



➤ FOREIGN VISITORS ARRIVING BY AIR

ITALIAN VISITORS

Total population: 59.4 million inhabitants
 Economic growth rate: -2.4%
 Unemployment rate: 10.7%
 Inflation rate: +3.3%



Source: Eurostat.

What type of profile?

The average age of Italian visitors (40 years old) is higher than that for international visitors as a whole arriving by air (39 years old).

Almost 4 visitors out of 10 come from the upper socio-professional categories¹ (38.9%, -7.1 points) and one quarter of them are employees (24.8%, +6.3 points). They come mainly from the Milan region (26.0%), Rome (20.0%) and the Naples region (12.1%).

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

What type of travel?

More than 7 visitors out of 10 (72.5%, -0.1 point) travel for solely personal reasons. They come as couples (32.9%, +6.8 points), alone (31.2%, -5.7 points) or as a family (23.5%, +2.5 points).

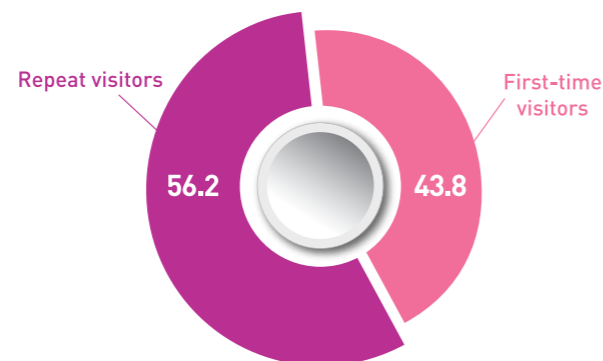
More than three quarters make their own travel arrangements (78.0%, -1.9 point). 18.4% travel individually with organized trips (+4.0 points) and 3.6% opt to travel with organized groups (-2.1 points).

What type of accommodation?

Almost 9 stays out of 10 (88.6%, +7.0 points) are spent in paid accommodation. The main types of paid accommodation used are hotels for 79.1% (2-star or 3-star hotels for 68.8% and 4-star and more for 28.5%), furnished accommodation and seasonal rentals (4.8%) and apartment hotels (3.4%).

The main types of non-paid accommodation used are staying with friends (4.8%) and parents' or friends' holiday homes (2.6%).

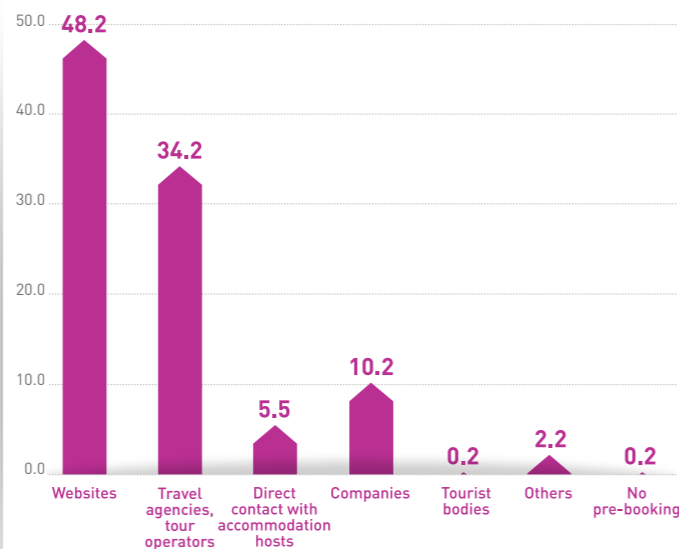
THE MAJORITY OF ITALIANS VISITING PARIS ILE-DE-FRANCE ARE REPEAT VISITORS (%)



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.

THE INTERNET IS THE PRIMARY METHOD OF RESERVATION (%)



Several possibilities, based on paid accommodation.

Italian visitors also favour the Internet as their preferred method of making travel arrangements (50.1%, +2.1 points), followed by travel agencies and tour operators (31.6%, +1.9 point).

What types of activity?

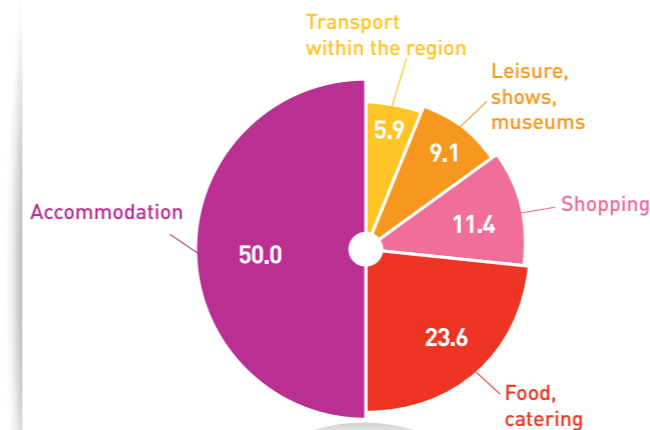
Italian visitors spend less time shopping (36.7%, -15.8 points), discovering gastronomy (28.2%, -14.6 points), visiting parks and gardens (29.5%, -12.2 points) and markets and flea markets (18.0%, -10.8 points). Fewer of them also take guided tours of different neighbourhoods (1.6%, -6.5 points) and visit museums and monuments (83.6%, -4.5 points). On the other hand, they enjoy visiting theme parks (27.8%, +8.7 points) and are more interested in discovering trendy areas (15.1%, +2.5 points).

Which sites are visited?

The 5 most visited sites are: Notre-Dame de Paris (68.5%), the tour Eiffel (63.9%), the Arc de triomphe (56.9%), the Louvre (52.1%) and the Sacré-Coeur de Montmartre (51.2%).

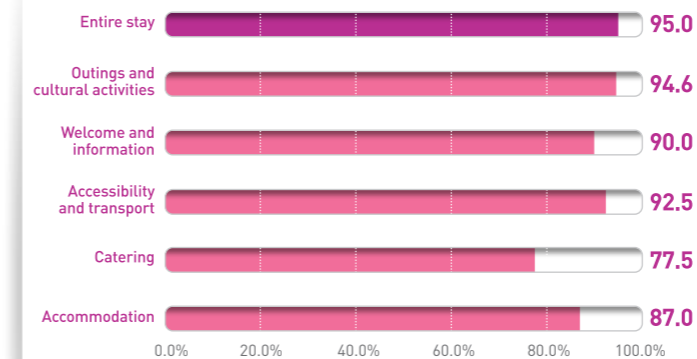
More of them visit Disneyland® Paris (25.6%, +8.3 points), Sacré-Coeur de Montmartre (+8.1 points), the Centre Pompidou (25.4%, +5.3 points) and Notre-Dame de Paris (+4.0 points). On the other hand, fewer of them visit the tour Eiffel (-6.4 points), the château de Versailles (13.5%, -5.1 points) and the Louvre (-4.9 points).

ONE HALF OF ITALIAN VISITORS' SPEND IS ALLOCATED TO ACCOMMODATION (%)



Italian visitors, whose average spend per day and per person is lower than that for all visitors, allocate a higher budget to accommodation (+8.7 points) and a lower budget to shopping (-8.4 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

- Work with travel agencies and tour operators, essential players despite the importance of the Internet.
- Concentrate efforts on catering, a sector in which the Italians spend more but are less satisfied.
- Pay attention to value for money and to accommodation-related services.

KEY POINTS

- 962,000 stays representing 9.0% of stays by all international visitors arriving by air.
- 4,583,000 overnight stays representing 7.0% of overnight stays by all international visitors arriving by air.
- 4.8 nights on average.
- 56.2% have already visited Paris Ile-de-France.
- 96.4% have tailored travel arrangements.
- 72.5% travel for solely personal reasons.
- €133 average spend (per day and per person).
- 95.0% are satisfied with their stay in Paris Ile-de-France.
- 97.6% would recommend the destination to their friends and family.
- 46.5% would like to return to Paris Ile-de-France within the next 2 years.