

les Études

april 2010

COMITÉ RÉGIONAL DU TOURISME PARIS ÎLE-DE-FRANCE
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BRITISH, GERMAN AND SPANISH REPEATERS: PROFILES AND EXPECTATIONS

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IPSOS Marketing

The various studies and survey mechanisms used by the Paris Ile-de-France Tourist Board (CRT) at airports and on trains have demonstrated the repeater potential for Paris Ile-de-France as a destination. But who exactly are these visitors who so love coming here? What are they looking for during each of their visits? How do they organise them? What do they expect from them? To find out more about these visitors, the CRT has conducted a survey mixing qualitative and quantitative approaches for some highly informative results.

Roughly speaking...

- "Repeaters" (people who have visited Paris Ile-de-France at least twice for personal reasons during the last 5 years) form a heterogeneous population: in the number of stays, in their motivations and in the manner in which they perceive the destination.
- People tend to return to Paris Ile-de-France above all for emotional and sentimental reasons.
- When organising their stay, most use the Internet both as a means of obtaining information and for reservation, which is usually made directly on the providers' own websites and rather more at the last minute than other travellers.
- Having a tendency to visit many of the places and monuments that they already know from previous visits, they are repeaters in terms of the destination but also of previous itineraries.
- However, they see themselves as connoisseurs of the destination and as such aspire to make new discoveries by themselves.
- The more frequent the repeater, the longer the stay and the larger the budget.
- Despite a more in-depth knowledge of Paris, the Ile-de-France region is seldom visited. However, this reluctance was rarely based on principle, and the main reasons mentioned were problems in finding information about activities and transport along with lack of time during a short stay.
- Repeaters to Paris Ile-de-France are often familiar with certain large European cities but Paris has a strong identity compared to other capital cities.
- They are true ambassadors for the destination, and have strong powers of recommendation, with a high approval rate.
- Almost all intended to return to Paris Ile-de-France, these are therefore visitors who are already persuaded but whose loyalty must continue to be cultivated.





Who are the repeaters?

Subtle differences in profile according to nationality



- 59% of women vs. 41% of men
- Older generation 55% over 45
- Majority USPC* (47%) with an average monthly income of €2740
- Average budget allocated to holidays per year more than one month's salary: €3020
 - Households composed of 2.6 people on average
- As many repeaters visited twice as repeaters visited three times or more (51% vs. 49%)

5% of British had come to Paris Ile-de-France at least twice over the last 5 years (and 20% at some point in their life).

8%

of Germans had come to Paris Ile-de-France at least twice over the last 5 years (and 30% at some point in their life).

- 49% of women vs. 51% of men
- Population very spread in terms of age
- Population very spread in terms of SPC* with an average monthly income of €2740
- Average budget allocated to holidays per year more than one month's salary: €2950
- Households composed of 2.6 people on average
- As many repeaters visited twice as repeaters visited three times or more (52% vs. 48%)

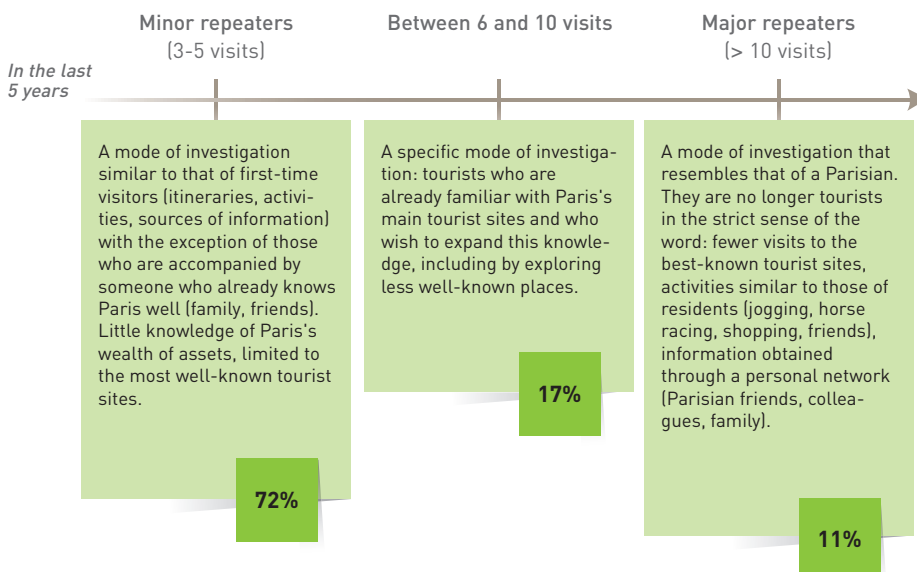


- 35% of women vs. 65% of men
- Younger generation with 49% at least 35
- Majority USPC* (50%) with an average monthly income of €2670
- Average budget allocated to holidays per year equivalent to one month's salary: €2550
 - Households composed of 3.1 people on average
- More repeaters visited twice than repeaters visited three times or more (54% vs. 46%)

7% of Spaniards had come to Paris Ile-de-France at least twice over the last 5 years (and 16% at some point in their life).

* (USPC = (Upper) Socio-Professional Category)

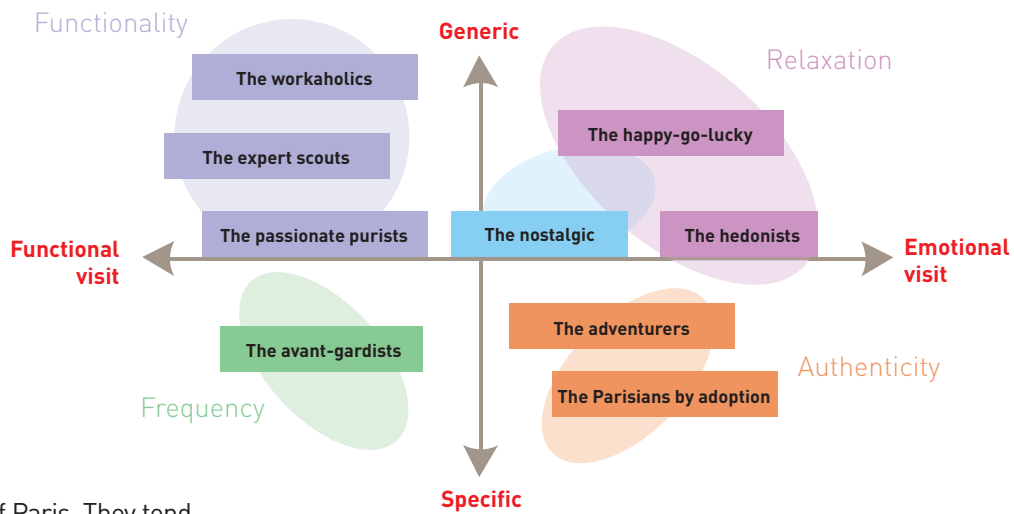
A heterogeneous population



Reasons for visiting mainly emotional and sentimental

When you are a repeater, whatever your nationality, you come first and foremost for emotional reasons (because you love the city), to visit the museums and monuments and for a romantic holiday. During later visits, you come more as a scout, to help a relative or friend to discover the city.

NINE PROFILES OF REPEATERS



Two majority profiles

those who discover Paris as they stroll around and those who try to make the most of their time.

The workaholics

These want to hone their knowledge of Paris. They tend to follow similar itineraries to those of previous visits, not always visiting monuments but using them as a point of reference on their itinerary.

"We take a map and visit all the places and monuments on it."

Aguilar, Spanish senior

The expert scouts

Their aim is to show Paris to their loved ones. Their itinerary is organised, their pace steady, with a full programme of monument visits.

The passionate purists

These are mostly seniors. They identify sites to visit according to their own focus of interest, their aim is clearly cultural and their itinerary planned out in advance.

The nostalgic

They have already visited Paris many times and feel a strong emotional bond with the city. They are mainly families and seniors. They tend to book several months in advance, to follow the same itinerary, and to alternate visits to symbolic sites with less well-known places.

The happy-go-lucky

Young people travelling as a group, their visits are only vaguely planned, but visits to tourist attractions are decided when they arrive.

"When I climbed the Eiffel Tower, it has to be the coolest thing I did this time... Just because it's so iconic..."

Aaron & James, young Brits

The hedonists

They come mainly to visit family and friends. Preparation of the visit is limited to reserving travel, they come to enjoy the Parisian atmosphere.

The adventurers

They know people in Paris. Their itinerary is not planned in advance, they want to organise their own visit, even when coming to visit a friend and alternate very popular tourist areas with less well-known places.

"I think I've seen the bad side of Paris too... But it makes things more real, it's not just a pretty postcard."

David, young Brit

The Parisians by adoption

They have already been here many times. They have a particular attachment to Paris and often return to visit a relative or friend. They tend to return to their favourite places, but also visit more exhibitions and areas with fewer tourists.

The avant-gardists

These are young people in search of the unusual (even if they don't know the must-see sights). Their pace is steady, their visit prepared, and they use the Internet to get the best deals.

"That picnic on the banks of the Seine we went to, with all those people, that was really cool. Even though we weren't introduced to everyone by our host, who's a member of a CouchSurfing network, people came up and talked to us, it was really cool."

Anna & Alex, British couple

Profiles by nationality



Clientele consisting mainly of "expert scouts" and "passionate purists".



Clientele consisting mainly of "Parisians by adoption" and "hedonists".



Clientele consisting mainly of "workaholics", "expert scouts" and the "nostalgic".



What do they do? How are they organised?

Visits generally not very organised


On the whole, the visit is not organised in advance. But where visitors have prepared a list of places to see, it's when they are showing Paris to a first-time visitor (expert role), or showing sights in association with a particular theme (role of connoisseur).


- The more frequent the repeater, the more last minute the booking.
- Reserving over the Internet is the preferred method, most often directly on the provider's own website (airline, rail company, hotel, etc.). The dominance of the Internet is also visible when it comes to gathering information.
- The more frequent the repeater, the longer the stay and the larger the budget.
- Although 3-star hotels are the preferred type of accommodation, there is a tendency to move up the scale as more visits are made.
- The accommodation is mainly situated in the centre of Paris, with a wish to be as close as possible to the action.

Visits concentrated around tourist areas

Length of stays

 5,1 nights

 4,5 nights

 4,4 nights

Wish to maximise the time : explore districts that offer a large concentration of tourist attractions. Walking is a means of getting around much used by repeaters, followed by the rail network. Buses are used by a quarter of them as a minimum.

"We want to do everything ourselves and explore Paris away from the crowds of tourists."

Heike et Kurt, German family

Focus on the sources of information used

Repeaters maintain a rather special relationship with tourist information: most often, believing that they know the destination, they do little in the way of research for information. They prefer: unofficial sources of information (places frequented by Parisians, good deals - restaurants, bars, shops, etc.), using the public as their main source of information for its value of authenticity, originality and uniqueness.

Sometimes, certain "major repeaters" use official local sources to adapt their programme on the spur of the moment. By contrast, it is quite difficult, especially for repeaters who do not have a network of contacts on the spot, to access this type of information, in particular the good deals of "Paris pratique".

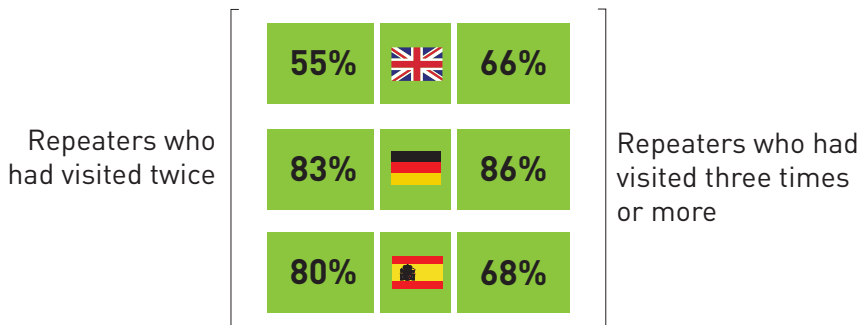
A target group for whom information, without being too intrusive, has to come to them (push mode distribution), because they are unlikely to go and look for it on their own accord once there.



Repeated itineraries

The repeater shows a general tendency to visit many of the places and monuments that he/she already knows from previous visits. Visiting slowly becomes "paying a visit"...

PERCENTAGE OF PEOPLE VISITING CERTAIN PLACES ON EACH VISIT



"When you come back to somewhere you already know, you think you know the city well. There's the bakery where I always buy my croissants, and that's where I had a coffee last time. You feel almost at home and not just a tourist. I associate it with very personal experiences and these are the moments that make me come back to Paris."

An hwa, German woman in a couple

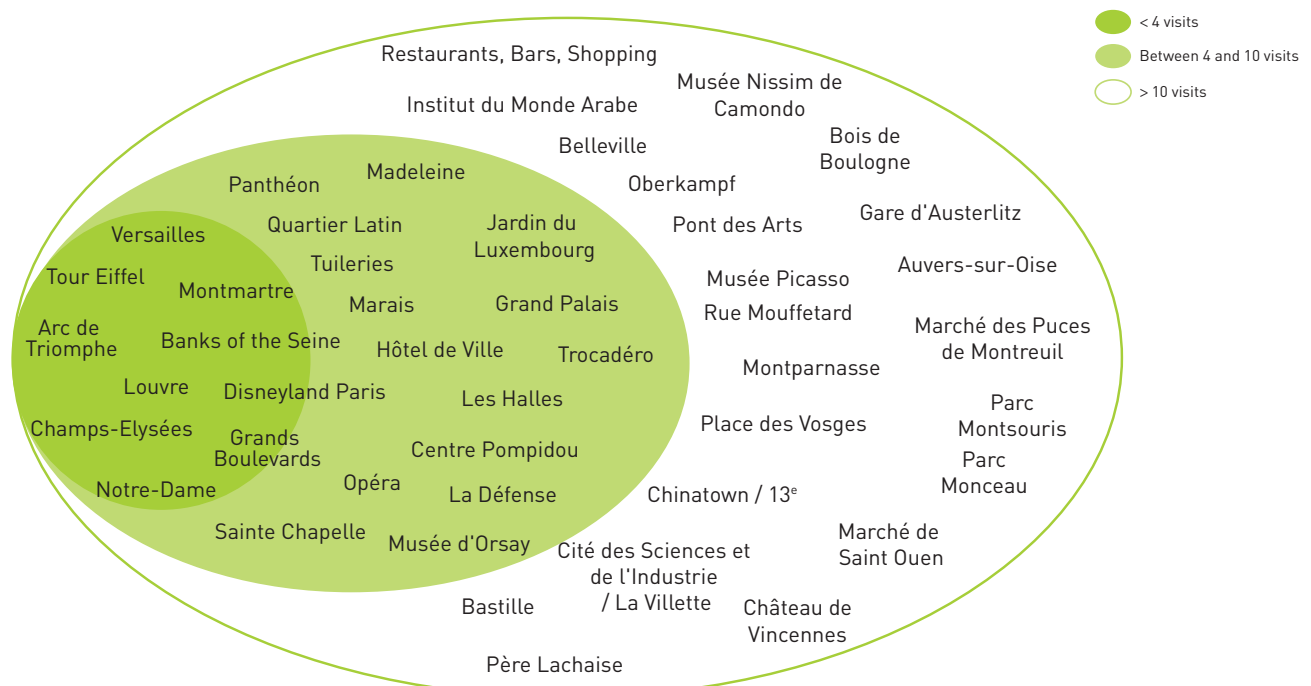
The main activities remain going to restaurants, exploring the city on foot, shopping, visiting museums/monuments, visiting districts (non-guided), visiting parks and gardens. Visits to museums and monuments (although these remain frequent) and to a lesser extent excursions (for the British and Germans) are less frequent than during the last stay. The opposite is true for going out to restaurants, shopping and shows/theatres (for the Germans and Spanish).

Paris's four top tourist attractions are the Tour Eiffel, the Arc de Triomphe, Notre Dame and the Louvre museum. However, repeaters revisit these places less than on their last visit, or they use them as points from which to set off on other visits.

The most visited areas are those of the Tour Eiffel, the Champs Elysées, Montmartre/Barbès, Bastille, Les Halles/Louvre, Montparnasse and Saint Michel. Some places like the Brady passage for the Germans and Spanish are visited more on their last visit.

Repeaters generally show a readiness to "get off the beaten track"... But, we note a very slow change in itinerary according to the number of visits.

VISITS THAT HAVE CHANGED VERY LITTLE OVER TIME

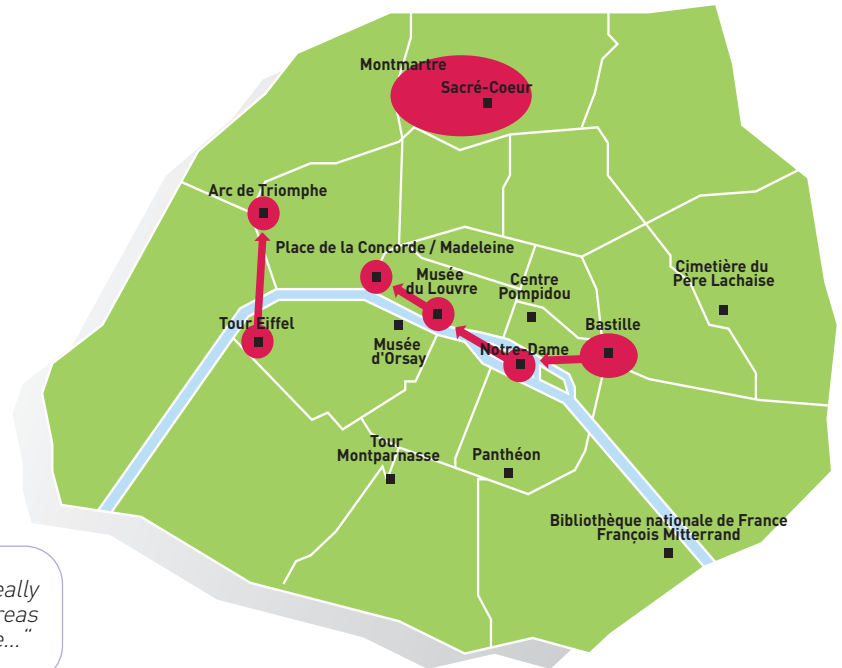


Itineraries concentrated in the historic centre of Paris

In general, the repeaters we met stated that they "hadn't planned an itinerary" in advance. The repeater normally decides that very morning (at breakfast) how they are going to spend their day in Paris. It seems that the only attractions visited in the Ile-de-France region outside Paris are the Château of Versailles, the district of La Défense (often included as Paris) and Disneyland Paris; a small minority visit Auvers-sur-Oise. However, there is no reluctance in principle to visit the region, but lack of time, difficulty with finding information and a perceived complexity with transport beyond the limits of the metro.

Itinerary of an "expert scout" on his 3rd visit. César: young Spaniard who has come with friends to show them Paris.

- Day 1 : Montmartre, Sacré-Coeur, Moulin Rouge, stroll around Montmartre
- Day 2 : Bastille, Notre-Dame, the Louvre, Place de la Concorde, Madeleine
- Day 3 : Tour Eiffel and Arc de Triomphe



"We didn't have any special plans, what we really liked was going for long walks and exploring areas of the city that we hadn't had time to visit before..."

Fernando, Spanish senior



Itinerary of "avant-gardistes" on their 3rd visit. Anna & Alex: young British couple (CouchSurfers, getting around Paris by bike).

- Day 1 : Centre Pompidou, looking for a bar near the Seine
- Day 2 : Tour Eiffel, Jardin des Tuileries, Louvre, Seine, Bastille, Sacré-Coeur (proposal!)
- Day 3 : Montreuil Flea Market, Père Lachaise cemetery, Bastille, picnic on the banks of the Seine
- Day 4 : Breakfast and shopping in Bastille

"We just get up, have breakfast and then decide."

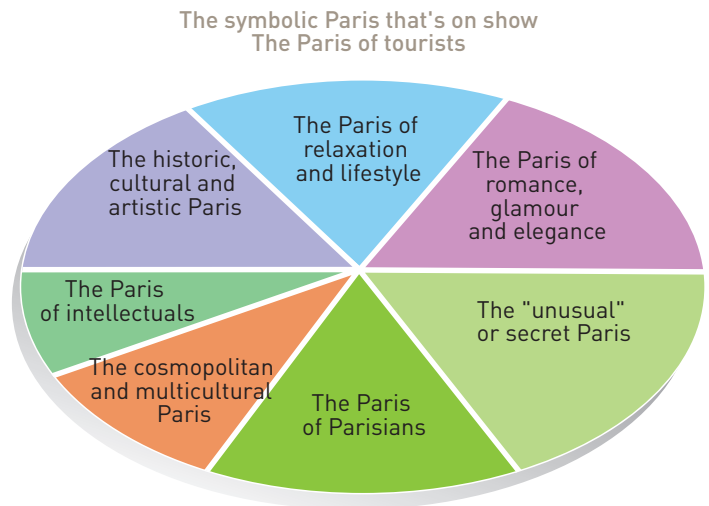
Laure & Anna, young Brits



What place will Paris have in their imagination and in their heart?

A rich and varied image

The representations of Paris are generally very close to those of first-time visitors: an idealised "picture postcard" Paris. But tempered, for the keenest strollers (like the "adventurers"), by perceptions that tend to take in the realities of the city, its less touristy side.



A strong identity compared to other European cities

Repeat visitors to Paris have on average visited 5 other European cities during the past 5 years. The most visited cities include: London, Barcelona, Amsterdam, Madrid, Rome. Differences do exist according to country and are logically linked to geographical proximity (e.g. Dublin for the British, Berlin, Prague and Vienna for Germans, Lisbon for the Spanish).

The comparison with other cities reveals Paris's unique character as a destination: concentration of tourist attractions, architectural homogeneity, historical and romantic aspect, strong cosmopolitan aspect (which makes Paris more like London), well adapted

to tourism (easily understandable transport system).

"The city that's maybe a bit like Paris is London. We've been to London once, no twice, but you get the same feeling of this enormous place and that cosmopolitan side."

Jochen, Daniel, Alice et Marcus, young Germans

"I think Paris is a multi-faceted city - I've been there for a romantic holiday, with friends and with family and I loved it each time. I like the fact that you feel as you do in London, but with more space."

Rachel, British women in a couple

"The architecture and atmosphere of Paris are unique."

Miguel, Spaniard with family

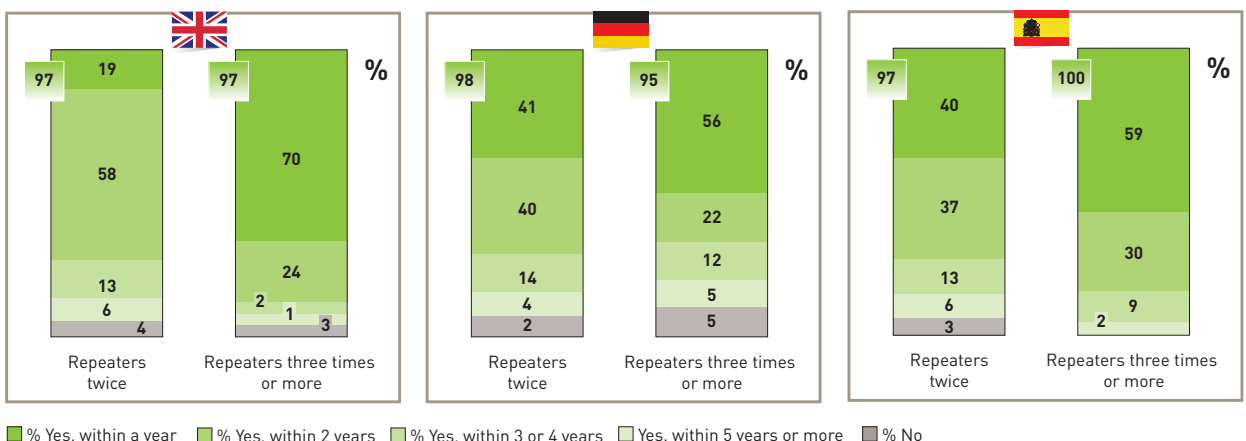
"Paris is easily the place I have returned to most often in Europe, and for the reasons described by all the others. Great food, weather, architecture, cafes, shops etc. and the lack of homogenised Starbuckery to give the child an idea that London life is not all there is."

Ben, member of a British family

High customer loyalty potential, to be converted!

A high potential of customer loyalty to the destination: almost all (95-100%) of repeaters intend to come back to Paris soon. Almost all also recommended the destination to their friends and family: the figures are between 94% (German "major repeaters") and 100% (Spanish "major repeaters"). They plan to spend their next stay exploring new things to do, even though the traditional favourites will be (re)visited by more than half of repeaters. The activities envisaged focus around food, open-air activities (exploring the city, parks and gardens, markets and flea markets), cultural activities (museums, monuments) and shopping.

INTENTION OF RETURNING TO PARIS FOR A HOLIDAY



What are the expectations in terms of activities?

Repeaters are particularly attracted by activities which:

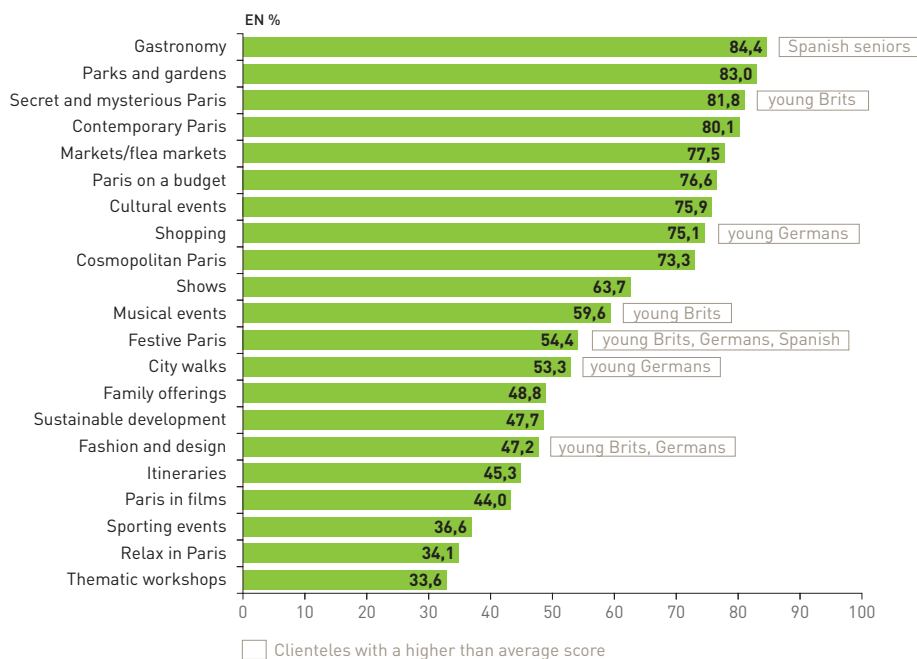
- offer a "different" way of discovering Paris,
- take place in the open air,
- relate to restaurants and cafés, etc
- relate to learning about contemporary Paris or to shopping.

For all three types of clientele, gastronomy, associated with the Parisian lifestyle, is one of the destination's indisputable assets. Typical, reasonably priced bistros are favoured, along with good French food. True to their wish not to be considered as mere "tourists", repeaters are also on the lookout for good places a long way from the tourist routes.

From the same perspective, they are keen to find non-traditional methods of discovering the city, hence the success scored by topics such as "Secret and mysterious Paris" and "Contemporary Paris", which can represent the "icing on the cake" of the holiday.

Parks and gardens are seen not so much as a separate activity but as somewhere to have a rest during a day's visiting. The visits to "markets/flea markets", which appear to be rarely planned, are in step with the "wandering around" aspect of the holiday, and are sometimes seen as an extension to shopping. They also meet the desire to immerse themselves in the local life, and to experience Paris "like the Parisians". It is also this readiness to go out and look for a more authentic Paris which the "Cosmopolitan Paris" appeals to.

DURING YOUR NEXT VISIT, WOULD YOU BE INTERESTED IN:



We noted some distinct expectations in terms of cultural events and also in terms of information on this subject before the holiday. The idea of opening museums at night also met with considerable approval, on the model of the 'Nuit Blanche' event, for example.

"To start with, the monuments are the main attraction, but after that you look for more contact with the people, you try to vary between concerts, cultural activities, going out in the evening, meeting the people who live here, to get to know another way of life."

**Maria, Susana & Carmen,
young Spaniards**

On the theme "Secret and unusual Paris": "Wow, of course that would make me come back to Paris. The idea of exploring some unknown parts of Paris, that really grabs me"

Jamie, part of a British couple

Methodology mixing two types of approach

- Qualitative approach in two stages: 60 qualitative interviews carried out in 2 waves in Paris Ile-de-France, 3 online forums over a period of two weeks with 30 people per country.
- Quantitative approach in two stages: omnibus survey of 500 people per country, online questionnaire to 300 people per country.

Survey conducted June-October 2009.