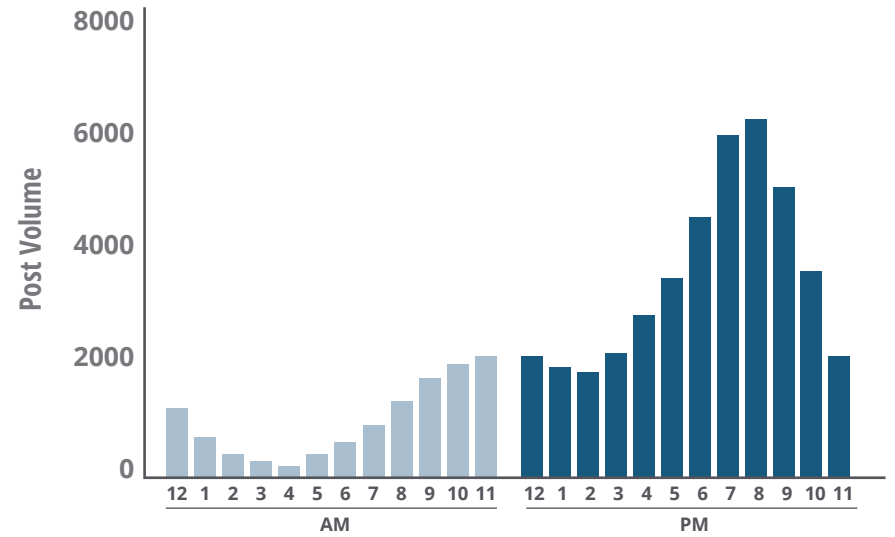
Netflix Conversation by Time of Day



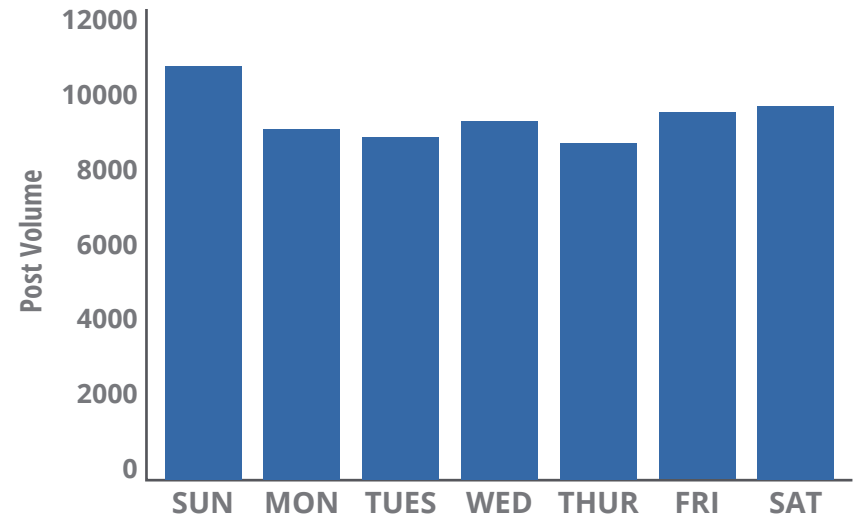
Netflix Conversation by Day of the Week



TV Conversation by Time of Day



TV Conversation by Day of the Week



Conclusion

Our research found that French entertainment consumers are likely to switch between the two offerings of Netflix and traditional TV depending on which programmes fit their desires at the time. Although Netflix is gaining ground in the French market, and therefore can't be ignored, traditional TV still captures a large proportion of audience interest, so it's still worthwhile for brands to consider engaging with it. Going forward, TV and Netflix are likely to continue playing complementary roles. But traditional TV needs to keep up the variety and quality of programmings, to avoid losing viewers to the convenience and rich selections of Netflix and other on-demand services.





Transport disruptors

Ridesharing and public transportation vie for consumer approval

France has **world-class public transport**; indeed, the Paris Metro is one of the world's densest systems. France also has more than one million kilometres of roads, including 12,000 km of motorways. The country is well-connected by train too, with 32,000 km of railways. In large cities, the transport network is very efficient, but there tends to be a lack of regular bus services in rural areas, although buses are also a frequent feature of French cities and towns. And despite the effective public transport system in Paris, rising pollution levels from traffic led the city to instigate **its first 'car-free' day** in 2015, followed by plans for more.

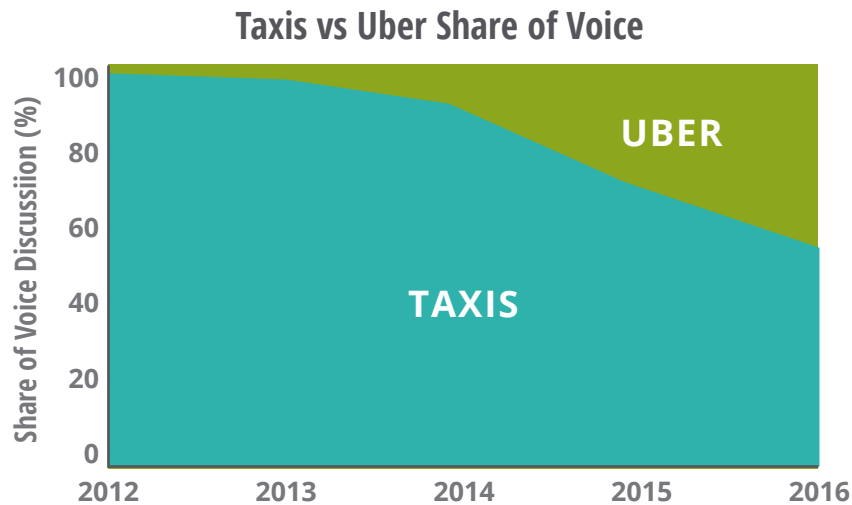
Our research into the topic of transport aimed to discover people's attitudes towards the public transport system in France. Are they satisfied with it, or are increasing numbers turning to the use of cars? This section will examine the data and try to unearth the details behind public transport sentiment. It will try to answer questions including:

- Is tech challenge Uber really a threat to French taxi services?
- What drives the bulk of negative sentiment around traditional taxis?
- What makes people more likely to use public transport and/or cars?

Uber and Uber again

French cities have world-class public transport; indeed, the Paris Metro is one of the world's densest systems. Buses are also a frequent feature of French cities and towns. But what are people's attitudes towards the public transport system? Are they satisfied with it, or are more of them turning to their cars? This section will examine the data and try to unearth the details behind public transport sentiment. Also, when it comes to taxis, France has developed **a bit of a reputation**. With their tendency to trick unwitting tourists, charge too much, and go on strike, sometimes violently, the French have an uneasy relationship with their taxi drivers.

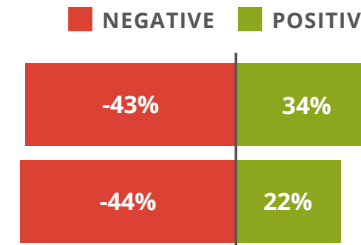
So it was no surprise to find a tech challenger disrupting the French taxi industry. We're talking of course about Uber, which chose France as its first European target market. Uber began in 2012, where it accounted for only 2% of the conversation in France, but has steadily expanded and now captures 45%. This presents a challenge for taxis. Despite **various legal attempts** to counteract its rise, Uber continues to make headway in the French market, judging by the levels of conversation around it.



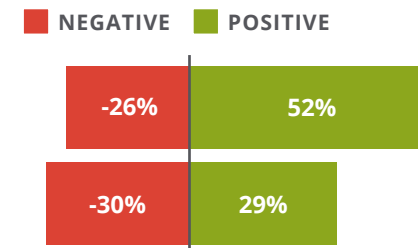
There's nothing to suggest Uber will lose popularity anytime soon. It may well outdo taxis in the near future, although taxi drivers in France have been **fiercely resisting its rise**. French consumer sentiment around taxis and Uber also tells an interesting story.

Negative sentiment among French conversations around taxis has remained unvaried over the last four years. Uber attracted substantial positive sentiment (52%) when it launched in 2012, but this decreased to only 29% of overall positive sentiment in 2016.

Taxi Conversation Sentiment (2012-2016)



Uber Conversation Sentiment (2012-2016)



Negative sentiment around Uber has also increased from -26% to -30%. It may seem that people are becoming more negative about Uber. But closer analysis of the data shows us much of the negative sentiment coming from discussions of an ongoing disagreement between Uber and various local French taxi services. The taxi drivers were angry when Uber started to take away their business, **so they rioted and went on strike**. The resulting disruption has produced a lot of negative sentiment linked to Uber, but the verbatims reveal that people are more unhappy with the taxi drivers.

Shut up please
@dannijeanlouis

Je hais le aeroport et les connard de taxi qui t'empêche de prendre ton uber tranquille #journeenationaledesabrutis

TRANSLATION

(I hate airports and the stupid taxis that prevent me from taking my Uber serenely

Capu Patriote
@CapuPatriote

Combien de fois le #taxis m'ont répondu "ah désolé mml, mais je vais pas dans cette direction" > ah ben désolée, je prends #Uber

TRANSLATION

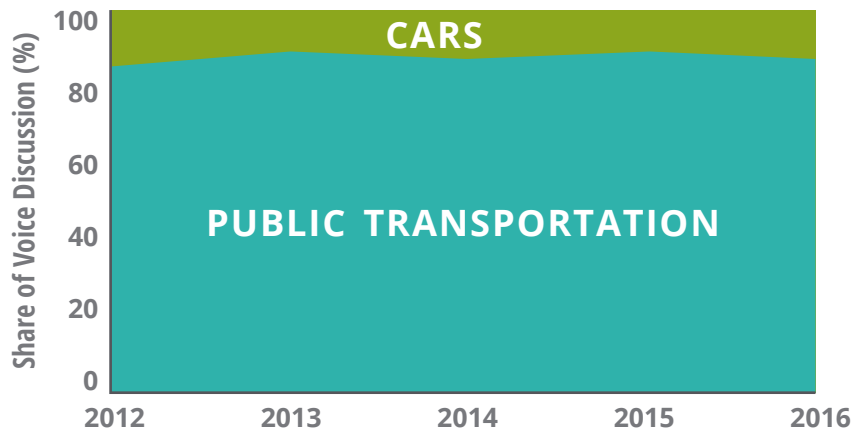
How many times taxis reply "I'm sorry, not going in that direction" => I'm sorry, I'm taking Uber

Judging from these sentiments, the angry response from the French taxi drivers may have backfired, making customers even more likely to use Uber. It looks like, despite some initial scepticism, convenience is starting to win out in the French market, spanning the full spectrum from gastronomy, to accommodation and transport.

Bus for work, car for fun

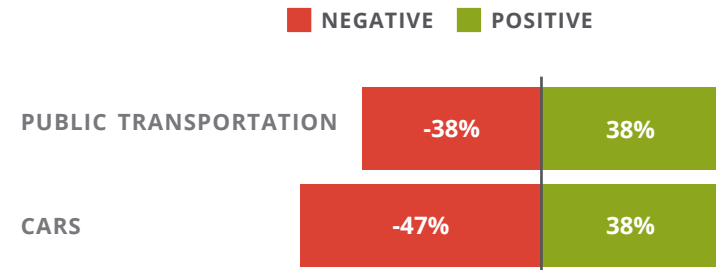
Finally, we turn our attention to public transport and how it compares to car use. In France, public transport generates a significant portion of conversation, rising from 86% in 2012 to 89% in 2016. Car-related conversations have decreased accordingly, from 14% in 2012 to 11% in 2016.

Public Transportation vs Cars Share of Voice

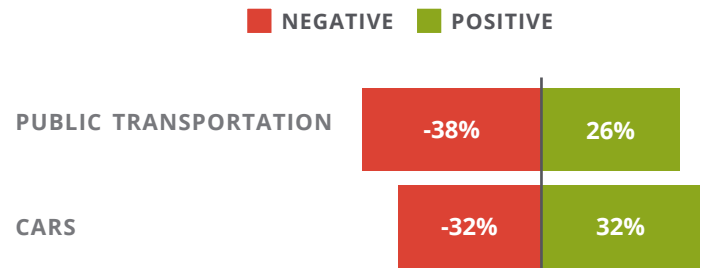


It's also important to discern whether the increased conversation around public transportation is positive or negative. In 2012, public transport attracted 38% positive sentiment and -38% negative. Cars also attracted 38% positive sentiment, but combined with more negative sentiment, - 47%.

Cars vs Public Transportation Sentiment 2012



Cars vs Public Transportation Sentiment 2016



Four years later, things have changed significantly. French travellers have become less positive about public transportation, while the negative sentiment around it remains the same. Cars, on the other hand, have slightly decreased positive sentiment (from 38% to 32%), but have also decreased negative sentiment a lot more (from -47% to -32%).

This strongly suggests that public transportation is attracting increased share of voice for mainly negative reasons. Let's dive into the data and see what people are saying about public transport and cars. Firstly, delays and scheduling issues seem to be causing much of the negative sentiment around the former.

Fanny
@FannyEngelspach

J'aime bien prendre un train une heure en avance, pour au final arriver encore plus en retard. Merci merci. @RERD_SNCF

TRANSLATION

I love taking the train 1 hour earlier to arrive even more late. Thanks a lot

OneBoy
@Christopherj

Je suis déjà en retard, j'ai loupé mon bus, j'ai du prendre celui d'après et on m'annonce un accident sur l'autoroute

TRANSLATION

I'm already late, I missed my bus, I had to take the next one and I've been told there's an accident on the highway

Frustrations such as these compel some people to take the car instead. Some prefer its convenience and choose the car over public transport. This suggests the will to use public transportation is present among the population. But issues with delays and inconvenient scheduling mean French commuters are likely to choose the car whenever they can.

Andy
@Ucephal

Hier attente pendant 1h30 pour avoir enfin un bus, frustré je décide ce matin de prendre ma voiture.. panne de batterie

TRANSLATION

Yesterday I waited 1 hour and a half for the bus, frustrated this morning I decided to take the car. Battery failure

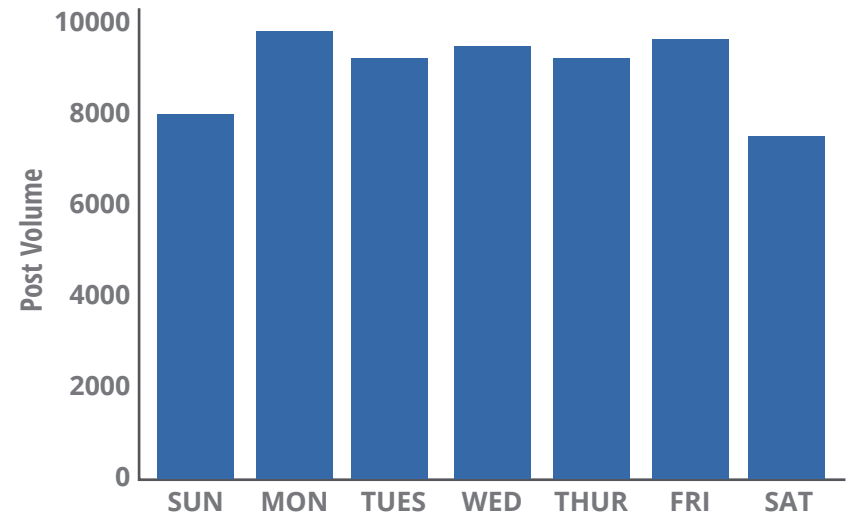
Perrine
@PCornuel

Heureusement je vais en voiture ce matin

TRANSLATION

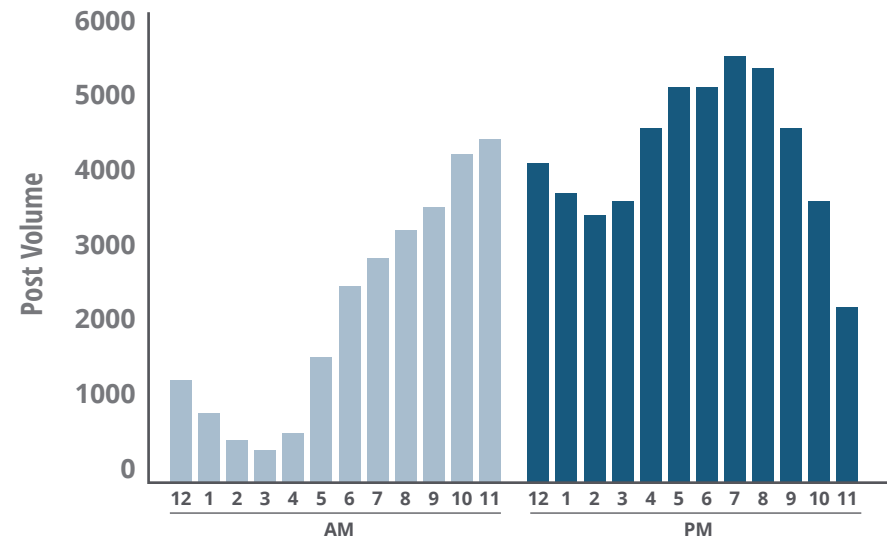
Luckily I'm taking the car this morning

Public Transportation Conversation by Day of the Week



Car conversation is higher in the evenings, suggesting that people are more likely to use their cars for going out after work.

Cars Conversation by Time of Day



Conclusion

Overall, consumers appear willing to use public transport over cars, but inconvenience often gets in the way of their good intentions. Most of the increased share of voice around public transport comes from people complaining about problems with delays or scheduling. In contrast, conversation around cars remained stable, suggesting a lack of problems in this area. If France hopes to tackle ongoing issues such as the air pollution in Paris, then addressing public transport weaknesses should be a critical step. For France's taxis, Uber is a credible challenger and cannot be ignored. But sentiment reveals that consumers have a multitude of problems with traditional taxis. To properly challenge Uber (and other potential challenges like Lyft), French taxis should consider improving aspects of their customer service to measure up to Uber.



Afterword

As this report reveals, research using social sentiment data uncovers issues among national audiences that brands may otherwise fail to notice. Interrogating social data offers levels of insight that more traditional research methods can't provide, which brings major benefits for consumer brands.

For large international brands in the French market, such as Netflix, Airbnb and Uber, social sentiment research shows that local reactions to their services suggest various issues to be resolved. For example, Uber may not have anticipated quite such vehement opposition from taxi drivers in Paris. And Netflix may have assumed that French viewers would accept international content in English.

From what we see here, French audiences tend to be sceptical and not always easily convinced. What's more, people are not shy about airing their views on social media. In France, there are also many rules and regulations designed to protect existing French industries from disruption. Newcomers to the market need to be prepared for these challenges - and interrogating social media data can give them the best possible grounding.

By becoming better informed, brands can avoid troublesome issues while leveraging local knowledge in positive ways. The social media landscape in France offers significant potential for brands to discover fresh trends, gain insights and stay informed, now and in the future.



Crimson Hexagon

To learn more about how social media analytics can help you better understand evolving consumer trends across the globe, schedule a customised demo today.

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