



German visitors

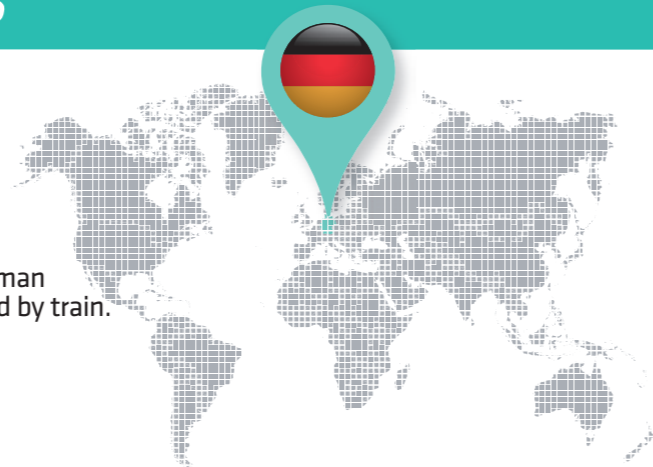
- Total population: **80.5 million inhabitants**
- Economic growth rate: **+0.4%**
- Rate of unemployment: **5.3%**
- Rate of inflation: **+1.6%**

Source: Eurostat.

55.7% of German tourists arrived by air.

44.3% of German tourists arrived by train.

Road transports not taken into account.



What type of profile?

The average age of German visitors is the same as the overall average for international visitors arriving by air and by train (40 years old). 4 visitors out of 10 come from the upper socio-professional categories¹ (40.2%, down 2.1 points) and 23.6% are employees (up 3.1 points). They come mainly from North Rhine-Westphalia (27.4%), Bavaria (15.4%), Baden-Württemberg (13.8%), Hessen (9.0%) and Berlin (8.5%).

¹ Self-employed professionals, teachers, scientific professions, executives and other highly qualified occupations.

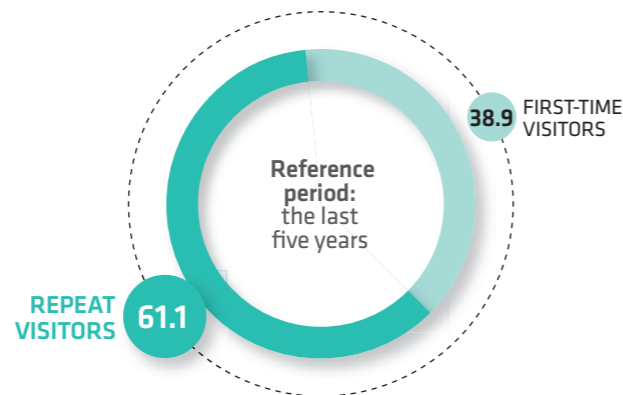
What type of travel?

More than two thirds (68.2%, down 3.3 points) travel for solely personal reasons. They come alone (38.3%, up 6.0 points) or as couples (25.1%, down 2.5 points). 85.5% make their own travel arrangements (up 5.5 points). 11.5% choose to travel individually with organized trips (down 2.2 points) and 3.0% prefer organized groups (down 3.3 points).

What type of accommodation?

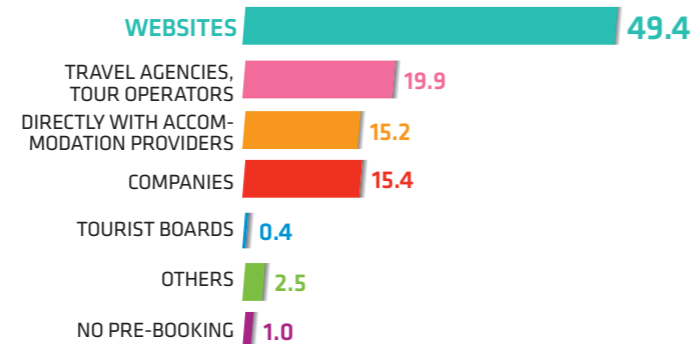
More than 8 stays out of 10 (83.5%, up 0.7 point) are in paid accommodation. The main types of paid accommodation used are hotels, with 73.6% (mid-range for 65.9% and high-range for 27.7%), furnished accommodation and seasonal rentals (4.1%), youth hostels (2.3%) and apartment hotels (1.8%). The main types of non-paid accommodation used are staying with friends (8.6%), parents (2.7%) and parents' or friends' holiday homes (2.7%).

THE MAJORITY OF GERMANS VISITING PARIS REGION ARE REPEAT VISITORS (%)



The overall average for international visitors is 56.1% repeat visitors and 43.9% first-time visitors.

THE INTERNET IS THE PRIMARY METHOD OF RESERVATION (%)



Several possible answers, based on paid accommodation.

German visitors also favour the Internet for their travel planning (51.1%, up 1.8 point), followed by travel agencies and tour operators (18.3%, down 7.7 points) and companies (14.1%, up 4.7 points).

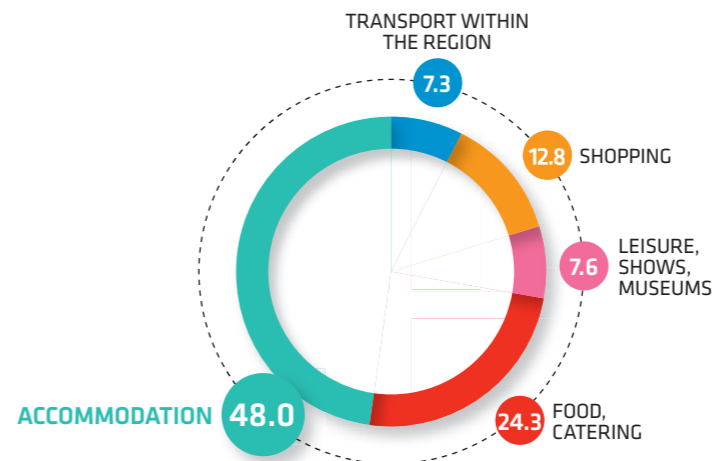
What types of activity?

German visitors are particularly keen on nights out (26.0%, up 7.7 points), discovering fashionable new neighbourhoods (21.7%, up 4.6 points), towns and cities (73.7%, up 3.5 points) and gastronomy (38.4%, up 2.8 points). On the other hand, they spend less time on visiting theme parks (9.7%, down 7.4 points), shopping (38.6%, down 7.2 points) and markets and flea markets (16.7%, down 5.5 points). They are also less interested in guided tours of neighbourhoods (4.4%, down 3.6 points), parks and gardens (31.5%, down 3.3 points) and visiting museums and monuments (85.3%, down 2.4 points).

Which sites are visited?

The 5 most visited sites are: the tour Eiffel (61.1%), Notre-Dame de Paris (60.2%), the Arc de triomphe (53.1%), the Sacré-Coeur de Montmartre (51.3%) and the Louvre (49.0%). More Germans visit the Sacré-Coeur de Montmartre (up 8.4 points) and the centre Pompidou (24.4%, up 4.3 points). On the other hand, fewer visit the tour Eiffel (down 7.1 points), the musée d'Orsay (17.5%, down 6.5 points), the Louvre (down 6.1 points), Disneyland® Paris (9.1%, down 5.9 points) and the château de Versailles (11.2%, down 5.8 points).

GERMAN VISITORS SPEND NEARLY HALF OF THEIR BUDGET ON ACCOMMODATION (%)



German visitors have a lower average daily spend per person than international visitors as a whole. They spend more on accommodation (up 5.8 points) and less on shopping (down 6.7 points).

VISITORS RATE THEMSELVES AS SATISFIED, WITH IMPROVEMENTS NEEDED IN CATERING AND TRANSPORT (%)*



* % satisfied and very satisfied.

Average satisfaction rating for international visitors as a whole: 94.3%.

The figures expressed as "points" show the comparison with the overall average for international visitors arriving by air and by train.

Sources: ongoing surveys at airports and on trains - CRT Paris Île-de-France (Paris Region Tourist Board), ADP (Paris Airports Authority), SAGEB (Paris Beauvais Airport Management Authority), SVD (SNCF Travel Development), BVA - 2013 results.

SUGGESTIONS

- Cater for the requirements of business travellers.
- Concentrate efforts on catering and transport.
- Increase communications about nightlife and less well-known venues.

Key points

- 875,000 stays**, or 5.8% of stays by international visitors arriving by air and by train.
- 3,787,000 overnight stays**, or 4.6% of overnight stays by international visitors arriving by air and train.
- 4.3 nights** on average.
- 61.1%** of visitors have already visited Paris Region.
- 97.0%** of visitors have tailored travel arrangements.
- 68.2%** of visitors travel for solely personal reasons.
- €132** average spend (per person and per day).
- 93.6%** of visitors are satisfied with their stay in Paris Region.
- 95.6%** of visitors would recommend the destination to their friends and family.
- 52.7%** would like to return to Paris Region within the next 2 years.