



Australian visitors

- Total population: **23.2 million inhabitants**
- Economic growth rate: **+2.4%**
- Average exchange rate: **€1 = AUD 1.38**; variation 2013/2012: **+10.9%**
- Rate of unemployment: **5.7%**
- Rate of inflation: **+2.4%**

Sources: Australian Bureau of Statistics, Banque de France, IMF.

- ✈️ **75.3%** of Australian tourists arrived by air.
- 🚆 **24.7%** of Australian tourists arrived by train.

Road transports not taken into account.



What type of profile?

• The average age of Australian visitors (45 years old) is higher than the overall average for international visitors arriving by air and by train (40 years old). 43.2% come from the upper socio-professional categories¹ (up 0.9 point), 17.3% are retired (up 9.3 points) and 12.2% are employees (down 8.3 points).

¹ Self-employed professionals, teachers, scientific professions, executives and other highly qualified occupations.

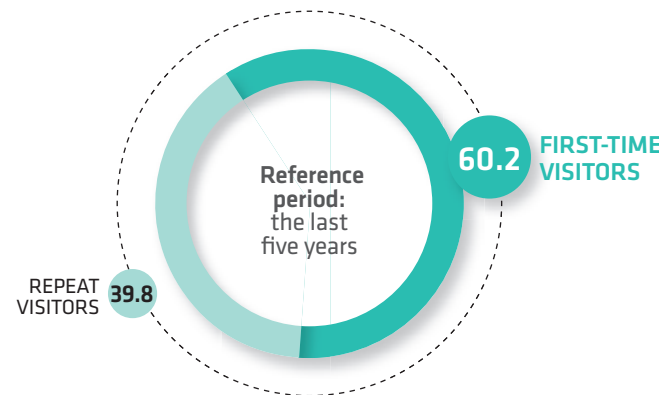
What type of travel?

• More than 9 visitors out of 10 (91.8%, up 20.3 points) travel for solely personal reasons. They come mainly as couples (39.5%, up 11.9 points), as families (23.5%, up 1.5 point) or alone (20.3%, down 12.0 points). For more than half (52.1%, up 31.9 points), the stay is included as part of a European tour. Paris Region is the sole destination for 32.1% (down 38.0 points). For 29.4% (up 16.6 points), it is part of a French tour. 76.8% (down 3.1 points) of Australians make their own travel arrangements. 16.9% (up 3.2 points) choose to travel individually with organized trips, while 6.3% (0.0 point) prefer organized groups.

What type of accommodation?

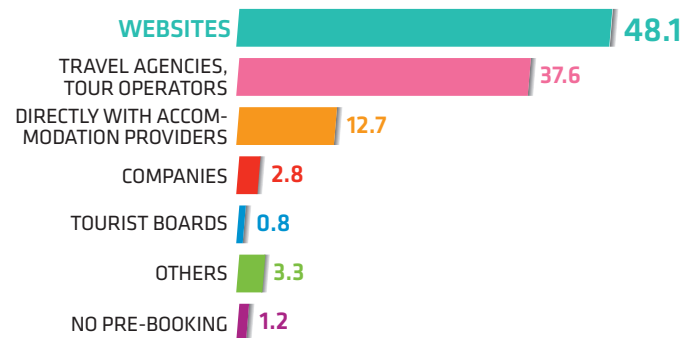
• More than 9 stays out of 10 (91.6%, up 8.7 points) are in paid accommodation. The main types of paid accommodation used are hotels, with 70.3% (mid-range for 66.9% and high-range for 28.3%), apartment hotels (9.0%) and furnished accommodation and seasonal rentals (8.0%). The main types of non-paid accommodation used are staying with friends (4.2%) and parents (1.5%).

THE MAJORITY OF AUSTRALIANS VISITING PARIS REGION ARE FIRST-TIME VISITORS (%)



The overall average for international visitors is 56.1% repeat visitors and 43.9% first-time visitors.

THE INTERNET IS THE PRIMARY METHOD OF RESERVATION (%)



Several possible answers, based on paid accommodation.

Australian visitors also favour the Internet for their travel planning (51.7%, up 2.5 points), followed by travel agencies and tour operators (33.3%, up 7.3 points) and word of mouth (13.6%, up 4.9 points).

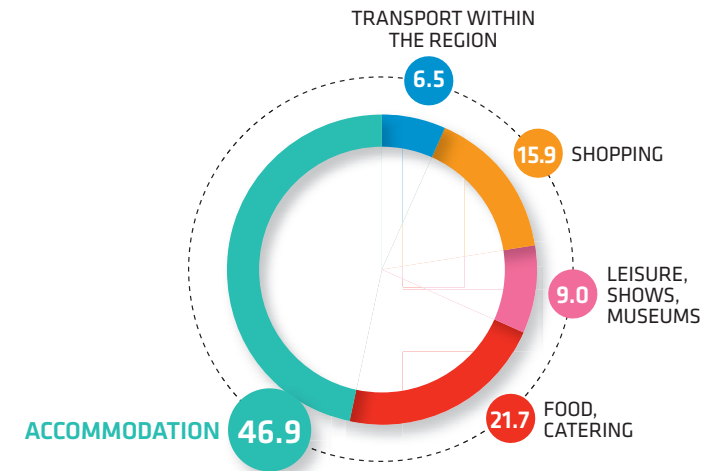
What types of activity?

• Australian visitors are particularly interested in guided tours of neighbourhoods (18.4%, up 10.4 points), visiting museums and monuments (95.8%, up 8.1 points), shows and concerts (15.0%, up 5.7 points) and discovering towns and cities (75.8%, up 5.7 points). They also enjoy visiting markets and flea markets (27.6%, up 5.5 points), parks and gardens (40.1%, up 5.3 points) and discovering fashionable new neighbourhoods (21.9%, up 4.7 points). On the other hand, they are less keen on visiting theme parks (10.3%, down 6.7 points) and nights out (13.9%, down 4.4 points).

Which sites are visited?

• The 5 most visited sites are: the tour Eiffel (79.8%), Notre-Dame de Paris (72.3%), the Arc de triomphe (64.4%), the Louvre (59.3%) and the Sacré-Coeur de Montmartre (41.7%). More Australians visit most of the top 5 sites, in particular Notre-Dame de Paris (up 12.3 points) and the tour Eiffel (up 11.6 points). On the other hand, fewer visit Disneyland® Paris (9.2%, down 5.8 points), the centre Pompidou (14.7%, down 5.4 points) and the Grande Arche de La Défense (4.9%, down 4.3 points).

AUSTRALIAN VISITORS SPEND NEARLY HALF OF THEIR BUDGET ON ACCOMMODATION (%)



Australian visitors have a much higher average daily spend per person than international visitors as a whole. They spend more on accommodation (up 4.7 points) and less on shopping (down 3.6 points).

VISITORS RATE THEMSELVES AS VERY SATISFIED, PARTICULARLY WITH OUTINGS AND CULTURAL ACTIVITIES (%)*



* % satisfied and very satisfied.

Average satisfaction rating for international visitors as a whole: 94.3%.

The figures expressed as "points" show the comparison with the overall average for international visitors arriving by air and by train.

Sources: ongoing surveys at airports and on trains - CRT Paris Île-de-France (Paris Region Tourist Board), ADP (Paris Airports Authority), SAGEB (Paris Beauvais Airport Management Authority), SVD (SNCF Travel Development), BVA - 2013 results.

SUGGESTIONS

- Align the marketing message to an older clientele, looking for culture and events.
- Work together with travel agencies and tour operators, which are indispensable despite the importance of the Internet.
- Owners of furnished accommodation and apartment hotels: focus in particular on visitors seeking this type of accommodation.

Key points

- **520,000 stays**, or 3.4% of stays by international visitors arriving by air and by train.
- **2,899,000 overnight stays**, or 3.5% of overnight stays by international visitors arriving by air and by train.
- **5.6 nights** on average.
- **39.8%** of visitors have already visited Paris Region.
- **93.7%** of visitors have tailored travel arrangements.
- **91.8%** of visitors travel for solely personal reasons.
- **€177** average spend (per person and per day).
- **96.7%** of visitors are satisfied with their stay in Paris Region.
- **96.5%** of visitors would recommend the destination to their friends and family.
- **33.2%** would like to return to Paris Region within the next 2 years.