



➤ FOREIGN VISITORS ARRIVING BY AIR

RUSSIAN VISITORS

Total population: 143.1 million inhabitants
Economic growth rate: +3.4%
Average rate of exchange: €1 = RUB 39.92 ; variation 2012/2011: -2.3%
Unemployment rate: 6.0%
Inflation rate: +5.1%



Sources: Federal State Statistics Service (GKS) – Banque de France – IMF.

What type of profile?

The average age of Russian visitors is the same as that for international visitors as a whole arriving by air (39 years old). More than one third (36.8%, -9.2 points) come from the upper socio-professional categories¹ and 21.3% from the middle socio-professional categories (+12.4 points).

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

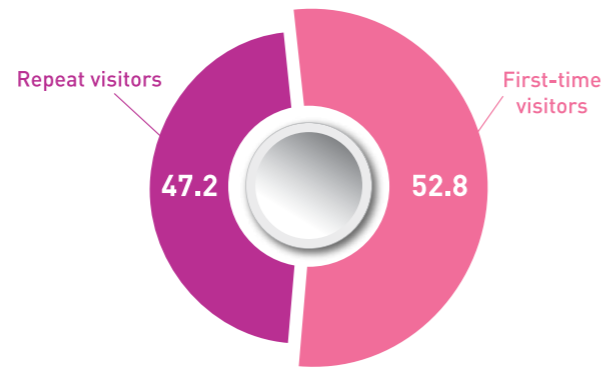
What type of travel?

Almost 8 visitors out of 10 (78.4%, +5.9 points) travel for solely personal reasons. They come mainly as couples (36.9%, +10.8 points) or alone (34.1%, -2.8 points). Paris Ile-de-France is the sole destination in more than two thirds of cases (68.5%, -3.4 points). For 21.4% (+9.5 points) it is part of a French tour and for 12.6% (-5.4 points) it is part of a European tour. More than two thirds of Russian visitors make their own travel arrangements (68.5%, -11.4 points). More than one quarter (27.1%, +12.7 points) travel individually with organized trips and 4.4% (-1.3 point) opt to travel with organized groups.

What type of accommodation?

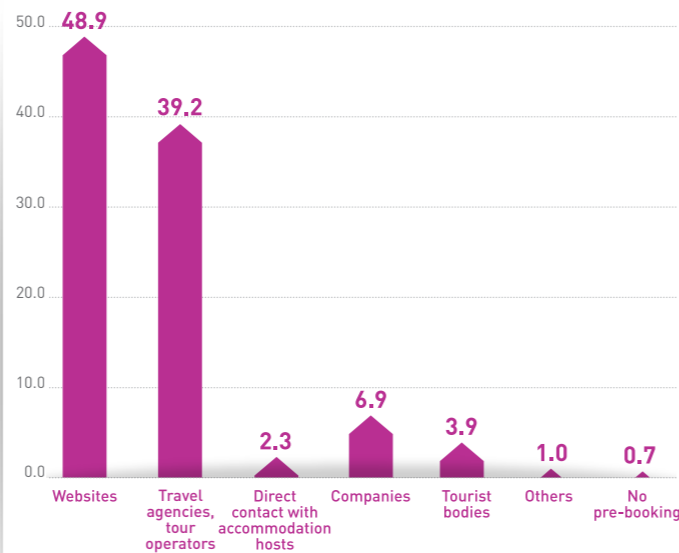
Almost 9 stays out of 10 (89.7%, +8.1 points) are spent in paid accommodation. The main types of paid accommodation used are hotels for 80.7% (2-star or 3-star hotels for 89.4%), furnished accommodation and seasonal rentals (4.6%), apartment hotels (1.7%) and B&Bs (1.4%). The main types of non-paid accommodation used are staying with friends (7.3%) and parents (2.6%).

THE MAJORITY OF RUSSIANS VISITING PARIS ILE-DE-FRANCE ARE FIRST-TIME 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.
 Russian visitors also use the Internet as their preferred method of making travel arrangements (50.1%, +2.1 points), followed by travel agencies and tour operators (36.5%, +6.8 points).

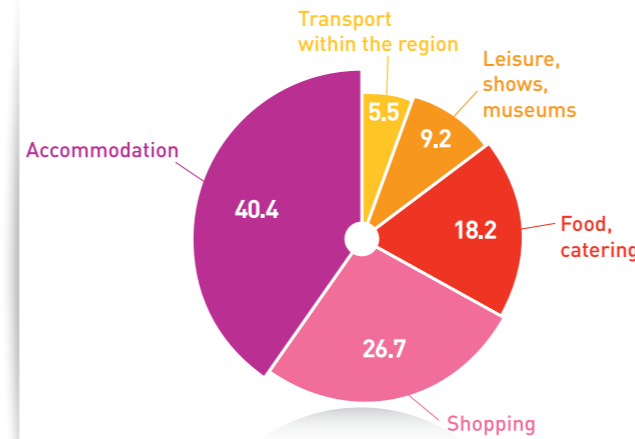
What types of activity?

More Russian visitors spend time discovering towns and cities (83.7%, +9.9 points), gastronomy (50.4%, +7.6 points), visiting museums and monuments (94.7%, +6.7 points), parks and gardens (47.4%, +5.7 points) and taking guided tours of different districts (13.8%, +5.7 points). On the other hand, they are less attracted by nights out (8.7%, -11.0 points), discovering trendy new areas (6.0%, -6.6 points) and events and cultural exhibitions (5.0%, -3.3 points).

Which sites are visited?

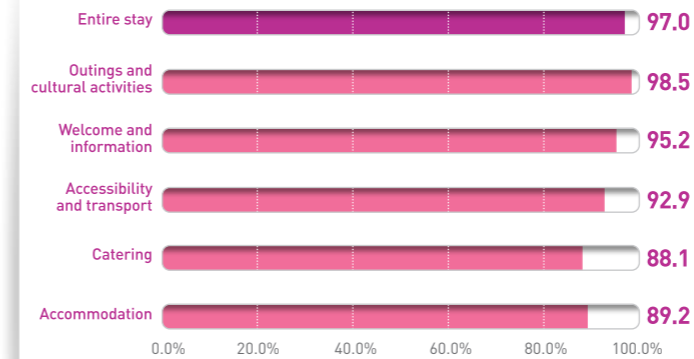
The 5 most visited sites are: Notre-Dame de Paris (80.1%), the tour Eiffel (77.2%), the Louvre (75.9%), the Arc de triomphe (67.9%) and the Sacré-Coeur de Montmartre (62.4%). More Russians visit the 5 most visited sites, such as the Sacré-Coeur de Montmartre (+19.3 points) and the Louvre (+18.9 points). More of them also visit the château de Versailles (31.6%, +13.0 points), the musée d'Orsay (35.5%, +10.8 points) and the château de Fontainebleau (13.2%, +9.9 points). There are few sites which they visit less than the others.

MORE THAN ONE QUARTER OF RUSSIAN VISITORS' SPEND IS ALLOCATED TO SHOPPING (%)



Russian visitors, whose average spend per day and per person is much higher than that for all visitors, allocate a higher budget to shopping (+6.8 points) and a lower budget to catering (-3.5 points) and transport (-2.6 points).

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



* % 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

- Pay particular attention to the couples' target market.
- Step up efforts in the area of accommodation, particularly with regard to comfort levels.
- Base communications on the theme of "shopping", an activity which attracts a large budget.

KEY POINTS

- **356,000** stays representing 3.3% of stays by all international visitors arriving by air.
- **2,702,000 overnight stays** representing 4.1% of overnight stays by all international visitors arriving by air.
- **7.6 nights** on average.
- **47.2%** have already visited Paris Ile-de-France.
- **95.6%** have tailored travel arrangements.
- **78.4%** travel for solely personal reasons.
- **€170** average spend (per day and per person).
- **97.0%** are satisfied with their stay in Paris Ile-de-France.
- **98.7%** would recommend the destination to their friends and family.
- **59.8%** would like to return to Paris Ile-de-France within the next 2 years.