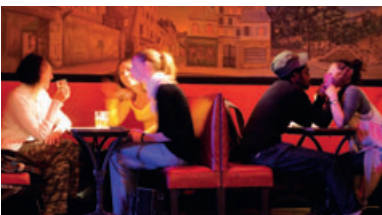
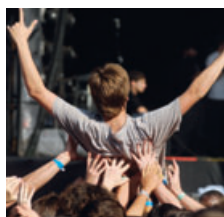
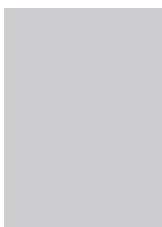
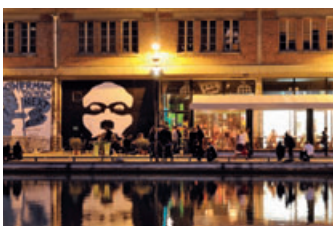
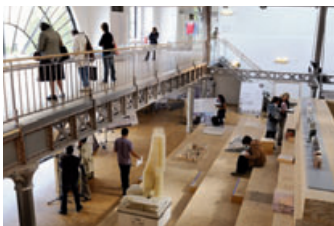
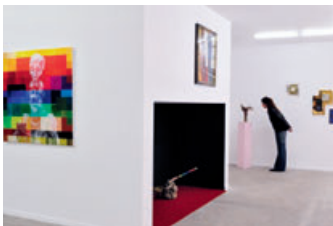
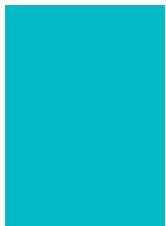


# 2009 Key points

Tourist activity for Destination  
Paris Ile-de-France

→ N°2





# A dynamic tourist destination

With 79.3 million international visitors, France remains the world's number one tourist destination, while Paris Ile-de-France is still the leading French region.

## ■ Paris Ile-de-France, foremost French tourist destination

• With 32.1 million arrivals and 66.2 million overnight hotel stays in 2008, Paris Ile-de-France is by far the most visited French tourist region, ahead of Provence-Alpes-Côte d'Azur and Rhône-Alpes. The decrease in the number of arrivals and overnight hotel stays in Ile-de-France (down 1.7% on 2007) is more marked than at national level (down respectively 0.8% and 0.7%).

## ■ Tourism: an essential sector for the regional economy

• At the end of 2008, transport, accommodation, catering and leisure activities companies and travel agencies employed close to 427,000 people\*.

This figure accounts for over 13.0% of the total employees of companies with more than ten employees in the Ile-de-France region.

The top-ranked French "départements" in terms of tourism jobs are Paris (32.4%), Val-d'Oise (14.6%) and Seine-et-Marne (11.9%). 54.3% of jobs in the accommodation and catering sector and 33.8% of jobs in the leisure activities sector are concentrated in Paris.

## ■ Employment growth despite the crisis

• Between the final quarter of 2007 and the last three months of 2008, the number of jobs in tourism companies with at least ten employees grew by 1.6%. The leisure activities sector increased most significantly (+5.9%), followed by the transport sector (+1.6%). There was very weak growth in the accommodation and catering sector (+0.7%).

## TOURISM REVENUES IN FIGURES

◆◆◆ €18.3 billion\*\* of tourism expenditure in Ile-de-France in 2007, making Ile-de-France the top French region.

◆◆◆ €7.9 billion spent by foreign tourists arriving by air in Ile-de-France in 2008, up 1.9% on 2007.

◆◆◆ €32.8 million of income from tourist tax (taxe de séjour) and flat rate tourist tax in 2007 in the Ile-de-France region.

\* The salaried jobs included are generated by the sectors which are most sensitive to tourism activity, but they are not entirely attributable to it. Furthermore, other sectors in which a proportion of jobs are attributable to tourism are not taken into account. These data are taken from GARP (Organisation for the collection of social security contributions), statistics on salaried employment in companies with more than ten employees and affiliated to the state unemployment insurance scheme. The sectors analysed: transport, accommodation-catering, travel agencies and leisure, corresponding respectively to codes NAF H, I, N79 and R.

\*\* Estimation calculated by applying the regional proportion of the uptake of tourism services in 2005 (15.5%) to total tourism expenditure in 2007 (€117.6 billion).

Sources: UNWTO - INSEE (National Institute for Statistics) - DGCIS (Department of Tourism) - GARP - Ministry of the Interior - CRT Paris Ile-de-France (Paris Ile-de-France Tourist Board).

# An offering of culture predominates

The region's cultural sites are one of its major assets. Their great diversity, from museums and monuments to contemporary art, to design and fashion, ensure that they reach a varied audience.

## THE 20 MOST VISITED SITES IN ILE-DE-FRANCE

SITES	2008	VAR 08/07
Disneyland® Resort Paris	15,300,000	6%
Notre-Dame de Paris	13,000,000	Estimation
Sacré-Cœur de Montmartre	10,500,000	Estimation
Musée du Louvre	8,460,000	2%
Tour Eiffel	6,929,463	2%
Domaine de Versailles <sup>(1)</sup>	5,613,850	5%
Centre Pompidou <sup>(2)</sup>	5,483,941	0%
Cité des sciences et de l'industrie <sup>(3)</sup>	3,042,000	0%
Musée d'Orsay	3,025,164	-4%
Muséum national d'histoire naturelle <sup>(4)</sup>	1,696,360	23%
Musée du quai Branly	1,389,490	-7%
Arc de Triomphe <sup>(5)</sup>	1,317,996	-1%
Galerias nationales du Grand Palais <sup>(6)</sup>	1,280,410	56%
Musée de l'armée	914,457	-23%
Musée d'art moderne de la Ville de Paris <sup>(7)</sup>	784,213	110%
Sainte-Chapelle	757,976	-11%
Musée Grévin	751,541	-1%
Musée Rodin	744,051	11%
Musée Carnavalet <sup>(8)</sup>	730,104	59%
Tour Montparnasse	643,904	16%

## OPENINGS AND REOPENING IN 2008

- Historial Charles de Gaulle (22 February)
- Musée de l'Informatique (16 April)
- Musée national du sport (4 June)
- Collège des Bernardins (5 September)
- Le CENTQUATRE (11 October)
- Musée Fragonard (reopened on 1<sup>st</sup> November)

(1) These data include the Chateau, the small and large Trianon and shows (2) General visits to the Centre (3) Géode included [new counting system] (4) These data include: the Great Gallery of Evolution, the Gallery of Mineralogy, the Gallery of Palaeontology and the Botanical Gardens Zoo (5) Not including museum passes (6) "Picasso et les maîtres" exhibition (7) Significant programme of temporary exhibitions in 2008 (8) Various temporary exhibitions in 2008.

Sources: Museums and monuments – Paris Town Hall – CDT (Departmental Tourist Boards) – CMN (Centre for national monuments) – RMN (National museums service) – Paris Ile-de-France Tourist Board.

## Special events at the heart of the region

The many special cultural and festive events which add further spice to life in the region consolidate the dynamic image of the destination.

### THE TOP 10 CULTURAL EXHIBITIONS

EXHIBITIONS	START	END	SITES	VISITORS
Picasso et les maîtres	08/10/08	02/02/09	Galeries nationales du Grand Palais	798,288
Volcans et séismes	12/10/07	24/08/08	Palais de la Découverte	522,142
Gustave Courbet	13/10/07	28/01/08	Galeries nationales du Grand Palais	480,000
Ombres et lumière*	18/10/05	late 2008	Cité des sciences et de l'industrie	454,000
Les soldats de l'éternité : l'armée de Xi'an	15/04/08	14/09/08	La Pinacothèque de Paris	450,000
Picasso - Manet : le Déjeuner sur l'herbe	08/10/08	01/02/09	Musée d'Orsay	444,883
Arcimboldo 1526-1593	15/09/07	13/01/08	Musée du Luxembourg	430,000
L'atelier d'Alberto Giacometti	17/10/07	11/02/08	Centre Pompidou	423,701
Andrea Mantegna 1431-1506	26/09/08	05/01/09	Musée du Louvre	340,000
Marie-Antoinette	15/03/08	30/06/08	Galeries nationales du Grand Palais	335,700

(\*) Figures of the end of 2008.

### FESTIVALS AND CULTURAL EVENTS

• **European Heritage Days:** 1.2 million visitors to 1,400 Ile-de-France sites and monuments.

• **Nuit blanche:** over 1 million visitors for the 7<sup>th</sup> edition.

• **Techno Parade:** 300,000 people attended the 10<sup>th</sup> edition of this event.

• **Solidays:** 160,000 visitors for the festival's 10<sup>th</sup> year.

• **Rock en Seine:** 76,000 festival-goers at the 30 concerts held.

### Shows for professionals and the general public

• Following the example of the Paris Motor Show (1,037,716 visitors from 4 to 19 October 2008) and the Paris International Fair (674,525 visitors

between 30 April and 12 May 2008), various shows for professionals and the general public have been held in Paris Ile-de-France. In 2008, business tourism accounted for 44.6% of overnight hotel stays in Ile-de-France and 43.4% of those spent in Paris.

Sources: Museums - DRAC (Department of Cultural Affairs) IdF - Paris Town Hall - Technopol - Solidarité Sida (AIDS Solidarity) - Rock en Seine Festival - OJS (Office which tracks attendance statistics for trade fairs, trade shows and congresses) - INSEE - DGCIS - Paris Ile-de-France Tourist Board.

## Hotel visitor numbers

While Paris Ile-de-France remains one of the most popular international tourist destinations, the effects of the global economic crisis did not spare it, particularly during the second half of the year.



### PARIS (75)

**78,244 hotel rooms**, 52.7% of regional capacity  
**46.9%** market share  
**15.0 million arrivals** -2.5%  
**35.1 million overnight stays** -1.8%  
 Length of stay: **2.3 days** =  
 Occupancy rate: **77.8%** -0.7 pp  
 Foreign tourists: **64.7%** -0.9 pp  
 UK (14.8%), United States (14.8%) and Italy (9.1%)

### VAL-D'OISE (95)

**9,964 hotel rooms**, 6.7% of regional capacity  
**8.1%** market share  
**2.6 million arrivals** -0.7%  
**3.9 million overnight stays** =  
 Length of stay: **1.5 day** =  
 Occupancy rate: **69.6%** -1.1 pp  
 Foreign tourists: **35.4%** +1.0 pp  
 UK (19.2%), United States (10.8%) and Germany (7.0%)

### YVELINES (78)

**7,552 hotel rooms**, 5.1% of regional capacity  
**5.1%** market share  
**1.6 million arrivals** +2.5%  
**2.8 million overnight stays** +0.2%  
 Length of stay: **1.7 day** -0.1 day  
 Occupancy rate: **62.9%** -0.7 pp  
 Foreign tourists: **35.6%** +7.7 pps  
 UK (24.7%), Netherlands (10.3%) and Germany (9.8%)

### ESSONNE (91)

**6,430 hotel rooms**, 4.3% of regional capacity  
**4.4%** market share  
**1.4 million arrivals** -2.1%  
**2.4 million overnight stays** -4.2%  
 Length of stay: **1.7 day** =  
 Occupancy rate: **62.9%** -0.3 pp  
 Foreign tourists: **32.8%** +5.6 pps  
 UK (22.0%), Netherlands (9.6%) and Germany (9.5%)

The green figure represents variation from 2007 to 2008.  
 pp = percentage point.

## HOTEL VISITOR NUMBERS FOR PARIS ILE-DE-FRANCE

	ARRIVALS	VAR 08/07	OVERNIGHT STAYS	VAR 08/07	OR	VAR 08/07
Paris (1)	15,036,179	-2.5%	35,060,746	-1.8%	77.8%	-0.7 pp
Inner suburbs (2)	6,871,130	-1.0%	12,678,450	-1.1%	73.1%	-0.8 pp
(1) + (2)	21,907,309	-2.0%	47,739,196	-1.6%	76.4%	-0.7 pp
Outer suburbs	10,173,337	-1.0%	18,443,323	-2.0%	68.7%	-0.8 pp
<b>TOTAL REGION</b>	<b>32,080,646</b>	<b>-1.7%</b>	<b>66,182,519</b>	<b>-1.7%</b>	<b>74.3%</b>	<b>-0.8 pp</b>

OR = occupancy rate. VAR = Variation

### HAUTS-DE-SEINE (92)

**13,266 hotel rooms**, 8.9% of regional capacity

**8.0%** market share

**2.6 million arrivals** -0.7%

**5.1 million overnight stays** +0.2%

Length of stay: **2.0 days** =

Occupancy rate: **72.1%** =

Foreign tourists: **41.7%** -1.6 pp

UK (14.4%), Germany (10.9%) and United States (8.4%)

### SEINE-SAINT-DENIS (93)

**10,242 hotel rooms**, 6.9% of regional capacity

**7.6%** market share

**2.5 million arrivals** -0.8%

**4.4 million overnight stays** -0.8%

Length of stay: **1.8 day** =

Occupancy rate: **74.9%** -1.4 pp

Foreign tourists: **32.3%** -1.1 pp

UK (14.6%), Spain (11.3%) and Germany (9.6%)

### VAL-DE-MARNE (94)

**7,649 hotel rooms**, 5.1% of regional capacity

**5.8%** market share

**1.9 million arrivals** -1.7%

**3.2 million overnight stays** -3.3%

Length of stay: **1.7 day** =

Occupancy rate: **72.3%** -1.5 pp

Foreign tourists: **30.1%** -4.8 pps

UK (13.5%), Spain (12.7%) and Germany (10.1%)

### SEINE-ET-MARNE (77)

**15,183 hotel rooms**, 10.2% of regional capacity

**14.1%** market share

**4.5 million arrivals** -2.0%

**9.4 million overnight stays** -2.8%

Length of stay: **2.1 days** =

Occupancy rate: **73.4%** -1.0 pp

Foreign tourists: **62.6%** +2.3 pps

UK (31.3%), Spain (21.0%) and Netherlands (9.6%)

## HOTEL OFFERING IN PARIS ILE-DE-FRANCE

2,341 hotels and 148,530 hotel rooms in Ile-de-France, respectively 13.6% and 24.9% of French hotel capacity\*.

Most hotel rooms (64.4%) are rated 2 and 3 stars, but the proportion of 4 to 4 star Luxury rooms (20.1%) is higher than in France (+9.3 pps).

Approval was granted to build 1,069 hotel rooms and tourist apartments in 2008, 63.0% of which in the Inner suburbs.

1,476 hotels and 78,244 hotel rooms in Paris, respectively 63.0% and 52.7% of Ile-de-France hotel capacity.

Most hotel rooms (65.3%) in Paris are rated 2 and 3 stars, but the proportion of 4 to 4 star Luxury rooms (26.9%) is higher than in Ile-de-France (+6.8 pps).

## READING KEY

Market share (in %) is calculated based on arrivals.

The green figure represents variation from 2007 to 2008.

The proportion of foreign tourists (in %) is calculated based on overnight stays.

The proportion of the three main tourist nationalities is calculated using total foreign overnight stays.

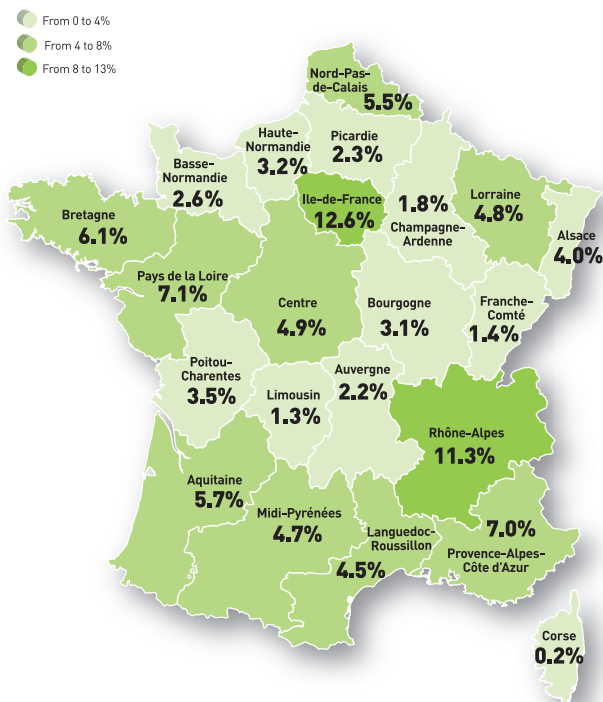
\* Metropolitan France.

Sources: INSEE - DGCIS - Paris Ile-de-France Tourist Board.

## French tourists

In 2008, French residents made 19.9 million journeys generating 74.5 million overnight stays in Paris Ile-de-France.

### GEOGRAPHICAL ORIGINS OF TOURISTS RESIDENT IN FRANCE AND HOLIDAYING IN PARIS ILE-DE-FRANCE



#### PARIS ILE-DE-FRANCE IS:

- The second favourite destination region for French tourists, with 9.5% of journeys made in France.
- A short-stay destination, with an average stay length of 3.8 nights (5.7 nights for France as a whole).
- The main tourist destination for business tourism, with journeys for business reasons accounting for almost a quarter of total journeys (24.6% compared with 8.6% nationally).
- A region where significant use is made of non-paid accommodation: used for nearly three-quarters of personal journeys (73.9%).

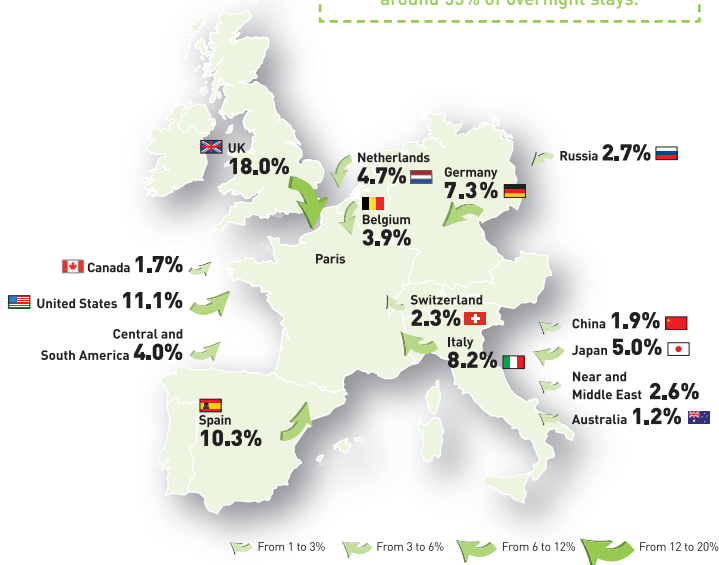
Source: TNS SOFRES.

## Foreign tourists

In 2008, foreign tourists generated 14.4 million arrivals in Ile-de-France hotels (down 2.6% on 2007) and 36.2 million overnight stays (down 1.7% on 2007).

### FOREIGN TOURISTS IN ILE-DE-FRANCE HOTELS\*

Main neighbouring European clients:  
around 55% of overnight stays.



### MAIN CHARACTERISTICS

Foreign tourists account for **45.0%** of hotel arrivals in Ile-de-France and **54.8%** of overnight stays.

They mainly come from **European countries**, led by the **UK**, but the **USA** is the second-largest country of origin.

In a context of falling tourist numbers, the main foreign clienteles affected are long-haul clienteles such as **China** (down 22.1% in terms of overnight stays), the **USA** (-16.3%) and **Japan** (-10.8%), but also **Spain** (-8.6%) and to a lesser extent, the **UK** (-3.4%) and **Germany** (-1.1%).

Conversely, a rise in tourist numbers from some countries, such as **Belgium** (+11.7%), the **Netherlands** (+6.3%), **Switzerland** (+5.0%) and **Italy** (+2.6%), was recorded.

\* Base overnight stays in hotels.

Sources: INSEE - DGICIS - Paris Ile-de-France Tourist Board.

## Foreign tourists arriving by air and train

In order to fine-tune knowledge of its main markets, the Tourist Board has undertaken a number of permanent surveying operations in Ile-de-France airports since January 2007, and in trains since July 2008.

### CHARACTERISTICS OF FOREIGN TOURISTS ARRIVING BY TRAIN

- Over 5,000 French and foreign visitors were interviewed on trains during the second half of 2008 (of whom 46.0% were foreign visitors).
- 58.0% of foreign visitors had already visited Paris Ile-de-France.
- The Internet is the most popular means of finding information and making bookings, used respectively by 40.1% and 36.5% of foreign visitors (base paid accommodation).
- 85.4% of visitors came for personal reasons.
- 94.3% of visitors arranged their own journeys.
- 72.9% of stays are in hotels, of which nearly three-quarters are rated two or three star.
- The average spend is €133 per person per day.
- 94.8% of visitors are satisfied with their stay in Paris Ile-de-France.
- 56.0% would like to return to Paris Ile-de-France within two years.

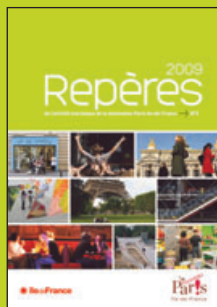
### CHARACTERISTICS OF FOREIGN TOURISTS ARRIVING BY AIR

- Over 14,000 foreign visitors were interviewed in airports in 2008.
- 48.1% of visitors had already visited Paris Ile-de-France.
- The Internet is the most popular means of finding information and making bookings, used respectively by 48.2% and 40.8% of foreign visitors (base paid accommodation).
- 73.0% of visitors came for personal reasons.
- 91.6% of visitors arranged their own journeys.
- 79.8% of stays are in hotels, of which nearly two-thirds are rated two or three star.
- The average spend is €148 per person per day.
- 94.0% of visitors are satisfied with their stay in Paris Ile-de-France.
- 48.2% would like to return to Paris Ile-de-France within two years.

Note: these figures concern visitors who spent at least one night in Ile-de-France for personal or business reasons.

Sources: ongoing surveys in airports and trains - Paris Ile-de-France Tourist Board (BVA).

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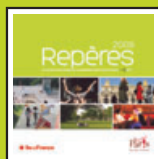
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