

- 프랑스 파리 부시장 면담자료(2018.1.10. 09:00~11:00)



THE KEY TOURISM FIGURES

47 MILLION TOURISTS

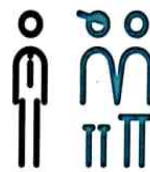
IN PARIS AND THE ÎLE-DE-FRANCE IN 2015 INCLUDING



58% French people
42% foreigners

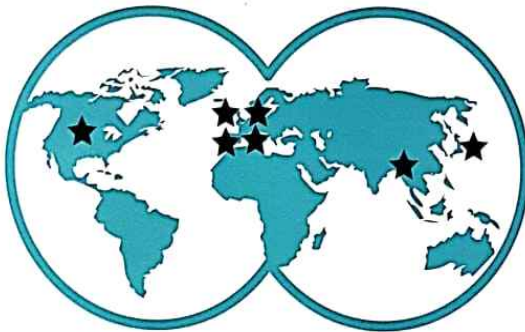
74% return visitors

26% first-time visitors



1/3 business tourism

2/3 leisure tourism



THE TOP 7 Among international tourists
COUNTRIES GENERATING THE MOST TOURISTS in 2015

USA	1.8 M
UK	1.2 M
CHINA	746,000
GERMANY	725,000
ITALY	621,000
SPAIN	608,000
JAPAN	481,000

A DRIVER OF THE ECONOMY AND PARISIAN JOBS



48 MILLION overnight hotel stays in Greater Paris in 2015

Nearly **40 BILLION EUROS** in tourism consumption in Île-de-France

524,000 JOBS in Île-de-France, **12.4%** of the region's paid employment in 2015

A UNIQUE QUALITY OF TOURISM OFFERINGS AND WELCOME RESERVED FOR TOURISTS



93% of visitors surveyed said they were satisfied with their overall stay

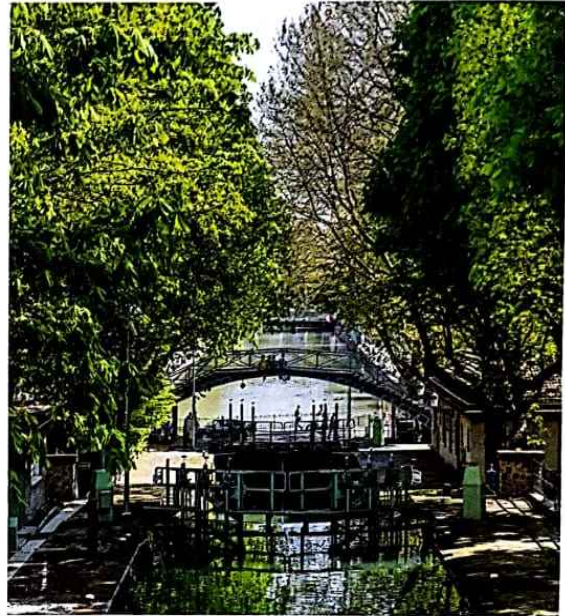
57% of visitors surveyed intended to return within the year

UNIQUE ASSETS

With 46.7 million tourists in Île-de-France in 2015¹, Paris is one of the leading tourist destinations in the world for both leisure and business tourists.

Paris owes this leading position to its exceptional assets. It is one of the rare cities in the world that can offer an experience suited to each visitor, while still remaining a liveable city with excellent connectivity, tourism infrastructure and quality services:

- **Paris is the city of art and history par excellence:** it features a rich, unparalleled cultural life, with over 200 museums, 1,000 art galleries, and hundreds of exhibitions and cultural events with international appeal.
- **A city of monuments:** its heritage includes over 2,000 historic monuments, including the most visited sites in the world like Notre Dame Cathedral, Sacré Cœur, the Eiffel Tower, The Chapel of Our Lady of the Miraculous Medal, and the Arc de Triomphe, with nearly 25 million visitors in 2015.
- **Paris is the capital of gastronomy:** With its 14,000 cafés and restaurants, 82 markets, and 90 Michelin-starred restaurants, gastronomy is at the heart of the Parisian way of life. Parisian gastronomy is thriving and creates space for culinary traditions from around the world, illustrating the cosmopolitan life and exchange of cultures that form the very foundations of the city's spirit.
- **Paris is one of the most popular shopping destinations in the world,** due to the wealth and unique nature of its network of stores, including top luxury brands, 8 department stores, and a multitude of artisans and designers with unique expertise, in addition to the 240 second-hand booksellers that give Paris its charm.
- **Paris is also a city for celebration** - cutting edge and avant-garde, it offers out-of-the-ordinary experiences and the chance to discover unexpected places. At night Paris has much to offer: 67 concert halls, 265 theatres and cabarets, 285 cinema screens, 3 opera houses, nearly 200 clubs, 10,000 bars and restaurants, 300 events per evening, over 100 concerts and the biggest European music festivals.
- **Paris is a green city:** with two large forests, 400 squares, parks and gardens, the pedestrian areas along the banks of the Seine, its canals and Promenade Plantée, which preceded High Line in New York City, and 700 kilometres of bike paths (which will double by 2020), Paris is a wonderful place to walk or bike.
- **Paris is one of the best connected cities in the world,** due to its central location in the heart of Europe, and its excellent air and rail connectivity.



The power of the Parisian airport system lies in the complementarity of its 4 major airports: Roissy CDG (Number 1 European hub), Paris-Orly (Number 2 French airport), Paris-Le Bourget (Number 1 European business airport), and Beauvais-Tillé, strengthened by the growing momentum of low cost airlines.

In addition, the city's 7 major train stations, including the Gare du Nord, which is the number 1 European train station in terms of international arrivals, make it well connected to both French cities and major European cities.

- **Paris has high-quality infrastructure and exceptional tourism capacity:** With 116,000 rooms, Greater Paris features the 2nd largest hotel accommodation offering in the world and a wide range of quality hotel services. The city's public transport network is one of the most efficient in the world, with its extremely dense network of interconnections.
- **Paris is the number 1 city in the world for conferences and trade shows:** business tourism is one of the driving forces in Parisian tourism, representing one third of visitors to Paris and over 40% of overnight hotel stays. Each year, Paris hosts approximately 1,000 conferences and 400 trade shows, representing over 5 billion euros in economic benefits. The city is also home to the largest exhibition area in Europe² and has unparalleled expertise in hosting large events.
- **Paris is a city that welcomes the world:** from the first World's Fairs to hosting COP 21 and the Euro 2016, Paris excels in organizing large international events.



- **Paris is a city of freedom:** Throughout the world, Paris embodies human rights and is a city of tolerance, defending individual freedoms and the freedom of the press, a city in which everyone may circulate freely without experiencing discrimination.

- **Paris offers services and a welcome of excellent quality:** the overall satisfaction rate of visitors to Paris is 93%³ thanks to the city's quality services and the professionalism of the stakeholders in Parisian tourism, as well as the exceptional quality of life and Parisian art of living, appreciated by visitors from all over the world.

THE CHALLENGES

A LEADING POSITION IN THE INCREASINGLY COMPETITIVE FIELD OF GLOBAL TOURISM

With global growth estimated at 4% per year between 2014 and 2030⁴, tourism is one of the most dynamic economic sectors in the world and a driving force for the Parisian economy and jobs.

However, in an extremely competitive international environment, Paris' historic position as the world's tourism capital must be defended.

- **In the leisure tourism segment,** Paris is facing increasing competition from major emerging countries (Brazil, India, China, South Africa, Mexico, Russia...) and from regional

destinations that these developing countries are refocusing on, such as South-East Asia for the Chinese in particular. Yet **the number 1 competitor for Paris is within Europe.** Spain has become the top destination for European tourists, ahead of France and Italy. And Paris has not benefited as much as other destinations from European "city-breakers" travellers who take advantage of long weekends to enjoy urban tourism. For the past ten years, Paris has been falling behind neighbouring cities (Berlin, Amsterdam, London, Barcelona...), which have succeeded in structuring their tourism offering and image to attract this customer base.

- **In the business tourism segment,** Paris' leading position has been challenged by major European capitals such as Berlin, Barcelona and Vienna, as well as by emerging destinations such as Singapore, Istanbul and Kuala Lumpur, which have made huge investments in infrastructure for hosting large professional events and have rolled out increasingly competitive tourism facilities to attract event organizers.

- **More generally, since 2015, the economic slowdown in emerging countries (China and Brazil in particular) and some historical markets (Russia, Japan), for reasons related to geopolitical situations and exchange rates, has curbed the driving growth that these new markets represent.**



3. Source: CRT overall satisfaction survey
4. Source: OMT



While the weaker growth (and the economic downturn) of Paris' position can be explained by the context of terrorism threats, it is primarily due to more natural reasons linked to tourism infrastructure, connectivity challenges and macroeconomic issues:

- 2015 and 2016 were marked by an upsurge in terrorist attacks in France and Europe, which had a major impact on tourist visits to Paris. The number of visits decreased by 1.1% in the Greater Paris area between 2014 and 2015, due to the impact of the attacks in January and November 2015. This is why in 2016, Paris City Hall, in partnership with the Ministry of Foreign Affairs and International Development and the major tourism stakeholders, rolled out a **tourism stimulus plan** aimed at supporting the sector and accelerating the return to normal tourism numbers.

- Yet the slowdown in tourist visits to Paris can be explained by more structural reasons, related to **the high-cost of the destination** (2nd most expensive hotel network in the world), to **connectivity challenges** (Paris lacks low-cost airlines that serve the destination), to **the quality of tourism infrastructures and service** (the overall tourist satisfaction level is very good, but there is room for improvement for some fundamental aspects, such as cleanliness and the mastery of foreign languages).

- But beyond these short-term support actions, this tourism development plan is aimed at **improving the long-term structural advantages of tourism in Paris, specifically the quality of the tourism offering, the welcome provided to visitors, and tourism infrastructures in Paris.**

OUR AREAS **FOR IMPROVEMENT**

Continue to increase investment in tourism infrastructure with the aim of ensuring a high level of service and meeting the needs of the increasing influx of tourists:

Paris has some of the best connectivity solutions in the world, in terms of both diversity and capacity: Across all categories of customers, tourists come to Paris by plane (45%), train (30.5%) or by road (24.5%). But with a 5% increase per year in the number of tourists, it is necessary to increase and modernize our infrastructure capacities in order to remain the number one tourist city in the world:

- Pursue investments and adapt regulations in order to develop our airport capacity to respond to the increasing influx of tourists and improving connections to Paris.

- Modernise Parisian train stations and develop the train timetables, which have reached saturation point.

- Reorganise coach transport by creating the right conditions for the sustainability of this option, and, in so doing, meet the challenges of managing the public space and improving air quality.

- Rethink river transport by adapting our facilities to the current rise in the cruise industry (from 30,000 passengers in 2009 to 90,000 in 2015).

With a hotel capacity of over 116,000 rooms, Paris has the second largest hotel network in the world, one which continues to grow through the implementation

of an ambitious hotel plan for 12,000 rooms in the metropolitan area. The tourism accommodation sector remains buoyant with the mobilization of many hotel investors and the development of digital platforms. However, in order to face the increasing influx of tourists, and to improve Paris' affordability and the appeal of the destination to all tourist types, it will be necessary to do the following:

- Mobilise the Parisian property market in order to meet our objectives of completing new hotels.
- Enhance the metropolitan aspect of the hotel plan, in order to enable the entire metropolitan area to benefit from the economic benefits of the tourism industry.
- Diversify the type of hotel options to enable the development of tourism for young people and families.
- Regulate the supply of furnished tourist rental options in order to ensure the sustainability of this type of accommodation, while maintaining the city's policy priority of promoting housing and creating balance with the hotel industry.

Renew and enhance the diversity of our tourism offering, to promote the "off-the-beaten-path" discovery of Paris, and create an urgent desire to visit Paris

Paris is the city of art and history par excellence, and has extremely rich cultural and heritage offerings which rely above all on the constant renewal of the visitor experience at these timeless sites and the appeal of visitors' heritage tourism experience.

In addition, the flow of tourists to Paris tends to be concentrated on the "traditional" tourist sites: the major monuments and museums located in the 8 first arrondissements of Paris (the Eiffel Tower, the Latin Quarter, the Louvre, Musée d'Orsay, Sacré Cœur, Arc de Triomphe and the Champs Elysées), with a saturation effect on the heart of the Parisian city centre that must be managed in order to preserve residents' quality of life and improve the quality of the visitor experience.

Whereas alternative "off-the-beaten-path" tourist options are still in early development stages: such as night outings, experienced by only 22% of tourists, Parisian parks and gardens, visited by only 1/3 of tourists, despite the beautiful natural heritage Paris has to offer:

Therefore, Paris must diversify the nature of its tourism offerings, in terms of both time and space:

- **Develop niche markets** (night tourism, green tourism, memorial tourism, savoir-faire tourism, etc.), in order to meet the needs of new types of tourists, renew Paris' image, and allow visitors to discover new aspects of the capital, the Paris of the Parisians.
- **Create the sense of a tourism "event"** in order to create an urgent desire to visit the city, drawing young European city-breakers and arousing the desire to return to Paris.
- **Structure the tourism offering around new districts and make it more dynamic** in order to enable the entire Parisian territory to enjoy the economic benefits of tourism and counteract the saturation of the centre of Paris.

Innovation aimed at constantly improving the welcome visitors receive:

The overall satisfaction of visitors in Paris is over 90%⁵, proving that the supposed weaknesses of our destination do not translate into negative feelings about the quality of the visit. Nevertheless, we must continue to be uncompromising and proactive regarding the standards of the welcome received by visitors:

- **Increase our capacity to inform and direct tourists** by mobilising tourism professionals and developing the mastery of foreign languages, by improving tourist information throughout the stay, and creating conditions that favour exchanges and meetings between tourists and residents.
- **Improve access to major tourist sites and reduce waiting times for visitors** by modernizing ticketing systems and reorganizing the management of the flow of visitors.

