



➤ FOREIGN VISITORS ARRIVING BY AIR

SPANISH VISITORS

Total population: 46.2 million inhabitants
 Economic growth rate: -1.4%
 Unemployment rate: 25.0%
 Inflation rate: +2.4%



Source: Eurostat.

What type of profile?

The average age of Spanish visitors (38 years old) is lower than that for other international visitors as a whole arriving by air (39 years old). Almost one half come from the upper socio-professional categories¹ (48.7%, +2.7 points) and 20.1% are employees (+1.5 point). They come mainly from the Madrid area (34.7%) and the region of Catalonia (30.1%).

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

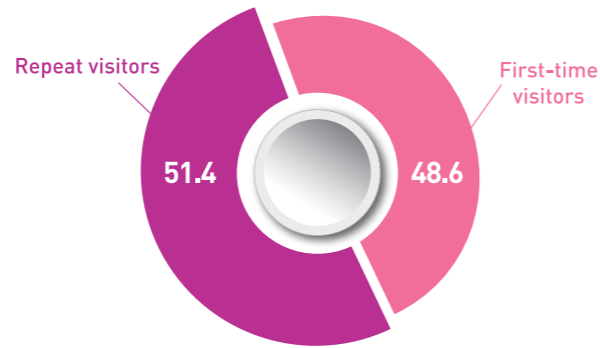
What type of travel?

More than three quarters (77.6%, +5.1 points) travel for solely personal reasons. They come as a family (37.8%, +16.9 points) or alone (27.7%, -9.2 points). The majority make their own travel arrangements (71.6%, -8.3 points). One quarter of visitors choose to travel individually with organized trips (25.1%, +10.7 points) whilst relatively few (3.4%, -2.3 points) opt for organized groups.

What type of accommodation?

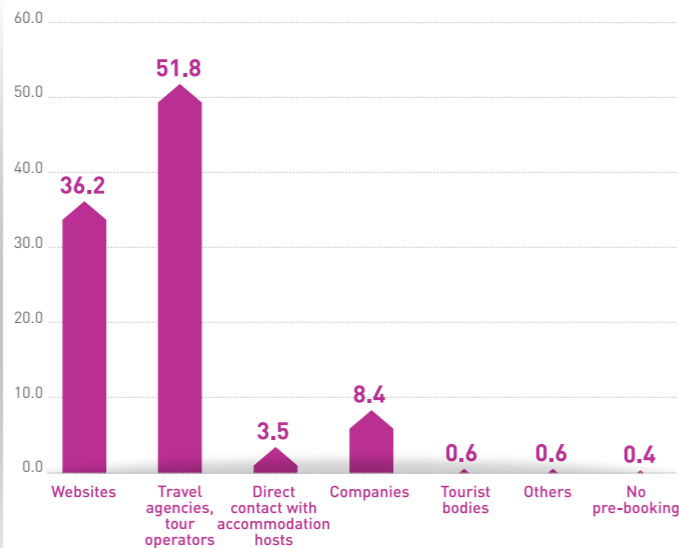
Almost 9 stays out of 10 (85.7%, +4.0 points) are spent in paid accommodation. The main types of paid accommodation used are hotels for 78.2% (2-star or 3-star hotels for 65.7% and 4-star and more for 30.4%), furnished accommodation and seasonal rentals (4.6%), youth hostels (1.3%) and apartment hotels (1.0%). The main types of non-paid accommodation used are staying with friends (6.0%) and parents (5.9%).

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



Reference period: the last 5 years.
 The average figures for foreign visitors as a whole are 54.9% repeat visitors and 45.1% first-time visitors.

TRAVEL AGENCIES AND TOUR OPERATORS ARE THE PRIMARY METHODS OF RESERVATION USED FOLLOWED BY THE INTERNET (%)



Several possibilities, based on paid accommodation.
 Spanish visitors use travel agencies and tour operators equally (50.3%, +20.6 points) as their preferred method of making travel arrangements followed by the Internet (39.2%, -8.8 points).

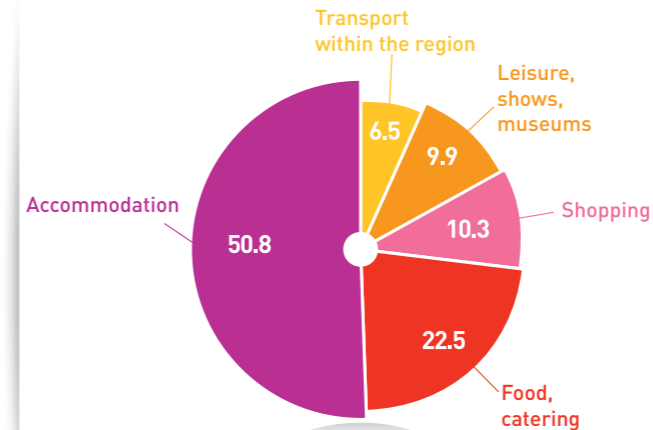
What types of activity?

Spanish visitors spend less time shopping (30.4%, -22.2 points), visiting museums and monuments (73.7%, -14.4 points), discovering gastronomy (31.0%, -11.8 points) and visiting markets and flea markets (18.1%, -10.7 points). They are also less interested in visiting parks and gardens (32.5%, -9.2 points) and in discovering towns and cities (66.6%, -7.1 points). On the other hand, more are interested in visiting theme parks (42.8%, +23.6 points).

Which sites are visited?

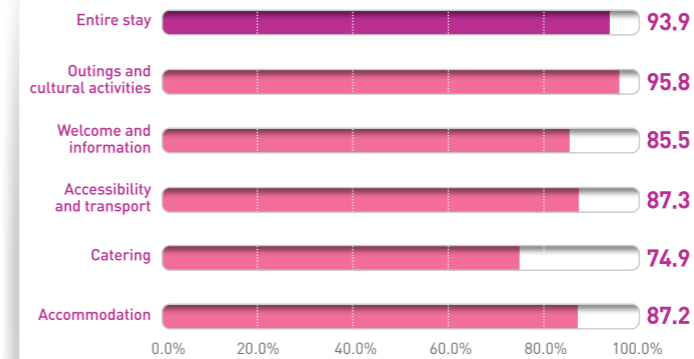
The 5 most visited sites are: the tour Eiffel (61.3%), Notre-Dame de Paris (59.1%), the Arc de triomphe (48.8%), the Sacré-Coeur de Montmartre (46.6%) and the Louvre (46.1%). More of them visit Disneyland® Paris (39.2%, +21.8 points) and the Sacré-Coeur de Montmartre (+3.4 points). On the other hand, fewer of them visit the Louvre (-10.8 points), the Arc de triomphe (-10.1 points), the tour Eiffel (-9.0 points) and the château de Versailles (9.9%, -8.7 points).

MORE THAN A HALF OF SPANISH VISITORS' SPEND IS ALLOCATED TO ACCOMMODATION (%)



Spanish visitors, whose average spend per day and per person is lower than that for all visitors, allocate a higher budget to accommodation (+9.5 points), but a lower budget to shopping (-9.6 points).

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



*% satisfied and very satisfied.
 Average satisfaction rating, all foreign visitors as a whole: 96,0%.

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

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

Suggestions

- Meet the specific requirements of families.
- Work with the travel agencies and tour operators.
- Pay attention to the services and welcome offered by catering establishments.

KEY POINTS

- **719,000 stays** representing 6.7% of stays by all international visitors arriving by air.
- **3,215,000 overnight stays** representing 4.9% of overnight stays by all international visitors arriving by air.
- **4.5 nights** on average.
- **51.4%** have already visited Paris Ile-de-France.
- **96.6%** have tailored travel arrangements.
- **77.6%** travel for solely personal reasons.
- **€140** average spend (per day and per person).
- **93.9%** are satisfied with their stay in Paris Ile-de-France.
- **96.9%** would recommend the destination to their friends and family.
- **34.2%** would like to return to Paris Ile-de-France within the next 2 years.