



➤ FOREIGN VISITORS ARRIVING BY AIR

AUSTRALIAN VISITORS

Total population: 22.8 million inhabitants
Economic growth rate: +3.6%
Average rate of exchange: €1 = \$ AUD 1.24 ; variation 2012/2011: -7.9%
Unemployment rate: 5.2%
Inflation rate: +1.8%



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

What type of profile?

The average age of Australian visitors (43 years old) is higher than that for other international visitors as a whole arriving by air (39 years old).

Almost one half (46.9%, +1.0 point) come from the upper socio-professional categories¹ and 12.7% (+6.5 points) are retired.

¹ Liberal professions, teachers, scientific professions, executives and other intellectual professions.

What type of travel?

Almost 9 visitors out of 10 (87.8%, +15.2 points) travel for solely personal reasons. They come mainly as couples (36.8%, +10.7 points), as a family (25.3%, +4.3 points) or alone (19.4%, -17.5 points).

For 38.2%, (-33.8 points), Paris Ile-de-France is the sole destination for their trip. For almost one half (44.0%, +25.9 points) it is part of a European tour and for 21.9% (+10.1 points) it is part of a French tour.

74.9% (-5.0 points) of Australian visitors make their own travel arrangements. 18.4% (+3.9 points) travel individually with organized trips while 6.8% (+1.1 point) opt to travel with organized groups.

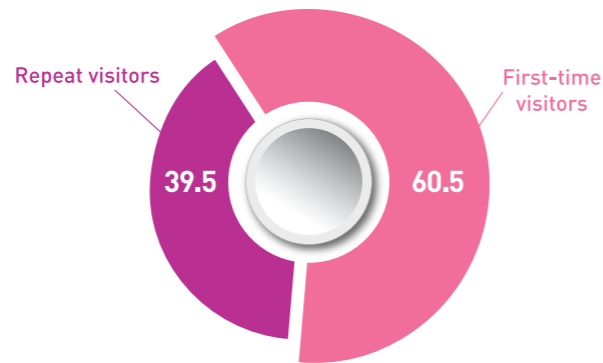
What type of accommodation?

Almost 9 stays out of 10 (86.7%, +5.1 points) are spent in paid accommodation.

The main types of paid accommodation used are hotels for 62.7% (2-star or 3-star hotels for 62.0% and 4-star and more for 35.4%), furnished accommodation and seasonal rentals (11.7%) and apartment hotels (8.1%).

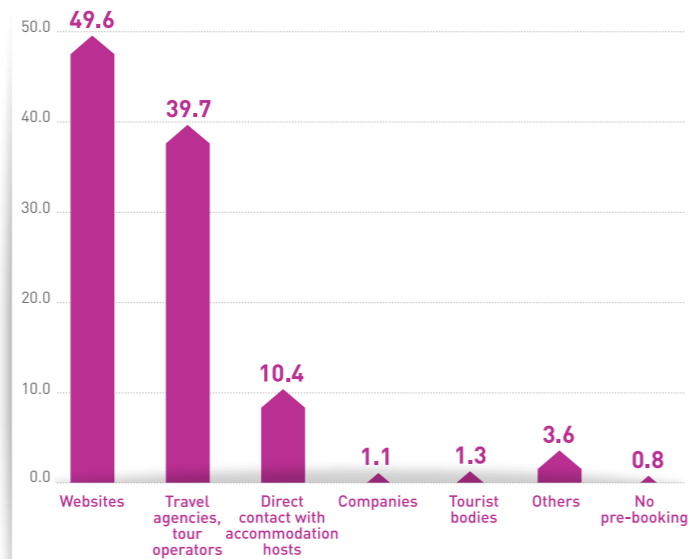
The main types of non-paid accommodation used are staying with friends (4.0%), apartment swaps (3.6%) and staying with parents (2.5%).

THE MAJORITY OF AUSTRALIANS VISITING PARIS ILE-DE-FRANCE ARE FIRST-TIME VISITORS (%)



Reference period: the last 5 years.
 The average figures for foreign visitors as a whole are 54.9% repeat visitors and 45.1% first-time visitors.

THE INTERNET IS THE PRIMARY METHOD OF RESERVATION (%)



Several possibilities, based on paid accommodation.
 Australian visitors also use the Internet as their preferred method of making travel arrangements (50.7%, +2.7 points), followed by travel agencies and tour operators (36.7%, +7.1 points) and direct contact with accommodation hosts (12.5%, +5.3 points).

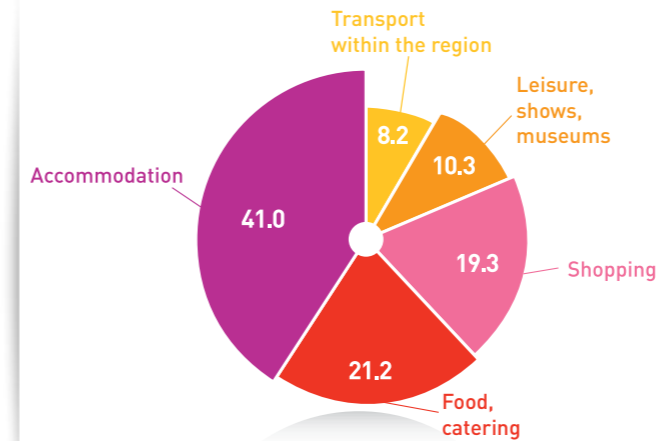
What types of activity?

Australian visitors are particularly interested in guided tours of different districts (20.0%, +11.9 points), visiting museums and monuments (97.4%, +9.3 points), discovering trendy new areas (21.0%, +8.4 points), shows and concerts (11.9%, +4.5 points) and events and cultural exhibitions (11.4%, +3.1 points). On the other hand, they are less attracted by nights out (12.4%, -7.3 points) and visiting theme parks (14.0%, -5.1 points).

Which sites are visited?

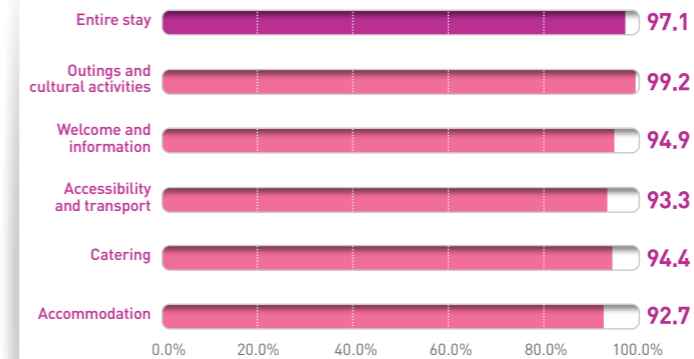
The 5 most visited sites are: the tour Eiffel (82.1%), Notre-Dame de Paris (81.4%), the Arc de triomphe (69.9%), the Louvre (63.7%) and the Sacré-Coeur de Montmartre (41.8%).
 More of them visit the majority of the 5 most visited sites and particularly Notre-Dame de Paris (+16.9 points) and the tour Eiffel (+11.8 points). On the other hand, fewer of them visit Disneyland® Paris (13.2%, -4.1 points), the Centre Pompidou (17.5%, -2.7 points) and the Cité des sciences et de l'industrie (1.8%, -2.2 points).

41% OF AUSTRALIAN VISITORS' SPEND IS ALLOCATED TO ACCOMMODATION (%)



Australian visitors, whose average spend per day and per person is higher than that for all visitors, allocate a slightly higher budget to leisure activities (+1.2 point).

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



* % satisfied and very satisfied.
 Average satisfaction rating, all foreign visitors as a whole: 96.0%.

The figures are expressed in "points" and relate to all foreign visitors arriving by air.

Source: ongoing survey in airports - Paris Ile-de-France Tourist Board, ADP (BVA) – 2012 results.

Suggestions

- Offer a large number of activities for first-time visitors, the majority and very active.
- Adapt the marketing message for an older clientele, in search of culture and events.
- Pay particular attention to the couples' target market.

KEY POINTS

- **337,000 stays** representing 3.2% of stays by all international visitors arriving by air.
- **2,166,000 overnight stays** representing 3.3% of overnight stays by all international visitors arriving by air.
- **6.4 nights** on average.
- **39.5%** have already visited Paris Ile-de-France.
- **93.2%** have tailored travel arrangements.
- **87.8%** travel for solely personal reasons.
- **€164** average spend (per day and per person).
- **97.1%** are satisfied with their stay in Paris Ile-de-France.
- **97.7%** would recommend the destination to their friends and family.
- **34.3%** would like to return to Paris Ile-de-France within the next 2 years.