

Japanese visitors

- Total population: **127.3 million inhabitants**
- Economic growth rate: **+1.5%**
- Average exchange rate: **€1 = JPY 129.66;** variation 2013/2012: **+26.3%**
- Rate of unemployment: **4.0%**
- Rate of inflation: **+0.4%**

Sources: Statistics Bureau of Japan, Banque de France, IMF.

- **92.9%** of Japanese tourists arrived by air.
- **7.1%** of Japanese tourists arrived by train.

Road transports not taken into account.



What type of profile?

• The average age of Japanese visitors (37 years old) is lower than the overall average for international visitors arriving by air and by train (40 years old). Nearly half (44.1%, up 23.6 points) belong to the socio-professional category of employees.

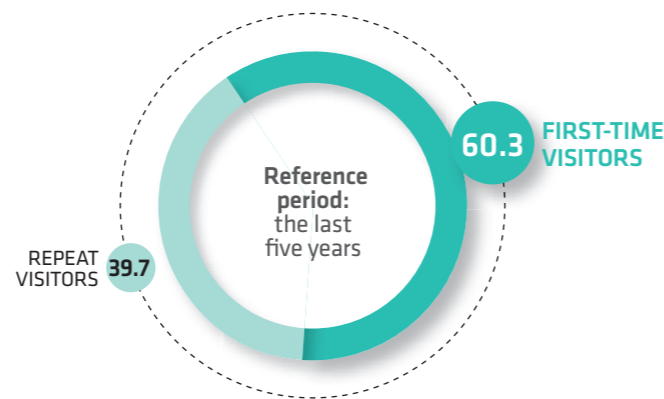
What type of travel?

• Nearly 8 visitors out of 10 (76.4%, up 4.9 points) travel for solely personal reasons. They come alone (28.3%, down 4.1 points), as families (22.4%, up 0.4 point) or with friends (20.3%, up 9.9 points). For 41.4% (up 21.1 points), the stay is included as part of a European tour. For about the same percentage (39.0%, down 31.0 points), Paris Region is the sole destination. It is part of a French tour for 27.2% (up 14.4 points). 53.1% (down 26.8 points) of Japanese make their own travel arrangements. More than a quarter (26.7%, up 13.0 points) choose to travel individually with organized trips and 20.2% (up 13.9 points) prefer organized groups.

What type of accommodation?

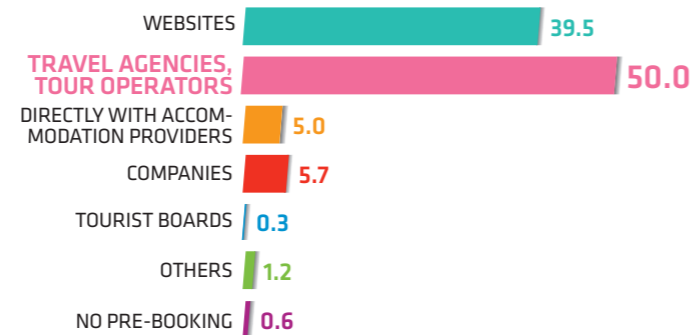
• More than 9 stays out of 10 (93.7%, up 10.8 points) are in paid accommodation. The main types of paid accommodation used are hotels, with 85.9% (mid-range for 53.7%, low-range for 23.8% and high-range for 22.4%), apartment hotels (3.5%), youth hostels (1.7%) and furnished accommodation and seasonal rentals (1.6%). The main types of non-paid accommodation used are staying with friends (4.3%) and parents (1.2%).

THE MAJORITY OF JAPANESE VISITING PARIS REGION ARE FIRST-TIME VISITORS (%)



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

TRAVEL AGENCIES AND TOUR OPERATORS ARE THE PRIMARY METHOD OF RESERVATION (%)



Several possible answers, based on paid accommodation.

Japanese visitors also favour travel agencies and tour operators for their travel planning (48.4%, up 22.4 points), followed by the Internet (42.0%, down 7.3 points).

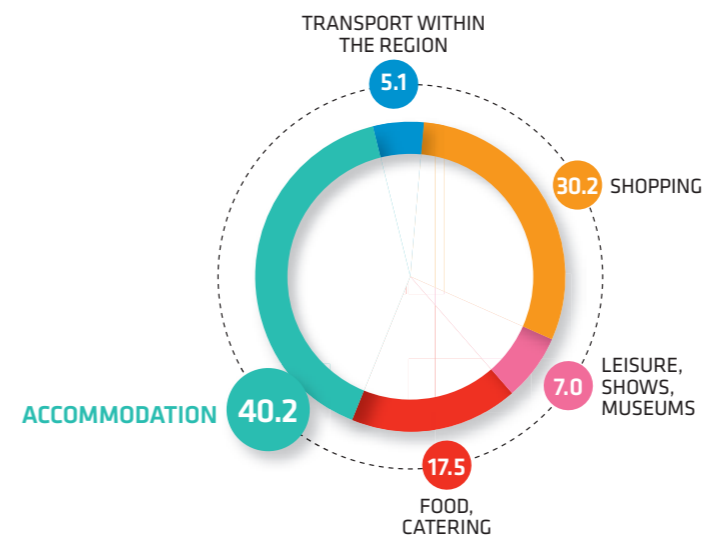
What types of activity?

• More Japanese visitors spend time on shopping (59.0%, up 13.2 points), guided tours of neighbourhoods (16.7%, up 8.7 points), discovering gastronomy (42.1%, up 6.6 points), visiting museums and monuments (94.1%, up 6.5 points) and discovering towns and cities (75.1%, up 4.9 points). On the other hand, fewer are interested in visiting theme parks (5.1%, down 11.9 points), parks and gardens (25.7%, down 9.0 points), markets and flea markets (14.5%, down 7.7 points) and discovering fashionable new neighbourhoods (10.1%, down 7.1 points).

Which sites are visited?

• The 5 most visited sites are: the Louvre (68.0%), the tour Eiffel (67.2%), the Arc de triomphe (65.2%), Notre-Dame de Paris (55.0%) and the musée d'Orsay (30.5%). More Japanese visit the Louvre (up 12.9 points), the château de Versailles (29.1%, up 12.1 points), the Arc de triomphe (up 8.5 points) and the musée d'Orsay (up 6.5 points). On the other hand, fewer visit the Sacré-Coeur de Montmartre (25.9%, down 16.9 points), the centre Pompidou (9.0%, down 11.0 points), Disneyland® Paris (4.5%, down 10.4 points), the Grande Arche de La Défense (2.7%, down 6.6 points) and Notre-Dame de Paris (down 5.0 points).

30% OF JAPANESE VISITORS' SPEND IS ALLOCATED TO SHOPPING (%)



Japanese visitors have a much higher average daily spend per person than international visitors as a whole. They spend more on shopping (up 10.7 points) and less on catering (down 5.3 points).

VISITORS RATE THEMSELVES AS SLIGHTLY LESS SATISFIED, PARTICULARLY WITH CATERING (%)*



* % 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

- Work with travel agencies and tour operators.
- Increase communications on the theme of shopping, an activity popular among Japanese visitors and on which they spend a lot of money.
- Step up efforts on welcome, information and services in the catering sector.

Key points

- **473,000 stays**, or 3.1% of stays by international visitors arriving by air and by train.
- **2,239,000 overnight stays**, or 2.7% of overnight stays by international visitors arriving by air and by train.
- **4.7 nights** on average.
- **39.7%** of visitors have already visited Paris Region.
- **79.8%** of visitors have tailored travel arrangements.
- **76.4%** of visitors travel for solely personal reasons.
- **€214** average spend (per person and per day).
- **90.4%** of visitors are satisfied with their stay in Paris Region.
- **94.2%** of visitors would recommend the destination to their friends and family.
- **29.4%** would like to return to Paris Region within the next 2 years.