



FOREIGN VISITORS ARRIVING BY AIR AND TRAIN

GERMAN VISITORS

Total population: 81.8 million inhabitants
Economic growth rate: +0.7%
Unemployment rate: 5.5%
Inflation rate: +2.1%



Source: Eurostat.

What type of profile?

The average age of German visitors is the same as that of all international visitors arriving by air and train (40 years old). More than 4 visitors out of 10 come from the upper socio-professional categories¹ (44.0%, -0.9 point) and 22.1% are employees (+2.9 points). They come mainly from North Rhine Westphalia (23.2%), Bavaria (20.7%), Baden-Württemberg (15.6%), Berlin (10.1%) and Hessen (8.4%).

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

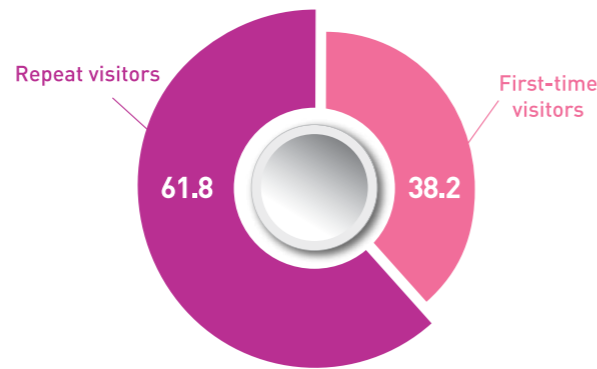
What type of travel?

Almost two-thirds (66.1%, -5.8 points) travel for solely personal reasons. They come alone (38.0%, +2.8 points) or as couples (25.8%, -1.0 point). 84.2% make their own travel arrangements (+3.8 points). 10.9% travel individually with organized trips (-3.4 points) and 4.9% opt to travel with organized groups (-0.4 point).

What type of accommodation?

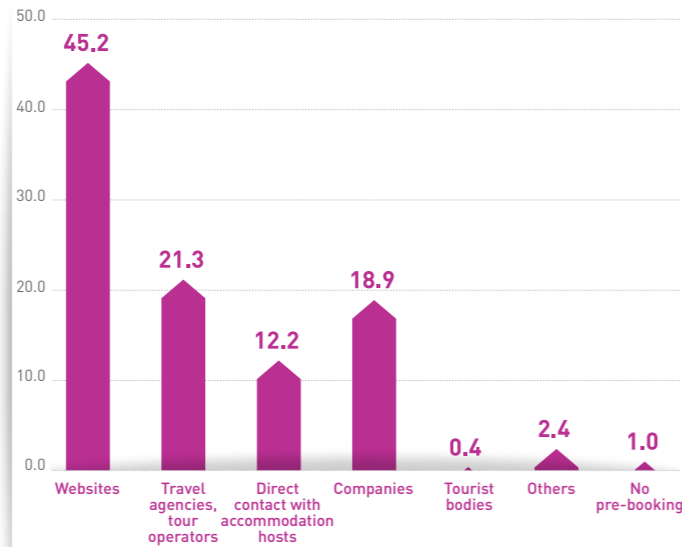
More than 8 stays out of 10 (84.1%, +2.4 points) are spent in paid accommodation. The main types of paid accommodation used are hotels for 76.5% (2-star or 3-star hotels for 63.5% and 4-star or more for 30.8%), furnished accommodation and seasonal rentals (3.3%), youth hostels (1.9%) and apartment hotels (1.3%). The main types of non-paid accommodation used are staying with friends (6.6%), parents (4.1%) and parents' or friends' holiday homes (2.2%).

THE MAJORITY OF GERMANS VISITING PARIS ILE-DE-FRANCE ARE REPEAT VISITORS (%)



Reference period: the last 5 years.
 The average figures for foreign visitors as a whole are 56.9% repeat visitors and 43.1% first-time visitors.

THE INTERNET IS THE PRIMARY METHOD OF RESERVATION (%)



Several possibilities, based on paid accommodation.
 German visitors also favour the Internet as their preferred method of making travel arrangements (48.0%, -0.5 point), followed by travel agencies and tour operators (20.0%, -7.6 points) and companies (16.8%, +7.2 points).

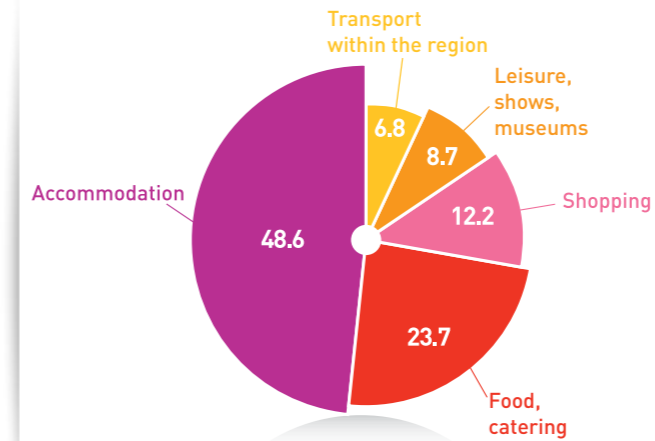
What types of activity?

German visitors are particularly keen on nights out (26.8%, +8.4 points) and discovering trendy new areas (19.5%, +5.7 points). On the other hand, they spend less time shopping (40.3% -9.4 points), visiting theme parks (10.5%, -7.2 points) and visiting markets and flea markets (18.7%, -6.8 points). They are also less interested in visiting museums and monuments (82.4%, -4.2 points), parks and gardens (34.4%, -3.8 points) and in guided tours discovering different neighbourhoods (4.3%, -3.1 points).

Which sites are visited?

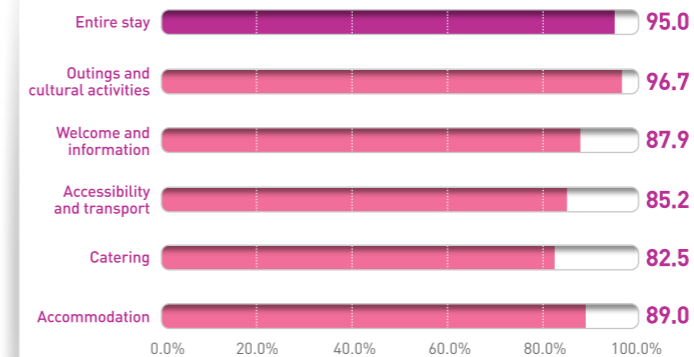
The 5 most visited sites are: the tour Eiffel (60.5%), Notre-Dame de Paris (60.5%), the Arc de triomphe (51.7%) the Sacré-Coeur de Montmartre (48.5%) and the Louvre (47.6%). More of them visit the Sacré-Coeur de Montmartre (+6.5 points) and the Centre Pompidou (24.9%, +5.0 points). On the other hand, fewer of them visit Disneyland® Paris (9.6%, -6.6 points), the tour Eiffel (-6.3 points), the Louvre (-6.2 points), the château de Versailles (10.3%, -6.0 points) and the musée d'Orsay (17.7%, -5.6 points).

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



German visitors, whose average spend per day and per person is lower than that for all visitors, allocate a higher budget to accommodation (+7.1 points) and a lower budget to shopping (-7.0 points).

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



* % satisfied and very satisfied.
 Average satisfaction rating, all foreign visitors as a whole: 95.6%.

The figures are expressed in "points" and relate to all foreign visitors arriving by air and train.

Sources: ongoing surveys in airports and trains - Paris Ile-de-France Tourist Board, ADP, SVD (BVA) - 2012 results.

Suggestions

- Establish clear positioning with the aim of generating repeat visits.
- Adapt to the requirements of business travellers.
- Concentrate efforts on catering, transport and accommodation.

KEY POINTS

- ➔ **845,000 stays** representing 6.2% of stays by all international visitors arriving by air and train.
- ➔ **3,301,000 overnight stays** representing 4.4% of overnight stays by all international visitors arriving by air and train.
- ➔ **3.9 nights** on average.
- ➔ **61.8%** have already visited Paris Ile-de-France.
- ➔ **95.1%** have tailored travel arrangements.
- ➔ **66.1%** travel for solely personal reasons.
- ➔ **€139** average spend (per day and per person).
- ➔ **95.0%** are satisfied with their stay in Paris Ile-de-France.
- ➔ **96.5%** would recommend the destination to their friends and family.
- ➔ **50.8%** would like to return to Paris Ile-de-France within the next 2 years.