



➤ FOREIGN VISITORS ARRIVING BY AIR

AMERICAN VISITORS

Total population: 313.9 million inhabitants
Economic growth rate: +2.2%
Average rate of exchange: €1 = \$1.29 ; variation 2012/2011: -7.6%
Unemployment rate: 8.1%
Inflation rate: +2.1%



Sources: U.S. Census Bureau – Banque de France – IMF.

What type of profile?

The average age of American visitors (43 years old) is higher than that for other international visitors as a whole arriving by air (39 years old). More than half come from the upper socio-professional categories¹ (52.0%, +6.0 points). The majority come from New York/Boston (24.1%), California (16.5%) and Pennsylvania/ Ohio/Michigan/Illinois (12.7%).

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

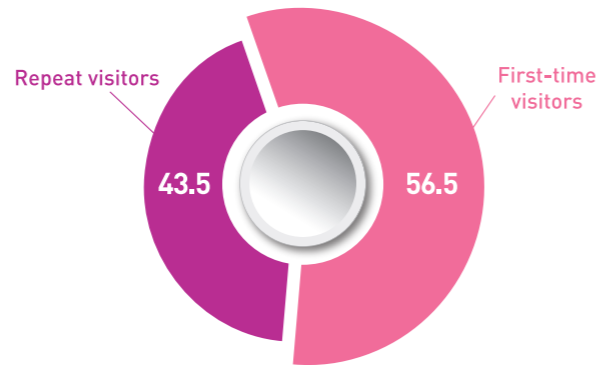
What type of travel?

More than three quarters (78.8%, +6.3 points) travel for solely personal reasons. They come mainly alone (31.2%, -5.8 points) or as couples (29.2%, +3.1 points). Paris Ile-de-France is the sole destination for 59.2% of stays (-12.8 points). For 24.6% it is part of a European tour (+6.6 points) and for 18.1% it is part of a French tour (+6.2 points). 80.8% of Americans make their own travel arrangements (+0.9 point). 11.7% (-2.7 points) travel individually with organized trips and 7.5% (+1.9 point) opt to travel with organized groups.

What type of accommodation?

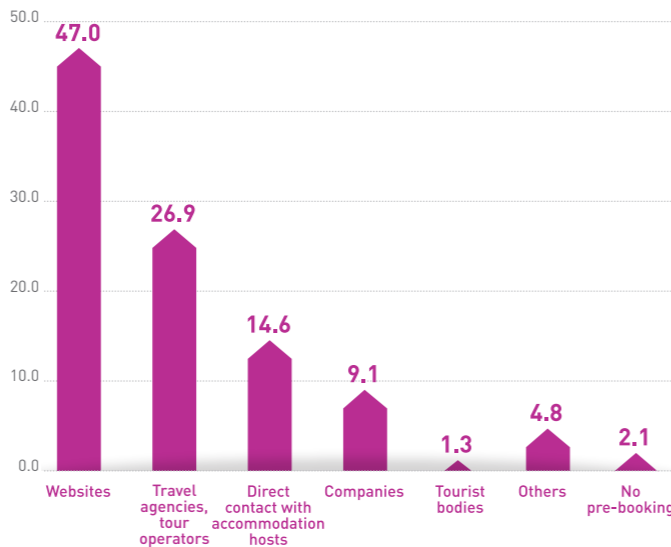
More than 8 stays out of 10 (84.7%, +3.1 points) are spent in paid accommodation. The main types of paid accommodation used are hotels for 72.9% (2-star or 3-star hotels for 58.6% and 4-star and more for 36.2%), as well as furnished accommodation and seasonal rentals (5.9%). The main types of non-paid accommodation used are staying with friends (6.4%), parents (3.0%) and apartment swaps (1.6%).

THE MAJORITY OF AMERICANS 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.
 American visitors also use the Internet as their preferred method of making travel arrangements (46.9%, -1.1 point), followed by travel agencies and tour operators (24.4%, -5.3 points).

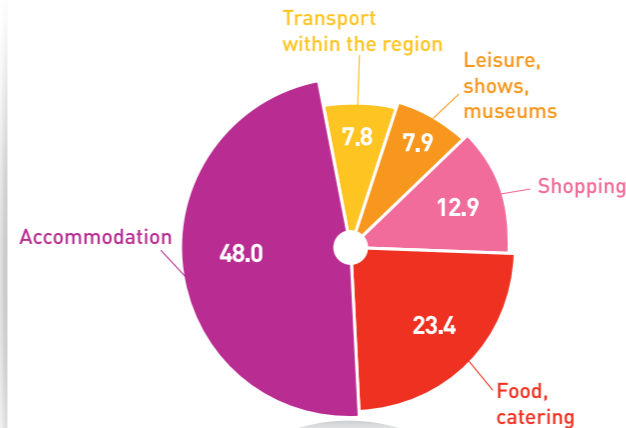
What types of activity?

American visitors are particularly interested in visiting parks and gardens (49.2%, +7.5 points), museums and monuments (94.3%, +6.3 points), events and cultural exhibitions (14.5%, +6.2 points), markets and flea markets (34.9%, +6.1 points) and discovering towns and cities (79.5%, +5.7 points). They also enjoy guided tours of different districts (13.5%, +5.4 points) and discovering gastronomy (47.9%, +5.1 points). The only activities where they have less involvement than the other tourists are visiting theme parks (8.5%, -10.6 points) and nights out (17.4%, -2.3 points).

Which sites are visited?

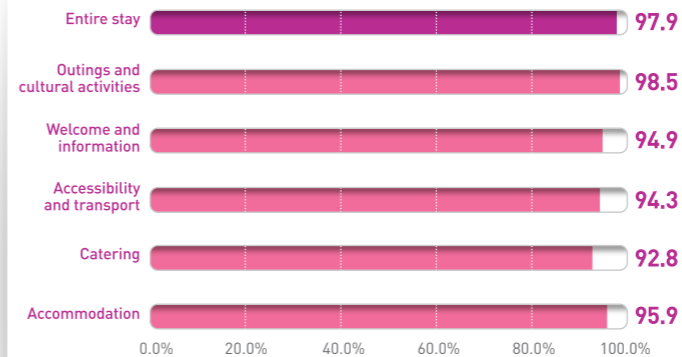
The 5 most visited sites are: Notre-Dame de Paris (76.6%), the tour Eiffel (74.5%), the Louvre (65.5%), the Arc de triomphe (61.6%) and the Sacré-Coeur de Montmartre (39.9%). Particularly large numbers of them visit the musée d'Orsay (38.1%, +13.4 points), Notre-Dame de Paris (+12.1 points) and the Louvre (+8.5 points). On the other hand, fewer visit Disneyland® Paris (7.2%, -10.2 points), the Grande Arche de la Défense (6.8%, -3.8 points) and the Sacré-Coeur de Montmartre (-3.3 points).

ALMOST ONE HALF OF AMERICAN VISITORS' SPEND IS ALLOCATED TO ACCOMMODATION (%)



American visitors, whose average spend per day and per person is higher than that for all visitors, allocate a higher budget to accommodation (+6.8 points) and a lower budget to shopping (-7.0 points).

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, better-off clientele, in search of culture and events.
- Focus on the Internet and mobile applications.

KEY POINTS

- 1,364,000 stays representing 12.8% of stays by all international visitors arriving by air.
- 9,090,000 overnight stays representing 13.8% of overnight stays by all international visitors arriving by air.
- 6.7 nights on average.
- 43.5% have already visited Paris Ile-de-France.
- 92.5% have tailored travel arrangements.
- 78.8% travel for solely personal reasons.
- €152 average spend (per day and per person).
- 97.9% are satisfied with their stay in Paris Ile-de-France.
- 97.9% would recommend the destination to their friends and family.
- 39.1% would like to return to Paris Ile-de-France within the next 2 years.