



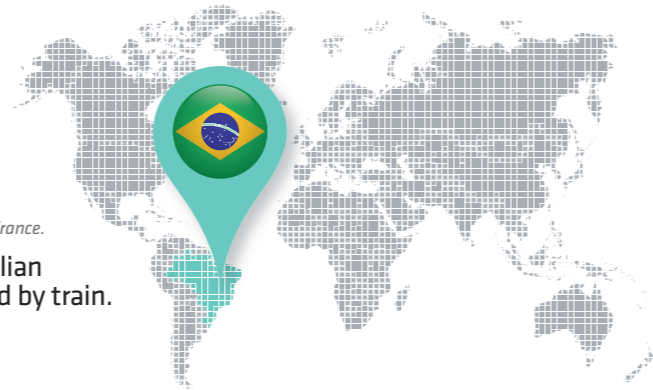
Brazilian visitors

- Total population: **201.0 million inhabitants**
- Economic growth rate: **+2.3%**
- Average exchange rate: **€1 = BRL 2.87**; variation 2013/2012: **+14.2%**
- Rate of unemployment: **5.4%**
- Rate of inflation: **+6.2%**

Sources: Brazilian Institute of Geography and Statistics, IMF, Banque de France.

- **91.1%** of Brazilian tourists arrived by air.
- **8.9%** of Brazilian tourists arrived by train.

Road transports not taken into account.



What type of profile?

• The average age of Brazilian visitors (41 years old) is higher than the overall average for international visitors arriving by air and by train (40 years old). More than half (52.6%, up 10.3 points) come from the upper socio-professional categories¹.

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

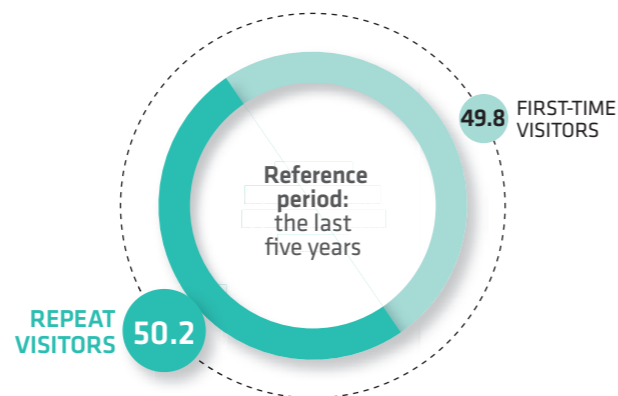
What type of travel?

• More than 8 visitors out of 10 (83.5%, up 12.0 points) travel for solely personal reasons. They come as couples (36.2%, up 8.6 points), as families (25.4%, up 3.4 points) or alone (22.4%, down 10.0 points). For 50.7% (up 30.4 points), the stay is included as part of a European tour. Paris Region is the sole destination for 38.2% (down 31.9 points). It is part of a French tour for 14.8% (up 2.0 points). 80.5% of Brazilians make their own travel arrangements (up 0.5 point). 11.6% choose to travel individually with organized trips (down 2.1 points) and 7.9% prefer organized groups (up 1.6 point).

What type of accommodation?

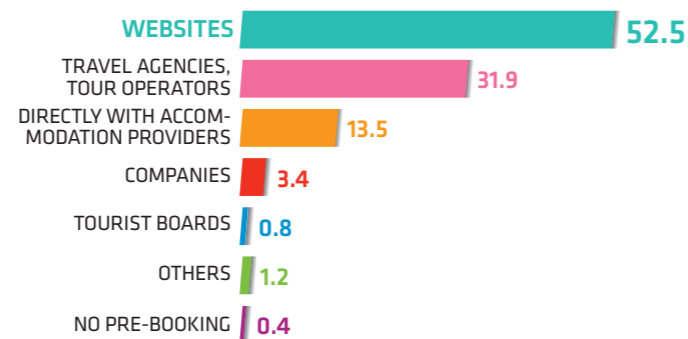
• Nearly 9 stays out of 10 (89.3%, up 6.4 points) are in paid accommodation. The main types of paid accommodation used are hotels, with 78.0% (mid-range for 64.0% and high-range for 23.7%), furnished accommodation and seasonal rentals (5.5%), apartment hotels (2.9%) and youth hostels (2.1%). The main types of non-paid accommodation used are staying with friends (6.0%) and parents (2.8%).

EQUAL NUMBERS OF REPEAT AND FIRST-TIME VISITORS AMONG BRAZILIANS VISITING PARIS REGION (%)



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.

Brazilian visitors also favour the Internet for their travel planning (50.6%, up 1.4 point), followed by travel agencies and tour operators (29.1%, up 3.2 points).

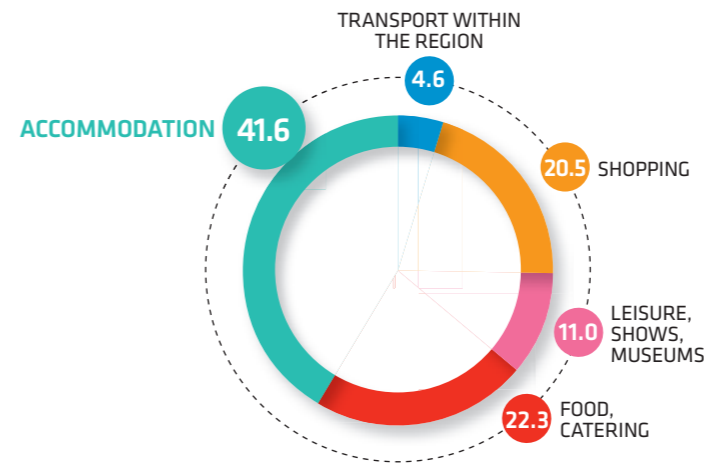
What types of activity?

• Brazilian visitors are particularly interested in visiting parks and gardens (51.3%, up 16.6 points), discovering gastronomy (48.5%, up 12.9 points), visiting museums and monuments (97.7%, up 10.0 points) and nights out (27.9%, +9.6 points). They are also keen on markets and flea markets (27.5%, up 5.4 points) and discovering fashionable new neighbourhoods (20.8%, up 3.6 points). On the other hand, they are less interested in guided tours of neighbourhoods (6.6%, down 1.4 point) and discovering towns and cities (69.1%, down 1.1 point).

Which sites are visited?

• The 5 most visited sites are: the tour Eiffel (86.1%), the Arc de triomphe (79.9%), the Louvre (79.0%), the Sacré-Coeur de Montmartre (53.1%) and Notre-Dame de Paris (46.4%). Large numbers of Brazilians visit some of these traditional landmarks, such as the Louvre (up 23.9 points), the Arc de triomphe (up 23.1 points) and the tour Eiffel (up 17.9 points). More also visit the musée d'Orsay (40.4%, up 16.4 points) and the château de Versailles (30.5%, up 13.5 points). On the other hand, fewer visit Notre-Dame de Paris (down 13.6 points) and Disneyland® Paris (12.6%, down 2.3 points).

BRAZILIAN VISITORS SPEND 21% OF THEIR BUDGET ON SHOPPING (%)



Brazilian visitors have a much higher average daily spend per person than international visitors as a whole. They spend more on leisure (up 2.5 points) and less on transport (down 2.2 points).

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



* % 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 couples and families.
- Step up efforts on welcome and services in the catering sector and be generally attentive to the quality of the welcome in all sectors.
- Give priority to the Internet, both as an information and a booking tool.

Key points

- **463,000 stays**, or 3.1% of stays by international visitors arriving by air and by train.
- **3,223,000 overnight stays**, or 3.9% of overnight stays by international visitors arriving by air and by train.
- **7.0 nights** on average.
- **50.2%** of visitors have already visited Paris Region.
- **92.1%** of visitors have tailored travel arrangements.
- **83.5%** of visitors travel for solely personal reasons.
- **€171** average spend (per person and per day).
- **91.8%** of visitors are satisfied with their stay in Paris Region.
- **98.1%** of visitors would recommend the destination to their friends and family.
- **53.7%** would like to return to Paris Region within the next 2 years.