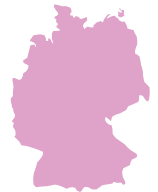




German visitors arriving by air and train ✈️ 🚆

- **Total population: 82.0 million inhabitants**
- **Economic growth rate: -4.9%: forecast for 2010: +1.2%**
- **Unemployment rate: 7.5%**
- **Inflation rate: +0.2%**

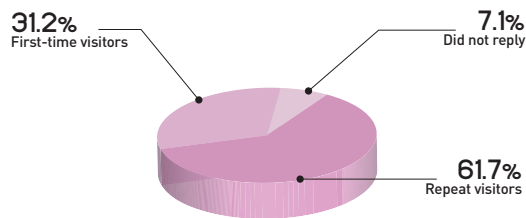
Source: Eurostat.



■ What type of profile?

- The average age of the German visitors is the same as for the other foreign visitors as a whole (39 years old).
 - 4 out of 10 people come from the upper socio-professional categories* (43.3%, +3.0 points compared to the foreign visitors as a whole).
 - They come from north Rhine-Westphalia (25.6%), Bavaria (19.1%), Baden-Württemberg (15.5%), Hesse (10.0%) and Berlin (4.7%).
- *Liberal professions, teachers, scientific professions, executives and other intellectual professions.

A MAJORITY OF GERMAN REPEAT VISITORS TO PARIS-ILE-DE-FRANCE

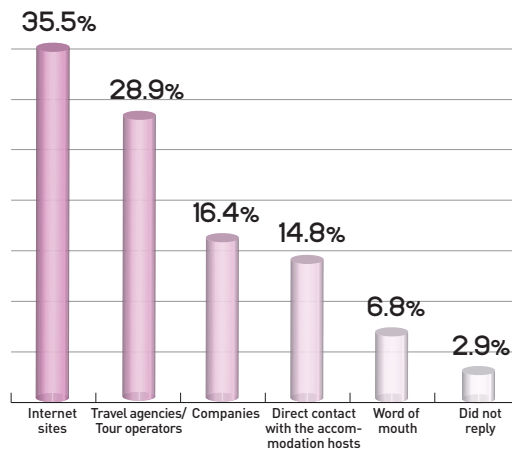


Reference period: the last 5 years.

■ What type of travel?

- More than two thirds travel for personal reasons (70.3%, -4.9 points). They come alone (35.2%, +4.3 points) or in couples (31.3%, +0.8 point).
- 80.7% (+3.2 points) make their own travel arrangements. 15.6% (-3.0 points) travel individually with organized trips, while only 3.7% (-0.2 point) opt for travel with organized groups.

INTERNET SITES PLAY A DOMINANT ROLE AS A SOURCE OF INFORMATION



Several possibilities, based on paid accommodation.

More bookings are made through Internet (29.7%, -2.1 points) just ahead of travel agencies and tour operators (28.7%, -5.7 points). Furthermore, the number of bookings made directly through travel agency Internet sites represents just over a third of all travel agency bookings (34.5%).

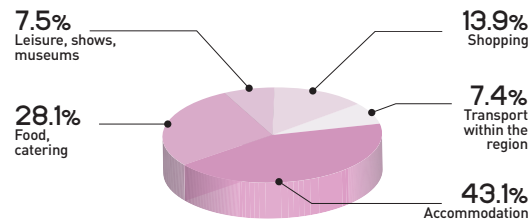
■ What types of activity?

- Discovering towns motivates 71.3% of travels for personal reasons and this remains the case once in the country (78.9%, +4.5 points). They are also interested in discovering new fashionable neighbourhoods (22.2%, +9.3 points), evenings out (32.8%, +9.1 points), discovering French gastronomy (37.9%, +4.3 points).
- On the other hand, they allot less time to markets (18.7%, -8.3 points) and shopping (40.9%, -6.7 points).

■ What sites are visited?

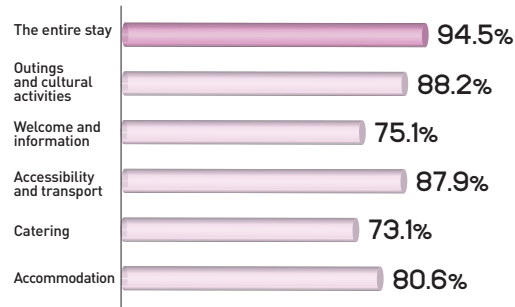
- The 5 most visited sites include: Notre-Dame de Paris (59.8%), the tour Eiffel (58.5%), the Arc de triomphe (51.2%), the Sacré-Cœur de Montmartre (48.3%) and the Louvre (44.5%).
- Fewer of them go to the musée d'Orsay (15.7%, -7.4 points), the Louvre (-7.1 points), Disneyland® Paris (7.2%, -6.6 points) and the château de Versailles (7.2%, -6.1 points). On the other hand, a larger number go to the Centre Pompidou (28.4%, +7.0 points) and the Sacré-Cœur de Montmartre (+4.9 points).

ALMOST 45% OF GERMAN VISITOR SPENDING IS ALLOTTED TO ACCOMMODATION



The average German visitor spending, per day and per person, is lower than that for the other foreign visitors as a whole. They allot a higher budget to catering (+3.3 points) as well as accommodation (+3.0 points) and less to shopping (-6.9 points).

SATISFIED VISITORS, WITH IMPROVEMENTS NEEDED IN CATERING AND WELCOME*



*% of satisfied and very satisfied.
Average rate of satisfaction, all foreign visitors as a whole: 95.0%.

The average age of the clientele varies depending on the type of transport used. The figures expressed in 'points' concern all foreign visitors arriving by air and train.
Sources: ongoing surveys in airports and trains - Paris Ile-de-France Tourist Board (BVA), 2009 results.

61.7%
HAVE ALREADY VISITED PARIS ILE-DE-FRANCE DURING THE LAST 5 YEARS

58.4%
WOULD LIKE TO RETURN TO PARIS ILE-DE-FRANCE WITHIN THE NEXT TWO YEARS (REPRESENTING A HIGHER AVERAGE THAN THE OTHER FOREIGN VISITORS AS A WHOLE)

KEY POINTS

- **943,000 stays** representing 7.7% of stays by all foreign visitors arriving by air and train.
- **3,263,000 overnight stays** representing 5.3% of overnight stays by all foreign visitors arriving by air and train.
- **3.5 nights on average.**
- **61.7%** have already visited Paris Ile-de-France.
- **96.3%** make their own travel arrangements.
- **123 € spent on average** (per day and per person).
- **94.5%** are satisfied with their stay in Paris Ile-de-France.
- **58.4%** would like to return to Paris Ile-de-France within the next two years.