

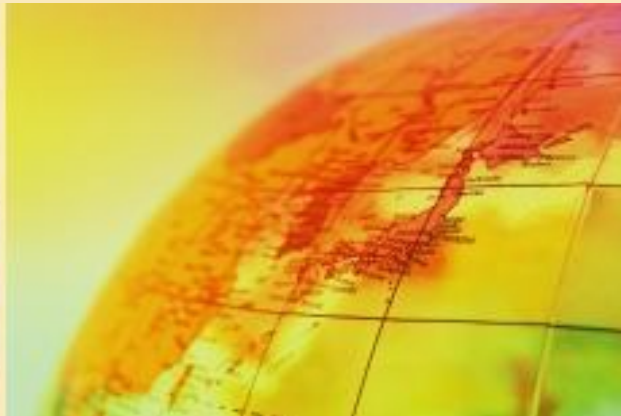
Présence

mystery shopping ↔ best practices

THE UNDERGROUND SYSTEMS OF THE WORLD

Put to the test by mystery customers

November 2006





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Introduction

- ▶ Cities such as Paris, New York and Hong Kong attract visitors from all over the world. Yet, in the face of ever-increasing competition and an ever-more-demanding clientele, these cities must continue in their efforts to highlight their assets and improve their image as hospitable hosts.
- ▶ PRESENCE - a leader in Mystery Shopping research both in France and at international level – has already shown you the results of a study into attractiveness, reception and service on 17 of the world's most prestigious avenues.
- ▶ Today, we are presenting a new study on:

**The quality of welcome and service
extended to foreign tourists
on 12 of the world's underground systems**



Introduction (continued...)

We wanted to know what **level of welcome is extended to international visitors coming to use the underground system in a major tourist destination city.**

- ▶ *Where is travel on the underground a good experience?*
- ▶ *Which cities have the cleanest underground systems?*
- ▶ *Where is the welcome at the ticket booth warmest ?*
- ▶ *In which countries does the ticket clerk take the trouble to answer you in your own language?*
- ▶ *Where do people feel safest?*

The Présence / Excellence work programme

Mystery Shopping International wanted to check these points out **and visited the underground systems of 12 major tourist destination cities throughout the world.**



- | | |
|------------------|---|
| ① Amsterdam | ▶ Amsterdam Centraal, Middelhoven Poortwachter... |
| ① Berlin | ▶ Hermannplatz, Bundesplatz, Berliner Strasse... |
| ① Brussels | ▶ De Brouckère, Gare Centrale, Sainte Catherine... |
| ① Hong Kong | ▶ Wan Chai, Yau Ma Tei, Kwai Fong... |
| ① Lisbon | ▶ Marqués de Pombal, Parque, Bela Vista, Restauradores... |
| ① Madrid | ▶ Principe Pio, Nuevos ministerios... |
| ① New York | ▶ Canal Street, Prince Street, Astor Place, Houston Place... |
| ① Paris | ▶ Bir Hakeim, Trocadéro, Madeleine, Cité... |
| ① Beijing | ▶ GuoMao, TianAnMenDong, DongZhiMen... |
| ① Rio de Janeiro | ▶ Flamengo, Maracana, Acari, Praça Onze... |
| ① Rome | ▶ Manzoni, Piazza di Roma, Flaminio, Lepanto... |
| ① Singapore | ▶ Changi Airport, Queenstown, Chinese garden, Little India... |

Results of the Study

A. Principal qualitative results

A. Principaux résultats qualitatifs

Cities such as Paris, New York and Hong Kong attract visitors from all over the world. Yet, in the face of ever-increasing competition and an ever-more-demanding clientele, these cities must continue in their efforts to highlight their assets and improve their image as hospitable hosts. Présence presents a study on the quality of welcome and service extended to tourists in 12 of the world's underground systems, from Hong Kong to Paris via Rio.

- ▶ **“Hello, I’d like a ticket for the underground please!”** If, upon hearing such a sentence, the person at the ticket booth takes the trouble to raise his or her eyes and greet you, you’re more likely to be in Paris than Singapore. If, as you approach the underground platform, you are troubled by a stench, you could be in any one of a number of the world’s cities – but probably not New York.
- ▶ All these situations have been simultaneously experienced by professional mystery researchers sent by **PRESENCE MYSTERY SHOPPING**, who played the role of tourists in the biggest cities on the planet.

A. Principal qualitative results

► What tourist has never lost his way in the twists and turns of the underground system, looking for the right station to get to a not-to-be-missed tourist destination? Where is travel on the underground a good experience? Which cities have the cleanest underground systems? And where is the welcome at the ticket booth warmest?

► In order to find the answers to these questions, 12 underground systems and around 720 stations were visited. Mystery researchers bought tickets and made journeys on lines serving tourist destinations, within a predefined scenario.

► The main points tested concerned: **the station environment** (cleanliness, the condition of automatic ticket machines, bins emptied, etc.), **the welcome extended to tourists by personnel** (courteousness, etc.), **the train environment** (cleanliness, condition of the seats, etc.), customer information (response to a simple question in the tourist's own language, announcements signalling the arrival of the train, etc.). 10 cities are on the podium, with the exception of Paris and Amsterdam if we use themed reasoning.

► **Hong Kong took 1st place, Madrid 2nd, and Singapore 3rd in our study .**

Scenario: Our 'tourist' bought a ticket at the station, asked for information from the ticket clerk, using his own language, and then went to the platform to catch a train.



1. Cleanliness

Hong Kong and Singapore - exemplary in terms of hygiene

In negotiating **the corridors of the Singapore underground system**, our tourists found themselves in clean surroundings on 75% of their journeys. In Paris and Berlin, our tourist often waited on a dirty platform (in 40% of cases), where the seats were less likely to be clean than in other cities. According to the mystery researchers, the smells of underground systems were often repulsive -especially in the trains of Paris, Lisbon and Rome – and with the notable exception of New York. One mystery researcher remarks: *“In Hong Kong, when I was buying my ticket, all the machines were clean and in perfect working order”*. Unlike the experience of our 2 mystery researchers in Rome and Berlin : *”On each of our visits, the machines were out of order, and each time we had to queue for tickets from the ticket booth.”*



1. Cleanliness

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2. Courteousness

The Dutch respect their peers

A pregnant young woman, a mother with her children, a senior citizen – **there's no shortage of opportunities to give up one's seat to others on the train.** Our Dutch researcher recalls: *"I got on the train at Middelhoven, and once I was on the train, I noticed a young pregnant woman was standing. I was just about to give her my seat when a young man offered his. This sign of good manners was well-received by the young woman, if her smile was anything to go by..."* On the contrary, when a senior citizen or pregnant woman would have appreciated being offered a seat, no passenger on the underground systems of Madrid, Hong Kong or Singapore demonstrated this basic civility in such a situation.



3. Safety

Hong Kong inspires confidence

For most of the journeys undertaken, our tourists were able to stroll along the corridors in Hong Kong, Lisbon and Singapore without being approached by people begging. This situation would be unusual in Rome or New York. In one city out of two, there are no safety devices between the platform and the train. In Hong Kong, which is a modern underground system, such a safety device was observed on the platform by our researchers on four out of five journeys.

4. Courtesy at the ticket booth

The inhabitants of Rome and Brussels are good hosts

On average, waiting time for a ticket for the underground system was less than three minutes at the ticket booth. The service is therefore relatively quick - but is it carried out as it should be? Rome comes top in terms of the welcome extended to tourists. This is proved by the fact that ticket clerks both greet and look at the customer in 100% of cases and also smile (75% of cases). The ticket clerk announces the sum due and thanks the customer in 10 out of 12 instances. The title of worst host goes to Singapore and Beijing, where none of our researchers were greeted. Neither did they receive a smile – however, once the purchase was complete, they were the only ones to express thanks to 100% of customers. A Parisian researcher says: *“When I was buying my ticket at the Louvre station in Paris, the ticket clerk gave me an icy ‘Hello’. Once my ticket was paid for, no thanks were forthcoming...the next time, adds this user, I’ll buy my ticket from the machine, it’ll be just about as friendly ... ”*

5. Requests for information

Beijing is making an effort

In 85% of cases, the ticket clerk in Beijing took the time to respond to our customer verbally. For each journey, the mystery researcher was informed of the arrival of his train by an announcement. But this never happened in Madrid, Paris or New York. The people of Amsterdam, Rome and Brussels took the time to respond to our tourists when they were asked a question in a language other than that of the country, and this, in 100%, 95% and 85% of cases respectively. A lovely performance from Amsterdam, where the ticket clerks always responded in the language used by the tourist. When our tourist was at Queenstown station in Singapore: *“The ticket clerk didn’t answer me, even though I did try to make myself understood in his language - I really did feel I was bothering him.”* Worse yet, our study shows that for each request for information in Singapore, the employee showed signs of weariness!



In conclusion

Even though all the cities tested are major tourist destinations, they need to try harder if they want to improve the image of their underground systems. Our study shows that the Parisian underground system does not excel in terms of cleanliness at stations serving the most popular tourist destinations. Contrary to all expectations, staff were considered quite good in terms of answering a simple request for information in a foreign language. **The Parisian underground system scored best in our study in terms of the 'Hello' (85% of cases) even though the greeting is not always accompanied by a smile!**

B. Ranking of Underground Systems

B. Ranking of underground systems

- Here is the **ranking of tourist destination cities** in terms of the quality of the welcome and service extended to foreign tourists.
- Hong Kong (798 million passengers in 2004) is in 1st position, followed by Madrid and Singapore.
- We now invite you to enter into the heart of the quality of welcome and service extended to foreign tourists in 2006.

Underground System	Position
Hong Kong	1
Madrid	2
Singapore	3
Berlin	4
Rome	5
Rio	6
Lisbon	7
Amsterdam	8
Beijing	9
Paris	10
Brussels	11
New York	12

Station Environment	Welcome	Train environment	Customer Information
①	-----	4	-----
4	4	5	②
②	10	①	9
10	3	③	5
11	①	8	③
6	7	②	8
③	9	12	3
8	8	7	6
7	11	11	①
9	6	6	7
5	②	10	10
11	③	9	11

In Hong Kong, no ticket booth contact was possible – there were only automatic ticket machines.

C. Principal quantitative elements

1. Automatic ticket machines – station surroundings

Scenario: Our tourist is travelling by underground system and has bought a ticket – either from an automatic ticket machine or directly from the ticket booth. (In Hong Kong, no ticket booth contact was possible – there were only automatic ticket machines.)

► Few **automatic ticket machines** are clean and in good working condition, with the exception of those in Hong Kong and Lisbon. A mystery researcher remembers: *"In Hong Kong, when I bought my ticket, all the machines were clean and in perfect condition."* In Berlin and Rome, the machines our tourists wanted to use were out of order.

"On each of our visits, the machines were out of order, and each time we had to queue for tickets from the ticket booth."

► When our researchers went to the ticket booths, the surrounding areas were systematically dirty – except in the de Hong Kong underground system, which has a cleanliness rate of 87%.

2. Cleanliness of the corridors

Scenario: Then he went to the platform to take the train...

- ▶ The corridors are mostly clean in all the underground systems visited, but the underground systems in Berlin, New York and Paris have plenty of room for improvement in terms of the comfort of their users - given that in two cases out of three, they are dirty in several places. One of our researchers advises: *"The underground system in Singapore should be seen as an example!"*.
- ▶ The general cleanliness of platforms and walls is decent in all the underground systems visited except in Berlin, where the platforms and walls were very dirty in 40% and 30% of cases respectively. In Paris, the platforms are almost as dirty as those in Berlin.
- ▶ In Rome and Beijing, the bins in the corridors are not emptied, even though they are overflowing. Our researcher in Rome remembers: *"At Flaminio station, I wanted to put my water bottle in a bin, but it was absolutely impossible. The rubbish was just piled up"*.

3. Odours – Availability of seats on the platform

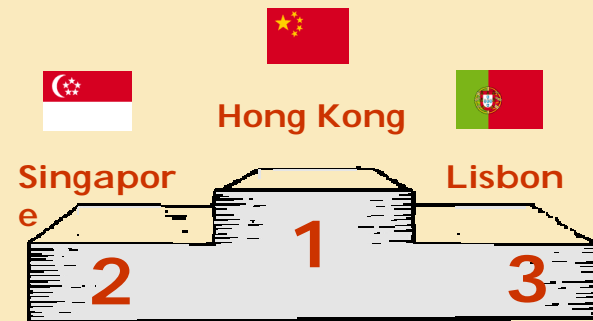
- ▶ The smells in the corridors (or stations) are not considered pleasant, with the exception of New York which clearly stands out - in 97% of cases the smells were considered pleasant. On the other hand, plenty of work remains to be done in terms of improving passenger information – since, in New York, city and street plans were clean and in good condition on just 20% of the journeys made.
- ▶ In Paris and Berlin, the seating whilst waiting for the train is often less clean than in other cities. Our researcher in Paris was the powerless witness to a scene: *"Before sitting down, a senior citizen scrutinized the state of the seats before giving up: in the end, she preferred to remain standing, in spite of the fact that this seemed to be a great effort for her."*
- ▶ In the German capital, our researchers had to wait for the next train in the company of smokers in almost half of all cases. *"In a confined space like the underground system, it's very unpleasant. We have to put up with this smell".*

4. Passenger safety

- ▶ Whilst the **presence of guards or security forces** creates a climate of passenger safety, they were particularly noticeable in the underground systems of New York (97% of journeys made), Rio de Janeiro (33%), Amsterdam (23%) and Beijing (20%).
- ▶ No **begging** was noticed in the underground systems of Hong Kong, Lisbon or Singapore. Our researcher in Singapore states: *"It's very nice not to be constantly solicited"*. New York and Rome, however, scored very badly on this point.
- ▶ In one city out of two, there are no safety devices between the platform and the train. **Access to the train is therefore direct.** In Hong Kong, a safety device was provided in 80% of cases. In Rio de Janeiro, the rate was 77%, and in Amsterdam 43%.

In conclusion, stations and surrounding areas don't always offer a level of cleanliness to ensure a **minimum level of comfort to visitors**. Rome, New York, Berlin and Paris must, imperatively, improve this aspect.

Underground System	Ranking
Hong Kong	1
Singapore	2
Lisbon	3
Madrid	4
Brussels	5
Rio	6
Beijing	7
Amsterdam	8
Paris	9
Berlin	10
Rome	11
New York	11



5. Customer Care at the ticket booth

Scenario: Our tourist buys his ticket at the ticket booth and takes note of the welcome he receives (identification of personnel, politeness of the person he is dealing with, etc.).

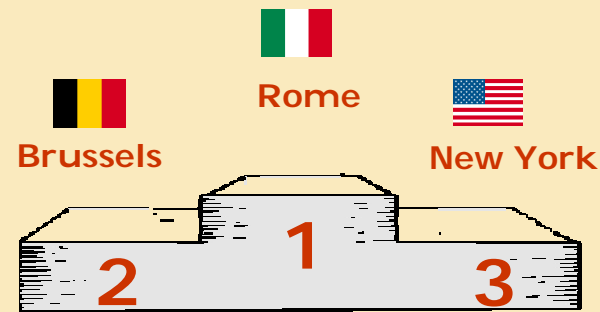
- Overall, staff in ticket booths are easily identifiable -either because they are wearing a uniform - this isn't always the case in Berlin (50% of cases) and Amsterdam (25% of cases) – or by the fact that they are wearing a badge (systematically in Rome and Singapore).
- Waiting time to buy a ticket is less than three minutes in most tourist destination cities.
- The tourist in search of a ticket gets a '**Hello**' in 85% of cases in Paris (best performance of all the cities), followed by Madrid (79%) and Brussels (75%). Substandard performance for Singapore, New York and Rome. The **welcome** given by New Yorkers and Berliners comes **with a smile** systematically. It is almost impossible to coax a smile out of the Singaporeans and Beijinger. Two times out of three, the Parisian ticket clerk doesn't smile at the customer.

6. Purchase of a ticket for the underground system

- ▶ In Singapore, employees never **look** at the traveller **as they say “Hello”**. Eye contact is not customary in Beijing either.
- ▶ When the customer is greeted, the "Hello "is rarely personalized ("Hello Madam », "Hello Sir »). New York leads on this item, in spite of the fact that its score is rather unsatisfactory (37%).
- ▶ The **employee announces the amount due** in five cases out of six, except in New York (announced only once in four times). "In New York, the ticket clerk welcomed me with a smile. *“I politely asked for a ticket and waited for her to tell me how much it would be, when I realised she was becoming impatient! She wanted to take my money without telling me how much it would be! ”*. However, when they do state the price, New Yorkers most often accompany their request with a "Please". The people of Rome and Berlin share these good manners.
- ▶ Customers are **always thanked for their purchases** in Singapore – in contrast with Beijing, where this is only the case 10% of the time.
- ▶ Our researcher tells us about the very particular Singaporean welcome: *"I approached the ticket booth, smiled and said “Hello”. The ticket clerk didn't look up from his paper and didn't reply. No reaction! I made my request, he told me the price in icy tones, and without a "Please". However, whilst I was putting my money away, he thanked me!! It was quite amazing!"*.

In conclusion, the reception of foreign visitors is highly variable from one country to another. **Rome is first in terms of the welcome extended to tourists** by ticket booth staff, whilst Lisbon, Singapore and Beijing must, imperatively, improve.

Underground System	Ranking
Rome	1
Brussels	2
New York	3
Berlin	3
Madrid	5
Paris	6
Rio	7
Amsterdam	8
Lisbon	9
Singapore	10
Beijing	11
Hong Kong	-----



There are no ticket booths in the Hong Kong underground system, only automatic ticket machines

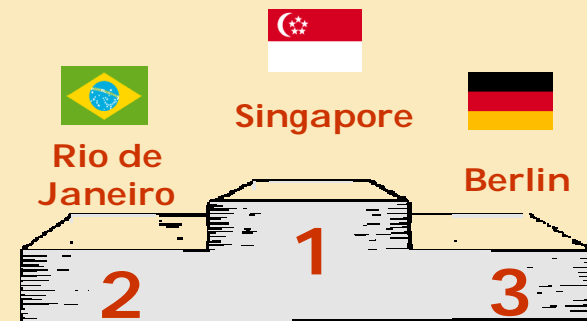
7. Courteousness of travellers – Train Stoppages

Scenario: Our tourist boards the train and observes the surroundings.

- ▶ A pregnant woman, a mother with her children, a senior citizen – there's no shortage of people who deserve a seat in the underground systems of the world. Our researcher in the Netherlands tells us: *"I boarded the train at Middelhoven station, and once I was inside, I saw a young pregnant woman standing. Just as I was about to give up my place to her, a young man offered her his seat."* 100% of Dutch people **give up their seats to someone who is in need of it**, yet no-one from Madrid does. In Hong Kong and Singapore, this basic level of public-spiritedness is not customary either.
- ▶ **Seats** are generally in good condition. But in the underground systems of Beijing, Amsterdam and New York, none of the **folding seats** were in working order in the train our tourist took.
- ▶ Paris, Hong Kong, Lisbon and Rome have an unpleasant **smell** in the train, whilst 100% of New York travellers consider the smell of the trains to be pleasant.
- ▶ In the course of our journeys, the **trains** were **stopped** in Rio, Madrid, Paris and Hong Kong. Only the underground system in Rio informs users of the reasons for the stop. Moreover, none of the companies made any apology, or indicated how long the delay would be.

In conclusion, the issue of the environment on the train has only been effectively addressed in a few countries, and France is not one of them. The people of Madrid would do well to follow the example of the Dutch, giving up their seats to senior citizens more systematically. But the travellers are not the only ones at fault in their behaviour: no transport company gave any apology after the train was stopped.

Underground System	Ranking
Singapore	1
Rio	2
Berlin	3
Hong Kong	4
Madrid	5
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Rome	8
New York	9
Brussels	10
Beijing	11
Lisbon	12



8. Request for information in a foreign language

Scenario: Our tourist goes to the ticket booth and asks classic questions in a language other than that of the country (asking his way, has lost his bag, wants access for a friend in a wheelchair, etc.). He also takes note of the information made available within the underground system.

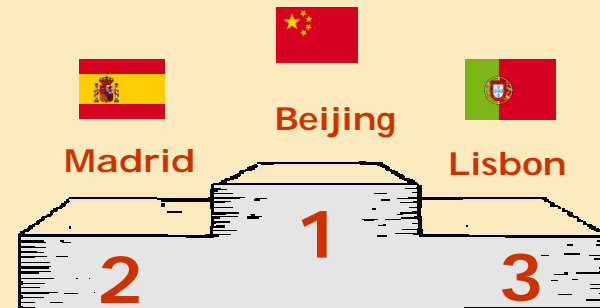
- ▶ At the ticket booth, the people of Amsterdam and Rome **take the time to respond orally to the question** they are asked. But in Madrid, New York and Singapore, the ticket clerks do not make this effort.
- ▶ Our researcher in Singapore won't forget the welcome he received in a hurry: *"I asked the person at the ticket booth which way I should go – he vaguely indicated a direction. When I wanted more specific information, he responded with a sigh. It was clear that my questions were too much trouble!"*. The New York ticket clerks were also quite clear in letting us know that our questions were irritating.
- ▶ Brazilians never make the effort to **respond in the language in which they are addressed**. Yet in Amsterdam, Singapore and New York, this effort is made each time it is requested. The French are also near the top, with 80% of responses made in the language used by the questioner.

9. Information: Station closed – announcements - neighbourhood maps

- ▶ In Brussels, Hong Kong, Singapore and Berlin, when **a station was closed for works**, the visitor was informed of this before entering the underground system. This was not the case in Madrid, Paris or Amsterdam. Our researcher has a memory of the Madrid underground system: *"I had to travel from the airport to the Nuevos Ministerios station to take another line. The underground system stopped at the station before Colombia and everybody had to get off. I would have like to have been warned before entering the underground system – it would have saved me a few detours! Especially with all the luggage I was carrying!"*
- ▶ In Paris, Madrid and New York, the arrival of the train was never **announced**.
- ▶ Perfect marks here for Hong Kong – the only city in which we heard announcements on the entrance to the underground system and as the doors closed – and this, in several languages.
- ▶ At the exit of the Singapore underground system, there is no **map of the neighbourhood**, although in Beijing, Madrid and Lisbon, it is easier to find your way because there is always a map. *"At the exit of the underground system in Lisbon, the map was easy to spot and in good condition: I had no difficulty in finding my way."*

In conclusion, customer information is in need of improvement in every country. Clear, reliable and up-to-date information should always be available to facilitate the travel of foreign visitors. Such information would certainly be much-appreciated. Whilst the ticket clerks we met never answered in the language in which they were questioned, the Beijinger never even looked at the person addressing them – which doesn't prevent their being ranked No.1 (nb: since Hong Kong doesn't have any ticket booths which are manned, we were unable to assess them on this point). New York, coming in last, needs to make a serious effort to reinforce its image as a hospitable place.

Underground System	Ranking
Beijing	1
Madrid	2
Lisbon	3
Rome	3
Berlin	5
Amsterdam	6
Paris	7
Rio	8
Singapore	9
Brussels	10
New York	11
Hong Kong	-----



Practical Details



1. The Underground Systems of the World

▶ On the basis of the latest tourist statistics published by the WTO (World Tourism Organisation), the most popular tourist destination city in each of 12 countries was retained.

▶ Altogether, **12 underground systems** and some **720 stations** serving tourist destinations were visited.

For example:

- | | |
|------------------|---|
| ① Amsterdam | ▶ Amsterdam Centraal, Middelhoven Poortwachter... |
| ① Berlin | ▶ Hermannplatz, Bundesplatz, Berliner Strasse... |
| ① Brussels | ▶ De Brouckère, Gare Centrale, Sainte Catherine... |
| ① Hong Kong | ▶ Wan Chai, Yau Ma Tei, Kwai Fong... |
| ① Lisbon | ▶ Marqués de Pombal, Parque, Bela Vista, Restauradores... |
| ① Madrid | ▶ Principe Pio, Nuevos ministerios... |
| ① New York | ▶ Canal Street, Prince Street, Astor Place, Houston Place... |
| ① Paris | ▶ Bir Hakeim, Trocadéro, Madeleine, Cité... |
| ① Beijing | ▶ GuoMao, TianAnMenDong, DongZhiMen... |
| ① Rio de Janeiro | ▶ Flamengo, Maracana, Acari, Praça Onze.... |
| ① Rome | ▶ Manzoni, Piazza di Roma, Flaminio, Lepanto... |
| ① Singapore | ▶ Changi Airport, Queenstown, Chinese garden, Little India... |

2. The Principle of the Operation

- ▶ Professional mystery researchers of the PRESENCE / EXCELLENCE MYSTERY SHOPPING INTERNATIONAL network simultaneously visited the underground systems of the most popular tourist destination cities in 12 countries.
- ▶ **30 journeys were made per underground system - a total of 360 journeys.**
- ▶ Each researcher made a journey from and to a station serving a tourist site, during comparable time slots. Each researcher complied with a predefined scenario, and then completed a table that was already drawn up.

The 'tourist' researchers purchased a ticket (from a ticket booth or an automatic machine), held conversations with the ticket clerks, asked 'classic' tourist questions, made their way through the corridors and stations before taking a train. Their observation continued once they were on the train: the condition of the train, the courteousness of travellers, announcements, etc.

- ▶ The questionnaire, which is highly objective, essentially addressed the issues of:
 - ▶ the station environment (cleanliness, smell, temperature, etc.)
 - ▶ the welcome extended to the 'international visitor' by the ticket booth staff (politeness, smile, etc.)
 - ▶ the train environment (cleanliness, condition of the seats, etc.)
 - ▶ customer information (response of the ticket clerk in the visitor's language, announcements, etc.)

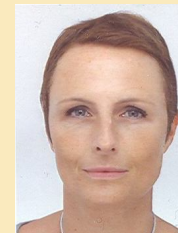
3. Excellence Mystery Shopping International

- ▶ Présence has been a **leader in Mystery Shopping Research** in France and at international level for more than 20 years, and carries out more than 100.000 mystery audits every year.
- ▶ Présence is also a founding member of the international work programme 'Excellence Mystery Shopping International', which brings together 20 partners covering more than 45 countries on the 5 continents.

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