



FOREIGN VISITORS ARRIVING BY TRAIN

DUTCH VISITORS

Total population: 16.7 million inhabitants
 Economic growth rate: -1.0%
 Unemployment rate: 5.3%
 Inflation rate: +2.8%



Source: Eurostat.

What type of profile?

The average age of Dutch visitors (43 years old) is higher than that for international visitors as a whole arriving by train (41 years old). More than 4 visitors out of 10 (42.8%, +1.8 point) come from the upper socio-professional categories¹ and 20.9% are employees (-0.8 point). They come from Amsterdam (33.8%), the South of the Netherlands (32.1%), from The Hague-Rotterdam (24.1%) and the North (10.0%).

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

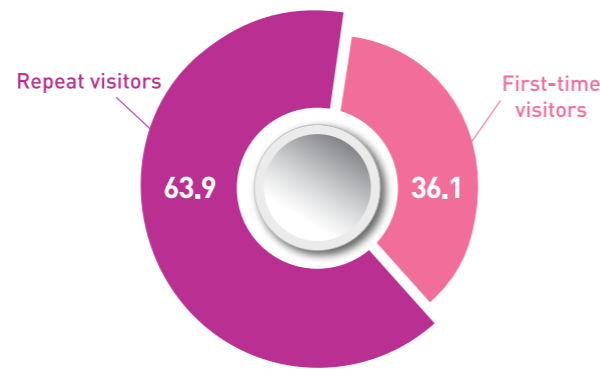
What type of travel?

More than 6 visitors out of 10 (62.1%, -7.9 points) travel for solely personal reasons. They come as couples (37.2%, +8.0 points) or alone (26.6%, -2.3 points). The majority make their own travel arrangements (74.6%, -7.3 points). 19.5% (+5.3 points) travel individually with organized trips and 5.9% (+1.9 point) opt to travel with organized groups.

What type of accommodation?

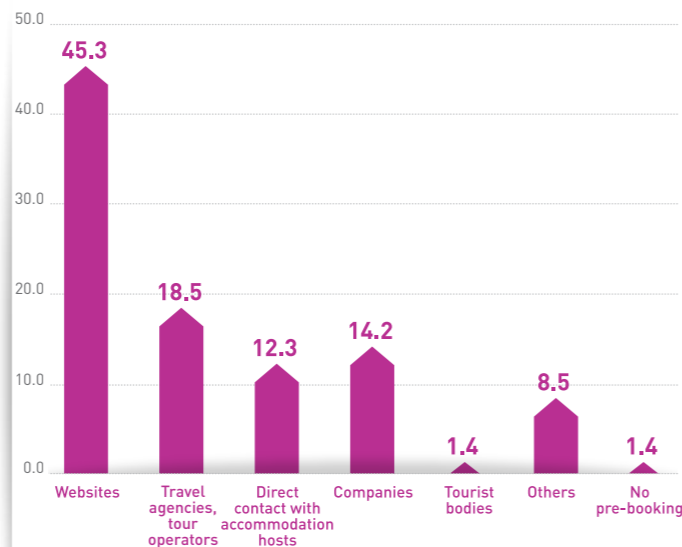
Almost 9 stays out of 10 (88.3%, +6.6 points) are spent in paid accommodation. The main types of paid accommodation used are hotels for 82.3% (2-star or 3-star hotels for 66.1% and 4-star and more for 25.6%), apartment hotels (2.4%) and furnished accommodation and seasonal rentals (2.3%). The main types of non-paid accommodation used are staying with friends (5.0%) and parents (3.1%).

THE MAJORITY OF DUTCH 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 (%)



Several possibilities, based on paid accommodation.
 Dutch visitors also use the Internet as their preferred method of making travel arrangements (47.4%, -2.6 points), followed by travel agencies and tour operators (17.5%, -2.7 points) and companies (13.8%, +3.9 points).

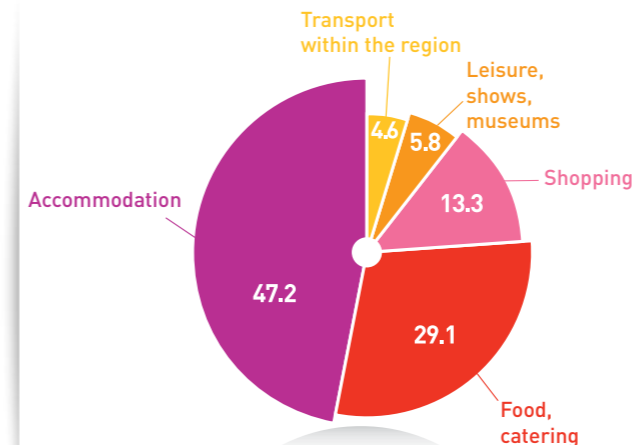
What types of activity?

Dutch visitors are particularly interested in shopping (42.2%, +3.3 points), visiting museums and monuments (84.4%, +3.2 points) and discovering towns and cities (67.6%, +2.0 points). On the other hand, they are less attracted by theme parks (7.7%, -4.8 points), guided tours of different neighbourhoods (0.8%, -4.1 points), shows and concerts (6.6%, -2.9 points) and discovering trendy new areas (16.6%, -1.8 point).

Which sites are visited?

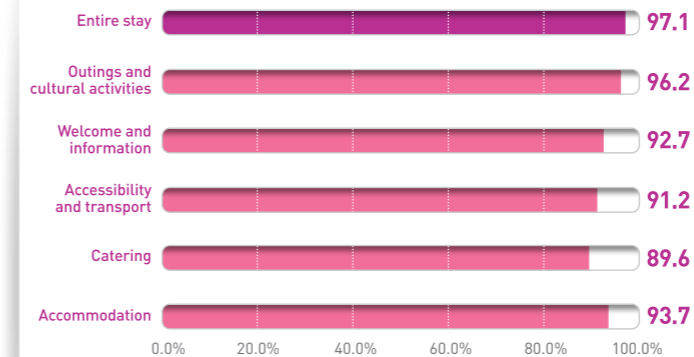
The 5 most visited sites are: the tour Eiffel (49.8%), Notre-Dame de Paris (46.5%), the Sacré-Coeur de Montmartre (42.5%), the Arc de triomphe (40.5%) and the Louvre (38.6%). More of them visit the Centre Pompidou (26.8%, +7.5 points) and the Sacré-Coeur de Montmartre (+5.0 points). On the other hand, fewer visit Notre-Dame de Paris (-4.2 points) the château de Versailles (3.8%, -4.1 points), the tour Eiffel (-3.9 points), Disneyland® Paris (8.3%, -3.5 points) and the musée d'Orsay (14.6%, -3.4 points).

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



Dutch visitors, whose average spend per day and per person is higher than that for all visitors, allocate a higher budget to accommodation (+3.8 points) and a lower budget to leisure activities (-2.8 points).

VISITORS RATE THEMSELVES AS VERY SATISFIED, PARTICULARLY WITH OUTINGS AND CULTURAL ACTIVITIES (%)*



* % 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 the marketing message for an older, better-off clientele, in search of culture.
- Adapt to the requirements of business travellers.

KEY POINTS

- ➔ 232,000 stays representing 8.0% of stays by all international visitors arriving by train.
- ➔ 721,000 overnight stays representing 7.5% of overnight stays by all international visitors arriving by train.
- ➔ 3.1 nights on average.
- ➔ 63.9% have already visited Paris Ile-de-France.
- ➔ 94.1% have tailored travel arrangements.
- ➔ 62.1% travel for solely personal reasons.
- ➔ €149 average spend (per day and per person).
- ➔ 97.1% are satisfied with their stay in Paris Ile-de-France.
- ➔ 98.2% would recommend the destination to their friends and family.
- ➔ 57.2% would like to return to Paris Ile-de-France within the next 2 years.