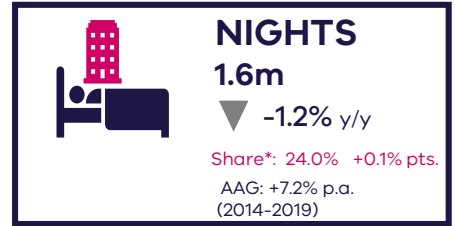
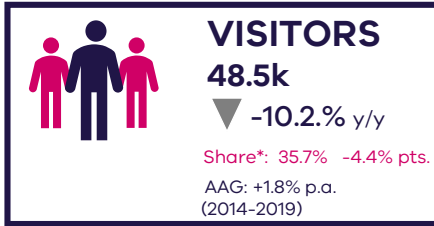
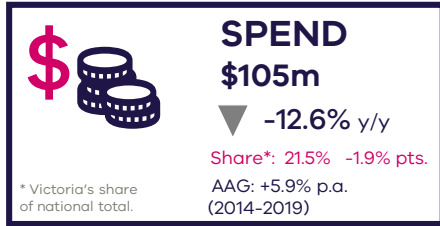


# International Tourism Summary: France

## Year ending December 2019

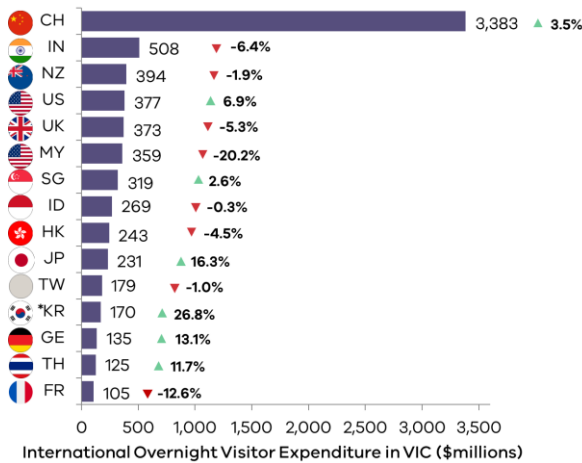


**48,500 French visitors spent 1.6 million nights and \$105 million on trips to Victoria in the year ending December 2019.**

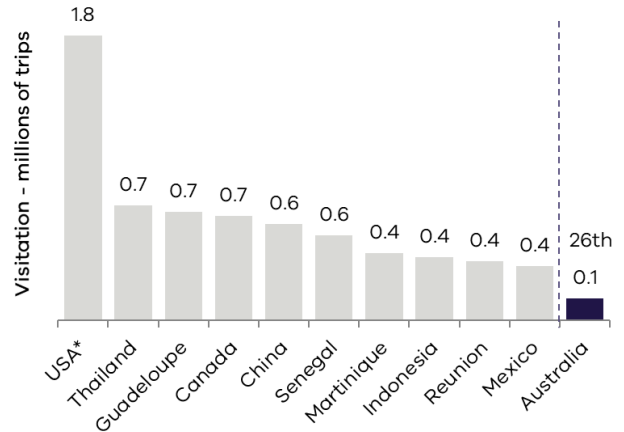


**Context:** In the year ending December 2019, international overnight visitors to Victoria (3.1 million) accounted for 3 per cent of total visitors to the state and 27 per cent (\$8.8 billion) of total visitor expenditure in Victoria.

### International Overnight Expenditure in Victoria (\$m)



### Top 10 Out-of-Region Destinations for French Travellers



French visitors spent \$105 million on trips to Victoria in the year ending December 2019, a year-on-year decline of 12.6 per cent. This represents 1.2 per cent of all international overnight visitor spend in Victoria. France is ranked Victoria's 15<sup>th</sup> largest international market in terms of expenditure.

Australia was ranked #26 for visitation against other out-of-region destinations for French travellers in the year ending December 2019 (down from #20 in 2018).

\* In the year ending December 2019, all Korean visitors to Australia were from South Korea.

### AUSTRALIA



**\$491m** Spend  
▼ -4.8%  
**136k** Visitors  
▲ 0.8%  
**6.6m** Nights  
▼ -1.5%

### NEW SOUTH WALES



**\$177m** Spend  
▼ -8.8%  
**87k** Visitors  
▼ -0.2%  
**2.2m** Nights  
▼ -4.9%

### QUEENSLAND



**\$87m** Spend  
▼ -16.3%  
**48k** Visitors  
▼ -1.9%  
**1.2m** Nights  
▼ -11.4%

The rate of decline of French expenditure on trips to Victoria (-12.2% year-on-year) was higher than the national average (-4.8%) and New South Wales (-8.8%), but lower than the decline seen in Queensland (-16.3%).

### MELBOURNE



**\$95m** Spend  
▼ -7.7%  
**47k** Visitors  
▼ -6.9%  
**1.3m** Nights  
▲ 8.4%

### REGIONAL VICTORIA



**np**  
**19k** Visitors  
▼ -4.2%  
**np**

In the year ending December 2019:

- 47,000 French visitors spent 1.3 million nights and \$95 million on trips to Melbourne
- 19,000 French visitors stayed overnight in regional Victoria.

np = non-publishable (figures are below reliable and publishable thresholds)

## French Spend, Visitors and Nights by Key States Visited

Victoria's Market Share of French spend, visitors and nights



### French Overnight Expenditure in Australia by Key States, 2014-2019

Expenditure by Visitors from France Year Ending December	Total Expenditure (\$ million)					Share of National %			Expenditure Per Night \$			Expenditure Per Visitor \$		
	2014	2018	2019	Av Ann 14-19	% Change 18-19	2014	2018	2019	2014	2018	2019	2014	2018	2019
New South Wales	151	194	177	3.2% p.a.	-8.8%	34.3%	37.6%	36.0%	60	85	82	1,908	2,232	2,040
<b>Victoria</b>	<b>79</b>	<b>121</b>	<b>105</b>	<b>5.9% p.a.</b>	<b>-12.6%</b>	<b>18.0%</b>	<b>23.4%</b>	<b>21.5%</b>	<b>71</b>	<b>76</b>	<b>67</b>	<b>1,788</b>	<b>2,234</b>	<b>2,172</b>
Queensland	91	104	87	-1.1% p.a.	-16.3%	20.7%	20.1%	17.7%	55	74	69	2,085	2,097	1,788
<b>Australia</b>	<b>440</b>	<b>515</b>	<b>491</b>	<b>2.2% p.a.</b>	<b>-4.8%</b>				<b>60</b>	<b>77</b>	<b>75</b>	<b>3,721</b>	<b>3,824</b>	<b>3,612</b>

<b>Total VIC International Expenditure</b>	4,903	8,467	8,826	12.5% p.a.	4.2%
<b>France's Share of VIC International Expenditure</b>	1.6%	1.4%	1.2%		

AAG = Average Annual Growth

NB: Visitor expenditure includes expenditure on packages attributable to destination. Estimates may differ from those published by Tourism Australia

Source: Regional Expenditure Model, International Visitor Survey, December 2014-2019, Tourism Research Australia, Canberra.

Victoria received 21.5 per cent of French overnight visitors' expenditure in Australia in the year ending December 2019, ahead of Queensland (17.7%) but behind New South Wales (36.0%). French visitors' expenditure per night in Victoria (\$67) was lower than the national average (\$75), New South Wales (\$82) and Queensland (\$69). However, Victoria received a higher total spend per visitor (\$2,172) than key competitor states New South Wales (\$2,040) and Queensland (\$1,788).

### French Overnight Visitation (000s) to Australia by Key States, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual		Share of Visitors %
							% change 14/19	% change 18/19	
<b>Australia</b>	<b>118</b>	<b>119</b>	<b>123</b>	<b>123</b>	<b>135</b>	<b>136</b>	<b>2.8% p.a.</b>	<b>0.8%</b>	
New South Wales	79	77	81	76	87	87	1.9% p.a.	-0.2%	64%
<b>Victoria</b>	<b>44</b>	<b>47</b>	<b>49</b>	<b>46</b>	<b>54</b>	<b>49</b>	<b>1.8% p.a.</b>	<b>-10.2%</b>	<b>36%</b>
Queensland	44	44	39	45	49	48	2.0% p.a.	-1.9%	36%

NB: Where there is a '-', figures are unreliable and are unable to be published.

The year-on-year decline in French overnight visitor numbers to Victoria (-10.2%) was in contrast to marginal growth at the national level (+0.8%), and greater than the slight decline seen in key competitor states New South Wales (-0.2%) and Queensland (-1.9%) in the year ending December 2019. Over the longer term (2014 to 2019), French overnight visitors to Victoria increased at an average annual rate of 1.8 per cent, behind the national average (+2.8% p.a.), Queensland (+2.0% p.a.) and New South Wales (+1.9% p.a.).

### French Visitor Nights (000s) in Australia by Key States, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual		Share of Nights %
							% change 14/19	% change 18/19	
<b>Australia</b>	<b>7,363</b>	<b>7,662</b>	<b>6,312</b>	<b>6,825</b>	<b>6,650</b>	<b>6,551</b>	<b>-2.3% p.a.</b>	<b>-1.5%</b>	
New South Wales	2,508	2,309	2,407	2,421	2,271	2,160	-2.9% p.a.	-4.9%	33%
<b>Victoria</b>	<b>1,113</b>	<b>1,655</b>	<b>1,413</b>	<b>1,259</b>	<b>1,593</b>	<b>1,574</b>	<b>7.2% p.a.</b>	<b>-1.2%</b>	<b>24%</b>
Queensland	1,648	1,606	976	1,440	1,408	1,247	-5.4% p.a.	-11.4%	19%

NB: Where there is a '-', figures are unreliable and are unable to be published.

In the year ending December 2019, French visitor nights to Victoria declined by 1.2 per cent year-on-year, softer than the decline at the national level (-1.5%), New South Wales (-4.9%) and Queensland (-11.4%). Over the longer term (2014 to 2019), French visitor nights spent in Victoria increased at an average annual rate of 7.2 per cent, in contrast to declines in the national average (-2.3% p.a.), New South Wales (-2.9% p.a.) and Queensland (-5.4% p.a.).

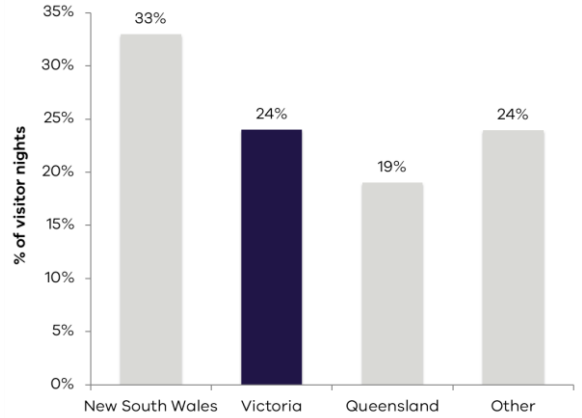
## Market Share by Key States<sup>1</sup>

French Overnight Visitors to Australia  
Year ending December 2019 – Market Share by Key States



In the year ending December 2019, 36 per cent of French visitors to Australia stayed overnight in Victoria; in line with Queensland (36%) but behind New South Wales (64%).

French Visitor Nights to Australia  
Year ending December 2019 – Market Share by Key States



Victoria's market share of visitor nights spent by French travellers to Australia in the year ending December 2019 was 24 per cent; ahead of Queensland (19%) but behind New South Wales (33%).

## Main Purpose of Trip (000s) to Australia by Key States Visited and Market Share

Year Ending December 2019

Year Ending December 2019	Holiday	Visiting friends and relatives	Total Leisure*	Total
New South Wales	52	16	68	87
Market Share %	70%	62%	68%	64%
<b>Victoria</b>	<b>30</b>	<b>8</b>	<b>38</b>	<b>49</b>
Market Share %	41%	30%	38%	36%
Queensland	31	9	40	48
Market Share %	42%	33%	40%	36%
<b>Australia</b>	<b>74</b>	<b>27</b>	<b>101</b>	<b>136</b>

\* Total Leisure = Holiday + VFR

NB: Where there is a '-', figures are unreliable and are unable to be published.

NB: Figures for 'Business', 'Education', 'Employment' and 'Other' visitors are unreliable and are unable to be published

In the year ending December 2019, 38 per cent of French leisure visitors to Australia stayed overnight in Victoria, including 41 per cent of holiday and 30 per cent of visiting friends and relatives (VFR) visitors. New South Wales' share of French leisure visitors was higher at 68 per cent, as was Queensland's share at 40 per cent.

## Purpose of Visit to Victoria (and the Destinations Within)

Some international visitors to Victoria visit more than one destination in the state, and for different purposes. For example, a visitor might stay in Melbourne for education reasons, and visit the Great Ocean Road region for a holiday. As such, the percentages of international visitors who visited Victoria for each purpose total more than 100 per cent.

French Overnight Expenditure and Visitation to Victoria by Destination Purpose of Visit – Year Ending December 2019

Year Ending December 2019	Holiday	Visiting friends and relatives	Total Leisure*	Employment	Total
<b>Overnight Expenditure (\$M)</b>	65	-	76	-	105
<b>Overnight Visitors (000s)</b>	35	11	41	-	49
<b>Visitor Nights (000s)</b>	956	-	1,112	284	1,574
<b>Average Length of Stay</b>	27.6	-	27.4	-	32.4
<b>Spend per Visitor</b>	1,884	-	1,878	-	2,172
<b>Spend per Night</b>	68	-	68	-	67

\* Total Leisure = Holiday + VFR (NB total leisure may equal more than the sum of holiday + VFR, since visitors can visit more than one destination in Victoria with more than one

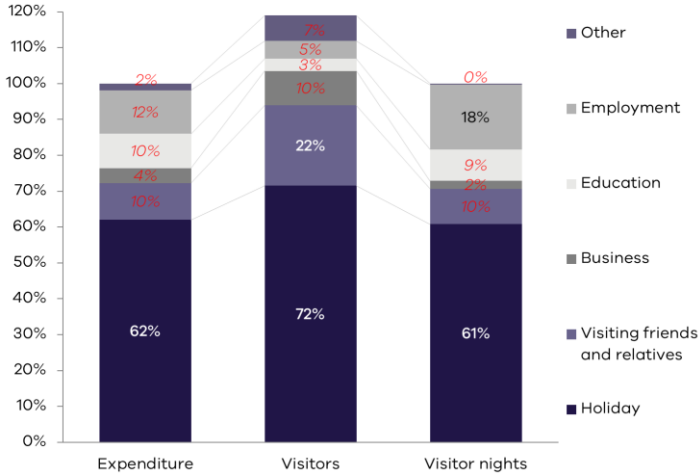
NB: Where there is a '-', figures are unreliable and are unable to be published.

NB: Figures for 'Business', 'Education' and 'Other' visitors are unreliable and are unable to be published

<sup>1</sup>NOTE: The proportion of Visitors to the States and Territories will not add up to 100% as visitors can travel to multiple destinations in one trip; while the proportion of Visitor Nights to the States and Territories will add to 100% as this measure is mutually exclusive.

## French Overnight Expenditure, Visitors and Nights to Victoria by Purpose of Visit

Year Ending December 2019



In the year ending December 2019, leisure visitors accounted for 72 per cent of French visitor expenditure in Victoria, including 62 per cent of spend contributed by holiday visitors.

During the same period, 72 percent of French visitors travelled to Victoria for holiday purposes, with an additional 22 per cent travelling for VFR purposes.

Sixty-one per cent (61%) of all nights spent in Victoria by French visitors in the year ending December 2019 were accounted for by holiday visitors, while employment visitors accounted for 18 per cent of visitor nights.

Note: Percentages of visitors will not add up to 100% as visitors can travel to multiple destinations in Victoria with different purposes.

Note: Percentages in red are based on small survey samples and are subject to high levels of sampling variability. Results should be interpreted with caution.

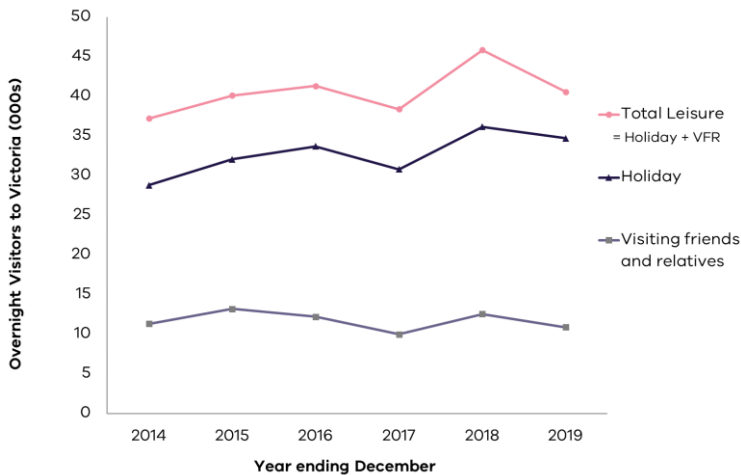
## French Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Holiday	29	32	34	31	36	35	3.8% p.a.	-4.0%
Visiting friends and relatives	11	13	12	10	13	11	-0.8% p.a.	-13.4%
<b>Total Leisure</b>	<b>37</b>	<b>40</b>	<b>41</b>	<b>38</b>	<b>46</b>	<b>41</b>	<b>1.7% p.a.</b>	<b>-11.5%</b>

NB: Where there is a '-'; figures are unreliable and are unable to be published.

NB: Figures for 'Business', 'Education', 'Employment' and 'Other' visitors are unreliable and are unable to be published

## French Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019

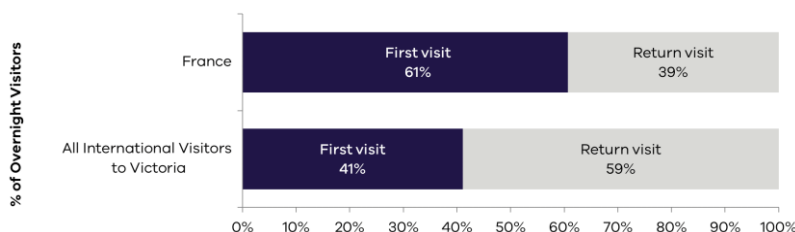


Of all the main purpose segments, the French holiday market has provided the strongest growth to overnight visitor numbers to Victoria over the past five years (+3.8% p.a.), while VFR visitors have declined at an average annual rate of 0.8 per cent over the same period.

Overall, overnight French leisure visitors to Victoria have increased at an average annual rate of 1.7 per cent per annum over the period 2014-2019.

## Repeat Visitation to Australia

Repeat Visitation to Australia (% of French overnight visitors to Victoria vs all international overnight visitors to Victoria)



In the year ending December 2019, 61 per cent of overnight visitors from France to Victoria were visiting Australia for the first time, compared with 41 per cent of international overnight visitors to Victoria overall.

## Melbourne and Regional Victoria Overnight Visitation

### French Overnight Visitation (000s) to Victoria, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Melbourne	43	44	46	44	51	47	2.0% p.a.	-6.9%
Regional Victoria	15	19	21	15	20	19	4.9% p.a.	-4.2%
<b>Victoria</b>	<b>44</b>	<b>47</b>	<b>49</b>	<b>46</b>	<b>54</b>	<b>49</b>	<b>1.8% p.a.</b>	<b>-10.2%</b>

NB: Where there is a '-', figures are unreliable and are unable to be published.

There were 47,000 French overnight visitors to Melbourne in the year ending December 2019, a 6.9 per cent decline over the previous year. French visitors to Melbourne have grown at an average annual rate of 2.0 per cent over the period 2014 to 2019.

In the year ending December 2019, there were 19,000 French overnight visitors to regional Victoria, a 4.2 per cent decline year-on-year. Over the longer term (2014-19), French overnight visitors to regional Victoria have grown at an average annual rate of 4.9 per cent per annum.

### French Visitor Nights (000s) to Victoria, 2 years<sup>2</sup> (rolling), 2014-2019

2 Years Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Melbourne	1,984	2,125	2,331	2,134	2,266	2,562	5.2% p.a.	13.0%
Regional Victoria	389	643	737	537	585	605	9.2% p.a.	3.3%
<b>Victoria</b>	<b>2,373</b>	<b>2,768</b>	<b>3,068</b>	<b>2,671</b>	<b>2,852</b>	<b>3,167</b>	<b>5.9% p.a.</b>	<b>11.0%</b>

NB: Where there is a '-', figures are unreliable and are unable to be published.

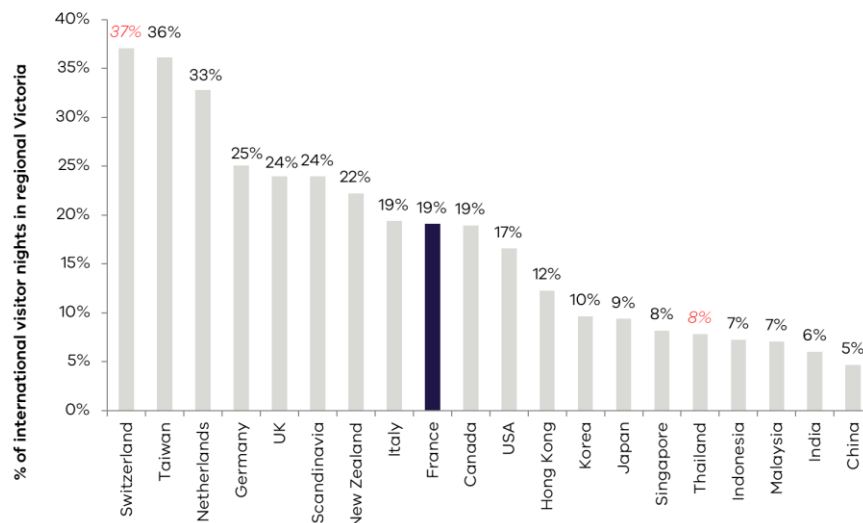
French visitors spent 2.6 million nights in Melbourne in the two years ending December 2019, an increase of 13.0 per cent compared with the two years ending December 2018. During the period 2014 to 2019 (using two years of data per annum\*), visitor nights spent in Melbourne increased at an average annual rate of 5.2 per cent.

In the two years ending December 2019, French visitors spent 605,000 nights in regional Victoria, representing an increase of 3.3 per cent compared with the two years ending December 2018. During the period 2014 to 2019 (using two years of data per annum\*), visitor nights spent in regional Victoria increased at an average rate of 9.2 per cent.

\* where 2014 includes years ending December 2013 and 2014 and 2019 includes years ending December 2018 and 2019.

## Regional Dispersal

### Regional Dispersal of Top 20 International Overnight Markets to Victoria – 2 Years Ending December 2019



Of the 3.2 million nights spent in Victoria by French visitors in the two years ending December 2019, 19 per cent (605,000) of them were spent in regional Victoria.

French visitors to Victoria have the 9<sup>th</sup> highest rate of overnight dispersal of all the state's top 20 international markets.

Note: Percentages in red are based on small survey samples and are subject to high levels of sampling variability. Results should be interpreted with caution.

<sup>2</sup> Two years of data are used to increase reliability of the figures.

## Places Visited in Regional Victoria and Melbourne Attractions

### Places Visited in Regional Victoria – Year Ending December 2019

Selected Places Visited - Overnight Visit or Daytrip (% of all Overnight Visitors to Victoria)	France Visitors	All International Visitors
Ballarat, Sovereign Hill	-	6%
Bendigo	-	3%
Daylesford, Hepburn Springs, Mt. Macedon	-	1%
Geelong & the Bellarine Peninsula	11%	9%
Great Ocean Road/Twelve Apostles	42%	33%
Healesville Sanctuary	-	2%
Mornington Peninsula	12%	8%
Phillip Island/Penguin Parade	20%	17%
Puffing Billy and Dandenong Ranges	-	10%
Victorian Snowfields	-	2%
Wilson's Promontory	12%	3%
Yarra Valley	19%	12%

NB: Where there is a '-', figures are unreliable and are unable to be published.

In the year ending December 2019, 42 per cent of French overnight visitors to Victoria spent time (daytrip or overnight) in the Great Ocean Road/Twelve Apostles region. This region is very popular generally, with 33 per cent of all international overnight visitors to Victoria travelling there.

Twenty per cent (20%) of French overnight visitors to Victoria went to the Phillip Island/ Penguin Parade area (compared with 17 per cent of international overnight visitors to Victoria overall) and 19 per cent visited the Yarra Valley region (compared with 12 per cent of international visitors overall).

### Melbourne Attractions Visited – Year Ending December 2019

Selected Places Visited - Melbourne Attractions (% of Overnight Visitors to Victoria)	France Visitors	All International Visitors
Australian Centre for the Moving Image (ACMI)	-	4%
Brunswick Street	20%	10%
Chadstone Shopping Centre	-	15%
Chapel Street	24%	9%
Crown Casino/entertainment complex	19%	19%
Docklands/Marvel Stadium (prev. Etihad Stadium)	30%	19%
Federation Square	38%	38%
Melbourne CBD Shopping Precinct	69%	63%
Melbourne Cricket Ground (MCG)	-	6%
Melbourne Museum (Royal Exhibition Building)	26%	16%
Melbourne Zoo	-	8%
National Gallery of Victoria (NGV)	25%	17%
Queen Victoria Market	59%	44%
Shrine of Remembrance	17%	12%
Southbank/Southgate	36%	26%
St Kilda	54%	28%

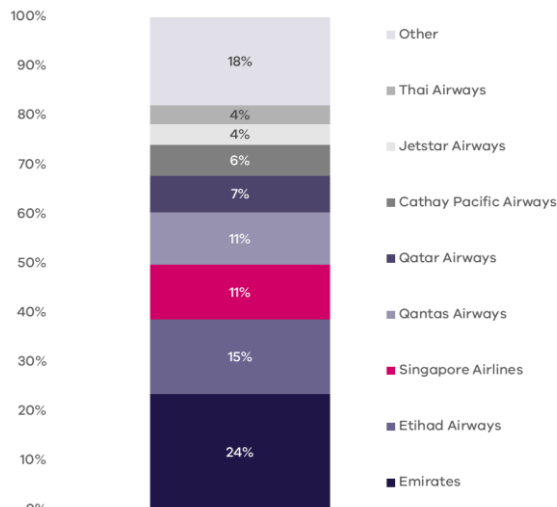
NB: Where there is a '-', figures are unreliable and are unable to be published.

The most popular Melbourne attractions visited by French overnight visitors to Victoria were the CBD shopping precinct (69 per cent compared with 63 per cent of international visitors overall), Queen Victoria Market (59 per cent compared with 44 per cent of international visitors overall) and St Kilda (54 per cent compared with 28 per cent of international overnight visitors to Victoria overall).

Other attractions that French visitors were more likely to visit compared to international visitors overall included Southbank/Southgate (36 per cent compared with 26 per cent of international overnight visitors to Victoria overall), Docklands/Marvel Stadium (30 per cent compared with 19 per cent of international overnight visitors overall), Melbourne Museum (26 per cent compared with 16 per cent of international overnight visitors to Victoria overall), the NGV (25 per cent compared with 17 per cent of international overnight visitors overall), Chapel Street (24 per cent compared with nine per cent of international overnight visitors overall), Brunswick Street (20 per cent compared with 10 per cent of international overnight visitors overall) and the Shrine of Remembrance (17 per cent compared with 12 per cent of international overnight visitors overall).

## Aviation<sup>3</sup>

### Airline Market Share – French International Arrivals into Melbourne – Year ending December 2019



In the year ending December 2019, Emirates (24%), Etihad Airways (15%), Singapore Airlines (11%) and Qantas Airways (11%) had the greatest share of French international arrivals into Melbourne.

<sup>3</sup> Note: Aviation capacity is measured by "available seats", which includes international visitors and Australian residents returning home.

## Sources:

- International Visitor Survey (IVS), years ending December 2014-2019, Tourism Research Australia (data released 8 April 2020)
- Regional Expenditure Model (REX) 2014-2019, Tourism Research Australia (data released 8 April 2020)
- Tourism Australia Consumer Demand Project, Tourism Economics, April 2020
- International Airlines Operated Flights and Seats, year ending December 2019, Department of Infrastructure and Regional Development (BITRE)
- Visitor Arrivals and Departures, year ending December 2019, Tourism Research Australia

Base for IVS and Expenditure data: Only those trips where International visitors aged 15 years or over who have stayed in Australia for less than 12 months are in scope. Expenditure includes package expenditure.

Figures that are unreliable and unable to be published are represented by '-'. Figures might not add up due to rounding.

To view the full suite of 15 International Tourism Summaries (Victoria's top 15 international markets in terms of expenditure, visitors and nights), see <https://www.business.vic.gov.au/tourism-industry-resources/research/international-research>

For further information on IVS and Expenditure data sources used please refer to our Guide to Tourism Data Sources and Definitions document found here: <https://www.business.vic.gov.au/tourism-industry-resources/research/teve-research>

For further information on Tourism Australia's Consumer Demand Project, see <http://www.tourism.australia.com/en/markets-and-research/reports/consumer-research.html>

Further information on international visitor statistics: <https://www.tra.gov.au/international>;  
<http://www.tourism.australia.com/en/markets-and-research/market-regions.html>

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Due care is taken in the production of this factsheet, however DJPR accepts no responsibility for the use of this information.