



FOREIGN VISITORS ARRIVING BY AIR



AMERICAN VISITORS

Total population: 311.6 million inhabitants
 Economic growth rate: +1.7%
 Average rate of exchange: €1 = \$1.39; variation 2011/2010: +4.9%
 Unemployment rate: 8.9%
 Inflation rate: +3.1%

Sources: U.S. Census Bureau – Banque de France – Eurostat – IMF.



What type of profile?

The average age of American visitors (43 years old) is higher than that for other foreign visitors as a whole arriving by air (39 years old).

More than half come from the upper socio-professional categories¹ (53.7%, +6.9 points). The majority come from New York/Boston (23.8%), California (13.9%) and Pennsylvania/Ohio/Michigan/Illinois (11.7%).

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

What type of travel?

Approximately three-quarters (75.4%, +4.3 points) travel for solely personal reasons. They come mainly as couples (32.9%, +4.8 points) or alone (31.5%, -3.4 points).

Paris Ile-de-France is the sole destination for 52.3% of stays (-14.9 points). For 24.3%, it is part of a European tour (+8.2 points) and for 18.4%, it is part of a French tour (+6.6 points). 80.7% of American visitors make their own travel arrangements (+3.4 points). 12.1% travel individually with organized trips (-5.1 points) and 7.2% travel with organized groups (+1.7 point).

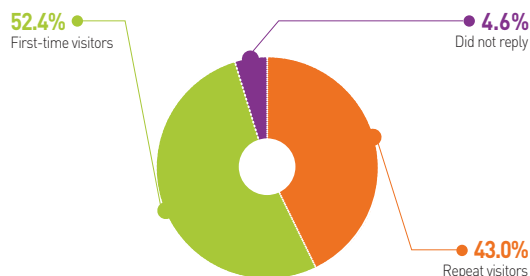
What type of accommodation?

More than 8 out of 10 stays (82.9%, +1.2 point) are spent in paid accommodation.

The main types of paid accommodation used are hotels for 68.1% (2- or 3-star hotels for 63.8% and 4-star and more hotels for 30.1%) and furnished accommodation and seasonal rentals (8.0%).

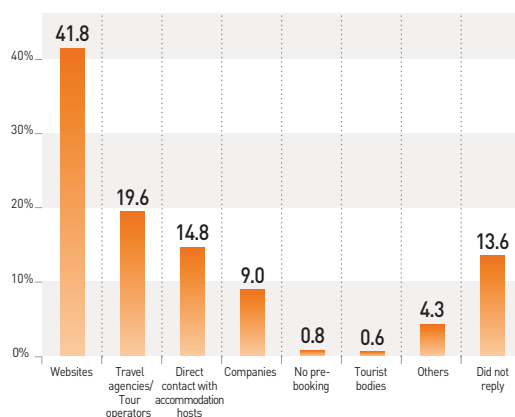
The main types of non-paid accommodation used are staying with friends (6.5%), parents (4.6%) and apartment swaps (1.9%).

THE MAJORITY OF AMERICANS 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 52.3% repeat visitors and 43.7% first-time visitors (4.0% did not reply).

THE INTERNET IS THE PRIMARY METHOD OF RESERVATION (%)



Several possibilities, based on paid accommodation.
 American visitors also use the Internet as their preferred method of making travel arrangements (45.0%, -1.4 point), followed by travel agencies and tour operators (19.0%, -7.0 points).

What types of activity?

American visitors are particularly interested in visiting parks and gardens (50.1%, +8.8 points), discovering French gastronomy (48.5%, +8.3 points), visiting markets and flea markets (36.2%, +7.9 points), visiting events and cultural exhibitions (14.6%, +6.3 points) and discovering trendy new areas (18.1%, +5.4 points). The only activity where they have less involvement than the other tourists is visiting theme parks (6.3%, -12.3 points).

Which sites are visited?

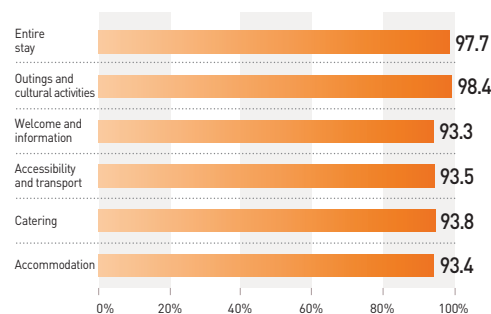
The 5 most-visited sites are: Notre-Dame de Paris (74.7%), the tour Eiffel (74.0%), the Louvre (65.1%), the Arc de triomphe (60.3%) and the Sacré-Cœur de Montmartre (43.8%).
 Particularly large numbers of American visitors visit the musée d'Orsay (38.7%, +13.2 points), Notre-Dame de Paris (+10.4 points) and the Louvre (+7.6 points). On the other hand, fewer visit Disneyland® Paris (5.4%, -13.0 points), the Grande Arche de La Défense (6.2%, -5.0 points), the Sacré-Cœur de Montmartre (-2.3 points) and the Stade de France (0.8%, -2.3 points).

APPROXIMATELY 46% OF AMERICAN VISITORS SPEND IS ALLOCATED TO ACCOMMODATION



American visitors, whose average spend per day and per person is lower than that for all visitors, allocate a higher budget to accommodation (+7.2 points) and catering (+2.5 points), but a lower budget to shopping (-8.7 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: 95.3%.

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) - 2011 results.

43.0% have already visited Paris Ile-de-France during the last 5 years²

41.6% would like to return to Paris Ile-de-France within the next 2 years²

² Which is lower than the average for all visitors.

KEY POINTS

- **1,296,000 stays** representing 12.5% of stays by all foreign visitors arriving by air (↑11.9% compared with 2010).
- **8,698,000 overnight stays** representing 13.6% of overnight stays by all foreign visitors arriving by air (↑19.7% compared with 2010).
- **6.7 nights** on average (↑0.4 night compared with 2010).
- **43.0%** have already visited Paris Ile-de-France.
- **92.8%** have tailored travel arrangements.
- **75.4%** travel for solely personal reasons.
- **€140 average spend** (per day and per person).
- **97.7%** are satisfied with their stay in Paris Ile-de-France.
- **97.7%** would recommend the destination to their friends and family.
- **41.6%** would like to return to Paris Ile-de-France within the next 2 years.