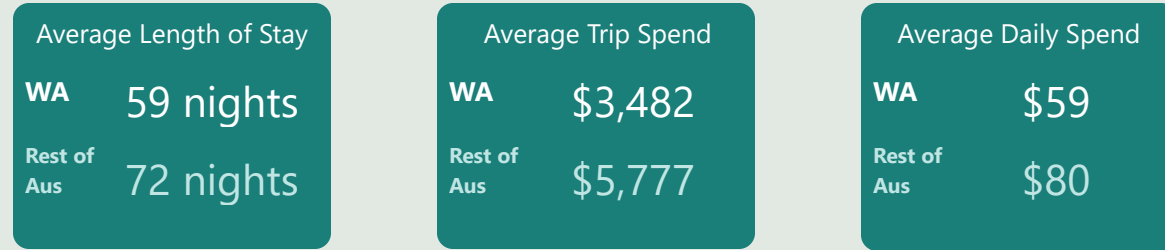


# FRANCE | MARKET PROFILE 2025

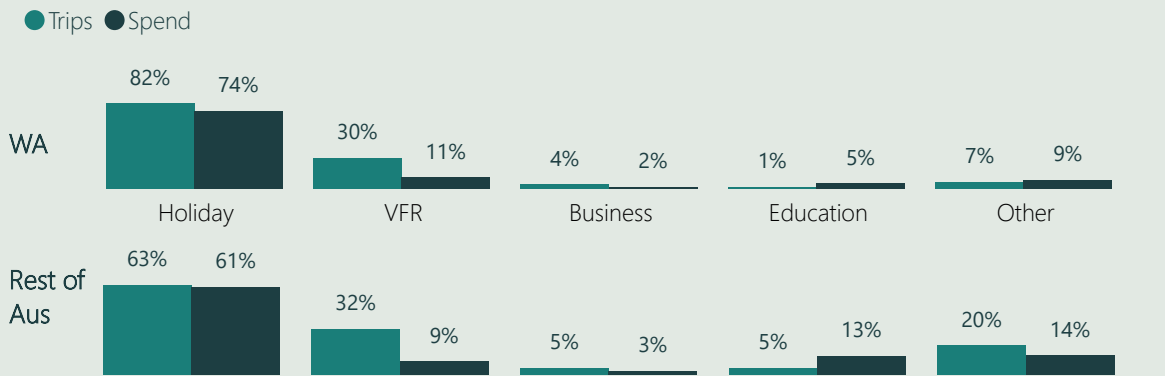
## MARKET OVERVIEW

### Leisure Visitation to WA (as compared to an average for other states/territories) <sup>1</sup>

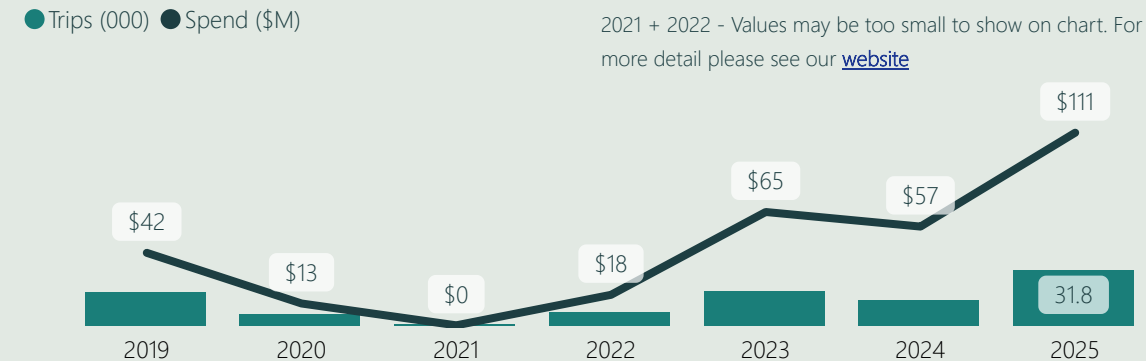
Rest of Aus is an average of all other states excluding WA



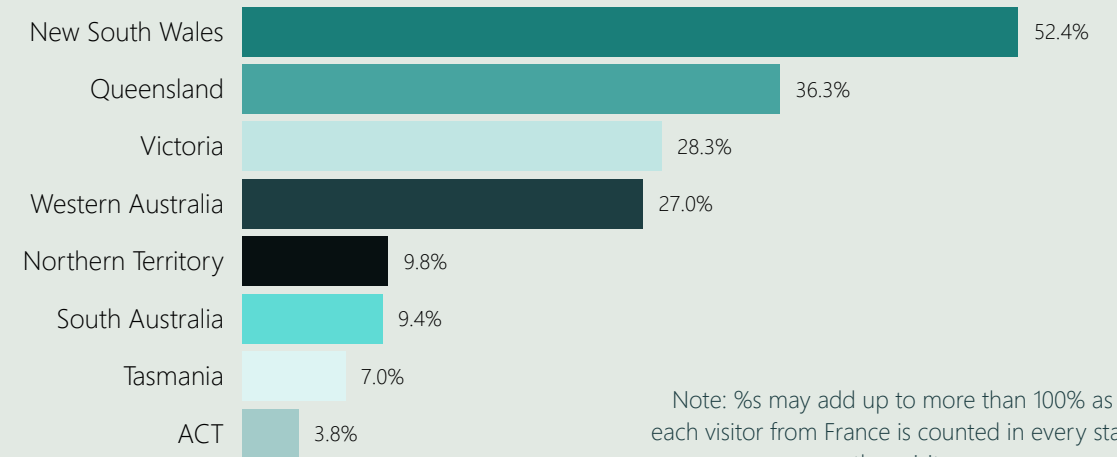
### Total Trips and Spend by Purpose <sup>1</sup>



### Leisure Visitation and Spend in WA <sup>2</sup>

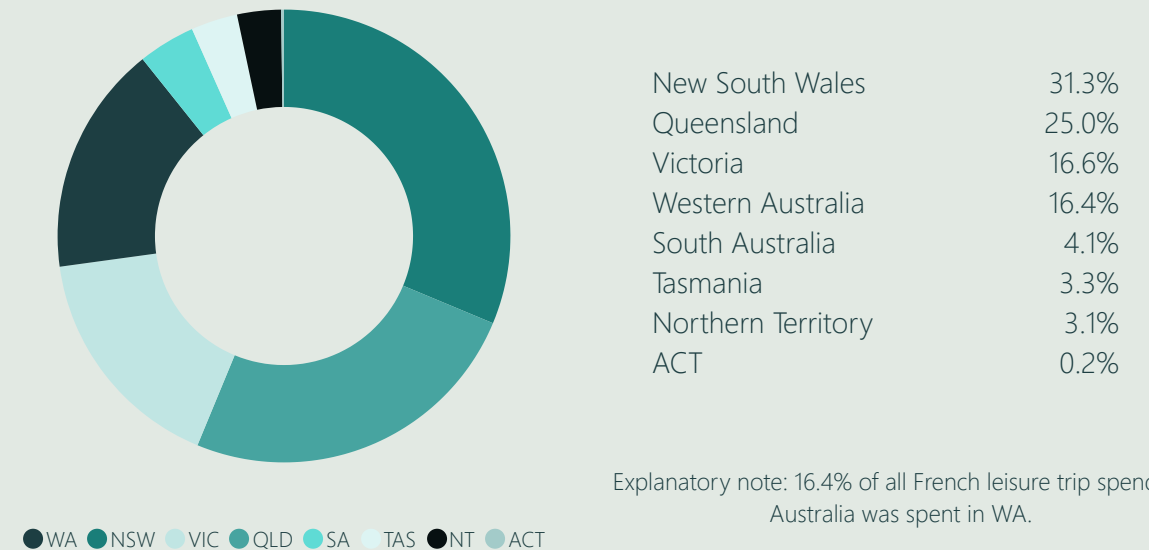


### Market Share of Leisure Trips to Australia <sup>1</sup>



Note: %s may add up to more than 100% as each visitor from France is counted in every state they visit.

### Market Share of Leisure Trip Spend in Australia <sup>1</sup>

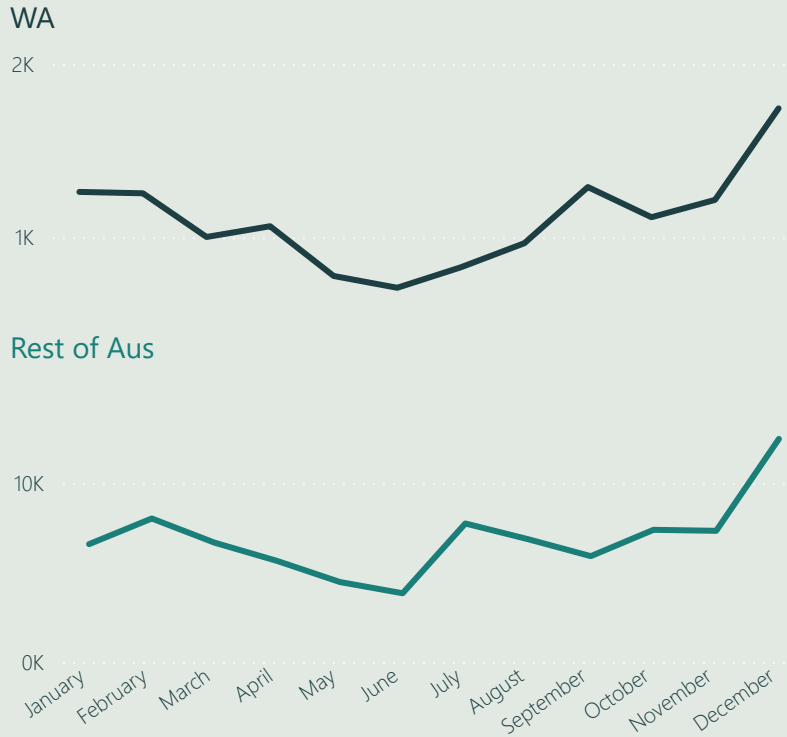


Explanatory note: 16.4% of all French leisure trip spend in Australia was spent in WA.

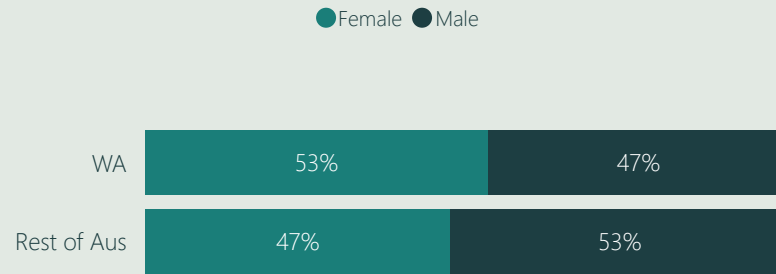
# FRANCE | MARKET PROFILE

## LEISURE TRIP PROFILE (TWO YEAR AVERAGE - 2024/25)

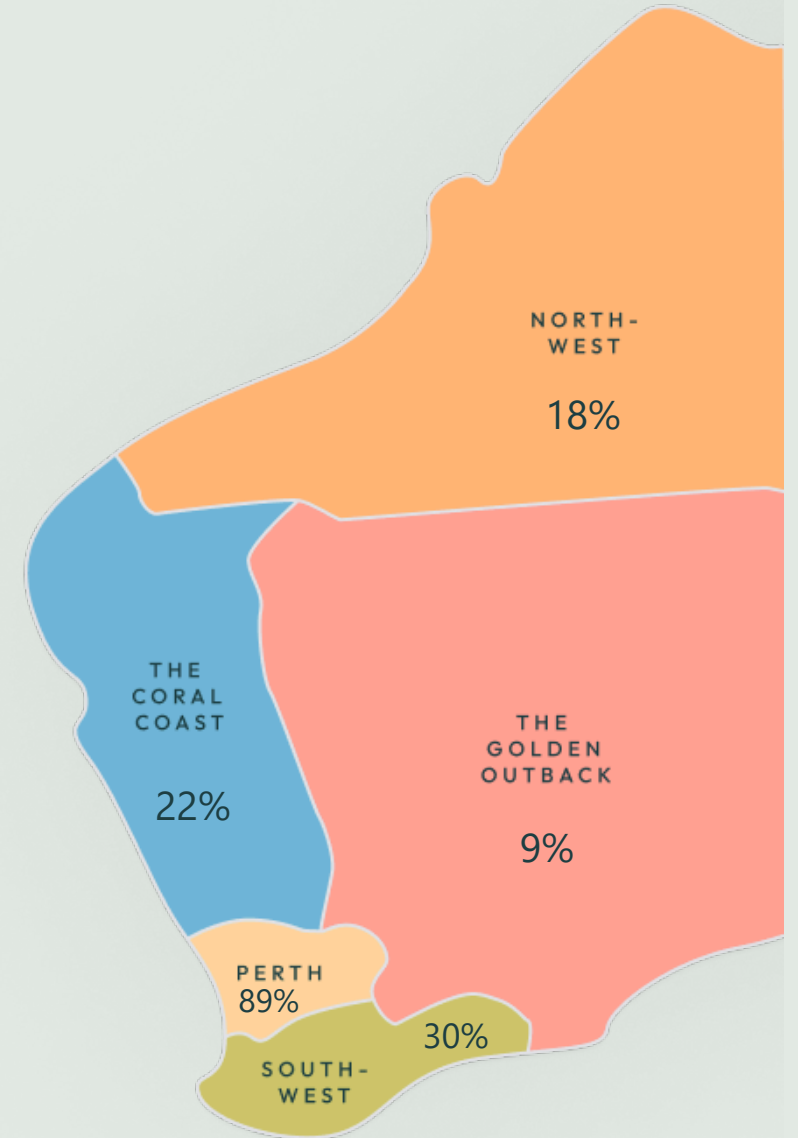
### Seasonality - Short-term Leisure Visitor Arrivals <sup>4</sup>



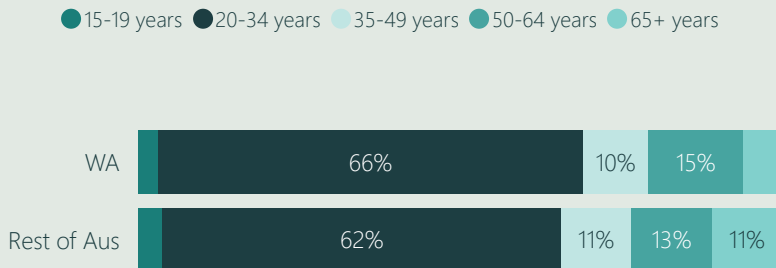
### Gender <sup>3</sup>



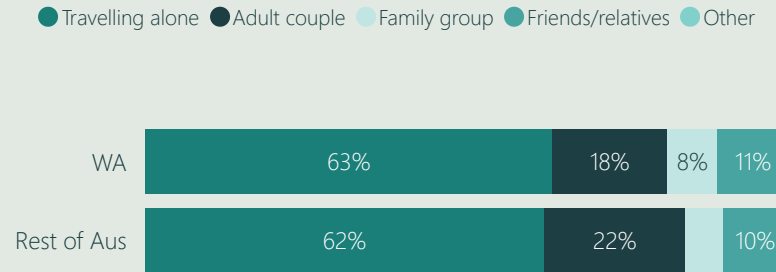
### Regional Dispersal <sup>3</sup>



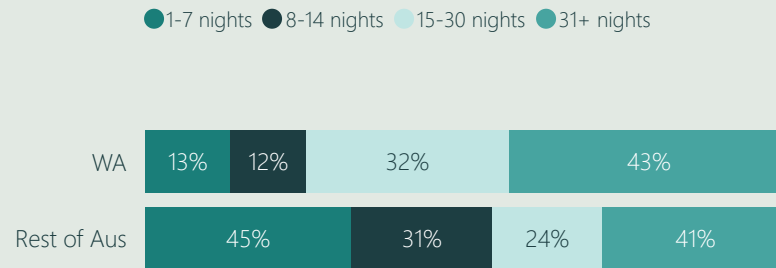
### Age <sup>3</sup>



### Travel Party <sup>3</sup>



### Average Length of Stay in State <sup>3</sup>



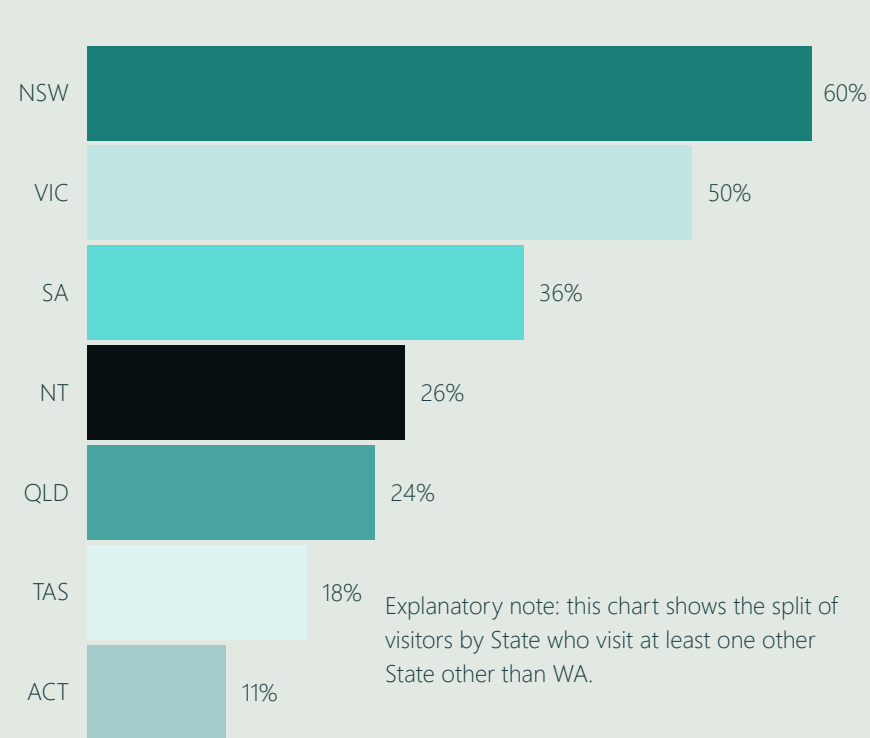
# FRANCE | MARKET PROFILE

## LEISURE TRIP PROFILE (TWO YEAR AVERAGE - 2024/25)

### Top 10 Activities for Leisure Visitors to WA <sup>3</sup>\*

	WA	Rest of Aus
	%	%
① Eat out / dine at a restaurant and/or cafe	95%	95%
② Go to the beach	89%	86%
③ Sightseeing/looking around	83%	73%
④ Go shopping for pleasure	81%	82%
⑤ Visit national parks / state parks	80%	72%
⑥ Visit botanical or other public gardens	70%	71%
⑦ Pubs, clubs, discos etc	68%	67%
⑧ Go to markets	65%	59%
⑨ Bushwalking / rainforest walks	58%	51%
⑩ Visit museums or art galleries	50%	58%

### Other States Visited <sup>3</sup>



### Group Tour v Free Independent Travellers (FIT) <sup>3</sup>

89% of French leisure visitors to WA are free independent travellers. 96% of French leisure visitors to the rest of Australia are free independent travellers, so only a small proportion are likely to be on a group tour.

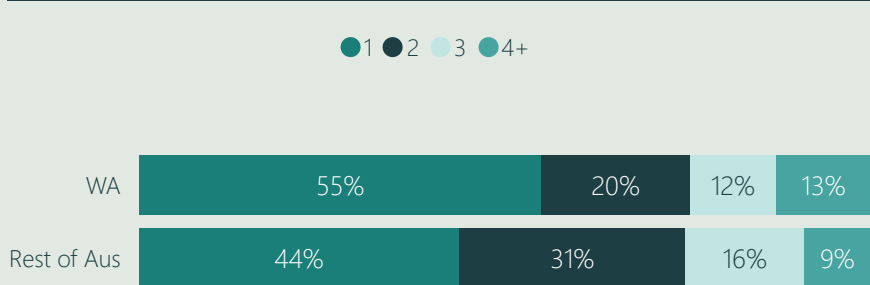
### Repeat Visitors <sup>3</sup>

47% of French leisure visitors to WA are on a return visit to Australia whilst the proportion for the rest of Australia is 37%.

### Top 3 Accommodation Choices for Leisure Visitors to WA <sup>3</sup>

	WA	Rest of Aus
	%	%
① Other commercial accommodation	59%	53%
② Hotel/resort/motel or motor Inn	32%	42%
③ Backpacker or hostel	32%	31%

### Number of States Visited <sup>3</sup>



### Travel Packages <sup>3</sup>

5% of French leisure visitors to WA arrived on a travel package and the percentage this type of visitor makes up in the rest of Australia is 5%.

\*Note: Activity may have taken in place in WA or elsewhere in Australia during the trip.

# FRANCE | MARKET PROFILE

## IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

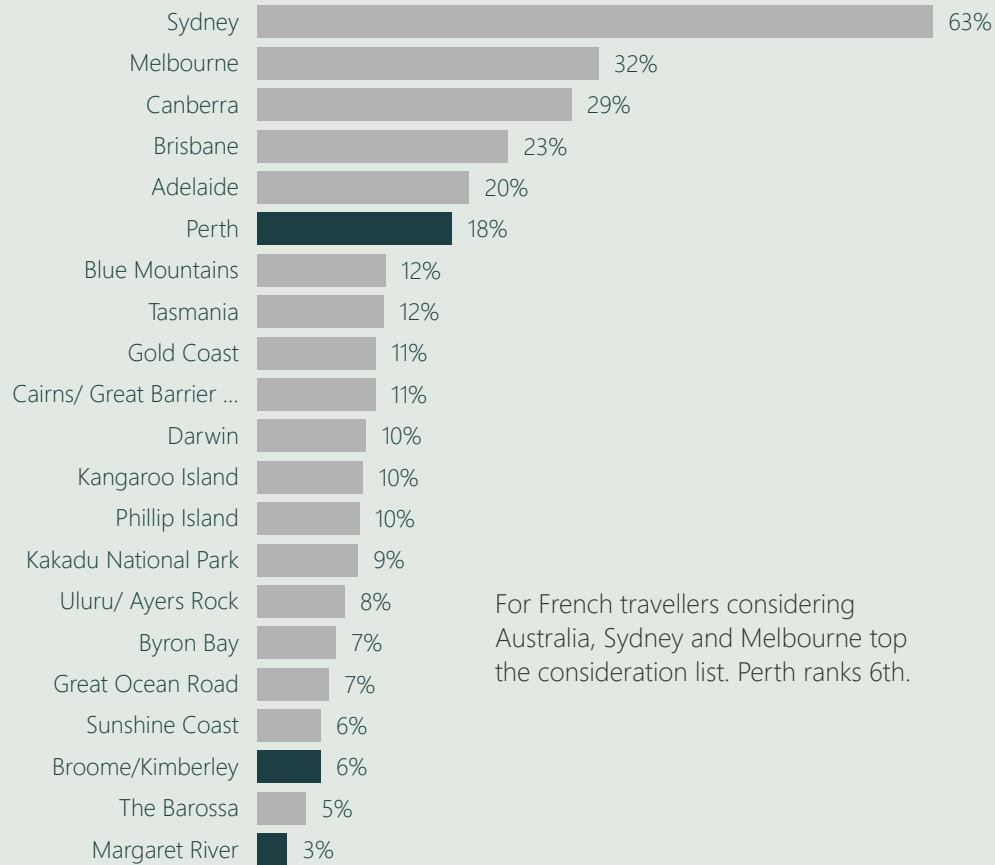
### Out of region (OOR) travellers



Travelled outside of their region within the last 5 years for leisure and/or intend to travel outside of their region for leisure within the next 2 years

### Consideration of Australian Destinations <sup>5</sup>

(those considering a trip to Australia in the next 4 years)



For French travellers considering Australia, Sydney and Melbourne top the consideration list. Perth ranks 6th.

### Which factors are most important when choosing a destination <sup>5</sup>

- ① Appealing climate or weather
- ② Easy to get to (time & effort)
- ③ A safe and secure destination
- ④ Value for money
- ⑤ World class beaches & coastlines
- ⑥ Beautiful natural environments

Appealing climate/weather is the number one driver of destination choice for French travellers, and they place more emphasis on this than the average traveller. French travellers seek destinations that are easy to get to (time and effort), which could be a barrier to visiting Western Australia.

### What OOR travellers associate with destinations <sup>5</sup>

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	41%	29%	14%	12%	8%	6%
A vibrant city lifestyle	56%	38%	19%	15%	5%	3%
Beautiful natural environments	21%	17%	11%	10%	12%	10%
Different and interesting local wildlife	17%	15%	9%	13%	10%	13%
Good food, wine/beverages, local cuisine and produce	40%	29%	16%	14%	6%	5%
Interesting events and festivals	48%	31%	13%	11%	3%	5%
Value for money	23%	18%	11%	10%	6%	6%

Compared to other international markets, French travellers have relatively low associations of Australian destinations. Perth's strongest association is with a vibrant city lifestyle.

# FRANCE | MARKET PROFILE

## DEFINITIONS & SOURCES

### Definitions

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**Leisure:** comprises both holiday visitors and those visiting friends and relatives (VFR).

### Sources

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1. Tourism Research Australia – International Visitor Survey, YE Dec 25
2. Tourism Research Australia – International Visitor Survey, YE Dec 19/20/21/22/23/24/25
3. Tourism Research Australia – International Visitor Survey, 2 yr average, YE Dec 24/25
4. Australian Bureau of Statistics via Tourism Research Australia – Visitor Arrivals and Departures (State of Stay: WA, Category of Traveller: Short Term Visitor Arrival, Main purpose of trip: Leisure, Country (TRA benchmarks)), YE Dec 25
5. Tourism Australia – Consumer Demand Project, October - December 2025.

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