



FOREIGN VISITORS ARRIVING BY TRAIN

BELGIAN VISITORS

Total population: 11.1 million inhabitants
 Economic growth rate: -0.3%
 Unemployment rate: 7.6%
 Inflation rate: +2.6%



Source: Eurostat.

What type of profile?

The average age of Belgian visitors (42 years old) is higher than that for other international visitors as a whole arriving by train (41 years old). 40.6% [-0.4 point] come from the upper socio-professional categories¹ and around one quarter (24.7%, +3.0 points) are employees. They come from Flanders (40.8%), Wallonia (36.0%) and Brussels (23.2%).

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

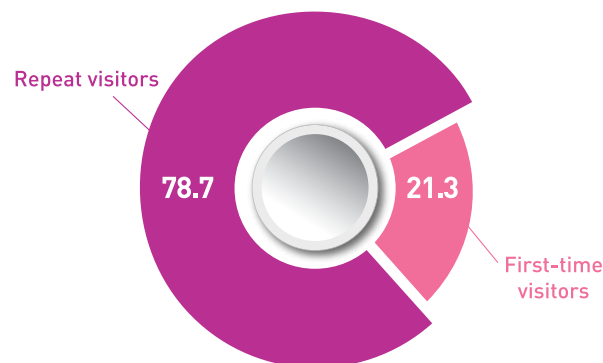
What type of travel?

More than half (59.9%, -10.1 points) travel for solely personal reasons. The majority travel alone (41.6%, +12.7 points) or as couples (25.0%, -4.2 points). More than three quarters (76.0%, -5.9 points) make their own travel arrangements. 19.8% travel individually with organized trips (+5.7 points) and 4.2% opt to travel with organized groups (+0.2 point).

What type of accommodation?

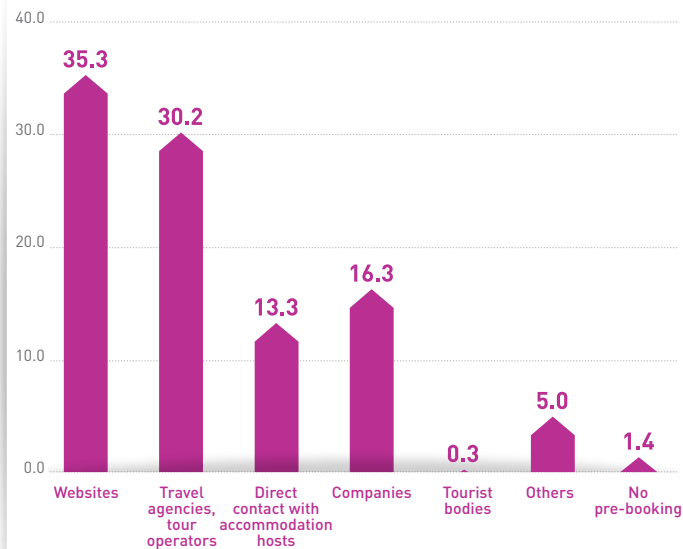
Three quarters of stays (75.5%, -6.2 points) are spent in paid accommodation. The main types of paid accommodation used are hotels for 72.3% (2-star or 3-star hotels for 68.2% and 4-star and more for 25.5%), furnished accommodation and seasonal rentals (1.2%), apartment hotels (1.0%) and B&Bs (0.7%). The main types of non-paid accommodation used are staying with friends (9.6%), parents (5.7%) and parents' or friends' holiday homes (3.1%).

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



Reference period: the last 5 years.
 The average figures for foreign visitors as a whole are 64.1% repeat visitors and 35.9% first-time visitors.

THE INTERNET IS THE PRIMARY METHOD OF RESERVATION, JUST AHEAD OF TRAVEL AGENCIES AND TOUR OPERATORS (%)



Several possibilities, based on paid accommodation.
 Belgian visitors also favour the Internet as their preferred method of making travel arrangements (40.4%, -9.7 points), followed by travel agencies and tour operators (27.1%, +6.9 points) and companies (15.7%, +5.9 points).

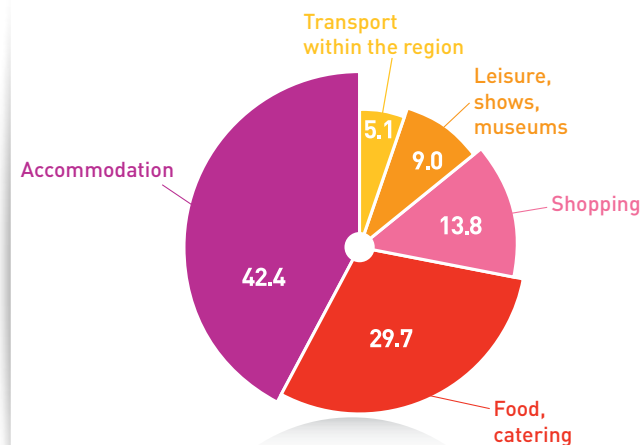
What types of activity?

Belgian visitors are particularly interested in shows and concerts (12.8%, +3.3 points) and in events and cultural exhibitions (16.0%, +2.4 points). On the other hand, they are less interested in visiting museums and monuments (66.7%, -14.6 points), discovering towns and cities (56.3%, -9.3 points), discovering gastronomy (16.3%, -9.3 points), visiting parks and gardens (18.6%, -6.7 points) and markets and flea markets (7.7%, -5.5 points).

Which sites are visited?

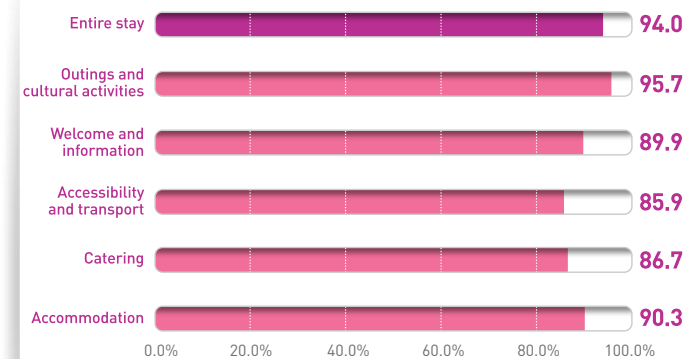
The 5 most visited sites are: the tour Eiffel (34.9%), Notre-Dame de Paris (32.6%), the Sacré-Coeur de Montmartre (28.7%), the Arc de triomphe (28.4%) and the Louvre (23.9%). Fewer of them than other international visitors visit "classic" landmarks like the tour Eiffel (-18.8 points), Notre-Dame de Paris (-18.1 points), the Louvre (-18.1 points) and the Arc de triomphe (-14.4 points). Fewer of them also visit the Sacré-Coeur de Montmartre (-8.7 points) and the musée d'Orsay (9.9%, -8.2 points). On the other hand, they are slightly more frequent visitors to Disneyland® Paris (13.3%, +1.6 point).

42% OF BELGIAN VISITORS' SPEND IS ALLOCATED TO ACCOMMODATION (%)



Belgian visitors, whose average spend per day and per person is lower than that for all visitors, allocate a higher budget to catering (+2.1 points) and a lower budget to accommodation (-1.0 point) and to shopping (-0.9 point).

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



* % satisfied and very satisfied.
 Average satisfaction rating, all foreign visitors as a whole: 94.3%.

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

Source: ongoing survey in trains - Paris Ile-de-France Tourist Board, SVD (BVA) - 2012 results.

Suggestions

- Establish clear positioning with the aim of generating repeat visits.
- Adapt to the requirements of business travellers.
- Keep the Belgians informed of upcoming events to encourage them to return.

KEY POINTS

- 492,000 stays representing 17.0% of stays by all international visitors arriving by train.
- 1,234,000 overnight stays representing 12.8% of overnight stays by all international visitors arriving by train.
- 2.5 nights on average.
- 78.7% have already visited Paris Ile-de-France.
- 95.8% have tailored travel arrangements.
- 59.9% travel for solely personal reasons.
- €134 average spend (per day and per person).
- 94.0% are satisfied with their stay in Paris Ile-de-France.
- 97.1% would recommend the destination to their friends and family.
- 66.0% would like to return to Paris Ile-de-France within the next 2 years.