



FOREIGN VISITORS ARRIVING BY TRAIN

SWISS VISITORS

Total population: 8.0 million inhabitants
Economic growth rate: +1.0%
Average rate of exchange: €1 = CHF 1.21 ; variation 2012/2011: -2.3%
Unemployment rate: 4.2%
Inflation rate: -0.7%



Sources: Eurostat – Swiss Federal Statistical Office – Banque de France.

What type of profile?

The average age of Swiss visitors (44 years old) is higher than for other international visitors as a whole arriving by train (41 years old).

Almost 4 visitors out of 10 (38.6%, -2.4 points) come from the upper socio-professional categories¹ and 21.5% (-0.2 point) are employees. They come mainly from Berne (26.7%), Geneva (24.2%) and Zurich (12.1%).

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

What type of travel?

More than three quarters (77.8%, +7.8 points) travel for solely personal reasons. They come mainly as couples (34.0%, +4.7 points), alone (30.9%, +1.9 point) or as a family (17.0%, -5.4 points).

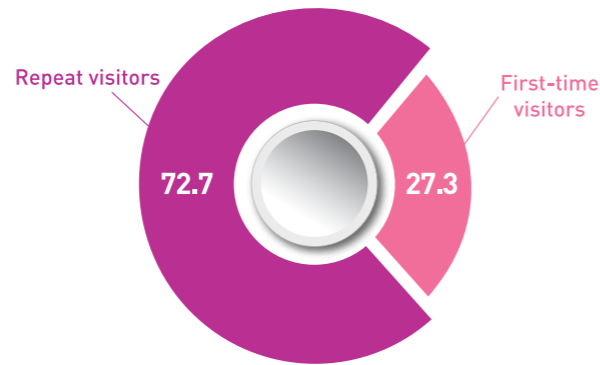
More than 8 out of 10 Swiss visitors make their own travel arrangements (85.7%, +3.8 points). 11.8% travel individually with organized trips (-2.3 points) and 2.5% opt to travel with organized groups (-1.5 point).

What type of accommodation?

More than two-thirds of stays (69.5%, -12.1 points) are spent in paid accommodation. The main types of paid accommodation used are hotels for 61.9% (2-star or 3-star hotels for 72.9% and 4-star and more for 23.6%), as well as furnished accommodation and seasonal rentals (5.0%).

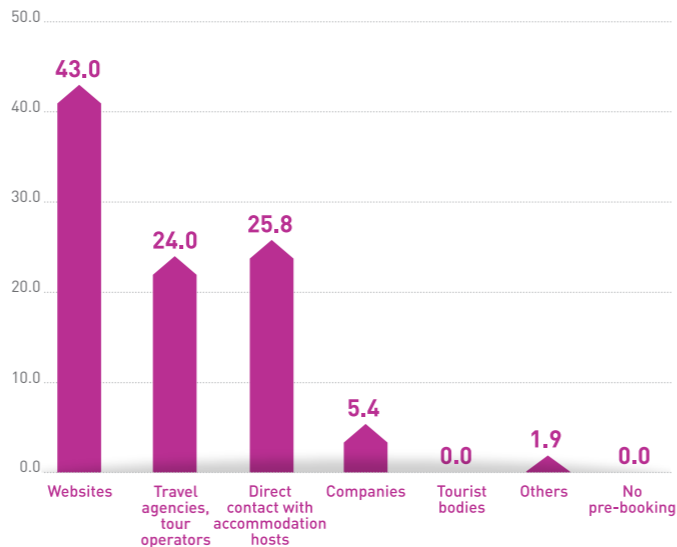
The main types of non-paid accommodation used are staying with friends (13.5%), parents (5.2%) and parents' or friends' holiday homes (4.8%).

THE MAJORITY OF SWISS 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.
 Swiss visitors also favour the Internet as their preferred method of making travel arrangements (49.2%, -0.8 point), followed by travel agencies and tour operators (21.6%, +1.4 point), and direct contact with accommodation hosts (18.2%, +6.2 points).

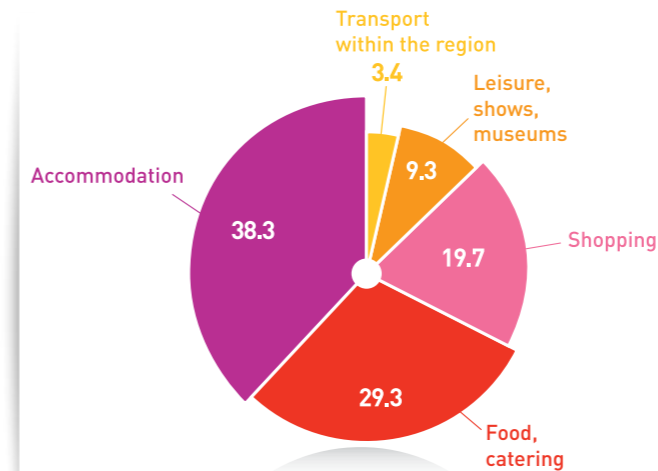
What types of activity?

Swiss visitors are particularly interested in shows and concerts (25.1%, +15.6 points), shopping (49.8%, +10.9 points) and events and cultural exhibitions (22.5%, +9.0 points). They are also attracted by discovering towns and cities (72.4%, +6.7 points) and trendy new areas (24.4%, +6.0 points). On the other hand, they are less interested in visiting theme parks (7.0%, -5.5 points), parks and gardens (22.7%, -2.6 points) and in guided tours discovering different neighbourhoods (2.8%, -2.2 points).

Which sites are visited?

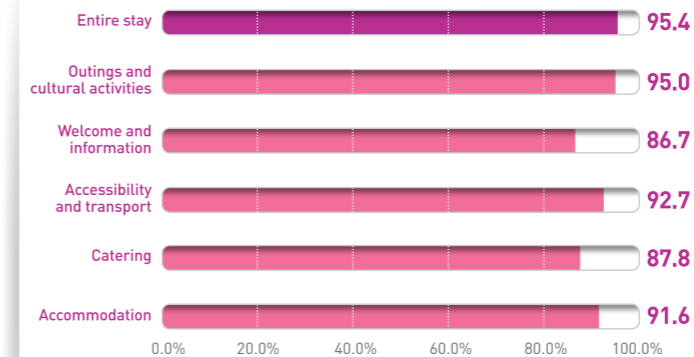
The 5 most visited sites are: the tour Eiffel (44.2%), Notre-Dame de Paris (42.8%), the Arc de triomphe (37.5%), the Sacré-Coeur de Montmartre (36.9%) and the Louvre (32.4%). Fewer visit certain "classic" landmarks such as the Louvre (-9.6 points), the tour Eiffel (-9.5 points), Notre-Dame de Paris (-7.9 points) or the Arc de triomphe (-5.2 points). They are also less likely to visit Disneyland® Paris (7.1%, -4.6 points). On the other hand, more visit the musée du quai Branly (7.1%, +3.5 points).

ALMOST 20% OF SWISS VISITORS' SPEND IS ALLOCATED TO SHOPPING (%)



Swiss visitors, whose average spend per day and per person is slightly lower than that for all visitors, allocate a higher budget to shopping (+4.9 points) and a lower budget to accommodation (-5.1 points).

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



*% 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 a very "leisure" based clientele, in search of events and shopping.
- Step up efforts in the areas of comfort of accommodation and welcome in restaurants.

KEY POINTS

- ➔ 221,000 stays representing 7.6% of stays by all international visitors arriving by train.
- ➔ 744,000 overnight stays representing 7.7% of overnight stays by all international visitors arriving by train.
- ➔ 3.4 nights on average.
- ➔ 72.7% have already visited Paris Ile-de-France.
- ➔ 97.5% have tailored travel arrangements.
- ➔ 77.8% travel for solely personal reasons.
- ➔ €138 average spend (per day and per person).
- ➔ 95.4% are satisfied with their stay in Paris Ile-de-France.
- ➔ 98.0% would recommend the destination to their friends and family.
- ➔ 63.0% would like to return to Paris Ile-de-France within the next 2 years.