

les Études

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COMITÉ RÉGIONAL DU TOURISME PARIS ILE-DE-FRANCE
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FOREIGN VISITORS TO PARIS ILE-DE-FRANCE ARRIVING BY PLANE

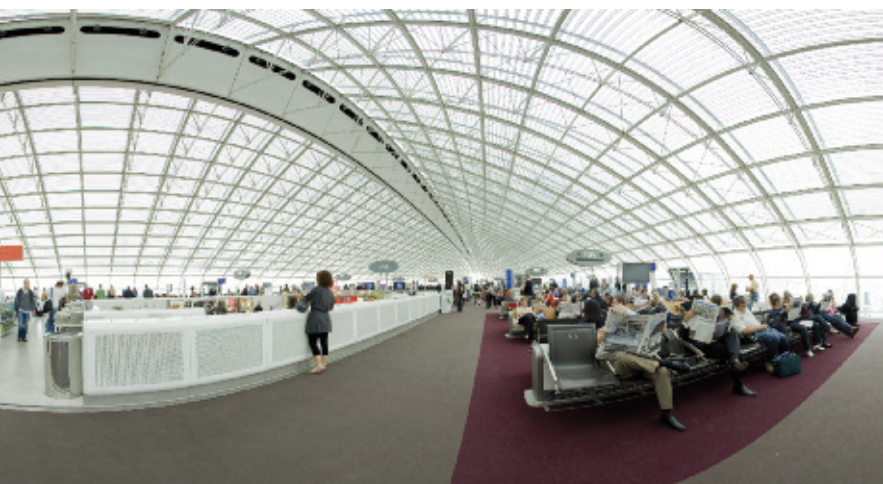
CRT Paris Ile-de-France
BVA

A study tool that has been in place since 2007

Tourism is a business sector that is essential to the regional economy. Which is why the Paris Ile-de-France Tourist Board (CRT) has developed some innovative observation tools, including a permanent survey of foreign visitors arriving at airports. The unusual methodology and the quality and detail of the results give this survey a certain reference status in terms of knowledge about foreign visitors to this destination.

This survey mechanism has been in place at the region's two main airports (Charles de Gaulle and Orly) since January 2007. It is conducted throughout the year and surveyed more than 42,000 tourists between 2007 and 2009. The size of the annual samples thus obtained makes it possible to draw reliable results about flows of tourists by geographical origin, to identify the profile of these visitors, their motives and expectations and to assess their level of satisfaction and their intention to return.

In 2009, 8.9 million international airline passengers stayed in the Paris Ile-de-France region, generating 49.6 million nights. The total annual expenditure by customers who arrived by plane was 6.5 billion euros, 18.3% down on the previous year. The global economic crisis which began in 2008 had a heavy impact on tourist demand in 2009, leading to a fall in the number of tourists (-5.7%) and in the amount spent per person per day (-12.1%).





Profile and motives of tourists arriving by plane

Nearly 60% of tourists are European

European tourists, of whom the Italians (8.5%), Spanish (7.1%), British (6.6%) and Germans (5.3%) made up more than half (56.7%) of international airline arrivals in 2009. However, the Americans remain the largest single group of international visitors who arrived by air (12.6%). Tourists from neighbouring countries including the Belgians, Swiss and Dutch, who tend to travel to Paris Ile-de-France by train or car, are less well represented.



PRINCIPAL TOURIST NATIONALITIES



Tourists belonging to upper socio-economic categories

More than half of the tourists arriving by plane belong in the upper socio-economic categories (52.8%) and a similar proportion have an income level higher than €3,000 per month. People aged between 25 and 60 make up almost three-quarters (71.2%) of this population, with the average age being 38. Tourists who are coming to Paris Ile-de-France for the first time are on average younger

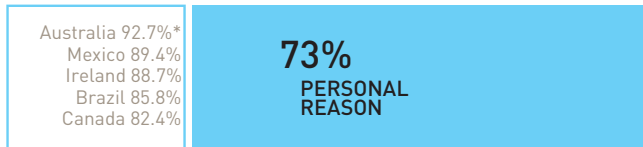
(36) than those who have been before (40). Although women are in the majority (51.2%), they make up only just over a third of visitors who come for professional reasons (36.1%). Compared to the two previous years, the profile of tourists remains stable both in terms of socio-economic category and income. By contrast, the average age is not quite as high (38 in 2009 versus 40 in 2007 and 2008).

Reasons for personal visits mainly cultural

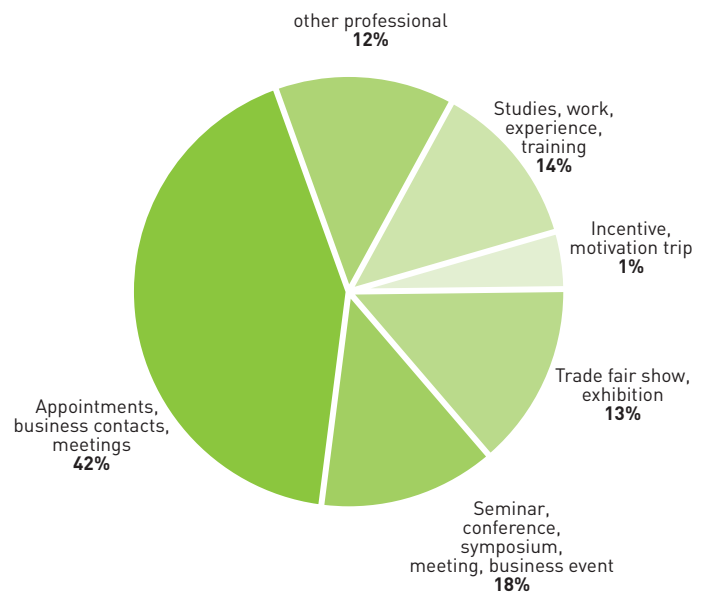
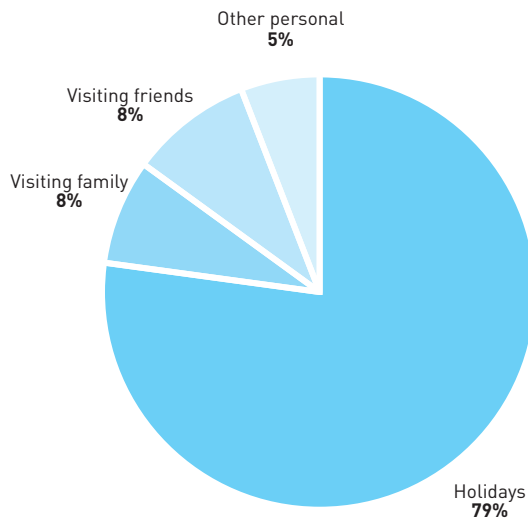
Almost three quarters (72.7%) of international visits to Paris Ile-de-France are for personal reasons, and more than three quarters of these are made in the context of holidays (78.6%). Exploring cities (68.4%) and the destination's historical and cultural heritage (56.4%) are the main reasons that foreign tourists come to Paris Ile-de-France for their holidays. Shopping (13.5%), to experience French cuisine (9.9%) and cultural events (9.6%) are also factors influencing the choice of holiday.

Almost half of professional trips are made for a business meeting or contact (41.9%). Business tourism is better represented amongst visitors from developing countries such as India or China, but also from Germany, France's main trading partner. In certain French "départements", especially Essonne (48.3%), Seine-Saint-Denis (47.4%), Val d'Oise (41.8%) and Hauts-de-Seine (37.8%), the proportion of visitors who come for professional reasons is higher than for the whole of the Ile-de-France.

REASONS FOR VISITING



* Example: 92.7% of Australian visitors travelled for personal reasons.



The proportions of tourist visitors coming for personal reasons and professional reasons remained stable over the period 2007-2009. Visitors who came for personal reasons represented 73.8% in 2007 and 73.0% in 2008. In terms of personal trips, the proportion of holidays is slightly down in favour of trips made to visit family or friends. In 2009, fewer tourists than in 2007 or 2008 came for shopping or to experience French cuisine, and more to visit the cities and their historical and cultural heritage. As for professional visits, the number of business meetings and contacts in 2009 was down compared to the previous year (51.8%), but the same as in 2007 (42.0%).





Preparation and development of the visit

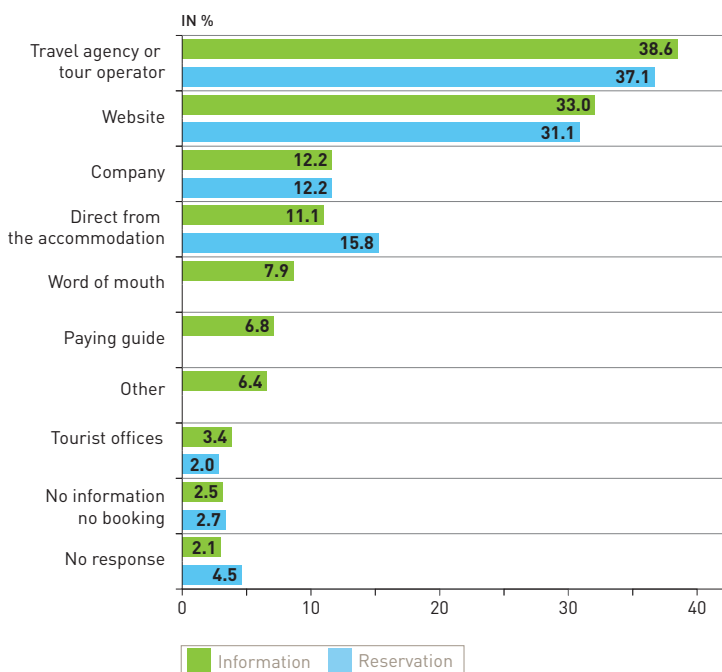
Predominance of travel agencies... thanks to the Internet

Travel agencies remain the leaders in terms of information and reservations, before specialist Internet sites. Nearly 4 tourists out of 10 got their information from (38.6%) and booked their accommodation (37.1%) with a travel agency. However, almost half of the searches for information (51.6%) were made on the travel agency's website, and only 47.4% face to face or over the phone. In terms of reservation, the trend is reversed but the online part (45.9%) remains significant. Customers who use travel agencies most for information are the Japanese

(57.3%), Brazilians (55.8%) and Mexicans (54.5%), and the Brazilians (64.7%), Japanese (58.5%) and Russians (54.3%) use them most for reservations.

Specialist travel websites are the second source of information and reservation used by tourists. Almost a third obtained information (33.0%) and booked their accommodation (31.1%) in this way. The Australians (52.4%/50.4%), Canadians (50.8%/38.4%) and Irish (41.2%/39.5%) are the customers who use this medium the most for information and booking.

MEDIA USED FOR INFORMATION AND RESERVING ACCOMMODATION



Those obtaining information most by ...	Those booking most by ...
Japanese, Brazilians, Mexicans	Brazilians, Japanese, Russians
Australians, Canadians, Irish	Australians, Irish, Canadians
Germans, Chinese, Indians	Dutch, Germans, British
Chinese, Russians, Koreans	Chinese, Brazilians, Koreans
Americans, Australians, Koreans	-
Americans, Chinese, Australians	-
Americans, Canadians, Brazilians	-
Mexicans, Japanese, Koreans	Brazilians, Russians, Koreans
Russians, Germans, Japanese	Mexicans, Germans, Canadians
-	-

Reservations latest for business tourists

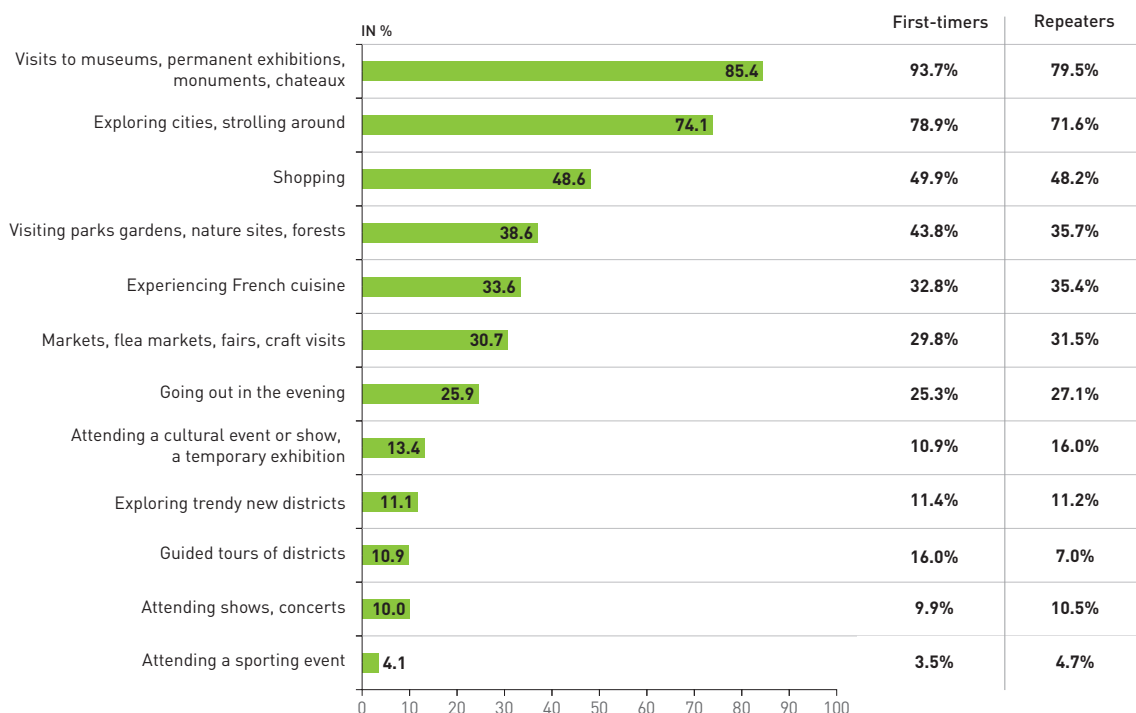
More than half of reservations (56.4%) are made more than a month before departure. For business travellers the reservations are made later: 62.5% less than a month before departure, against 35.7% for holiday visitors. The Indians (70.5%), Dutch (59.1%) and Russians (58.1%) make up half of the visitors who mostly book less than a month before departure. By contrast, amongst those who book earlier (one month or more before departure), we find the Japanese (75.8%), Americans (68.0%) and Australians (66.9%). Compared to previous years, the percentage of reservations made between 2 and 3 weeks in advance (22.5%) is up (+4.0 points compared to 2008 and +3.8 points compared to 2007), to the detriment of those made 2 months or more before departure (34.8%, -4.9 points compared to 2008 and -2.9 compared to 2007).



Visits to museums and monuments most popular with tourists

The main activities are visits to museums (85.4%), exploring the destination cities (74.1%) and shopping (48.6%). Visitors from faraway like the Mexicans (96.4%), Brazilians (94.2%), Australians (93.8%) and Americans (93.1%), are attracted more than all other tourists to museums and monuments. In general, visitors from outside Europe are more likely than other tourists to come for a longer stay and include a larger proportion of first-time visitors, who visit more tourist attractions than repeaters. However, certain activities such as "attending an event, a cultural performance, temporary exhibitions", "going out in the evening" and "experiencing French cuisine" are more popular with repeaters.

MAIN ACTIVITIES PRACTISED BY TOURISTS



Different visits depending on nationality

The main cultural attractions of the destination, visited by more than half of tourist visitors, are the Eiffel Tower (64.6%), Notre-Dame Cathedral (63.2%), the Musée du Louvre (54.5%) and the Arc de Triomphe (53.1%). More first-time visitors visit these sites than others visitors. By contrast, repeaters tend to visit sites such as the Cité des sciences et de l'industrie, the Musée du quai Branly, and the Stade de France. The interest shown by tourists in certain attractions also depends on their nationality. For example, Disneyland® Paris is very popular with the Irish (37.3%), the Spanish (27.5%) and the Italians (23.5%). The Musée d'Orsay and the Château de Versailles are very popular with long-haul visitors like the Mexicans (52.1%), Brazilians (51.2%) and Koreans (45.5%) for the former and with Koreans (35.6%), Brazilians (35.3%) and the Japanese (34.5%) for the latter.

The most active tourists in 2009

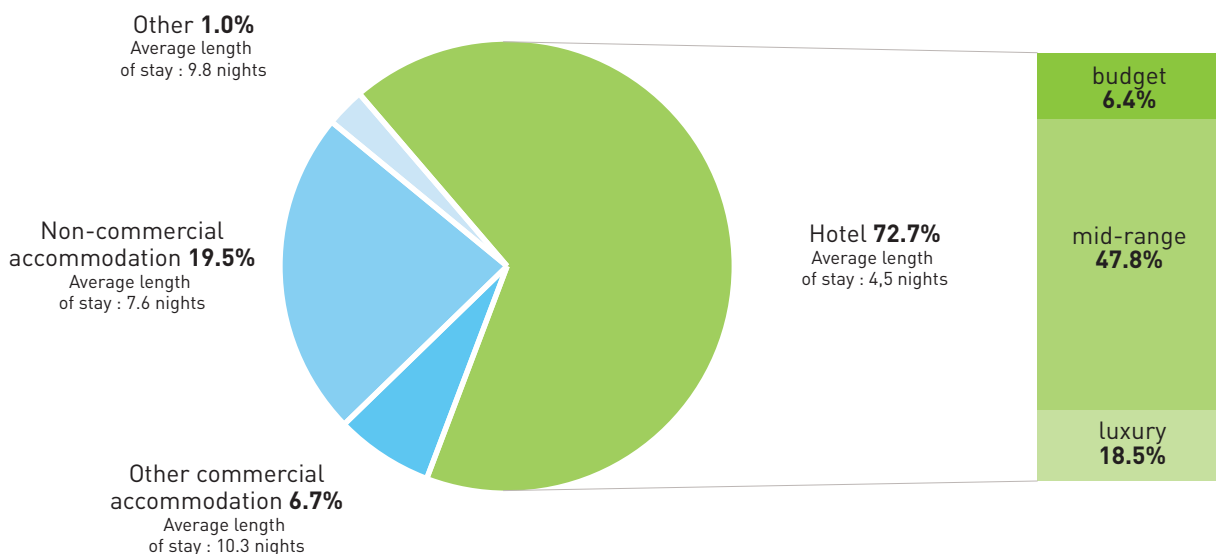
In 2009, tourists on average carried out more activities (4.0 per day) than in 2008 (3.3) or in 2007 (3.6). Activities that were significantly more popular in 2009 compared to the previous two years were visits to museums and monuments, visits to markets and flea markets, going out in the evening, shopping and guided tours of districts. In general, the proportion of tourists who have visited tourist attractions has increased. This partly explains why in a climate in which tourist arrivals are falling, the number of visitors to many attractions remains stable or is even slightly higher than in 2008.

Hotels: principal means of accommodation

Nearly 8 stays out of 10 (79.4%) are spent in commercial accommodation, of which more than 7 out of 10 are in hotels (72.7%). Almost two thirds (65.8%) of tourists who stay in a hotel chose a mid-range establishment. The proportion of hotel stays is higher amongst business visitors (80.4%) compared with leisure visitors (70.0%) and among first-time visitors (79.2%) compared with repeaters (67.5%). Tourists who come for professional reasons are more likely to stay in top-of-the-range hotels (31.8%),

compared with those who come for personal reasons (22.7%), just as with repeaters (30.8%) compared to first-time visitors (19.5%). In terms of nationality, the Japanese (90.0%), Dutch (84.6%), Germans (84.6%) and Russians (84.0%) are among visitors who mostly stay in a hotel. The Irish (33.3%), Americans (33.2%), Australians (30.0%) and the British (29.7%) have higher percentages that stay in top-of-the-range hotels.

PRINCIPAL MEANS OF ACCOMMODATION



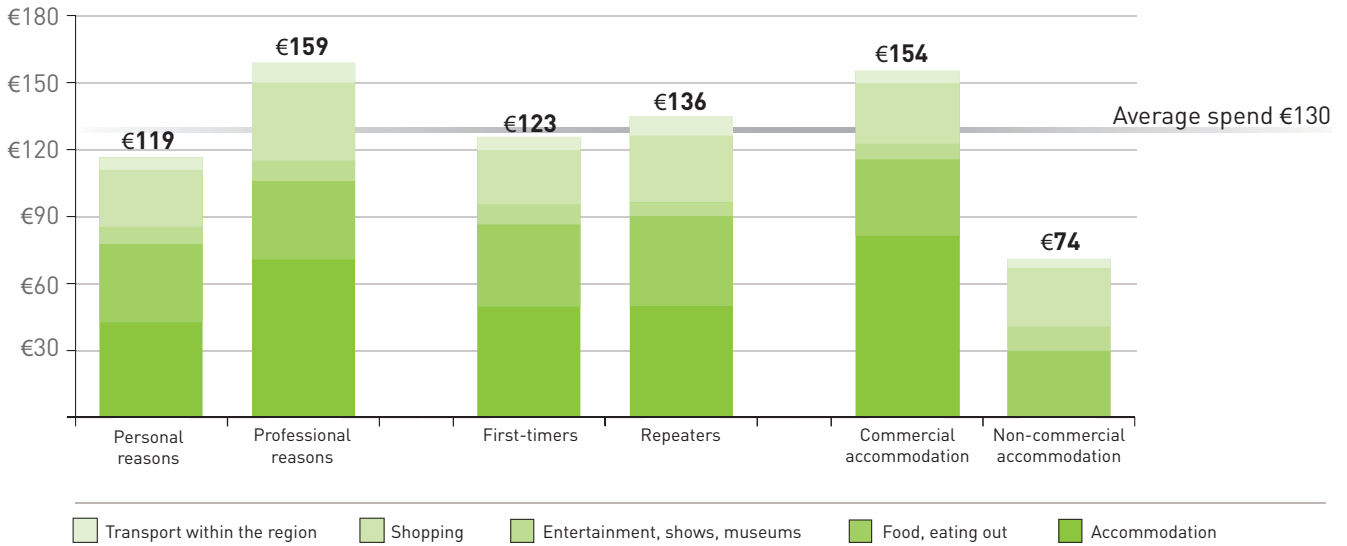
Non-commercial accommodation is chosen by almost one tourist in five

The use of this type of accommodation is most frequent in the case of repeaters (25.0%) and people who come for personal reasons (22.7%). The main types of non-commercial accommodation are the homes of friends (9.6%) and relations (6.3%). The visitors who make the most use of this type of accommodation come from the Maghreb (55.0%), Africa excluding North Africa (42.6%) and Mexico (22.8%). Although in 2008 the distribution of stays between the different types of accommodation was more or less stable compared with the preceding period, in 2009 the hotel percentage fell (-7.1 points compared with 2008), to the benefit of non-commercial accommodation (+6.9 points).

Almost two thirds of expenditure allocated to accommodation and eating out

In 2009, the average expenditure per person per day was €130. The main tourist services covered by this budget were accommodation (40%), eating out (24%), shopping (21%), entertainment, shows, museums (9%) and transport within the region (6%). Tourists who stayed in a hotel (€164), those coming for professional reasons (€159) and repeaters (€136) had a higher level of consumption than visitors as a whole.

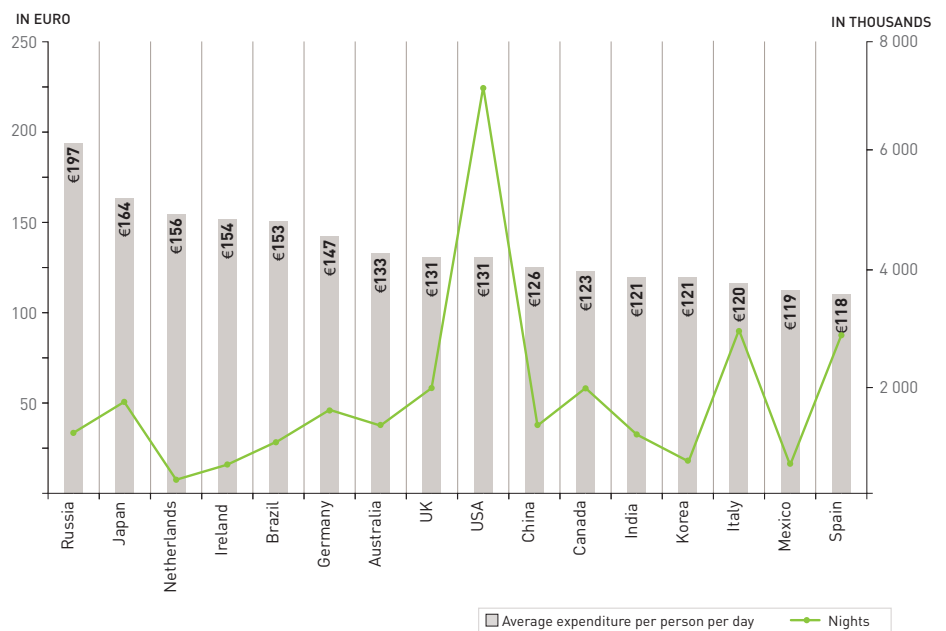
TOURIST EXPENDITURE BY ITEM OF CONSUMPTION



Although in 2008 the average expenditure per person per day (€148) remained more or less the same compared to 2007 (€150) despite the onset of the economic crisis, in 2009 this fell by 12.1%. This fall was due exclusively to visitors who came for personal reasons, who reduced their budget per person and per day by 18.4% after a slight rise in 2008 (+2.5%). Conversely, professional visitors, who had already reduced their expenditure per person and per day in 2008 (-7.0%), maintained the same level of expenditure in 2009 as in 2008 (+1.7%).

AVERAGE DAILY EXPENDITURE AND NUMBER OF NIGHTS PER NATIONALITY

The Russians, Japanese and Dutch are the visitors with the highest average expenditure per day and per person. The Americans, Italians and Spanish, who are not the visitors who spend the most, also contribute to the overall tourist consumption due to the fact that they are present in large numbers in Paris Ile-de-France.





Tourist loyalty and satisfaction

A strong intention to revisit

Thanks to its many assets, the destination of Paris Ile-de-France enjoys a very large potential for loyalty, which is revealed by the intention to revisit expressed by visitors. More than 7 tourists out of 10 (70.5%) plan to return to Paris Ile-de-France for a holiday and half of them (47.3%) intend to come back within the next 2 years. This proportion is relatively stable (-0.8 point) compared to 2008, but has declined in comparison to 2007 (-7.8 %).

A high level of satisfaction

More than 9 foreign visitors out of 10 (95.3%)² declare themselves generally satisfied with their stay in Paris Ile-de-France. The destination's strong points focus mainly around the variety and quality of the cultural offering. Most tourists come to Paris Ile-de-France for cultural visits and they express a very high level of satisfaction in relation to the main reason for their visit. The reasons for dissatisfaction among tourists

are essentially due to the quality/price ratio of the destination's main services and tourist offerings: restaurants, going out, cultural offering and accommodation. Foreign visitors are also less satisfied with the cleanliness of the city and the tourist attractions, the opening hours of tourist attractions and the accessibility of tourist information.

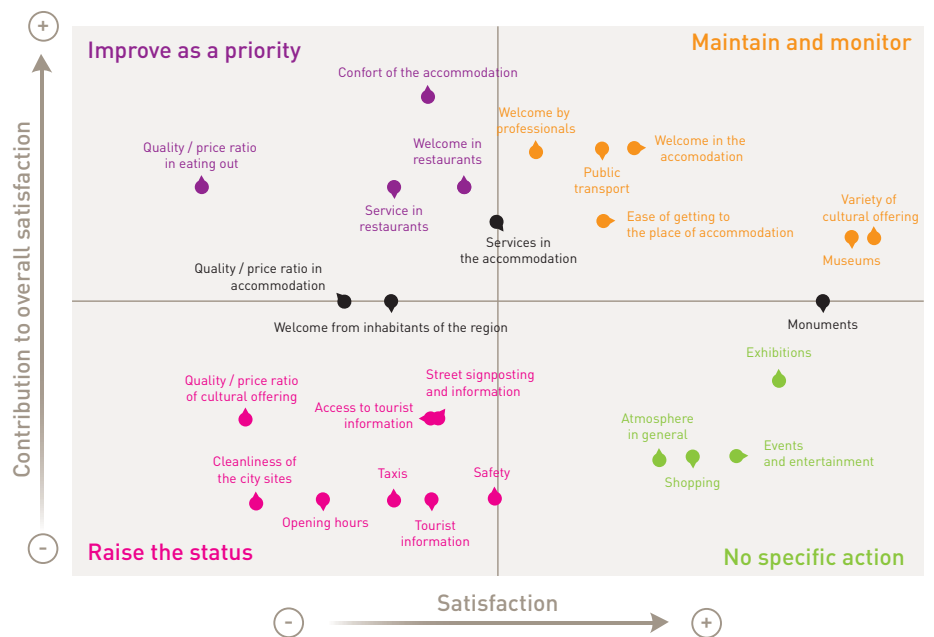
A majority of repeaters

As a consequence of the very high level of intention to revisit, more than half of visitors to the destination in 2009 were repeaters¹ (56.7%). The largest number of European tourists who have already visited the destination are from neighbouring countries: Netherlands (72.5%), Germany (71.1%), United Kingdom (61.9%). The proportion of repeaters is slightly up on the previous two years (+3.2 points and +1.1 point).

¹ Tourists who have visited the destination at least twice during the past 5 years. The proportion is calculated on the basis of respondents.

² The percentages for satisfaction are based on those responding

STRENGTHS AND WEAKNESSES OF THE DESTINATION



Reader guidelines

The above scatter graph gives a more detailed interpretation of the results relating to satisfaction, and provides levers that can be acted upon. The different services are divided into four categories based on the one hand on the level of satisfaction obtained and on the other on their contribution to overall satisfaction.

The top left-hand corner contains the items that contribute strongly to general satisfaction but which are judged not very satisfactory: these are the weak points to be "Improved as a priority". Eating out is the main service concerned: the price/quality ratio (58.7% satisfied), the service (79.0%) and the welcome (82.2%). The confort of the accommodation is also stated (78.5%).

The top right-hand corner contains the items that also contribute strongly to general satisfaction

but which are judged as satisfactory: these are the strong points and therefore elements to be "Maintained and monitored". The variety of the cultural offering (97.9% satisfied), the museums (97.2%), the welcome at the accommodation (89.1%), the ease of getting to the place of accommodation (86.5%) are some of the elements that make up the destination's strength.

The bottom left-hand corner contains the items that are not very satisfactory but which have little impact on the general level of satisfaction: improving satisfaction with these items will "Raise the competitive status".

Finally, the bottom right-hand corner contains the items that have little influence on general satisfaction but which are judged to be satisfactory: "No specific action" therefore needs to be planned for these.

Methodological framework

Permanent survey mechanism carried out monthly since January 2007 in the departure halls of the region's 2 main international airports: Charles de Gaulle and Orly. This survey is targeted at international tourists who have stayed at least one night in Paris Ile-de-France, for whatever reason (professional or personal). The sampling is based on all flights observed for a given period. The sample is representative in terms of the following variables: platform and terminal, destination of flights and period of reference. Also included are: the type of day, the period, flight time and the type of airline and connections. The results are rebalanced using the passenger traffic data by plane and by airline supplied by Aéroports de Paris.

Between 2007 and 2009 more than 42,000 foreign tourists were questioned as part of this study.