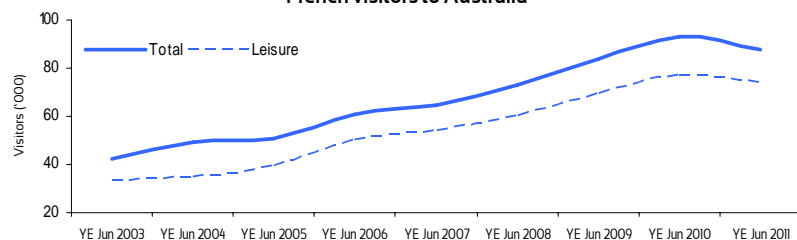


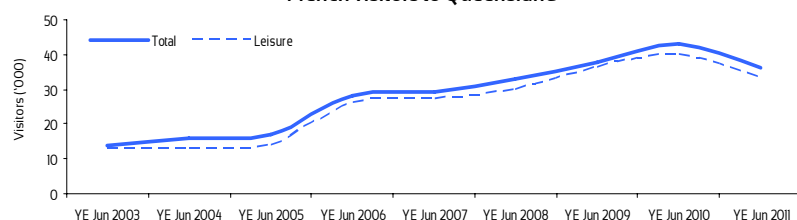
Year ended June 2011

	Australia	Annual change	Share of international visitors	Queensland	Annual change	Share of visitors to Qld
<b>Total visitors</b>	88,000	▼ -5%	2%	36,000	▼ -16%	2%
Total ALOS (nights) <sup>1</sup>	55.5	▲ 1.3		34.4	▲ 3.6	
<b>Leisure<sup>2</sup> visitors</b>	74,000	▼ -4%	2%	33,000	▼ -18%	2%
Leisure ALOS	44.3	▼ -0.5		26.0	▲ 3.1	
<b>Expenditure (\$m)<sup>3</sup></b>	\$346	▼ -2%	2% (share of expenditure)	\$82	▼ -16%	2% (share of expenditure)

### French visitors to Australia



### French visitors to Queensland



### French visitors to Australia

French visitor numbers to Australia declined by 4,000 visitors in the year ending June 2011 to 88,000 visitors.

Although accounting for 59% of all French visitors, first time visitors declined 9% in the year ending June 2011. In contrast, repeat visitors remained stable.

French visitors tend to travel to Australia unaccompanied (58%) or as an adult couple (21%).

The majority (53%) of French visitors to Australia are youth travellers (aged 15 to 29 years). This market declined by 6% during the year ending June 2011.

Around 63% of French visitors disperse beyond the major gateway cities in Australia.

### French visitors to Queensland

The number of French visitors to Queensland declined by 16% in the year ending June 2011. This was driven by declines in holiday, VFR (visiting friends or relatives) and education.

French visitors are most likely to visit Tropical North Queensland and Brisbane when in Queensland. Visitation to both of these destinations has declined by 17% and 24%, respectively.

### France market insights<sup>4</sup>

In 2010, Australia had a 0.4% share of France's total outbound market. The largest age group to Australia from France was 15 to 29 years. These consumers are increasingly booking direct with airlines and product. The French have been impacted by the weak European economic environment, the Icelandic volcanic ash cloud and the strong Australian dollar.

### Expenditure in Queensland

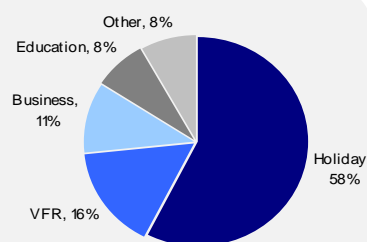
The French spent a total of \$82 million on their trips to Queensland in the year to June 2011. This was a decline of 16% on the year ending June 2010.

French spend per visitor in Queensland remained stable at around \$2,274. This is higher than the average spend of all international visitors to Queensland (\$1,822).

### Main purpose of visitation to Australia

The decline in French visitors to Australia in the year ending June 2011 was driven by holiday and education visitors. Despite this, holiday remains the main reason French visitors come to Australia.

The VFR and employment markets also declined, however business travel remained stable.

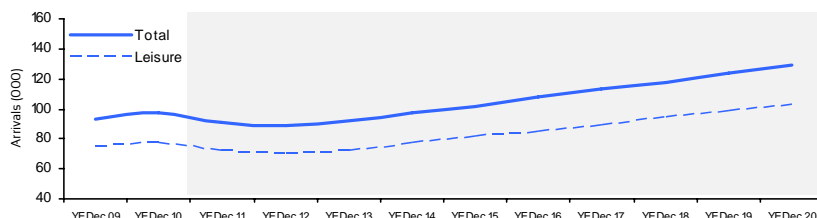


### French visitors forecast<sup>5</sup>

French arrivals to Australia are forecast to increase by an average of 2.9% each year between 2010 and 2020 to reach 129,000 arrivals.

Please note that arrivals forecast are based on total visitor arrivals into Australia, and therefore may vary from the visitation figures provided in the table above (as visitors are defined as persons over the age of 15, who are visiting Australia for 12 months or less).

### Forecast French arrivals to Australia



1. Average length of stay  
 2. Leisure is holiday and visiting friends or relatives (VFR) combined  
 3. Expenditure data is sourced from Tourism Research Australia and is inclusive of package expenditure  
 4. Tourism Australia's France Market Profile 2011  
 5. Tourism Forecasting Committee 2011 Issue 2  
 Note: All data unless specified is from Tourism Research Australia, International Visitor Survey year ended June 2011

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