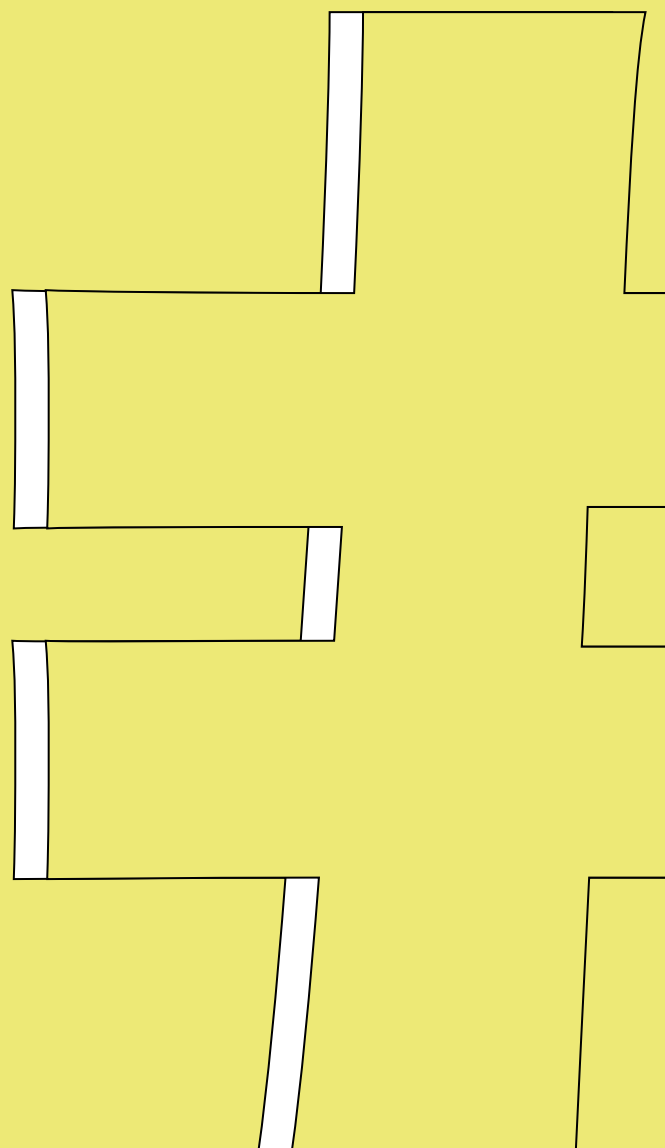# TREND BOOK #6

WELCOME CITY LAB
PARIS&CO

THE MAJOR TRENDS IN TOURISM, NOW AND IN THE FUTURE

PARIS&CO

PARIS

Métropole du Grand Paris

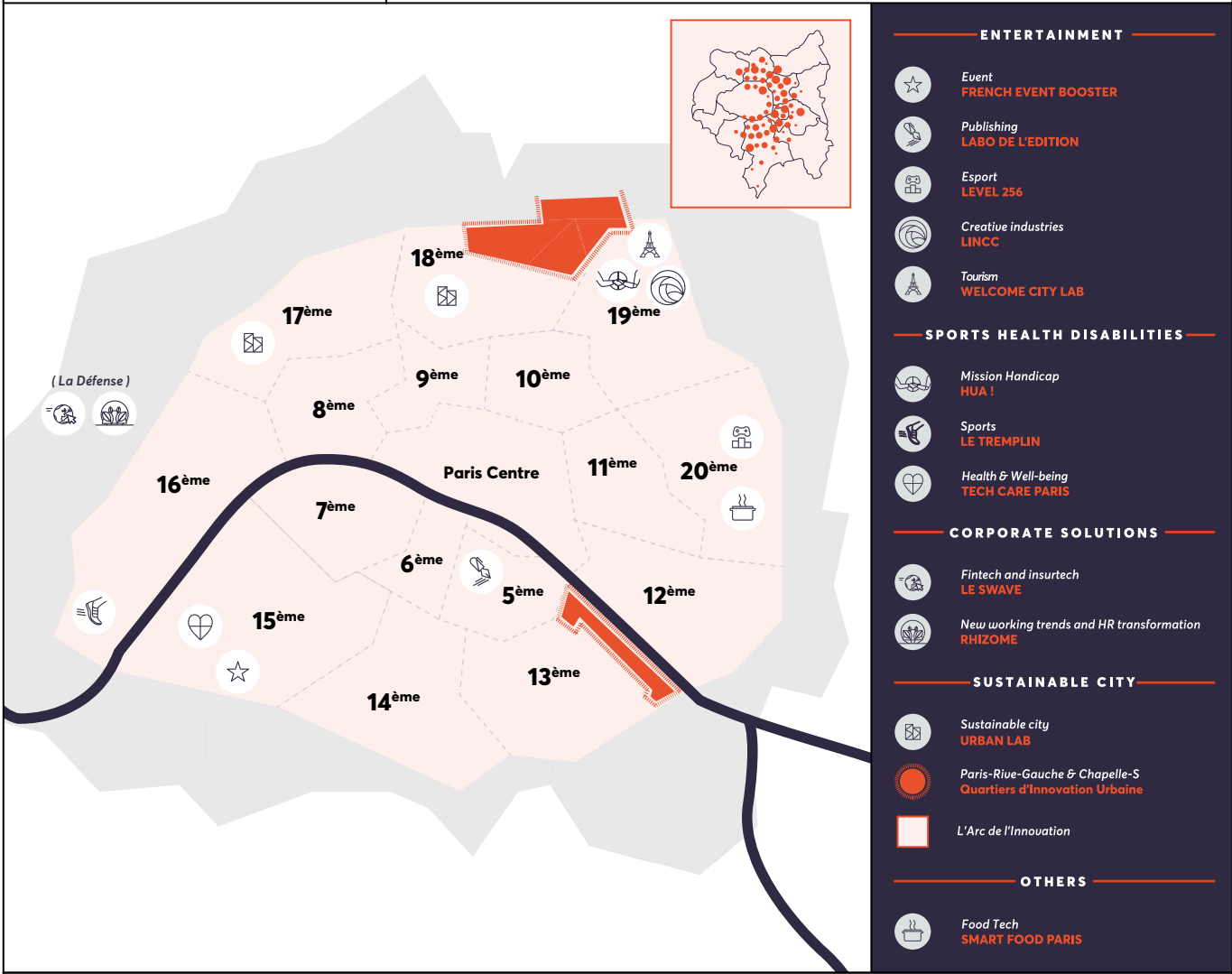ATOUT FRANCE
Agence de développement touristique de la France

TREND BOOK

BY WELCOME CITY LAB

PARIS&CO

Paris&Co is the innovation and economic development agency for Paris and the metropolis. It encourages the development of innovation through the incubation of more than 500 French and foreign start-ups each year, by testing innovative solutions, and by organising national and international events. It is developing its activity in a spirit of open innovation, working closely with more than 120 companies and major institutions.

18ème
17ème
19ème
(La Défense)
9ème
10ème
8ème
16ème
Paris Centre
11ème
20ème
7ème
6ème
5ème
12ème
15ème
13ème
14ème

ENTERTAINMENT

Event
FRENCH EVENT BOOSTER

Publishing
LABO DE L'EDITION

Esport
LEVEL 256

Creative industries
LINCC

Tourism
WELCOME CITY LAB

SPORTS HEALTH DISABILITIES

Mission Handicap
HUA !

Sports
LE TREMPLIN

Health & Well-being
TECH CARE PARIS

CORPORATE SOLUTIONS

Fintech and insurtech
LE SWAVE

New working trends and HR transformation
RHIZOME

SUSTAINABLE CITY

Sustainable city
URBAN LAB

Paris-Rive-Gauche & Chapelle-S
Quartiers d'Innovation Urbaine

L'Arc de l'Innovation

OTHERS

Food Tech
**SMART FOOD PARIS**

WWW.PARISANDCO.PARIS

WELCOME CITY LAB

PARIS&CO

Welcome City Lab is Paris&Co's innovation platform dedicated to urban tourism that includes the world's first incubator specifically for this sector. Created in 2013 with the support of the City of Paris, BpiFrance, Paris Convention and Visitors Bureau, and the General Directorate of Enterprise (DGE), this platform for innovation offers a set of services to start-ups and players in the tourism industry, including an incubator, a place for networking and discussions, a test platform, and a monitoring unit. Welcome City Lab can also count on the support of its founding members: Atout France, la Caisse des Dépôts, the Conseil Départemental des Hauts-de-Seine, Groupe ADP, the Métropole du Grand Paris, Centaurus Hospitality Management (formerly Paris Inn Group) and Viparis.
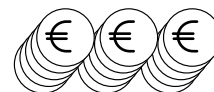
KEY FIGURES

for Welcome City Lab after 7 years
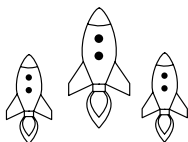
more than
170
start-ups incubated

85 %
success rate for the start-ups
in incubation

more than
€220
million raised

more than
1500
jobs created

Developing an international network with
MTLab Montréal &
Singapore Tourism Accelerator

WELCOMECITYLAB.PARISANDCO.PARIS

THE 4 OTHER PLATFORMS OF PARIS&CO

WORKING IN THE ENTERTAINMENT SECTOR

LINCC
PARIS&CO

LINCC is Paris&Co's innovation platform for the digital, cultural and creative industries. LINCC's ambition is to guide innovation for the creation, production and dissemination of creative, recreational and educational digital content. It draws its wealth from the cultural diversity and the transmedia complementarity of its start-ups and it partner members: Banijay, Caisse des Dépôts and Vivendi; its strength comes from its willingness to build a sectoral ecosystem that stimulates innovation, tells great stories and incites original and innovative partnerships. Its areas of focus are: Audiovisual, Video & Animated images, Video games, Music, Press & Media, Sound & Radio, Performing arts, E-education & Ed-tech. Launched in 2016, the LINCC platform is at the heart of Cargo, an emblematic building in the 20th district of Paris.

LEVEL 256
PARIS&CO

Level 256 is Paris&Co's innovation and development platform for sport. Level 256 is not just an incubator but also a real hub for the different stakeholders in esport today, which brings together the public and private sectors, with big corporate groups and associations with one aim: helping to make esport sustainable and open to everybody.

FRENCH EVENT BOOSTER

French Event Booster was created at the initiative of Viparis, it is an innovation incubator for the events sector that was born from the observation that the industry needs to reinvent itself, to create new experiences, and to assist all the stakeholders with the necessary transformation. At its home at Paris Expo Porte de Versailles, every year French Event Booster selects an intake of start-ups offering products and services for the events sector, promotes their access to the market, and allows them to benefit from an exceptional testing ground to perfect and try out their concept.

LABO DE L'ÉDITION
PARIS&CO

Every year since 2011, the Labo de l'édition incubator has been assisting more than ten companies in their development. The Labo de l'édition also offers guidance to professionals in the publishing chain through different types of introductions (conferences, round-tables, hackathons, training courses, workshops, etc.), in an events venue at the heart of the 5th district in Paris.

MT LAB MONTRÉAL

MONTREAL Drawing its inspiration from Welcome City Lab, MT Lab in Montreal is the leading incubator for start-ups dedicated to tourism, culture and entertainment in North America. It opened its doors in 2017, thanks to a contribution from its co-founders, UQAM and Tourisme Montréal. Acting both as a launchpad for start-ups and a platform for discussions, every year MT Lab plays host to a cohort made up of creative young companies with innovative solutions for its 12 big partners from the industry.

MT Lab's role is to encourage innovation and entrepreneurship in the sectors of tourism, culture and entertainment.

SINGAPORE TOURISM BOARD (STB)

The **Singapore Tourism Board** (STB) is the lead development agency for tourism, one of Singapore's key economic sectors. Together with industry partners and the community, we shape a dynamic Singapore tourism landscape. We bring the Passion Made Possible brand to life by differentiating Singapore as a vibrant destination that inspires people to share and deepen their passions. One of the key initiatives by STB is the Tourism Technology Transformation Cube, or Tcube.

SINGAPORE TOURISM ACCELERATOR

Part of Tcube's initiatives, the **Singapore Tourism Accelerator** is a highly-selective, equity-free six-month programme for the world's most promising companies that power the travel and tourism industry. Selected companies will be housed in STB during the programme, and will gain unparalleled access to critical business support, connections to Singapore's tourism ecosystem, and opportunities to pilot and work with world-leading industry partners.
Visit https://go.gov.sg/sgtourismaccelerator for more info.

Atout France, the Agency for the development of tourism in France

Atout France is tasked with enhancing the positioning of France as a destination for travellers from around the world. The Agency encourages investment projects in local areas through the FTI programme and coordinates different systems aimed at optimising the satisfaction level of travellers, such as rating tourist accommodation. It provides professionals with tools to observe and understand tourist demand. It works with a network of 1,200 partners to create marketing and communication campaigns to enhance their visibility. Finally, the Agency guides the adaptation of the tourist offering to meet the new expectations of visitors with regard to sustainable development, new services and digitisation.

Atout France has adapted its service offer to assist professionals during the COVID-19 crisis

Innovating and investing in quality to improve the customer experience

Every year, Atout France works with its many partners to assist a multitude of start-ups and innovative companies through promotion, networking for members, testing, and assessments to support them internationally.

Challenge Tourisme Innov'2021 and Trend Book #6 in collaboration with Welcome City Lab

Key figures for 2020

200 Engineering projects

328 communication campaigns, of which **70 %** were digital

37 digital events for the general public

246 events for professionals

246 webinars with **3,200** participants

589 professionals hosted

111 press events

working with **55** start-ups

atout-france.fr ou **france.fr**

THE FRENCH NETWORK OF TOURISM INCUBATORS AND ACCELERATORS

BRINGING SUCCESS TO A NEW GENERATION OF ENTREPRENEURS IN TOMORROW'S TOURISM

The creation of Welcome City Lab, the first incubator dedicated to the tourist industry, in 2013, gave rise to the idea to encourage the emergence of other structures to boost tourism throughout the whole country and in complementary fields. What is the aim? To stimulate innovation in tourism across the whole country, so that France remains at the cutting edge of trends and assists the creators of companies who are inventing the tourism of tomorrow. In a spirit of networking, to encourage synergies, to find economies of scale, to benefit from greater visibility and to collectively guide start-ups in their growth, since 2016 the General Directorate of Enterprise has been bringing together all of these structures under the banner of France Tourisme Lab.

Now with 9 incubators & accelerators, and having assisted 250 start-ups since 2013, the France Tourisme Lab network is an essential force in France due to its expertise in assisting innovative tourist companies and innovative projects from players across the country (both private and institutional).

France and its regions, which are particularly active in supporting innovation in tourism, can take pride in this network, which is unlike any other in the world.

There are support structures in place in several geographical areas. They cover various subjects, different key stages in the life of a company (pre-incubation, incubation, acceleration) or the management of in-house or intrapreneurial innovation projects.

● Alpes Tourisme Lab (Chambéry): Alpine and mountain tourism / Auvergne-Rhône-Alpes
● Œnotourisme Lab (Châlons-en-Champagne): wine-based tourism / Eastern Regions
● Open Tourisme Lab (Nimes/Toulouse): innovation platform / all of France

● Provence Travel Innovation (Marseille): tourist travel / Southern Region
● Slow Tourisme Lab (Troyes): slow tourism & soft travel / Eastern Regions
● Smart Tourisme Lab (Tours): smart heritage and lifestyle / Centre-Val de Loire
● Tourisme Innovation Lab (Angers): pre-incubation for student projects & assisting projects / Pays de la Loire
● Tourisme Lab Nouvelle-Aquitaine (Pessac): accelerator for regional projects focussed on transitions (economic, social and environmental) / Nouvelle-Aquitaine
● Welcome City Lab (Paris): urban tourism / Ile-de-France

Please contact our labs directly to benefit from their assistance.
To join the network as a support structure or to get more information about the network, feel free to contact the team from France Tourisme Lab at the DGE: dge francetourismelab francetourismelab.dge@finances.gouv.fr

THANK YOU

To Atout France and Paris City Hall for their direct support for the creation of this trend book.

To all the contributors for the writing of this sixth edition of the trend book, to all the teams from Atout France and Sophie Lacour, for their precious advice, and to all of our founding partners, to the different platforms of Paris&Co, and finally to our international partners: the MT Lab in Montreal and Singapore Tourism Accelerator.

PARIS

Métropole du Grand Paris

ATOUT FRANCE
Agence de développement touristique de la France

BANQUE des TERRITOIRES
GROUPE CAISSE DES DÉPÔTS

bpifrance

CENTAURUS
HOSPITALITY MANAGEMENT

DGe
DIRECTION GÉNÉRALE DES ENTREPRISES

GROUPE ADP

hauts-de-seine
LE DÉPARTEMENT

PARIS
Convention and Visitors Bureau

PARIS
Je t'aime

VIPARIS

THE TEAM

Laurent Queige

Entertainment Hub Director

**Welcome City Lab, French Event Booster,
Labo de l'édition, Level 256, LINCC**

Anna Veyrenc

Incubation Manager

Elise Akiki

Incubation Project Manager
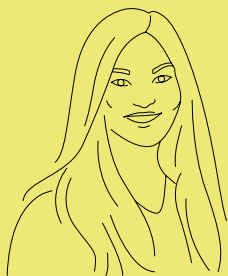
Estelle Musellec

Operations Project Assistant

The health crisis with which the world has been faced since March 2020 represents an unprecedented shock for the tourist industry. We can draw lessons and opportunities from this crisis:

Firstly, the crisis has simultaneously revealed the economic importance of the tourist industry and its fragility, but also its resilience. It leads us to consider the inner workings of our tourist appeal and our growth model.

Although it may lead us all to revise out outlook, it above all drives us to consolidate the business model for the development of each destination by addressing more of societies new expectations. In this regard, investing in innovation can no longer be seen as optional.

The challenges that we have co-organised over the last two years show that French Travel Tech has never been so dynamic and that it represents a precious lever for accelerating the recovery and the transforming both business and leisure travel to make them more responsible.

This crisis has also made it possible to measure to what extent the solidarity and collective dynamic between tourism and cultural companies, transport and leisure operators, professionals in the events industry, institutions and destinations were key for a collective and rapid recovery.

"The best way to predict your future is to create it," said Abraham Lincoln. This credo has never been more appropriate: we must trust entrepreneurs to invent the future of tourism, by providing them with the keys to understand market trends and with all the support tools to facilitate their projects and, ultimately, to create jobs.

That is the aim of this new trend book: to identify the overwhelming trends and compare the weak signals identified by Welcome City Lab, based on the tourism innovation ecosystem, with the developments in the international markets deciphered by Atout France.

This trend book is the fruit of considerable work by Elise Akiki, from Paris&Co, assisted by Sophie Lacour, from Advanced Tourism, and Bénédicte Mainbourg, from Atout France, each of whom were supported by the precious advice from their colleagues, working together on the Editorial Committee.

We give our heartfelt thanks to all the authors for their contributions, and to Alix d'Anselme for her beautiful illustrations, which make this document a work that we are pleased to keep on our bookshelf, unlike all those reports or articles that we briefly peruse on our screens.

We hope you enjoy your read!

Caroline Leboucher & Laurent Queige

TREND 4

New business models for cultural events?

TREND 5

Offering visitors permanent access to information: a major issue for specific and suitable offerings

Local and responsible tourism:

from intention to action!

Although the health crisis has undoubtedly increased interest in local and responsible tourism, players in the sector had already been taken an interest in the subject for several years with the firm intention of countering the negative impacts of mass tourism. But it is COVID that, at a time of the climate and health emergency, brought the urgency of turning towards a more sustainable tourism to the forefront.

Terms such as: ecological awareness, sustainable mobility and carbon footprint are now part of our daily lives, and allow us to claim that we have gone beyond the phase of intention and have moved into action. Indeed, according to a study on sustainable tourism by IFOP, 61% of French people said that preserving nature and the environment are greater concerns for them now than before the health crisis. 88% of French people are also in favour of imposing quotas or restrictions on visits to certain emblematic sites, which is unheard of at such a level.

This study clearly illustrates that sustainable tourism is making progress, and many start-ups are now addressing the issue to meet or even foresee travellers expectations.

With platforms for introducing local people, websites to book environmentally responsible activities or accommodation, and even the boom in bookings for soft mobility such as bikes, the tourist industry is reinventing itself as new innovations emerge. But business travel also needs to be rethought and to adapt, some start-ups are therefore working on making professional journeys more environmentally friendly and sustainable, using new indicators in particular.

Tourism is changing and will continue to develop. It remains to be seen if this trend, which is seen as being essential, will continue over time, as the phenomenon of revenge travellers is also emerging on the scene...

Sustainable tourism and a health crisis: a historic conjunction?

Thomas Deschamps | Director of the Observatory, for sustainable and accessible tourism at the Paris Convention and Visitors Bureau

The total disappearance of tourists during the crisis is leading people to reconsider the notion of tourism. But will this be a lasting change?

One of the effects of the global health crisis caused by the eruption of COVID-19 was the temporary shutting off of what we thought was an inexhaustible resource given the constant increase in tourism.

However, crises in tourist attendance are not new to big tourist destinations. Whether they are caused by geopolitical or cultural events (terrorist attacks, independence struggles, etc.), social incidents (opposition to tourism, social claims, etc.), natural disasters (hurricanes, floods, heatwaves, etc.) or even economic factors (the subprimes crisis, the bursting of the dotcom bubble, etc.), these crises did not impair the resilience of big cities. Resilience comes from both an economic and cultural appeal, which allow them to reinvent themselves.

Tourists have taken more or less time to return after each of these crises. But they came back. Are they different after a crisis? Tourists are a reflection of their times and always take on new parameters, changing gradually in different periods and places as consumption patterns change. So yes, they were always different when they returned. But how will the COVID-19 crisis change urban tourism this time?

After the health crisis: a new era or the same old story?

Tourism professionals were very hard hit by this crisis and the total disappearance of tourists. Their first reflex for survival will doubtlessly be to return to "business as usual" to get their heads above water as quickly as possible.

And what about tourists? Will they have changed? Initially, they too will get back to life as usual, back to the way they lived before the crisis, which sometimes they grew tired of and that was made more pleasant by tourism. Some destinations are even counting on "revenge tourism", hoping that tourists will want to make up for lost time after two frustrating years during which they were deprived of travel.

But have tourists like professionals in the industry also realised that things have to be done differently? That to avoid saturating sites and creating tourist bubbles, which are disconnected from the city and its inhabitants, things need to change.

One thing is for sure, the crisis is a catalyst. In their everyday lives, consumers are increasingly aware that each of their actions can become a means to minimise the destruction of the planet. COVID-19 is the result of our errors, a symptom of how we have gone astray, as consumers have learnt with stupor, amazement and sometimes with suffering. As tourism is a part of modern consumerism, it must follow this virtuous path laid down by consumer tourists themselves.

But tourism is also a product of a lifestyle that does not change as quickly as consumption itself, and that can sometimes remain stressful. Today, half of humanity lives in towns and cities, and urban environments can become a less appealing choice as a place to relax if they cannot change their appearance. After COVID, tourists are using the summer to escape from big cities in favour of other spaces with less of a health risk. Although this position is unlikely to remain the case in the long term, it will undoubtedly leave its mark.

So what is to be done?

When confronted by these contradictory influences, where should make an effort? The coming years will doubtlessly see changes in demand from tourists and these changes will not be anodyne. They will even be on a scale that no crisis has brought about until now. Tourist destinations are making no mistake and have identified sustainable tourism as a subject that they need to invest in and are bringing different players on-board to redefine themselves. This means thinking about the planet when you host tourists, of course, but also thinking about how local people can benefit, increasing how much tourism contributes to the urban economy, and not just with a consumer that adopts part of the town for a moment and then leaves. Sustainable tourism is now perhaps the prime subject that allows urban tourist destination managers to talk to residents and professionals in the tourist industry at the same time.

Some cities, and Paris is leading the way on these issues, have decided to rebalance their urban growth to make it more sustainable: by sharing the public space between pedestrians, cars and soft mobility; by giving over more space to nature and biodiversity, and thereby making the city more welcoming and easier to live in for its users—to the point that combining eco-tourism and the urban environment could represent a new way of promoting the area; by thinking about the fifteen minute city—bringing all the activities of city dwellers closer together (work, education, culture, shopping, leisure, etc.). An ever greater number of city dwellers in the world are testing these new trends for the cities of today and tomorrow, and will include them in their tourist practices.

However, tourism professionals are faced with another paradigm: changing their process, how to manage staff and their procurement, diversifying their clientele to be more resilient, opening up to their district, etc. requires quite a big effort. So

they need to be pushed to take action by convincing them that changing will bring them into phase with their future customers. They need to be offered pragmatic, turnkey solutions to facilitate their transition to a new business model. There are already many solutions, whilst others still need to be invented, both individually and collectively. The information needed to change people's mentalities is available, but a lot of it needs to be simplified and put into perspective.

Generating a movement

The challenges to be overcome are ambitious but thrilling. Tourism, which was previously invented as a means to discover other cultures by cultivating yourself (the famous World Tour), became a mass industry that disconnected the producers from the destinations, only involving a minority of the population. Today, urban destinations are rethinking towns and cities and integrating tourism so that all the stakeholders can benefit from the change. The economic aspect can no longer overshadow the cultural and natural aspects. The equation between these three aspects must be rebalanced to become a sustainable and fair manner of envisaging development (without greenwashing).

Does this mean that mass tourism has become an enemy to be fought? That tourists should be prevented from coming by plane because the carbon footprint is too great? Paris for example does not want to put an end to welcoming tourists from the USA, who represent its biggest foreign market. And the growth in tourism will now continue around the world, as new countries obtain sufficient resources to travel. Destinations will learn to project an image that better represents their city and the customers they want to host, without however closing their doors to "the old world". The pathway that we now face is (re)discovering a balance between temporary visitors and residents. And this pathway must be the only one possible if we do not want to empty our cities of their residents whilst seeking to increase tourism.
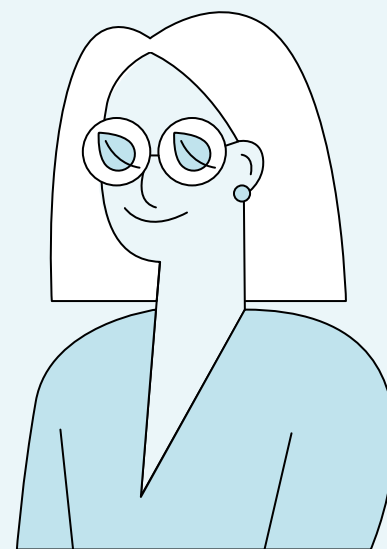
Setting targets, measuring progress, empowering participants and displaying the transparency of actions are the main components of the method we need to apply to change. It puts collecting and analysing data at the heart of the commitment by promoting the notion of progress.

Only time will tell if the combined developments in tourism will make comparing the carbon impact an essential factor alongside price for consumers when choosing their destination. But what is for sure is that cities are changing and supporting this awareness, and are just waiting for tourism to promote it.

Preserving your pleasure whilst preserving the planet thanks to high quality vacations

Marie-Pierre Vincent | Co-founder of We Go GreenR

73% of travellers intend to stay at least once in environmentally friendly accommodation *(study by booking.com 2019)*. But how can we move from intention to action? We Go GreenR is a facilitator that allows travellers to find holidays that are as desirable as they are responsible, so that travelling with guilt becomes just a bad memory.

A clear observation

We Go GreenR was born in 2019 from a simple and clear observation: whilst there were many ultra-simple solutions for shopping in a better way (for food, clothes, power, etc.), there was no ultra-simple solution when it came to travelling!

A resolutely socially responsible platform!

We Go GreenR is a platform for booking environmentally friendly accommodation and eco-friendly activities: 100% of the accommodation on offer is committed to an environmental approach and the activities on offer are intended to have a positive impact on both travellers and the planet (making your own bread with a baker in the village, attending yoga or permaculture classes, going for a hike and trying out wild harvesting, etc.).

With the GreenScore, our algorithm based on 110 environmental criteria, we select the best offerings, for every taste, every budget (from €4 to €450 per night) and at every time of life (as a couple, a family or even for 80 people!), to allow everybody to easily find a holiday that really suits them, and to book it on the spot.

But our commitment also applies to our business model that is virtuous because it is honest and fair: whilst being free to travellers, our commission is half that of generalist platforms, to offer a fair price to travellers and fair compensation to hosts. We do not charge any sign-up or subscription fee. We only make money if we are really useful to our hosts.

A virtuous circle for the tourist ecosystem

We have launched more than just a booking platform, we have put in place a support service based on our GreenScore to meet the needs of 80% of our hosts, who want help with their ecological transition.

We offer them special workshops and concrete solutions that are easy to implement, covering different subjects (resource management, reducing waste, etc.) or different phases (funding, building, developing, marketing, etc.). These solutions (products or services) are chosen for their impact, their professionalism and their capacity to perfectly meet the needs of hosts. This support is optional and allows our hosts to improve their impact whilst enjoying preferential rates negotiated specifically for them.

Their GreenScore improves for every solution they implement: this means that hosts can measure their progress, and so can their guests!

Promoting the sustainable initiatives taken by destinations

We are also a digital medium for sustainable tourism, through which we promote socio-economic players and destinations that are committed to an environmentally friendly approach. This promotion is implemented in collaboration with the partner regions. Through inspiring content, we are putting the environment back into the spotlight to protect and promote our regions.

3 solutions in 1

We Go GreenR facilitates the emergence of a more responsible kind of tourism based on 3 complementary pillars: marketing, increasing skills and increasing visibility.

Sustainable tourism: how to select and certify your accommodation offering

Florian Principale | Head of Communication on Sustainable Development at Vaovert

When Vaovert was created in 2017, the first challenge for the start-up was to find the right method for selecting and certifying a sustainable offering. The whole issue was finding the right balance between fairly promoting the actions taken by hosts and providing clear information for tourists.

The position adopted of our founder, Mélanie, made things easier for us. It must be said that Vaovert arose from a real need: easily finding environmentally friendly accommodation.

In 2017, before Vaovert was created, the sustainable tourism ecosystem was still highly institutional. Whilst at this time international platforms only pay scant regard to a host's environmental values, tourists have to try and find their way as best they can through a jungle of labels and certifications.

Our solution: the birth of the "Vaovert Index"

There was therefore a challenge on two levels: developing a measurement tool that ensures on the one hand a demanding selection of hosts that wish to joining us, and ensuring that tourists could easily adopt it on the other; so that they could easily identify the ecological gestures made by the host and their specialities. This reasoning led to the creation of the "Vaovert Index"— our secret ingredient—that makes all the difference.

The "Vaovert Index" combines nearly 90 criteria, the eco-points, spread over five categories:

- Habitat: reducing the environmental impact of accommodation.
- Energy: limiting its energy consumption or even producing energy.
- 3R (Reduce - Recycling - Reusing) to generate as little waste as possible.
- Healthy eating: offering travellers food that is healthy, locally produced and organic.
- Sharing: raising awareness amongst visitors and informing them about how to be more environmentally friendly.

For hosts, the "Vaovert Index" is made up of a grid of criteria that they fill out with the help of a member of our team. This gives us an opportunity to talk with them and ask them for proof where necessary.

A rating by levels

Our algorithm awards a score to hosts for each category depending on the number of criteria that they fulfil. A weighting system also takes into account environmental gestures depending on how complex they are to implement.

The average of each category is used to determine the hosts environmental score. This is an essential factor for our selection that comes into play here, as a minimum score of 20% is needed to join our community. Finally, the host also gets awarded a level depending on their overall score:

- Level 1: 20 - 49%
- Level 2: 50 - 69%
- Level 3: 70 % and above

To play a role in stimulating the development of an ever broader sustainable tourism offering in France, we have also created a "first steps" selection for those with a minimal score of 10%. By joining Vaovert, they commit to undertaking an environmentally friendly approach and achieving the 20% requirement within one year.

Easy to read

Tourists can see the level and check the score per category on the advertisement for every host: this means that they can identify the strengths of the accommodation in which they will be staying. By clicking on each category, they can also see the details of the environmental gestures that the host applies. We also send our hosts an environmental responsibility certificate to display, which summarises their overall score and their score for each category. This is a good way to start the conversation and to present their commitment to travellers who are not very sensitive to the ecological issue.

TRAVEL RESPONSIBLY WITH VAOVERT

MAKE A CHOICE

Choose among hundreds of ecologically responsible accommodations in France !

BOOK YOUR STAY

Take advantage of instant booking and benefit from secure payment.

ENJOY YOUR TRIP

Live an unique experience, completely eco-friendly. Good for you, Good for the planet !

WWW.VAOVERT.FR

@vaovert
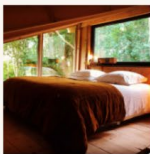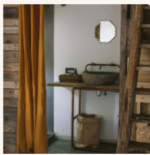
rfhouse : La Petite Landaise

Nouvelle-Aquitaine | ★ 5/5 🍴 Petit déjeuner : Oui

GreenR en ascension

escription | Equipement | Activités proches | Engagement éco | Infos pratiques

Description

Corenthine

150€/nuit

Arrivée | Départ

We go greenr

@WegogreenR

Local and responsible Tourism: what do the French think ?

BY INTERFACE TOURISM INSIGHTS

82 % of French people want **nature & outdoor activities**

For tomorrow's travels, the French will give more importance to:

40 % Driving to your destination yourself

32 % Environmental issues and policies

30 % Compensated or low carbon emission transports
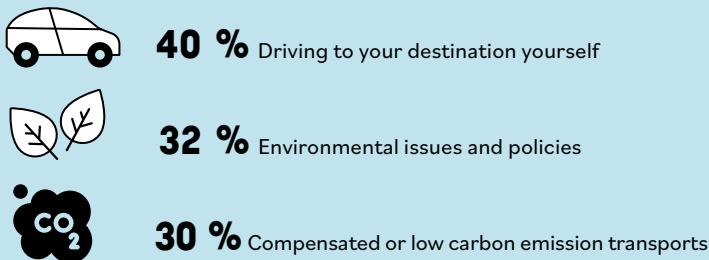
Profil of the French responsible traveler

51 %
Couples without kids

41 %
Singles without kids

8 %
Families with children under 17 yo
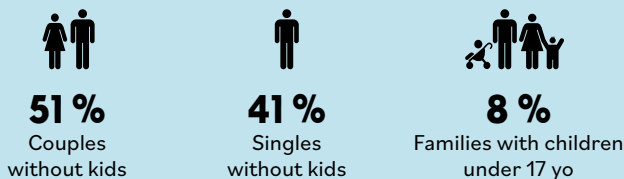
Accomodation : reponsible travelers' preference

Staying with friends or family

Private rental (airbnb, etc.)

B&B
Bed and breakfast

Holiday home

Independent hotel 3-4*
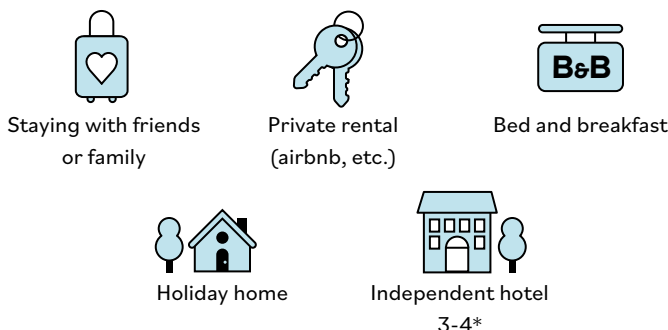
Proximity Tourism
In the next 2 years
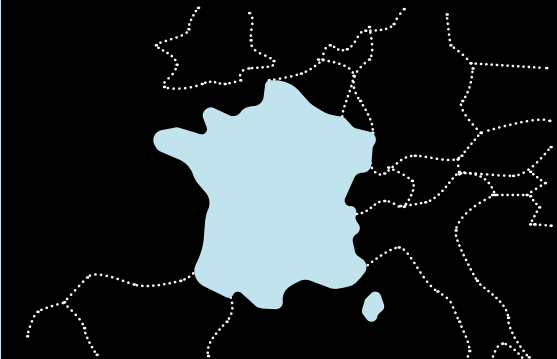
19% of French people will travel MORE in France and...

8% ... MORE in the neighboring countries
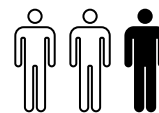
1 French out of 3 considers that **sustainable development** is a determining factor in the choice of a destination

Aspirations of **the French responsible traveler** VS *average French traveler*

Interacting with locals
59 %
44 %

Cultural expreriences
56 %
40 %

Meeting new people
76 %
60 %

Écology: the 3rd dimension of business travel

Laurent La Rocca	Co-founder and CEO, The Treep
Nabila Iken	Head of R&D, The Treep

For a long time, business travellers and their companies only considered the "budget" and "duration" dimensions of their journeys. Flygskam and an effort to achieve the same level of awareness of the climate issue at a corporate level as at a personal level have gradually imposed the idea of assessing a journey according to 3 dimensions. The "carbon footprint" dimension now also appears to be as important as the budget and the duration for many people. But how can you resolve this 3D equation in 2021 when 83% of travel in France still takes place by car[1] and no hydrogen powered flights will be available for several years.

Trains or course

More than 80% of French business journeys are domestic or cross-border. So, it is best to start with the essential: decarbonising professional travel by favouring the use of TGV, Eurostar, Thalys and the other regional trains that travel over the 30,000 km of the French railway network. Because the savings in terms of CO_2eq can be significant: to carry one person over 1 kilometre, a plane emits an average of 230gCO_2eq[2], fossil fuel cars 193gCO_2eq[3], and a TGV for its part emits 1.73gCO_2eq. The best rating for the "carbon footprint" dimension is therefore travelling by train.

However, it is not quite that simple. Over large distances, flight times are less than the time spent travelling by train. And for business travellers "time is money", the arbitration between the "duration" and "carbon footprint" dimension becomes difficult.

Comparing the times door to door

It is often claimed that you can travel faster from A to B by plane than by train. This is not always the case. In fact, when you take into account the time spent getting to airports or stations then checking in and boarding, which are more or less fast depending on the means of transport, a journey from the centre of Paris to the centre of Marseille, for example, takes about 4 hours by plane or by train. These are the total times, "door to door" that should be taken into account for the "duration" dimension, and not just the flight time and main journey time.

The "budget" dimension for its part depends on the volatility of the prices with regard to the yield management policy of the operators of the main means of transport. It therefore depends on the time when the booking is made. The aggressiveness of the low cost flight companies and railway operators greatly influences the decisions of business travellers. But there again, the total budget, door to door, should take into account the greater distances between airports at the starting point and destination, which can considerably increase the overall cost, especially if they are travelled by taxi or a car with driver. These hidden costs are not always included in the mental calculation made by a traveller, who has just a short time to make their booking. An algorithm, like the one offered on its interface by The Treep makes it possible to quickly compare the 3 dimensions to best chose the means of transport.

This new way of looking at the results therefore provides a 3D view of business travel. The traveller can compare their options and choose the train, for an equivalent or smaller budget and journey time, it can mean saving half a tonne of CO_2eq over a return journey between Paris and Marseille according to the ADEME calculation methodology.

Completing your journey with an environmentally friendly hotel and car hire

Another element of the environmental impact of business travel is staying in a hotel. A night in a hotel uses resources and engenders emissions due for example to the energy consumed for heating and lighting[4]. To further reduce their environmental footprint, a traveller can book an environmentally friendly hotel, and even plan, for some journeys, a short-term car hire, taking into account vehicles with hybrid or electrical engines. Therefore to progressively reduce the environmental impact of users, it is important to adopt a global vision to steer their choices at every step of their journeys.

Celebrating CO_2 savings

By choosing less polluting means of transport for their journeys, business travellers can contribute to reducing greenhouse gas emissions from the transport sector. These CO_2 savings (compared with a reference scenario) can be calculated and valued by a company when the traveller chooses a soft means of transport. Indeed, calculating the greenhouse gas emissions avoided can allow senior management, and also each employee, to visualise the levels achieved. This makes it possible in particular to coordinate and celebrate the CO_2 savings made in different ways (bonuses, competitions, rewards, etc.) to encourage employees to fully invest in this new way of considering their journeys.

Governing with an environmentally friendly travel policy

It is also possible for a company to create travel rules or a Corporate Travel Policy (CTP) to govern CO_2 emissions. B2B online booking systems, like the one from The Treep, are a means for applying these rules by only making plane journeys compliant if there is no alternative by train and for those where the difference in door to door journey time is greater than 1 hour. The CTP can also favour hotels that have an environmentally friendly label and renting hybrid or electric cars.
There are also studies under way for implementing CO_2 emission quotas for companies that are compatibles with the 2°C plan of COP21. Thus an environmentally friendly CTP applied on an online B2B booking service will play a role as a regulator by distributing emission authorisations for carbon emitting means of transport.

Reduction *versus* compensation

We are entering into an era of reduction versus compensation for greenhouse gas emissions. A company that compensates or contributes for carbon may be tempted to no longer reduce its CO_2 emissions. The two actions need to be combined as the issue is so essential for our planet. Indeed, carbon compensation (either regulatory or voluntary) with the aim of achieving global carbon neutrality by 2050 must be part of the process for reducing greenhouse gas emissions in the long term. At a company level, we speak more of carbon contributions, as carbon neutrality has only been scientifically defined at a planetary scale[5].

Therefore, it is down to each company to commit to beginning to reduce its emissions, before even thinking about compensating, so that carbon neutrality is not just the result of a simple mathematical trick. Favouring and combining on each journey the CO_2 savings, the time saved "door to door" and the price savings should ultimately be used for any travel booking. It should also be remembered that you can work during every kilometre of a train journey, from the first to the last. And for a business traveller, this "useful" time is precious.

[1] "Cars are still the most common means of transport from home to work, even for short distances", INSEE PREMIERE No.1835, INSEE 2021

[2] For a short haul flight, taking into account the condensation trails. Source: ADEME (the French Environment and Energy Management Agency) Carbon Database

[3] National average over all distances and all fuel types. Source: ADEME (the French Environment and Energy Management Agency) Carbon Database

[4] Pre-deployment draft of environmental displays for hotels. Betterfly Tourism & ADEME, 2020

[5] Net Zero Initiative- A reference system for collective carbon neutrality. Carbone4, 2020

Revenge Travel

counter article ● countertrend

Sébastien Vincent	Director at the Paris Office, Tourism, Travel and Leisure Specialist - Simon-Kucher & Partners

After having been decimated by the crisis, players in tourism could count on "Revenge Travellers" who are ready to spend more than before the crisis.

According to a survey carried out in June 2021 by global marketing strategy and consulting firm Simon-Kucher and Partners, a majority of those surveyed in France (73%) were preparing to go on holiday between June and September, and nearly half 46% said they had not been on holiday during the preceding 12 months. The survey, conducted with a sample of 5,000 people in seven countries (Germany, France, the Netherlands, United Kingdom, USA, Russia and China), identified "Revenge Travellers" as a key segment for the recovery of the sector.

The survey revealed that 83% of French travellers intend to spend as must (44%) or more (39%) on their journeys in 2021 as before the pandemic. French consumers are in this regard much like their peers, as at a world level, 83% of respondents gave the same answer.

Sébastien Vincent, Director at the Paris Office, a member of the Tourism, Travel and Leisure Team at Simon-Kucher & Partners said: *"The pandemic hit the travel and leisure industry hard in 2020. But our work shows that there will be a recovery of activity in 2021, with French people wanting to travel and spend as much as they did before the pandemic, or even more. French people are indicating that they will favour domestic travel, which offers hope to the players in the tourism and leisure sector in France. For companies in the sector, a unique window of opportunity is opening to review their strategies and business models offering the agility to allow them to capitalise on the new trends."*
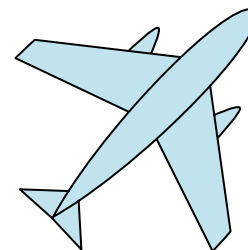
Conversely, "Revenge Travellers" plan to spend even more on travel after the pandemic.

The "Revenge Travel" trend was already seen in Asia in autumn 2020, when the restrictions related to the virus began to be lifted. China is an example: according to Bloomberg, during the "Golden Week Holiday", leisure travel reached 80% of the level prior to COVID-19—a promising recovery with regard to the current context.

A similar trend can be seen in the USA, where domestic demand was high in the second quarter of 2021. Since "Spring Break", we have seen a significant recovery in demand, with sales levels higher than the levels in 2019 in spite of the absence of international travellers.

Out of all the French consumers in the survey, around 40% are currently part of the "Revenge Travellers" segment, a significant increase compared with our most recent survey from October 2020, when only 10% of respondents planned to spend more after the crisis than they did before the pandemic. It is also noteworthy that around 5% of the French people asked even plan to spend "much more" than before the crisis on accommodation, travel, food, excursions and even on souvenirs and gifts. This figure even reaches 10% for expenditure on well-being, doubtlessly due to the French people's desire to compensate for a year marked by government restrictions.

Although the outlook for the market is promising, the pandemic will have a lasting impact on travellers' behaviour

In 2020, tourists had to stay closer to home. This trend for a "staycation" is unlikely to die out fast. Whilst 50% of French people stayed in France for their holidays before the pandemic, 61% now prefer to travel in their own country rather than head abroad.

The study also shows that cars are still the preferred means of transport to go on holiday for the French (65%), with little change due to the pandemic. Public transport (metro, bus, train) and the plane are the means of transport that have been most affected by the COVID crisis: whereas 24% (respectively 39%) of French people used them to go on holiday before the pandemic, only 20% (respectively 31%) are considering them for travelling post-COVID.

Professionals in the sector will also note that 46% of the French people surveyed would be prepared to extend their holidays by one to two weeks whilst teleworking. To attract this clientele, they need to provide a stable internet connection (sought by 57% of respondents) as well as an additional room to work in peace (45%).

Booking behaviour may also be affected in the long term. According to Dario Sangiovanni, Manager of the Paris office, and also a member of the leisure, tourism and travel team: *"One of the main changes in consumer behaviour at the end of the pandemic is in terms of bookings. We can expect more last minute bookings and less packages, which indicates a desire for travellers to have ever greater flexibility in their choices. Players in the tourist sector should therefore rethink their communication strategy and how they interact with their customers and prospects to adapt to these new timings and these new requirements from travellers."*

ABOUT THE STUDY

The "Revenge Travel 2021" study was carried out by Simon Kucher & Partners in June 2020. More than 5,000 people in France, Germany, the Netherlands, UK, USA, Russia and China, were asked about their travel behaviour and bookings.

ABOUT SIMON-KUCHER & PARTNERS:

Simon-Kucher & Partners is a global strategy consulting firm with over 1,400 employees in 40 offices around the world and that concentrates on TopLine Power®. Founded in 1985, the company has over 35 years of experience in consultancy in strategy, sales and marketing. It is considered as an international leader in the fields of pricing, marketing and sales. Its "TTL" branch is specialised in the Travel, Tourism and Leisure sectors. Simon-Kucher & Partners has more than 100 consultants based in Paris, France.

THE PRUDENT	THE STABLE	REVENGE TRAVELLERS
They will reduce their holiday budget	They will maintain their holiday budget	They will spend more
17 %	44 %	39 %

Source: Simon-Kucher & Partner survey carried out in June 2021: N=919

Celebrating travelling... in a responsible way

Claudine Barry | Chair of Transat tourism at ESG UQAM
Analyst in strategic monitoring

After 15 months of intermittent lockdown, with constraints on travel, a prohibition from going out at all—including visiting family—will vaccinated people really want to be reasonable and responsible?
In spite of all the good intentions that people talk about, we can't help but wonder if there won't be a period of making up for lost time, and even euphoria. Will we see revenge travelling?

In theory, this is however an ideal time to improve behaviour. The COVID-19 crisis will have made people more aware on many levels. Here are a few examples:

Our relationship with nature

It is indisputable, the benefits that being in contact with nature can have on people's mental and physical well-being and on quality of life have been proven. Moreover, a survey of 3,000 adults by Wunderman Thompson revealed that 82% of respondents now place a higher value on nature than before the pandemic.

Healthy local shops

Many regions of the world have seen a movement to support local shops. In Quebec, initiatives aimed at encouraging purchases in these types of establishments have borne fruit A survey by the firm Léger shows that one third of respondents said that they bought more local food produce than before the crisis. Agritourism companies have also enjoyed increased popularity in the summer of 2020.

A collective effort

Everybody had to put their shoulder to the wheel to reduce the transmission of the virus. Whilst the probability of developing complications associated with COVID-19 is not the same for all age groups, everybody was subject to sanitary restrictions. People are capable of great acts of solidarity.

Family and travel

Spending time with friends and family and travelling are amongst the first things on people's lists of things to do when it will be possible. The prohibition (or almost) from leaving the country has accentuated the desire to discover new places. Creating unique moments on holiday with friends and family is one of people's desires for the post-COVID period.

Making more sustainable choices

Local excursions and trips have been highly popular for want of being able to go further. But the seduction operation seems to have created a precedent. In Quebec, a study by the Transat Chair in tourism carried out with 1,172 travellers from Quebec indicated that 76% of those who had made a trip in the province in the summer of 2020 intended to repeat the experience.

The same survey also revealed that one in every two travellers from Quebec is ready to change their travelling habits to reduce their carbon footprint. Some 46% are even inclined to spend money to compensate for the impact of a return car journey between Montreal and Quebec, which represents a distance of approximately 250 kilometres. They also said that they wanted to travel more locally (42%) and to spend more time discovering one place – slow travel (23%).
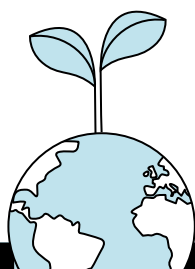
A strong desire to travel

But there is often a gap between people's intentions and their actions that is hard to assess. The recovery offers hope of a strong desire for tourist discoveries. A survey carried out by Destination Analyst in June 2021 with American travellers revealed that 74% of them were excited about the idea of travelling again. Nearly a quarter of respondents plan to change how they travel. Amongst other things, they plan to travel more!

According to the annual World Travel Monitor survey with some 500,000 respondents in 60 countries, holidays in the sun and on the beach are the most sought after for 2021. City breaks come in 2nd place followed by holidays focussed on nature and the great outdoors.

Responsible and appealing offerings

The move towards more sustainable tourism will need cooperation from all the sectors involved. The responsibility is not borne by the traveller alone. The industry must offer appealing sustainable choices that will trigger a real increase in popularity on the different markets. The tourist industry is already acting on several levels in terms of the environment: protecting biodiversity through protected areas, ecotourism, the collaborative economy, certifications, carbon compensation, involving residents, etc.
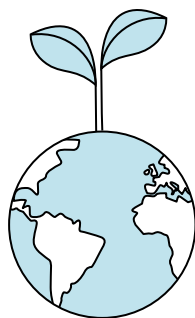
Slow travel

Post-pandemic travel will be considered as a therapeutic tool, a way of experiencing moments of well-being, happiness, entertainment and also transformation. For some markets this may mean adventure holidays in small groups to destinations that are off the beaten track where local guides are called in and where active transportation is favoured, as is offered by the company Karaveniers in Quebec. All the journeys made include an amount to compensate for the greenhouse gas emissions produced by air travel. For its part, the British agency, Byway, offers holidays that do not require any air travel.

Green and dynamic urban environments

This new way of travelling can also lead to discovering a town that has made big efforts to improve the well-being of its residents, so that its growth does not happen to the detriment of the environment and where innovative active mobility and public transport are central to its projects. Amongst the many assets of the capital of Slovenia, Ljubljana can attract tourists with its historic buildings, its canals, its heritage or even its eclectic culture. However, it is not seeking an increase in the number of people spending the night at any price. On the contrary, the development of the city has been carefully planned and it must benefit the residents first. It has even received several awards to this effect.

Adopting the values of residents

Travelling in a responsible manner also means discovering how local people live. In this way Finland offers visitors the chance to adopt the habits of its inhabitants to better experience the destination. As the country that is top of the happiness awards according to the World Happiness Report for the 4th year running, the country is offering to share this recipe for happiness through is destination management organisation Visit Finland. Every year, a campaign underlines the principles that are behind this lifestyle. The culture of the sauna, close contact with nature, and a unique relationship with the cold and winter are all values that are part of the DNA of the destination, and they are continuously talked about, often in a humorous manner, to potential visitors.

A collective mission

Many actions will need to be taken to turn towards a green economy. Continuing this transition depends on growth, creativity, partnerships, considerable investments and above all, a collective and planned approach to maximise the benefits for travellers, tourist companies and local areas.

Society can react very quickly to a direct emergency. The crisis has shown us that it is possible to have ambitious targets and to drastically change some practices to modify people's behaviour. Every crisis offers a new start. It is up to us to make it so that the new start for tourism follows a responsible pathway.

Contact-free technology,

a trend that perfectly matches the latest aspirations

Last year we spoke about reassurance. This trend is still around and it goes along with contact-free technology. Indeed, the hospitality industry must now look after everybody's health, everywhere, in every situation to relaunch business and to win back people's trust. According to a study by McKinsey (October 2020), 55% of interactions with customers are now digital. We can therefore see a technological development that existed before the pandemic, and that has found a new dimension in this need for sanitary reassurance.

Many hotel chains such as Accor, Marriott and CitizenM are launching the implementation of a contact-free pathway or testing one in their establishments. Digital check-in / check-out, using QR codes, contact-free payments, digital keys, automation, individual takeaway meals, etc. are all processes and solutions that can be implemented to limit contact points between customers and thereby reduce the risk of contamination. Most of these innovations are brought about by start-ups, who are a constant source of appropriate solutions that are quickly operational. The leisure sector must also seek a contact-free pathway to reassure visitors, whilst continuing to marvel them. Contact-free technology must now be part of the customer experience.

However, digitisation does not mean removing human contact. At each key moment in a visitor pathway, the famous moments of truth, you need to ask which is the best solution? Digital, Physical, Human and/or a mix of the three? (see the article by Rémy Treguer). Contact-free technology also makes it possible to improve skills and to create professions with more added value.

BOOK A ROOM

MENU

One plus one equals three!

Rémy Treguer	Director of customer experience at Futuroscope

When two "components" decide to live together (one plus one), they give rise to a system (which makes three). A system is a combination of components that interact according to certain rules. We can imagine that like a mobile that we hang in a child's bedroom: the whole is balanced and each component has its place. If we move one component everything needs to be readjusted.

Contact-free tech and people, the new marriage of three.

Playing with a touch sensitive viewpoint indicator, meeting a Socibot humanoid robot, getting a makeover with a smart wardrobe, directing the robot avatar Awabot, playing in a virtual sandpit, discovering the principle of 3D printing, exploring the VR world with HTC Vive, interacting with visitors through beacon technologies, leap motion or even interactive votes, but also marketing connected products from the brand Lick. That was our field of experimentation when we launched the Futur l'Expo pavilion in 2015. We learnt things, but also assessed and studied the reactions of visitors to better understand the challenges of the "contact-free". We knew that this technology was on the way, but not when it would be part of our daily lives. Few visitors could imagine or conceive of the future uses. That was yesterday...

We are at a key moment, contact-free technology is becoming the new "game changer" in the customer experience. It is reshuffling the deck and opening up new possibilities, it offers a much demanded freedom... The COVID crisis has been a phenomenal booster, French people are ready to go through the looking glass and explore new uses!

How can it be integrated into the pathway of a visit? How can contact-free tech facilitate the work of employees?

How does it transform our relationship with other people? How can we avoid developing functional features that are just gadgets? This goes beyond understanding expectations, one of the famous quotes from Steve Jobs is still relevant:

"It's not the customer's job to know what they want. Customer's don't know what they want until you show it to them". It's up to each company to design its user experience!

Are you ready :

● Contact-free technology is available, efficient, it is feasible.
● The entry level costs are affordable, it is viable.
● The solutions are what your customers are looking for.

"I invented nothing new. I simply assembled the discoveries of other men... Had I worked fifty or ten or even five years before, I would have failed". So said Henry Ford more than a century ago...

It is time to dive into the tank, to assemble, to innovate, to create new uses.

Just four years ago, we still drew a line between the visitors' physical pathway (during the visit) and the digital pathway (before and after the visit), approaches were often split and in the end they were frequently complicated, difficult to implement and expensive! Our vision is now clear. At Futuroscope, contact-free technology meets a strategic value for customers, helping visitors to manage their time, facilitating access and limiting constraints. Essentially, making the day seamless, as contact-free technology reduces space-time, it gives people superpowers, the possibility of navigating from one place to another, everything is connected as if by magic!

Mihaly Csikszentmihalyi, a Hungarian psychologist, devised the concept of 'Flow' that we can associate with this magical aspect. Flow is a state of high concentration when an individual is entirely consumed by the task that they are performing whilst feeling happy and fulfilled. Flow is therefore an efficient method for motivating our visitors and making them feel happy about what they are doing. Digital technology contributes to increasing this joy, which is the emotion that people seek during any visit.

We have all felt this sense of pride in having completed an order, a booking or making an appointment for your Covid vaccine! Big up!

Contact-free tech already allow us to:

• Improve how we welcome visitors through pre-booking and increasing their independence during their stay.

• Of course, with contact-free payment there is no longer any need to handle cash, quicker financial flows and transactions reduce waiting times in shops and restaurants.

• A "hands-free" experience reduces stress, the fear of losing keys or your wallet vanishing. It is also worth noting that "fear", even if it is short lived, is the ultimate negative emotion—except of course on rides like *Objectif Mars* where we are thrill seeking!

• Parents can make the functional features on the RFID card secure and children have greater freedom, they can become independent and dive into the *Aquapark*. This management of uses and access allows Futuroscope to adapt its offering and to have customised packages, which is a source of revenue.

• The data collected by the technology helps us to better understand consumer habits, and to optimise flows and traffic on the site. Which is one of the subjects that contributes to Very High Satisfaction.

Contact-free tech must above all work for visitors and their experience. It must not be just a gadget, it must contribute to the experience, plain and simple!

The famous mathematician, **Mickaël Launay,** tells us that there are two worlds. The additive world and **the multiplicative world, contact-free tech creates a multiplicative effect.**

Indeed, contact-free tech must not be an additional layer (+) or a risk of degrading the system (-); on the contrary, contact-free tech multiplies the effects (x), the combinations, the choices, it boosts the power x the experience. In that way it is a real innovation. There are several conditions for this multiplicative effect, which is why, at each key moment in a visitor pathway, the famous moments of truth, you need to ask yourself which is the best solution? Digital, Physical, Human and/or a mix of the three?

But first of all, the condition sine qua non is having a consistent software base that allows you to manage customer relationships properly. This consistency must be ensured by properly managing the connectivity between the databases and having a single account to register visitors. Indeed, managing identities and customer access (CIAM) has become a strategic necessity that makes it possible to offer users multichannel experiences that are seamless and customised, and a non-negligible source of income. The CDP (Customer Data Platform) must make it possible to create appropriate scenarios for our visitors. **More than ever, customer experience is a key consideration, it must make a connection on the web of the level of quality that is expected, desired, achieved and perceived.**

In addition to this technological progress, adopting the "good old recipes" can help to improve efficiency. Sometime you have to get back to basics. Handling things in the real world makes sense. We can "force" the visitor to act in a determined way. A kind of fool proofing or Poka-Yoke that we see in the industry. A solution that is often inexpensive, simple, easy to maintain, which we use for example to manage flows. Connected guidance or a specific app are add-ons, a paper map, signposting that can be seen from five metres away can complement the system. You have to cater to everybody; we have for example identified ten methods for organising a day in the parks depending on the visitor profiles.

As an additional digital solution, specific applications can complement our panel of solutions at certain times. For example, we used the Imagina app to support the "e-motions days" at Futuroscope, a soft mobility trade fair that will be held at the start of September. But applications such as Klaxoon or even Lineberty complement the system with different functional features. Our experience shows that you need to offer them for specific uses or visitor profiles. You need to find the right balance, this dosing needs to be achieved through experimentation and depends on each site.

In any case, the risk lies in making access more complicated. The three-click rule is a non-official and non-theorised rule of browsing that suggests that users must be able to find the information that they are looking for on a website in a maximum of 3 clicks The three-click rule applies in the Park, the information must be accessible and comprehensible in less than 30 seconds. That is where human contact has its full interest. This is the solution that we favour to add value. The welcome, the smile and the empathy of employees, providing information at the right time. A friendly speech at the end of a show helps to send visitors to another place without systematically using a specific app. Nothing can replace human contact when it is professional and high quality.

Employees assist and guide visitors, the quality that we look for in our staff is always people skills…

There is a future in the profession of helping people.

In conclusion:

Do not make things complicated, keep it simple, think about how tech will be used, as the design must contribute to the experience. Innovating means paying attention to people, time, the duration, to cycles and to key moments… Essentially, we are taking baby steps and we are progressing with humility and good humour.

"There is nothing worse than entering into a society that we do not understand and that we therefore reject. And if we reject it, we fall behind."
René Monory – the inventor of Futuroscope

Perfecting hospitality thanks to digitisation

Fabrice Goussin | Founder and CEO of Tabhotel

Many hotels had already started work on digitising their services before 2020, but the pandemic has made it possible to test new forms of organisation and to intensify this dynamic. For a long time, digitisation was restricted to budget hotels, but today it extends to top of the range, and includes both the customer pathway and the operational management of the establishments.
The challenge now is to find the right balance between productivity, the well-being of the teams and customer experience.

Adapting to economic and social changes

The digital transformation is being brought about primarily by economic and social developments, and the sanitary context has only accelerated the trend.

The hotel sector is seeking to achieve even more significant gains in productivity. The years 2020 and 2021 have made it possible to test new organisations with increased automation and flexibility. Feedback on experience from different hotel groups of different sizes confirm the increases in profitability, in particular in managing of check-ins and check-outs, and for sales of additional services.

Beyond this economic issue, there are also issues related to recruitment and the necessary revaluation of the operational professions. Difficulties in finding and keeping staff are nothing new to the hotel sector. Are there solutions that can help to reduce the hardship of the profession, whilst improving staff loyalty? Digitising the steps that have the least value in operational professions is an essential answer, beginning with reception staff, as it allows them to focus on hospitality and human relations.

What travellers want today: freedom and choices

Today's customers want to take control over their time and their stay. They want to be free to chose when they arrive and then how they plan and spend their stay. Some people want 100% contact-free solutions to reassure them after months of sanitary restrictions. Others are happy to start check-in before they arrive and to be informed so they do not miss out on opportunities. Others, such as young people and business travellers, use self-service solutions everyday and naturally expect to have this option at the hotel. And there will always be those who are looking for interaction with the hotel's staff and will seek some "human" time. How can you meet everybody's requirements?

During the crisis, hotel customers massively adopted digital technology, it is a real major trend! In an interview with French newspaper Le Monde, William-Alexandre François, a teacher at Lausanne hotel school confirmed that *"the acceptance of digitization in the hotel industry, on the customer side, was accelerated by the pandemic"*.

A boom in technological offerings (and it is not over)

For many years, hotel managers have tried to blend operational efficiency, customer satisfaction and experience with online technology.

From the first "self check-in" terminals launched by CitizenM in 2009 to digital keys in an Apple Wallet in 2021, the software solutions continue to multiply using NFC, RFID, Bluetooth Low Energy technologies and the IoT, QR codes or even OCR.

We can, notably, mention the following areas of progress:
Solutions for online check-in and terminals that are increasingly easy to use, user-friendly and customised to welcome each customer.
Essential services that are integrated into daily life during the stay: keys on phones, using smartphones for payments, and "where you want and when you want" orders with QR codes.

Mobile check-in at the hotel, in the bar or in a cosy area, which is particularly suited to teams in high class hotels, with check-in, payment and key coding.

There are two essential points for a successful digital transformation:
1 ● Ensuring that the chosen solution resolves daily points of friction for teams in the hotel: repetitive tasks, a lack of conviviality for the customer, payment issues, etc.
2 ● Focussing these transformations on the very nature of the hotel industry: customer service and offering a memorable hosting experience.

Everybody has their own way of greeting, everyone has their own way of arriving

But how far can digitisation go? When do you need to leave space for human service? How can it become an opportunity to increase the human aspect of the relationship between the guest and the host, and make a hotel more appealing?

At Tabhotel, we believe that technology must be dedicated to human hospitality. Our check-in solutions are also aimed at automating tasks with no added value so that receptionists have more time to talk to customers and to meet their needs, which is the essential aspect of the profession. As for customers, they no longer need to spend time waiting when they arrive and they control their pathway.

Our aim is to give this freedom of choice back to hotel managers and their customers. Every hotel has their own way of greeting customers and each customer has their own way of arriving and spending their stay. This is what guided how we innovated our technology, which is both omnichannel, ultra-customisable and practical, for the owner, the teams and the customer.

Photo credit: self-service on arrival at an upmarket hotel with M3 Ferney Geneva Airport and Tabhotel terminals.

The feedback we receive from customers everyday confirms our idea that digitising checking-in and checking-out, and sales of additional services makes it possible to find the right balance between productivity, staff well-being and customer experience. The emerging trend, regardless of the type of hotel, is offering freedom of choice for everybody, which means opening up more channels, whilst keeping the character of the hotel and the teams at the centre.

Audrey Gouache
VP Customer Experience at Tabhotel

Sources:
● Digitalisez-moi » Hospitality On and Samsung based on a study by MKG Consulting
● Le Monde – *Moins d'employés, plus polyvalents* : la tentation de l'hôtellerie après la crise liée au COVID-19 [Fewer employees, more flexibility: the temptation of the hotel sector after the COVID-19 crisis]
● Hospitality Upgrade Definitely Doug 21/5/21: Rethinking Guest Arrival
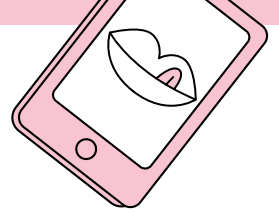
Catering: using digitisation to get closer to customers

Guilhem Miranda | CEO of Edgar

Since 19 May, restaurants in France have been open again. Customers are rushing back, but there is still some apprehension. Far from the negative aspects that we often attribute to it, digitisation will help to recreate social bonds.

COVID-19: The catering sector has been hard hit

Since the start of the health crisis in France, in February 2020, the catering sector has suffered greatly. After being forced to close their establishment for long periods, then being faced with sanitary restrictions (social distancing, contact tracing registers, etc.) and a drop off in tourism after lockdown, restaurant owners have seen a 38% fall in turnover and a 35% reduction in attendance compared with 2019.

A pandemic that keeps going...
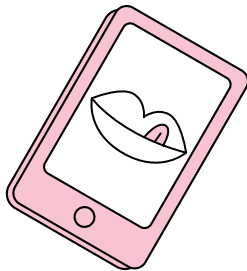
Two years ago, few people in the hospitality and catering sector were interested in or believed in the digitisation of the customer experience. We often heard people say: "Digitisation means losing the human touch and reducing jobs. Digitalisation is the beginning of the end". Whereas, now, we realise that this is not the case. During this period of pandemic, digitisation and the use of contact-free technology will make it possible for economic and social activities to be resumed. The solutions that have emerged recently will help to make it possible to comply with the sanitary measures and the social distancing put in place by the authorities to efficiently fight against COVID-19. And, as 95% of French people have a smartphone, anything is possible, provided that the solutions are sufficiently well designed so that any user, of any age, can use them. Ultimately, digitisation is THE solution!
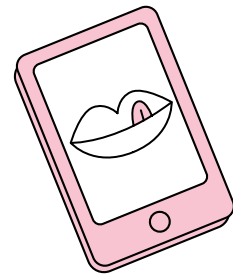
Edgar: The COST-FREE solution for restaurant owners

Edgar is a smart QR-code menu solution with a range of additional services that will allow restaurant owners to re-open with peace of mind.

● An interactive digital menu

A restaurant owner can create their free QR-code in 3 minutes on www.edgar.restaurant. They can then enter their menu and their meal deals very easily, add photos of the dishes, descriptions, etc. As for customers, when they arrive they just need to scan the QR code that is on their table. They can read the menus and meal deals, directly on their phone that are automatically in their own language.

● An integrated contact tracing feature

Since 2020, French restaurants must keep a register of the customers in their establishments to be able to contact them in case of a reported infection. This practice, which has since been adopted in other European countries, makes it possible for the restaurant to be able to quickly identify the customers who were at their establishment at a particular time in case somebody tests positive for COVID-19. Every customer enters their contact details by hand in a register. We could do better in terms of social distancing... With Edgar, the register becomes digitised. After having scanned the QR-code, the customer identifies themselves directly on their smartphone. No register and no shared pen are necessary—social distancing rules are complied with. The data are stored temporarily according to the GDPR.

● Mobile payment

At the end of the meal, to pay the bill, the customer scans the QR code once again. They can then pay all of the bill or split it. To ensure that this service is free to restaurant owners, the electronic payment terminal fees are covered by a little mandatory tip from the customer. Mobile payment therefore avoids unnecessary contact by customers paying directly from their table.

● A better e-reputation

Hospitality is the sector that has been the most affected by e-reputation, be it good or bad. When we know that is takes on average 12 positive reviews to cancel out the effect of one bad opinion, encouraging people to give positive opinions is now a major issue. With Edgar, we encourage satisfied customers to share their experience thanks to a simplified review process. 30 minutes after having scanned the QR code, the customer receives a notification to rate their experience, from 1 to 5 stars. Opinions that are pre-filled in a smart way and good reviews are published in 2 clicks on all social media.

MENU

Table 2

Restaurant menu

Starters

Greek salad
Tomatoes, feta, olives, cucumber, onion — 7.5€

Vegetarian toast — 6€

Warm goat cheese salad
Mesclun, tomatoes, goat cheese, honey — 7€

Deli tray — 7€

Mozzarella Tomatoes
Buffalo mozzarella, balsamic sauce — 6€

Main cou...

Pasta de la m...

● A recovery for local tourist activity

As the crisis is having a lasting impact on the tourist sector, we had the idea of suggesting to customers in restaurants activities that are located near by. In this way, customers have the possibility of booking, paying for and receiving a ticket directly on their phone.
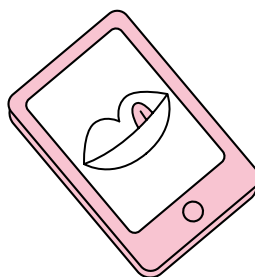
● Why choose Edgar?

✓ **Its customisable**
(logo and colours of the establishment)

✓ **No downloading**

✓ **Its multilingual**

✓ **No subscription necessary**

✓ **Its completely free**

Sources:
● www.vie-publique.fr
● www.npdgroup.fr
● www.onlinereputationmanagement.us

Digital technology working for the future of hospitality

Hugues van Heesewijk | CEO & co-founder of Gogaille

At first glass, the massive digitisation of the hospitality industry may appear to be a cause of job losses: connected door locks and local tourist applications have led to the eradication of concierge services, robots will replace cleaners, online check-in will mean no more receptionists, etc.

But, paradoxically, may be tomorrow's tourists will be looking for a more "human" approach? And what if the world of hospitality, although it is more digital, was in fact a creator of jobs, by creating new professions?

The two sides of the coin

We consider that the professions that are the most threatened by technology are those that involve the most repetitive tasks. And there are many such professions in the hospitality industry. It is true that, all sectors combined, 40% of jobs from 50 years ago no longer exist, or have become very marginal, but that is an unavoidable development and it will be the case for today's professions 50 years from now.

At the same time, we see new professions emerging and above all new professional profiles. Today, the big hotel brands, who are embracing the digital transformation, are massively recruiting highly qualified staff who can manage their digital platforms. They are also looking for employees who do not necessarily come from the traditional worlds of the hotel industry and restaurants, but who have strongly empathetic profiles, whose skills are focussed on communication and customer relations.

Moreover, although many hotel owners are planning to totally automate their establishments, we are beginning to see demand from most customers that goes against the trend to computerise everything. Human beings are no longer sought purely for their "technical" expertise, but more for their soft skills, which make a massive difference to the customer experience during their stay.

This trend is founded on 2 base trends:

The first, comes with the trends for slow tourism and getting off the beaten track. Historically, hospitality customers often followed "circuits", which were predefined or followed in an individual manner—you did not go to Paris or Rome without visiting all the big tourist attractions.

Today, travellers are looking for a more unique local experience: a tour of small gastronomic restaurants, visiting wine cellars on a bike, tastings with fine pastry chefs, attending craft workshops or yoga lessons, and meeting local people.

When a simple map of the town is insufficient, now people need guides, coordinators, specialists, to assist tourists.

The second phenomenon is the broad range of accommodation offerings available on the market. Here, once again, in recent years we have seen a real customisation of the offering: with Airbnb offerings in town centres and villas on the sea front, we no longer just sleep in hotels or weekly rentals. Hospitality is no longer dominated by the hotel industry. Thousands of private individuals have adopted the hospitality profession. Connected professions have tagged on to this trend: home-stagers, photographers, cleaning agencies, etc. As the offering has grown, we have seen the range of services offered upgraded with a real move towards becoming more professional.

Therefore, with the noticeable upgrading of the services, it is the human aspect that, little by little, is making a difference to the experience.

Changing business models

It is a little known fact that the payroll accounts for about 30% of the fixed costs in a hotel sector business plan. The remainder is mostly made up of operational costs, financing expenses and the costs of real estate (rent or paying off property loans).

With the massive introduction of digital technology in the industry, we can see substantial savings on operational costs and in particular on the different consumables.

Data and tech tools make it possible to reduce waste, needless cleaning, leaks, wasteful or unnecessary consumption (lights, laundry, water, heating, etc.). All of these improvements in productivity lead to increased operating margin over the whole operational budget.

Many new brands are therefore choosing to invest these savings in recruiting teams, to improve the quality of their services, and to make their products and brands more appealing. It is a virtuous cycle between technology and jobs.

A diversification of the offering that is becoming the norm

A few weeks ago, the Accor Group announced that they wished to launch a SPAC (special-purpose acquisition company) to massively diversify their catering and well-being offering. A few years ago, Airbnb was a precursor by launching its offering of "experiences" that travellers could buy directly on the platform.

What all these initiatives show us is that, after being greatly shaken up, the professions of the hospitality industry are reinventing themselves and giving greater value to the intrinsic value of the profession: **hosting**.
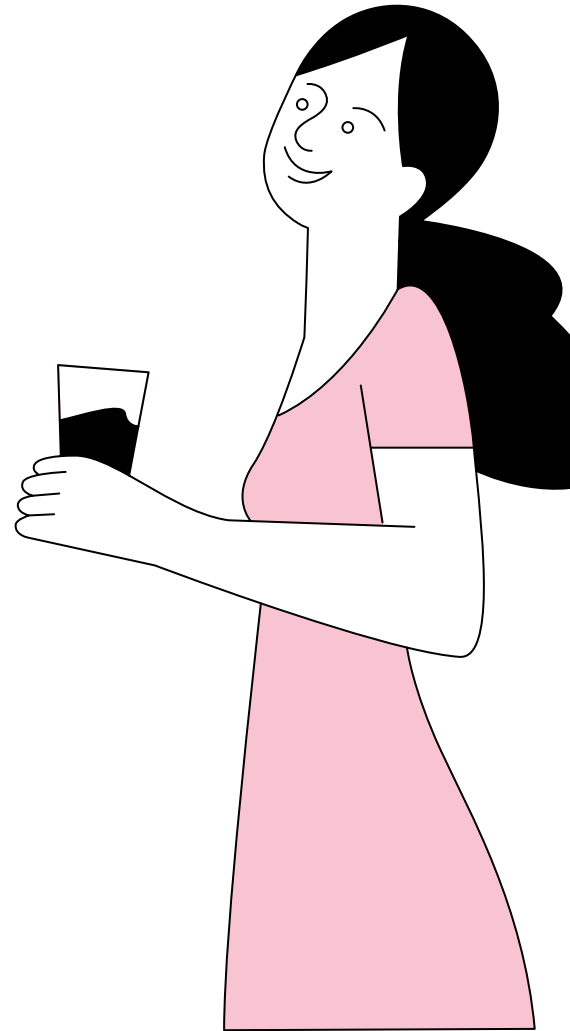
Traditional hotels are transforming to be really multi-faceted hosts, abandoning the guise as simple caterers or innkeepers to offer a broad range of customised services. Tomorrow's hospitality industry will be made up of "destination ambassadors", who are highly specialised, offering not only accommodation or a meal but an experience of the region or the town; from its gastronomy to its architecture including its artistic heritage. This phenomenon will lead to the emergence of new jobs in the coming years, which will compensate for the loss of more traditional jobs, due to new technological developments.

Contactless Tourism: Rebuilding the Future of Travel & Tourism Industry

Sneha Nigade | **Innovation Analyst**

The travel & tourism industry has faced tremendous revenue losses across the industry value chain due to the current unprecedented situation of the novel coronavirus (COVID-19). The COVID-19 pandemic has brought the industry to a near standstill with prolonged lockdowns. According to United Nations Conference on Trade and Development (UNCTAD), the industry will suffer degrowth of $1.2 trillion revenue loss or 1.5% of the global gross domestic product (GDP).

Government authorities across the geographies have implemented all possible preventive measures, from travel restrictions to contactless deliveries, to curb the spread of the virus. Because of this, the terms 'digital identity and contactless technology' have gained traction and become a buzzword for a safe and seamless travel experience. This has shifted travelers' luxury holiday experience from in-person service to privacy, wherein they are looking for premium amenities, gadgets, equipment, and hands-free service to sustain themselves comfortably. Now that government authorities in many countries are planning to relax air travel restrictions, airports and hotels are trying to rebuild confidence in travelers.

Although COVID-19 had a severe impact on the travel sector, it has acted as a catalyst for innovation and the integration of emerging technologies like artificial intelligence (AI), robotics, virtual and augmented reality (VR/AR), and mobile applications. The current surge of innovation is being driven by safety, and it will continue to be so in the new normal. Therefore, to meet tourists' or travelers' safety expectations, travel & tourism operators have accelerated the adoption of disruptive technologies and investment in the same such as touchless biometric like iris and face recognition for check-in at airports, cashless payments, interactive mirrors, and immersive experiences.

How contactless or touchless technologies are used by travel & tourism operators in order to protect the safety and well-being of travelers?

• **Biometric Verification:** Japan's Nippon Electric Company (NEC) in collaboration with Swiss International Airlines and Lufthansa Airlines has launched the Star Alliance Biometrics identity verification platform for Frankfurt Airport and Munich Airport. NEC's facial recognition engine allows travelers to pass through security access and boarding gates without physical contact.

• **Contactless Thermal Screening:** JFK International Airport, US-Based technology service provider Honeywell, and Dubai National Air Transport Association (DNATA) have teamed up to deploy thermal imaging and AI-powered ThermoRebellion solution. The system scans individuals passing through the high-resolution thermal imaging camera for elevated body temperature and alerts airport staff when travelers need additional screening.

• **Virtual Tourism:** The Tower of David Museum in Jerusalem has joined hands with Canadian VR firm OccupiedVR and Israel's Blimey to provide an immersive VR experience dubbed 'The Holy City.' Amid the COVID-19 crisis, OccupiedVR offers virtual tours to guests who want to explore Jerusalem from the comfort of their own homes.

• **Contactless Check-in:** Singaporean hospitality company DigiValet has launched a smart check-in solution, Thru. It enables guests to complete a contactless hotel check-in process. Users can avail of the service using an SMS invite sent by the application before 48 hours of check-in. It allows remote check-ins from anywhere across the globe.

• **Sanitizing Robots:** CIRQ+, Arizona's smart room platform provider startup, has rolled out CIRQ+CLEAN, a touchless, in-room autonomous, connected IoT disinfection system that dispenses an Environmental Protection Agency-registered fluid. The robot circumvents the space, dispensing a consistent, uniform electrostatically charged disinfectant on surfaces and areas missed by manual cleaning or ultraviolet light methods in a hotel guestroom equipped with the in-room CIRQ+ center.

The aforementioned examples would make inroads into the arena and accelerate innovation in their respective areas, which will drive contactless tourism. Contactless technology is not new, but it has become more of a need than a luxury in recent years. It is allowing businesses to recover from the COVID-19 catastrophe by digitizing the end-to-end journey for travelers. In the hospitality industry, contactless technology will empower both visitors and consumers while maintaining high standards of hygiene and sanitation. Airports and airlines have several areas to cut down on physical touchpoints and move toward contactless technology. On the other hand, Biometric technology raises privacy concerns, potentially increasing security threats in the future. Despite these concerns, travel in the post-COVID-19 world would be completely contactless and secure, not just for passengers but also for industry employees.
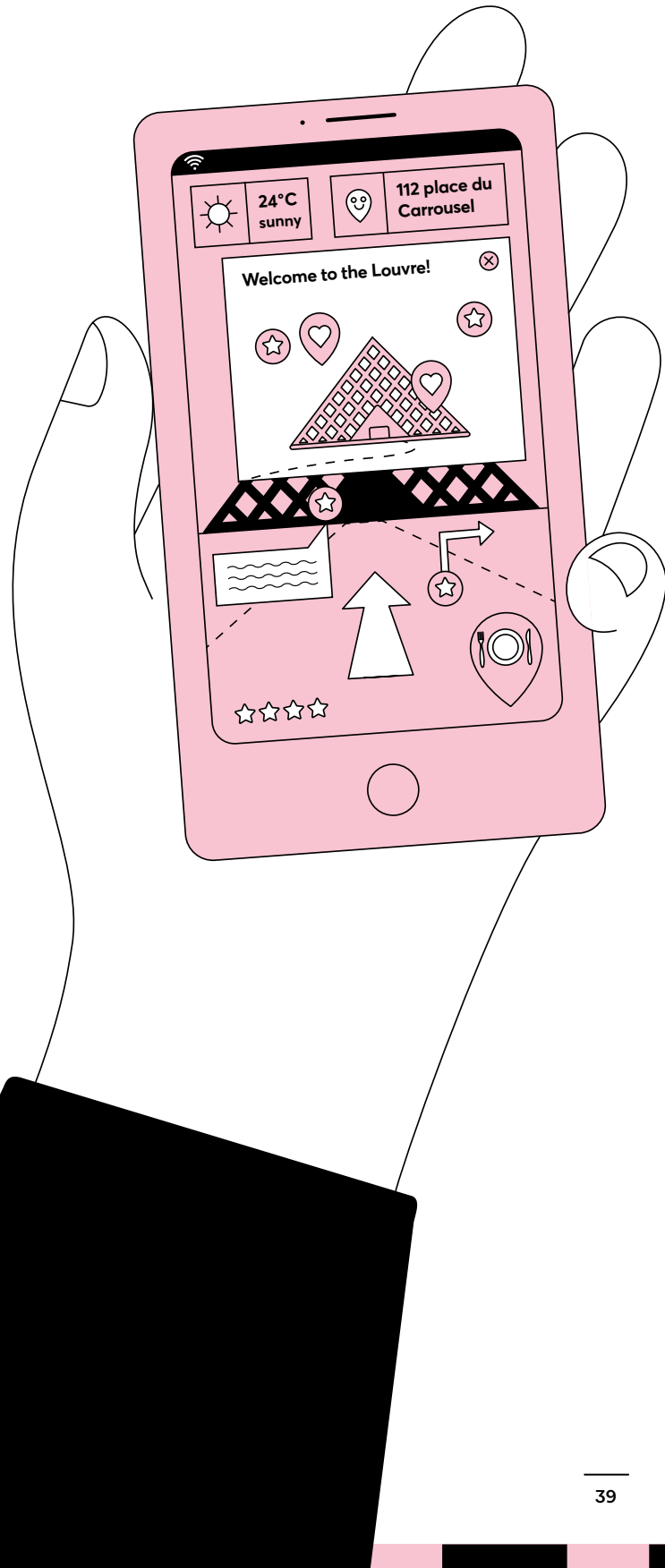
2020 EDITION

TREND BOOK #5

&CO

WELCOME CITY LAB

THE MAJOR TRENDS IN TOURISM,
NOW AND IN THE FUTURE

PARIS&CO | PARIS | Métropole du Grand Paris | SKÅL INTERNATIONAL Connecting Tourism Globally | ATOUT FRANCE Agence de développement touristique de la France

Example of a contact-free pathway

1

USING FACIAL RECOGNITION TO ENTER A HOTEL
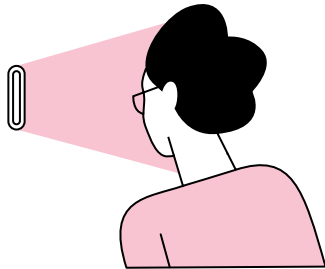
2

DIGITAL CHECK-IN / CHECK-OUT
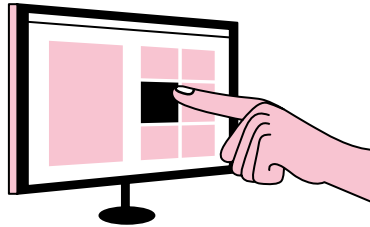
3

CONTACT-FREE PAYMENT
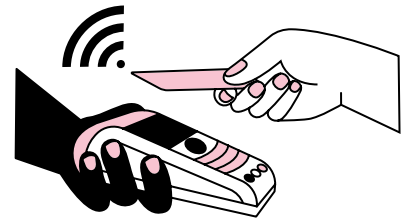
4

USING A PASS TO ACCESS THE FLOOR
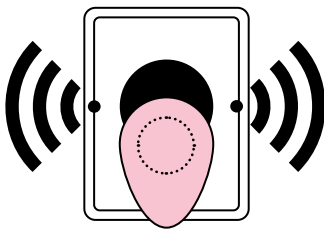
5

DIGITAL DOOR KEY
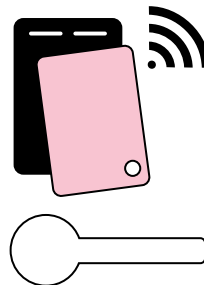
6

USING AN APPLICATION TO CHECK THE ROOM
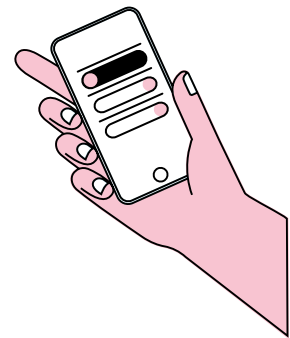
7

DIGITISATION OF THE WELCOME GUIDE

HELLO
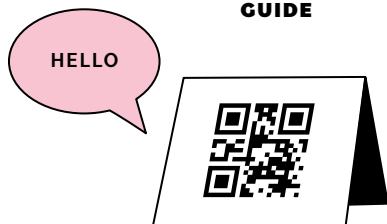
8

ORDERING A MEAL WITH VOICE RECOGNITION
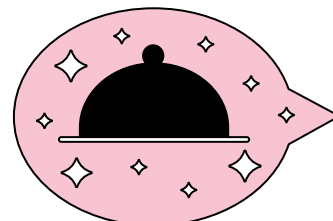
Teleworking,
a new opportunity for the tourist industry?

The sanitary context in which we are living has caused us to rethink how we work and to favour teleworking, in all sectors. This way of working, which is not really new, has been a revelation for some and a habit for others, and has put the spotlight back on the idea of the worksites and its versions such as the "digital nomads". The travel industry must therefore adapt, and find a way to benefit from this trend to promote the areas. Indeed, a new phase of taking up residence in tourist areas or mid-sized towns already seems to be causing some remote destinations, with high appeal, to rethink their offering at the dawn of these new practices.

For example, some destinations, such as Bermuda for example, are offering teleworking visas to bring tourists back. Others are resolutely positioning themselves as "Zoom towns" and starting to present local tourism offerings. For their part, hotel chains are providing work spaces or reorganising their rooms to provide a "daytime" teleworking offering.

So how will destinations and professionals adapt to this phenomenon? Is it an opportunity for destinations to reinvent themselves? Start-ups are working on innovative solutions to these new challenges to accompany this major social movement.

Teleworking, an opportunity to develop regional tourism, somewhere between a "staycation" and local tourism

Sophie Lacour | CEO Advanced Tourism

Local tourism is a major strategic angle for tourist development in regions as it offers a solution to the economic, social and environmental challenges that the tourist sector is facing. This trend allows inhabitants to get away from things and to see their own town or region in a new way, in a radius of no more than 100 km from their home. Staying at home, taking time to discover your immediate surroundings, enjoying experiences as a family or with friends, without sleeping away from home, has now become a real trend. This phenomenon, which emerged in the US through necessity, after the financial crisis in 2008, has become known as "staycations". And what if COVID was above all a catalyst for local tourism?

Changing for the better: the growth of Zoom towns

COVID has obliged us to rethink how we work and made it possible to "relocate": video conferences, Facebook after work drinks, Zoom and Teams, etc. the COVID epidemic has shaken up our relationship with work, each other and even with leisure time. But, even if we are getting back to normal, these new practices have changed our habits enormously. These new ways of working have allowed some people to reinvent their own lifestyles and many companies now intend to offer teleworking as a permanent, or at least regular, option for their employees. For several months this base trend is driving an increasing number of urban dwellers to leave their cities. Having decided to find a calmer and more pleasant environment, they are taking advantage of the increase in teleworking to move to smaller urban areas.

Small and medium sized towns are now good candidates to become what the Americans are calling "Zoom towns" due to the arrival of teleworking who organise their teleconferences using the namesake software. This name comes from an American phenomenon from 1890-1920, the Boom-towns. These Boom-towns are all the urban areas that grew like mushrooms around factories and the mining industries, like we see in westerns, most often built from wood.

Previously, the desire for the countryside amongst city dwellers was assimilated with an old farmhouse in an agricultural setting or a dwelling near Nice associated with a fantasy of sheep shearing and a huge allotment. But, in this post-COVID world, the new desire for the countryside is more related to small urban units, which are able to offer a better internet connection. Because therein lies the big novelty: city dwellers no longer want to live like "country folk" by working the land and living independently, but they want to work "in the greenery". And for teleworking, you need bandwidth. The issue of the urban exodus now comes down to the difficult equation of "at the same time": the town and the countryside at the same time, the internet and nature at the same time. This quest for land that many of our city dwellers are now undertaking is beginning to radically change our relations with small and mid-sized towns.

Medium sized towns and villages outside the immediate surroundings of big cities, which were traditionally only inhabited during the holiday period, are now becoming eligible places for the main house. These hybrid urban areas are becoming places where it is nice to live, where you can attend a teleconference in the morning and then go and pick mushrooms at lunchtime.

Although it is too early to measure the scale of the exodus that has been predicted since the first lockdown, and even if this model only applies to some office workers and freelancers, it is already possible to draw up a forecast for tourism and the regions.

The return of small towns

● **Cities have always been a choice destination But what if the new city-breakers were the future for medium-sized towns?**

This "Zoom town" trend represents more than a return to the countryside, it favours an extension to the peri-urban area, and at the same time an extension to the local tourism offering. This will also favour the transformation of a number of small urban units, which would find it hard to compete with big agglomerations, into urban tourism destinations for city breaks for example.

The fact that these new populations take up permanent residency in these areas encourages the creation of a local offering, which players in tourism must grasp.

● **New workers, with greater flexibility can organise their holiday time with fewer restrictions**

Even if all these new country folk will not stay in these areas, mainly due to job opportunities, the educational possibilities for their children, or access to health care, a large number will surely remain in the long term, even after the health crisis. We must therefore provide them with a diverse range of tourist offerings. Whether it is in terms of catering, cultural or leisure activities and even accommodation.

Indeed, one of the interests of teleworking is that it makes working hours more adaptable. These new workers can organise their time differently, by teleworking in the morning and freeing up time in the afternoon for example or working one out of two days, or even taking a break midweek or having long weekends. This possibility of changing the organisation of working hours provides large opportunities for consuming tourist offerings.

● **Developing a local offering**

Initially, these new arrivals will want to discover their area, and will therefore visit the biggest sites near to them. By freeing up half a day, it will be fairly easy for them to travel within a radius of 50 km around their home. This is where there is potential for a targeted offering, with guided tours combined with a catering that lasts for around 3 hours for example. Afterwards, these populations will become consumers of local tourism, for leisure centres and sailing venues for example. We could therefore think about special prices, offering introductory sessions or sports activities, or activities to discover the potential of the area.

Finally, the French landscape has the particularity that urban units are spaced approximately 30 km apart and medium sized towns tend to be about 100 km from each other. This geographical phenomenon combined with new ways of working opens up a range of possibilities for city breaks, which have become a strong trend over the last twenty years. Indeed, as former residents of large cities, these people are likely to be more likely to take up these kind of offerings, which they are used to choosing.

A new opportunity is therefore beginning to emerge for these areas, which can now propose activities in small and medium sized towns close to people's new residences. Less than an hour away by car, there will be a new urban centre to be discovered, enjoying two nights in a hotel or an urban gite type accommodation, and set out to discover the cultural and leisure offerings that can satisfy city-breakers.

This will therefore favour the creation and installation of new economic resources

To conclude, I would like to emphasise the potential economic appeal that this new type of tourism could bring about. Indeed, many researchers have stressed that tourism is often the first contact that a potential investor or candidate for a change in life style will have with an area. The title of an article in Forbes from September 2020, "Why Your Last Vacation Getaway May Be Your Next Home" is a perfect example of how this could be the case. The change in France from having a *local Agence de Développement Touristique* (ADT—Tourism development agencies) to A*gence d'Attractivité* (Appeal Agencies), as is the case in Nièvre for example, is an illustration of this capacity for appeal that is specific to tourism. In this post-COVID world, which offers new opportunities to urban units that were until now unable to compete with cities, we need to simultaneously rethink part of the tourist offering as a potential factor for economic appeal and develop a local offering for people who are new to rural life and who are used to having access to a large range of experiences, and cultural and leisure activities.

This offers a huge potential for rural areas, and small and medium sized towns.

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Teleworking, a growth driver for Best Western® Hôtels & Resorts with the launch of its coworking brand myWO, assisted by the start-up Dodo-up

Olivier Cohn	CEO, Best Western® Hotels & Resorts France
Nicolas Alquie	Co-founder of Dodo-up

In 2020, the Best Western® Hotels & Resorts France Group pursued its diversification and development strategy by investing in a new market segment—coworking—through the creation of its brand myWO. The Group has set itself the target of opening 70 myWO spaces in France by the end of 2021.

The practice of coworking has spread greatly in France in recent years amongst freelancers, employees, salespeople and entrepreneurs, with major growth in the last few months.

"The launch of myWO embodies our intention to meet the new requirements of consumers, particularly the corporate and business clientele, and our aim of using the communal areas of our establishments in our network to transform them into living spaces. Through this new offering, we provide co-workers with upmarket hosting, comfortable and welcoming spaces, and high quality services and equipment," said, Olivier Cohn, CEO, Best Western® Hotels & Resorts France.

This innovative concept of integrating coworking spaces directly at the heart of hotels perfectly meets the needs of different targets:
- Employees or freelancers who want to leave their homes and find an environment with the ambiance of a place of work, whilst retaining a certain freedom in their time management and their choice of location.
- Companies who have switched part of their workforce to teleworking and that need to offer a new form of high quality "welcome" to their employees.
- Hotels that have been faced for several months with a reduction in their business clientele and are seeking a new business model to market their communal areas.

Photo credit: Best Western®
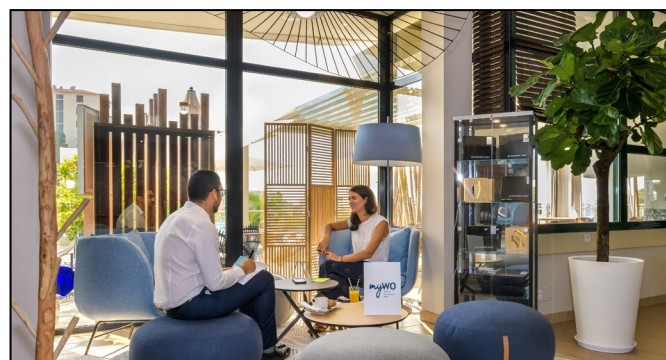
Challenge #1 – Adapting to new uses whilst respecting the habits of customers Roots

Several profiles of coworking people have emerged that can be hosted in the different coworking spaces:
- Mobile workers, who come to get inspiration, for networking, to meet colleagues, for brainstorming, and to work occasionally or regularly.
- Companies that are looking for new places where their employees can work and optimise their days when they are on business travel, without losing out on the quality of services or hosting.

One of the challenges of having a coworking space in a hotel is to mix the new users and the customers staying in the hotel. For that, we needed to completely redesign the spaces. Therefore a new strong brand identity with several constitutive parts was created to position myWO in the hotels as a friendly and welcoming work space.

Photo credit: Best Western®

Challenge #2 – Optimising and digitising the sales and management process

The pathway for booking a coworking offering can make marketing such a concept complicated. One of the risks for the hotels is spending too much time on daily management (operational and sales) for this new offering in addition to the core business.

To make the coworking gamble a success, the hotels had to use a tool that would allow them to market their offering widely, to modify the availabilities and the rates in real time, and to customise their offering.

Best Western® Hôtel & Resorts therefore wished to equip itself with a hybrid booking engine that could manage bookings for individual spaces, meeting rooms and snacking on one interface, whilst including daily and hourly stock management, and an administration interface with high-performance customisation.

As this technology was not available on the market, Best Western® Hotels & Resorts had to start from scratch and assigned the task to Dodo-up, which is a specialist in digitising booking processes for the hotel industry.

"We were specialised in digitising bookings for the Group clientele. Best Western France's request made us rethink our solution to adapt it to the changes in the market and to be able to completely digitise the booking process for a coworking space," explained Nicolas Alquie, co-founder of Dodo-up.

Dodo-up therefore developed a bespoke tool to allow Best Western® Hotels & Resorts France to put a totally redesigned platform online to market coworking spaces. The booking website with two entrance pathways (B2C and B2B clientele) therefore offers an interface that allows hotel managers to supervise this new offering completely independently.

The teams from the hotel can therefore concentrate solely on the customer relationship, capitalising on the sense of hospitality of their original profession, without any constraints.

Photo credit: Best Western®
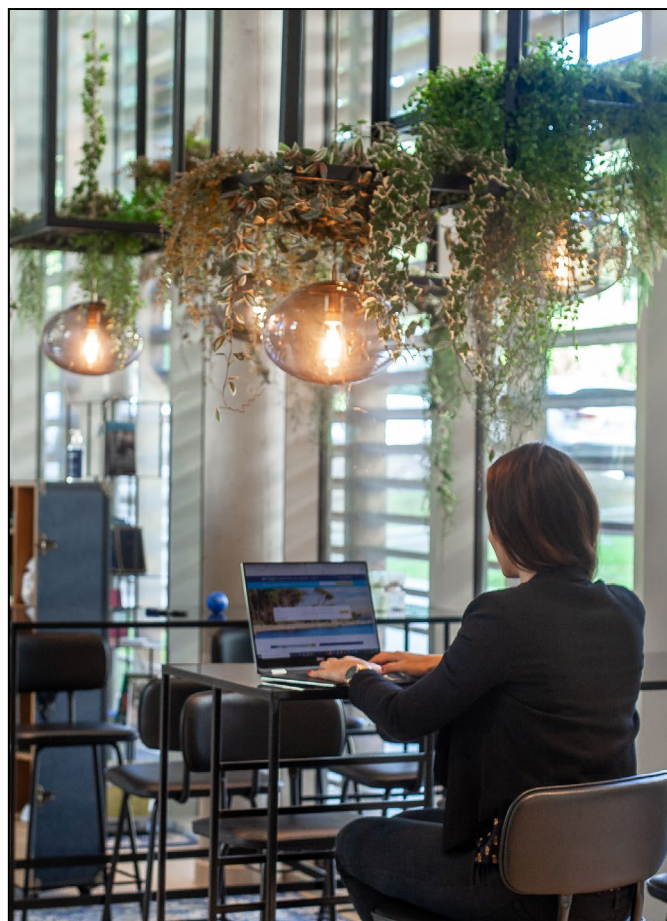
Challenge #3 – A business model that requires additional sales

Beyond the sale of coworking spaces, the customer promise of a coworking space requires that the offering of renting a seat or rooms be complemented with a high quality food and beverage offering, which is adapted to the key moments of the day, from breakfast to after work drinks, including snacking and lunchtime catering. Everything needs to be thought out so that the people in the coworking space wish to increase the time they spend in the space and above all to encourage them to stay loyal to the myWO network.

The booking platform developed by Dodo-up should also make it possible to promote complementary services to generate additional sales.

With the launch of its myWO brand, Best Western France aims to create a real community from the customers staying at the hotel, people who occasionally use its coworking spaces and loyal customers, based on an innovative technology designed for its hotels and its customers.

TELETRAVEL: the future of travelling

| **Maëva Proux** | Project Manager Best Of Tours Ltd with the brand Teletravel |

Every big upheaval comes along with major changes. These changes may be technological, social or conceptual. The health crisis that we are living through has two side effects that were unimaginable two years ago: shutting down travel and the almost generalised recourse to teleworking.
Don't wait for your holidays to go travelling! What if teleworking were to open up a new outlook for tourist travel?
Is this an opportunity to travel for longer, during the off season and to spend more time meeting local people?

The birth of the project

The last few months have been a good time for thinking and we decided to study the issues related to tourism and how to fix them. We made several observations:
- Some destinations suffer from over-tourism in high season
- The environmental impact of tourism
- The uneven distribution of the income from tourism around the world
- Journeys that are too fast and too short to have the time to really feel like you are somewhere else and to appreciate the culture.

These different observations led us to rethink tourism to try to get back to the essentials of travelling. What is the ultimate aim of an experience away from home? Meeting people, talking, sharing discovering, learning... As an open-minded operator, Best Of Tours wanted to assist with these changes and use its expertise to offer the future of travelling.
Moreover, if the last few months have taught us anything, it is that the corporate world was able to adapt to the health constraints related to the COVID-19 epidemic by rethinking how it worked, by limiting how much its employees travel and by reducing the time they spent at the office. This was a collective realisation that should increase the pace of the generalisation of teleworking in many companies.

Travelling without affecting your professional life

Teletravel® offers the opportunity to enjoy a unique immersive experience thanks to the practice of teleworking. Travelling for longer, meeting local people, growing as a person, discovering a culture, learning a language...

There is no longer a need to choose between working and travelling. We want to generalise the practice of teleworking away from home. Offering yourself a break of a few weeks, or even a few months to discover a region, a country or a new culture. And all of that, without having to take a break from your career.

Today, all you need to be able to work is a computer and a Wi-Fi connection. And the whole world becomes your office...

Definition of Teletravel

Teletravel® means travelling, encounters and learning in total immersion. Teleworking becomes an opportunity to offer yourself this experience because of the greater flexibility.

Teletravel® is different from Bleisure (business+leisure) as the latter is when an employee takes advantage of business travel to offer themselves some leisure time at a destination. Nor is it a Workation (work+vacation) as it is not about the 'teletraveler' taking a holiday but a journey with a truly immersive experience.

How can the Teletravel® concept be transformed into a tourist product for a clientele of demanding travellers? In view of the current trends for bookings, bespoke products and online platforms seems to suit the vast majority of customers.

@ Photo credit: Adobe Stock

One expertise, two possibilities

1 - The bespoke product

We offer assistance from A to Z for all Teletravel® requests.

The product is made up of a basic package (accommodation with Wi-Fi, greeting by a local person, a mobile application and travel insurance). We can add different additional services such as: legal advice on working, encounters with professionals, excursions, language courses, transportation, etc.

2 - A platform: MY TELETRAVEL

MY TELETRAVEL* is a platform for booking specialised Teletravel® accommodation. A selection of accommodation that is suited to the purpose of teleworking offering good rates for long stays. Gites, apartments, camp sites and many other types of accommodation are opening their doors to the travellers of tomorrow.

What is the aim? Automating the approach for teletravelers and assisting them with our expertise. On the platform there will be access to different tools that will enable them to make the most of their experience:

• **YOUR LOCAL EYE** puts the traveller in contact with locals to enjoy the attractions of the chosen destination. Activities, restaurants, excursions, accommodation and trips will be available on the platform. A tool that promotes local players to intensify the immersive and authentic Teletravel® experience.

• Finally, to assist the teletraveler with their teleworking in situ, we have created **MY DESK AWAY**. This is a platform that puts teleworkers in contact with infrastructures (hotels, restaurants, bars, camp-sites, etc.). Searching for places for teleworking will now be made easier by this tool, a VIP experience for users with access to advantages.

Recently, we have lived through what is perhaps the first truly global event and nobody can foresee the consequences that this health crisis will have on our behaviour.

The sudden shutdown made us rethink our relationship with travel and also with work. The temptation to shut yourself off must not be the only alternative to a return to "normal" and a type of tourism that does not care about the environment or local populations. Giving meaning to your work, feeling yourself progressing on a professional level and having a good work-life balance were already major needs before the crisis, they will probably become imperatives in the future.

Our ambition with Teletravel is to contribute to building a world that is aware of the climate emergency, the importance of well-being at work and where encounters do not have a negative impact on the destinations visited.

The era of road warriors is over, make way for work/life balance!

Raphaëlle Borneuf | Founder of Bonport

At the time of COVID and teleworking, finding a better balance has become a priority for most working people. When it comes to travel, what most professionals want can be summed up as: travelling less and better. Services for travellers now need to adapt to their lifestyles, and not the other way around.

The idea behind Bonport is that time spent travelling should be by choice and not imposed. The aim is to remove this useless source of stress caused by having to catch up on work, which could have been done whilst travelling, in the evening, at home. We have a conviction: a useful hour saved during the day is an extra hour in the evening to spend with your family or friends. With the crisis, the trends that have been emerging over the last decade and that were behind this innovation have been considerably strengthened and now affect a far broader scope than business travel.

Greater mobility in working methods

Mobile working methods were until now the domain of freelancers, managers whose days are punctuated by meetings, and professions that are mobile by their very nature: sales reps, consultants, network managers, etc. Now they affect almost all professions where teleworking is possible.

There will no longer be one place of work but a multitude of places where we will go during our working days.

Due to companies reducing the size of their offices, an increasing amount of time is being spent working outside the usual working environment. We do of course spend a great deal of time at home, but the new aspect also creates new mobility on a daily basis: going to business meetings outside corporate meeting spaces, meeting up with colleagues, going shopping, spending time at a second home, etc.

Increased times of connectivity

At the same time, video conferences have become part of our daily lives and now determine how our days are organised. This is true whether you are at the office, working from home or travelling. And in the future it will be hard to imagine a day without it.

Less acceptance of wasting time

With lockdown and the adoption of teleworking, employees and employers have got a taste for days with no down time. This results in people questioning the way that time is traditionally spent in a day (time spent in transport, time spent in meetings, etc.). The challenges of achieving a seamless organisation and optimising our time have become essential: we are entering the era of useful time.

Photo credit: Bonport

"Bonport was founded with the aim of allowing travellers and people far from their office to make better use of their time. More seamless days and more time for yourself."

The quest for personal time

Already, in 2016, a study by American Express Global Travel revealed that a desire for a better quality of life was a priority for business travellers. With the COVID-19 crisis and work entering into the private sphere, this trend has literally exploded. This has necessarily had an impact on how we approach business travel: the time of the road warriors is (definitively) over.

At the centre of the new lifestyles of working people, those who work in business travel have a role to play in developing innovative services and infrastructures to assist with these changes and to help to make them smooth. This represents a great opportunity to create value and to have an impact on our companies.

Photo credit: Bonport

Bonport is the premium provider of self-service tranquillity bubbles.
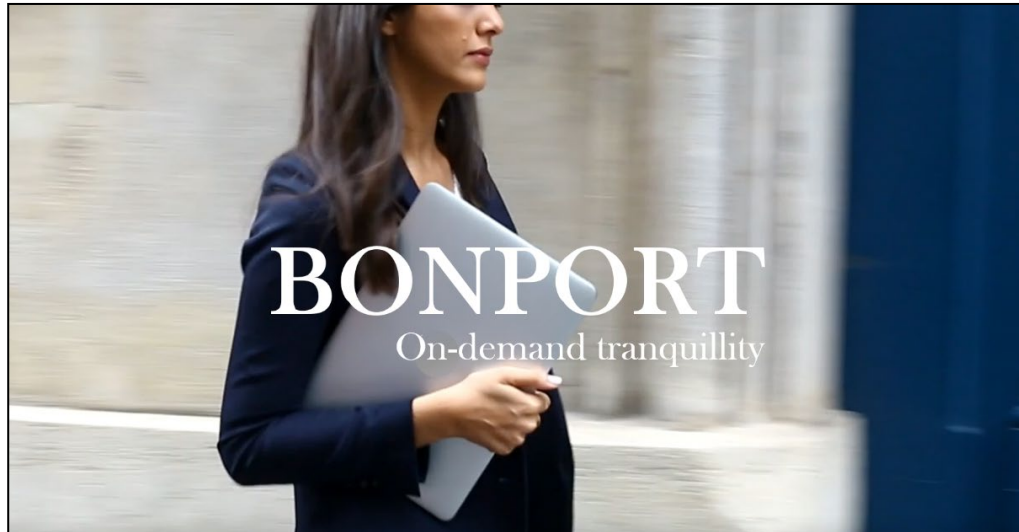
Photo credit: Bonport

Bonport, tranquillity on demand

Welcome to the era of useful time! In the centre of towns and stations, Bonport Business Lounges are a solution to the difficulty encountered by professionals when they travel or when teleworking: finding a quiet and high quality place where they can connect to a conference call, organise a meeting or just concentrate, without having to go far away.

A self-service individual space

With its new kind of business lounges, with "bubbles" that can be booked for one or more people, Bonport is creating a new format of work space that is easy to access, high quality, user-friendly and offers 100% tranquillity.

Every day, professionals can install themselves in the bubble of their choice to work for a moment, before continuing with their day. What we offer: a place to connect to a telephone conference, hold a confidential meeting with a customer, make professional calls, and simply a quiet place to work.

Environmentally friendly business trips

Ideally located, the lounges make it possible to meet up directly at the station and therefore to avoid wasting time on any additional travel. Our clients say they save on average one hour thanks to their session, the time that they would have spent travelling if this service did not exist. An approach that benefits the users, their employer and the planet.

The experience

Bonport offers lounges that are both chic and informal with a stylish and friendly atmosphere. The ambience was created by a pair of specialist architects from the luxury segment of the hospitality industry. The atmosphere is resolutely upmarket and friendly.

The service is available in stations and is growing in town centres. Numerous new sites are planned so that we can offer a Bonport lounge in all busy and travelling areas.

www.bonport.com
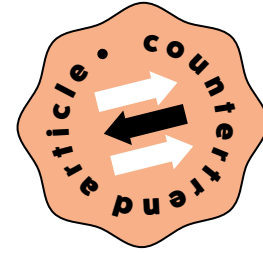
Teleworking: reconsidering how we live?

Philippe Duhamel

Lecturer in Geography at the University of Angers and Director of the GIS Etudes Touristiques

Teleworking is a practice that has been imposed on a large number of employees due to the COVID-19 pandemic. Although to begin with it may have appeared pleasant to those who had a work space at home, there was an immediate problem for employees with smaller living spaces, accentuated by the presence of children that were at home due to the closure of schools.

However, everybody agrees that this practice of teleworking was new or even revolutionary. The scale of this way of working was certainly unique and vast, but it was imposed and for many was a real constraint. The question is whether it will continue after COVID and wondering whether teleworking is a novelty or a gradual but unavoidable change in new relationships with work and places of work (the office) that have existed for working people for a certain amount of time already?

In that case, COVID has not so much revealed new professional practices and new lifestyles, or a new way of living in the world, but rather accelerated trends, as crises often do.

Indeed, the issue of teleworking, or working from home, fundamentally poses the question of people live and how the reside in particular places that some geographers such as Jacques Lévy and Michel Lussault have studied, namely "the spatialities of individual actors" (2003).

Teleworking: a spatial revolution?

Traditionally, either in agricultural or industrial societies, each individual lived in the place where they worked in a relationship of proximity that was evident and even built as a system of control for the workers: going from the mine or the factory home without going past a service (a bar) that could give rise to places for discussion and possibly for opposition to the established economic and political order. However, at all times, the economic and political elite lived and worked at home, with an office, lounges (that could be considered as meeting rooms) or libraries to conduct their work and meetings. And in modern times, teachers, university lecturers or researchers are people who have a work space at home and that only go to their place of work on days when they teach, for seminars or meetings, and/or may not go there for long periods, whilst drafting an article, a book or correcting students' work, or whilst on an assignment abroad.

For all of them, working at home means having a dedicated space. This means making an investment to have an additional 10 to 15 m² to install an office. Moreover, this also means not being in contact with the outside world (going out every day or seeing colleagues). A form of isolation is part of these professions. This dual logic (having an office/isolation) explains the great difficulties experienced today by some employees in working and living in the same place over a long period.

The tertiary society, which has been emerging for half a century, has profoundly called into question the ancestral lifestyle by progressively separating the residence and place of work, and leading to a first spatial revolution: the travel time between the
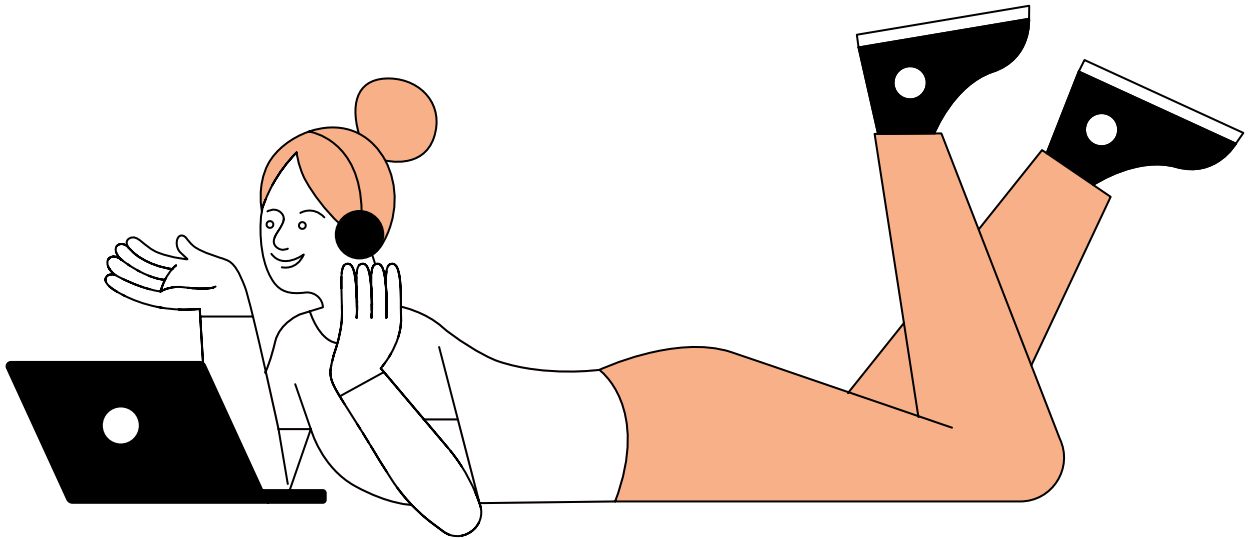
place of work and residence has constantly increased and the unit of measurement became "the duration" and not "the kilometre". The popularity of cars and the construction of fast roads along with the development of the public transport networks made it possible to increase the space-time between people's place of work and their place of residence. These rationales vary greatly depending on the size of the towns where workers live: the time spent travelling by workers in Paris and Anger are not of the same duration or over the same distances. These developments also brought about another change: the radical dissociation between the places that were until then the same. In France this gave rise in the 1980s and 1990s to the expressions "*turbo-prof*" [turbo teacher] and "turbo-cadres" [turbo executives] to refer to people who lived with their family for part of the week in a little town in the countryside whilst their job was in a large city or Paris some distance away.

Teleworking: the result of new technologies?

New developments required new innovations: ITC. Embodied in France by fax and Minitel in the 1980s, then accentuated by the progressive distribution of laptop computers and mobile phones, they are a necessary tool, but were not sufficient to give rise to teleworking. These tools made it possible for workers to live in one place and work elsewhere for a few days, such as professional event organisers met in 1993: living in the village of Deia in Majorca, they organised a whole series of events at a distance on the Iberian peninsula and went on site a few days before they took place.

But the digital revolution of the noughties made it possible to cross a new limit: the internet, social media and the digital communication of any document facilitate these exchanges and interactions. We can maintain a bond without being together in the same place. Applications like WhatsApp or WeChat make it possible to communicate from far away for little cost, tools like Zoom / Teams

shrink distances and compress time: everybody can try a feeling of power, of ubiquity because we can be everywhere, whereas before, distance and travel time forced us to choose.

Now; with all these tools, our home becomes a place from which we can have access to the world (the world that each of us has built through their professional and personal relationships). And finally, everything is not so bad, all the same… So why stay and live where we are? Especially when it is a large city that many people find noisy and polluted, and even a source of anxiety for some? It is possible to imagine another way of living, elsewhere. Which is why towns close to Paris and tourist destinations are becoming desirable and appealing. For the latter, after the arrival of temporary inhabitants (tourists) and permanent residents (people working in tourism), came new temporary inhabitants (business travellers and students) and new residents: former tourists who have come to retire and live in the land of their holidays.

Thanks to the health crisis caused by COVID-19, a new phase of making tourist places or medium sized towns increasingly residential seems to be commencing. This will only affect those who status or role is compatible with this new way of living.

"Workation": the new frontier for tourism in Italy

Fabiana Sorrento

Manager Digital Innovation and Monitoring - Atout France in Italy

The pandemic has imposed changes in everybody's daily life and has shaken up economic and cultural balances all around the world. The tourism sector has suffered the most. We have seen a dramatic collapse in short stay tourism and, with the uptake in agile working, also felt the need to combine work and private lives. All of this has caused us to rethink traditional holidays, which have gradually transformed themselves into working holidays or ""workations".

In Italy, the combination of holidays and work has been confirmed once again for the summer of 2021. According to the preliminary analysis by the Observatory of Milan Polytechnic and Ranstad Research, over the next few months, agile working could be of interest to an audience of 3 to 5 million workers as, during the most severe phase of the pandemic, it helped people to combine productivity, safety and the balance between their professional and private life.

As restrictions are eased and it becomes possible to travel around Italy and different countries around the world once more, teleworking is also changing from a necessity to a new way of working. Thanks to technology and digitisation, a large number of people (mostly Millennials) also work at the weekend and say that they are prepared to work during the holidays. A recent study in Italy on the portal Italianway showed that 35% of holiday bookings for summer 2021 involved working holidays. There is a preference for leasing apartments or villas for medium to long periods, or around 3 weeks, with specific equipment: a fast and unlimited Wi-Fi connection, the availability of a private working space. The aims is to alternate between working or studying and times of leisure and relaxation.

Many hotels and accommodation structures have also equipped themselves to meet this need by offering their customers specific services: small quiet offices, a Wi-Fi connection that goes as far as the beach and covers external areas, and a baby-sitting service for children, to mention but a few. For example, VOI Hotels, the hotel chain of the Alpitour Group, decided to launch the "Smart Week" package : a week's holiday designed for people who do not want to disconnect from work. A high debit connection in the bedroom, a "pocket lunch" delivery to eat in front of their computer, free use of scanners and printers, a delivery and pick-up service for documents and packages, a coffee area, and rooms prepared in specific places to allow for concentration and ensure more peace. Another interesting offering comes from the Accor Group, which also shows how hotels have stepped up to the challenge of transforming themselves into what customers need and exploiting everything they have to offer. With the "Relax & Connect" package, you can enjoy the calm and comfort of a perfectly equipped hotel room during the day, from 9 am to 6 pm, and customise your own experience by adding breakfast, a snack, a special meal and a moment of relaxation in the spa or pool.

Teleworking with the family

There are also those who decide to take the family on holiday, even if they are not themselves completely free of their professional obligations; so that their kids can have a break after being bored at home for so long. A number of family hotels have equipped themselves ready for this possibility. The "Club del Sole" family resorts, for example, offer "Smart Holiday Villages", packages where certain spaces have been turned into the ideal places to work in a quiet environment whilst your children have fun. A key condition is the childcare or babysitting service for small children whilst their parents are working.

Teleworking during the holidays for sustainability and the economic recovery

The Italian company Italianway has made sustainability its battle horse by giving a new life to Italian people's unused second homes (not only in popular tourist destinations but particularly in less well known parts of Italy). It has launched an online "holiday working" platform, which is the first Italian OTA for house sharing, to use hi-tech to promote small towns and villages that can play host to those who are fleeing the big cities, so they can continue to work during the pandemic. Families and groups of friends have changed how they travel, their destinations and the types of accommodation that they look for to meet their professional needs, and the upside of the uncertainty about transportation, which discourages people from taking long journeys, is that people are discovering regions that were not traditionally tourist destinations but that are now becoming so. This virtuous circle has made it possible to renovate old houses in many places, to encourage investment in regions, to repopulate destinations outside the big tourist flows, and to relaunch local economies and the job market. Finally, all this also helps to make holidays less seasonal, encouraging accommodation structures to be widely available and therefore offer better prices.

Piedmont (VisitPiemonte) is counting on teleworking to increase the number of tourists by up to 400,000 night stays per month, starting from the consideration that by hosting just 0.01% of the population of six countries from the European Union with cold climates like Belgium, Denmark, Germany, the Netherlands, Norway and Sweden for a stay of one month, tourist resorts could have an increase of half a million night stays, which could double if France, England and Finland were added to the list. The solution would also have a positive impact on the rest of the tourist chain, such as restaurants and travel.

Examples of virtuous municipalities

Several municipalities have equipped themselves to offer interesting opportunities. One of the best examples is Santa Fiora, which is one of the most beautiful villages in the Tuscan Maremma. In an effort to repopulate the village it has been entirely cabled to offer high bandwidth connections and the local authority offered to cover 50% of the rental costs for stays of two to six months. A unique opportunity to enjoy slow living without giving up on digital technology.

Different initiatives have emerged on the wave of workations in villages, such as Borgo Office, an online platform where users can book holidays on farms and agritourism sites, with the possibility of teleworking surrounded by magnificent, historical and natural landscapes. In this case, the accommodation is free but the visitors support the structure by purchasing local products or packages of experiences created in the host villages to help boost local businesses. To offer another example, a few kilometres from Milan, at Franciacorta, you can work in the vines, surrounded by one of the most evocative landscapes in Lombardy. At Agriturismo Corte Lantieri di Capriolo you can choose to work in one of the spacious bedrooms, some of which have a lounge, or in one of the elegant communal rooms, or even, weather permitting, in the open air on the terrace or in the garden. At the end of the day, a gastronomic meal with typical local dishes is served in the establishment's restaurant.

Getting away from crowded cities for a breath of fresh air, if just to be in nature for a while, is a proven way to boost creativity and productivity. Because waking up in the place where you work already saves time. Time that you can spend on yourself, by meditating, practising yoga or reading a new book every day and developing your own routine freely.

The start-ups that are restarting tourism

The Italian start-up Up2You has launched Work Your Way, an online platform that offers employees the possibility of purchasing customised travel packages to allow them to spend long periods of teleworking (1 to 12 months) in little known Italian tourism spots; they can enjoy the pleasure of travelling in a slow tourism vibe, filled with select experiences, which they can enjoy in their spare time. They can discover secondary destinations, in a pleasant environment, which they do not have the time to visit during the traditional holidays, a more authentic reality that is more closely connected to the area, whilst also enjoying a new experience and an ideal setting for concentrating, living in nature, visiting the neighbouring artistic towns or discovering the landscapes. As a travelling employee, you can build your package by selecting the activities you prefer to be sure to be able to "Work Your Way".

Companies play a key role, with the capacity to offer packages in their Corporate Welfare packages. By promoting these initiatives, they obviously give themselves a positive image and help to increase the productivity and commitment of their employees. The most virtuous can also co-finance these packages, with the possibility of selecting specific training courses such as team building events, networking, yoga sessions, etc.

Work Your Way has the potential to create a particular value for the tourist sector: longer stays during the off season, less known destinations, targeted segments with large disposable income, slow and not mass tourism, are just a few of the assets that can support tourism during its recovery and help to relaunch it.

DID YOU KNOW?

CCI France Italie supports the ecosystem of French and Italian start-ups

CCI France Italie is the first French-Italian business network that brings together more than 300 companies based on an active and dynamic community of around 5,000 direct contacts and more than 20,000 contacts around the world, through its connection to the CCI France International network.

The Chamber's initiatives are particularly concentrated on the activity of its themed Clubs. These include the Start Up Club, which is a real hub to aggregate Italian and French start-ups with the aim of assisting them in the different phases of their development and in positioning on their respective reference markets.

The Club's programme includes webinars, training courses, meetings for start-ups and Innovation Managers from key accounts with the aim of encouraging Open Innovation processes.

The Start Up Club also organises two live stream B2B days to introduce start-ups to big companies.

The session on 29 April involved 26 big companies and 74 start-ups with a total of 290 speed dating introductions. The 48 managers from the big companies involved in the B2B introductions are part of a vast and diverse number of sectors such as: transport, luxury goods, finance, tourism, energy, food processing, and services. For their part, the start-ups offered the big companies products and/or services in the fields of Digital & Martech, Foodtech, HRTech, Fintech, Healthtech and even Biotech. The aim for the start-ups and big companies is always to create advantageous partnerships and to do business.

The third Bridge meeting is planned for 17 November this year.

French people's holidays in 2021
The impact of the health crisis on how the French behave

SURVEY © IPSOS | ALLIANCE FRANCE TOURISME

Nearly a quarter of French working people say that they will probably resort to teleworking during the holidays, either by leaving for their destination earlier or by having a workation.

Resorting to teleworking during the summer holidays

Setting off for their holiday destination
before being on leave

22 %

70 %
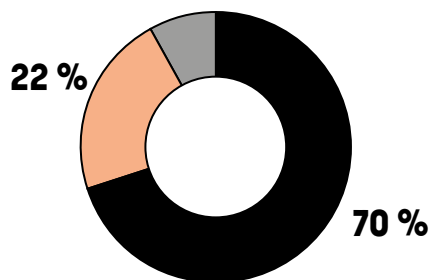
Working from a different place
to change mindset

25 %

67 %

- Likely
- Unlikely
- Don't know
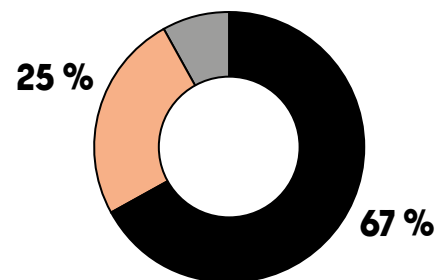
How likely is it that you will do the following things this summer?
Base: Working people who intend to go away this summer (518 respondents)
©Ipsos I Alliance France Tourisme - Intention of going on holiday - 2021

Almost half of French people think that the flexibility offered by teleworking can have a positive impact by smoothing out going on holiday. They are however far more critical about the potential impact it could have on ticket prices

Opinion on teleworking

The growth of teleworking will make it possible to limit traffic jams on roads during big days for going on holiday, as the times when people can leave are more flexible

49 %

36 %
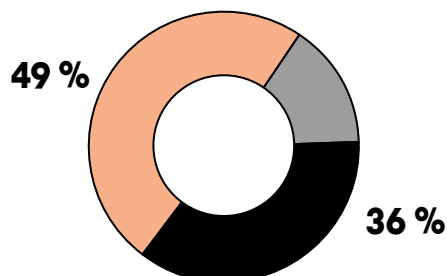
The growth of teleworking will make it possible to reduce the price of travel tickets (planes, trains, etc.) as departures will be more spread out

27 %

54 %

- I agree
- I disagree
- Don't know
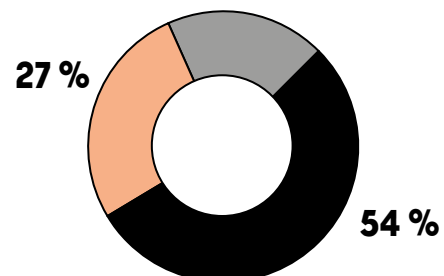
Here are some opinions that people can have about teleworking. To what extent do you agree with each of them?
Base: All (1068 respondents)
©Ipsos I Alliance France Tourisme - Intention of going on holiday - 2021

New business models for cultural events?

The pandemic led to a shutdown of everything related to events: exhibitions, trade fairs, shows, cinema screenings, festivals, etc. The cultural events affected by the health crisis had to reinvent themselves and therefore change their business models to adapt to the new post-COVID challenges.

During the crisis, this sector was able to provide new offerings: an increase in online offers, visiting exhibitions remotely, hybridisation, etc.; museums, festivals, and cultural events continued to present their offerings, but in a new way. At the same time, this crisis has also revealed to what extent, by creating moments of bringing people together around shared reference bases, culture, whether in terms of the performing arts, music, film or art in general, is an essential social glue.

Digital technology dictated the configuration of new business models in large parts of the cultural sector. These new models were already shaping the economic landscape of the cultural industry, but the crisis has accelerated this phenomenon due to the impossibility of attending a cultural event in person. So, what will happen to these events in this post-COVID world?
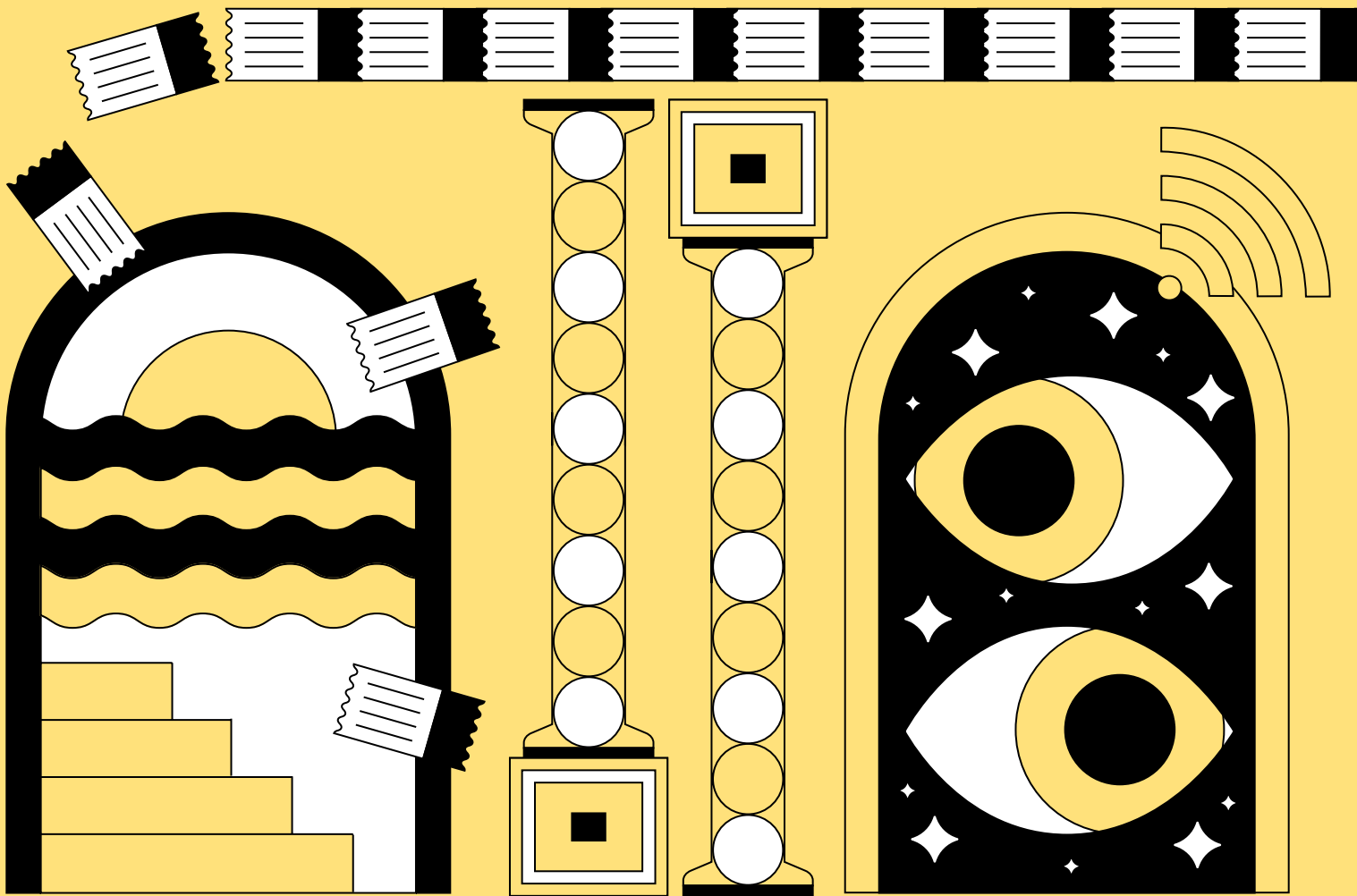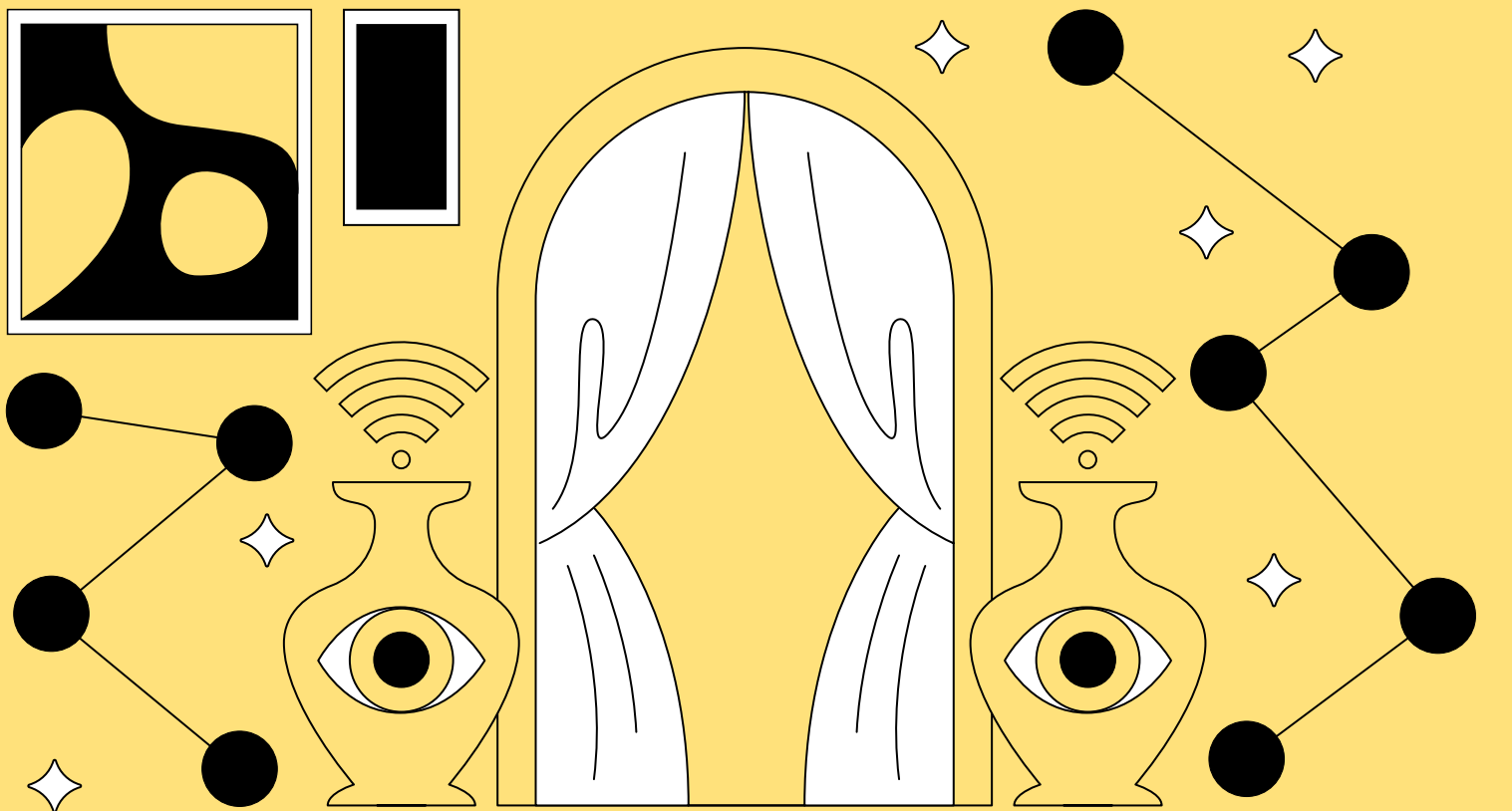
Cultivating Culture as a Rhizome

Roei Amit | **CEO - Grand Palais Immersif**

The new developments in culture combined with new business models; a few examples of how to cultivate culture in a changing world

In Latin "*cultura*" means living, honouring, working, cultivating—the very essence of human activity—the creators and the audience, events and institutions in particular, all of the stakeholders in an ecosystem that are changing over time. This characteristic of always being subject to a context means constantly adapting and changing—particularly at the present time—on the fringes of a global pandemic, a galloping digital revolution and faced by hot ecological and social issues. In this world of fast paced change, we need to continue to work on culture; in a rhizome like way.

The Rhizome concept by Deleuze and Guattari refers to structures that are constantly developing in different directions and in an interconnected way—which allows us to ask the question of business models where solutions can only be diverse, hybrid and varied.

The advantages of being online

The months spent in lockdown and the closing of cultural sites increased the pace of the development of online cultural offerings greatly. Well before this crisis, culture had already begun to come online, since the emergence of the channels and terminals that have multiplied over recent decades (PCs, tablet computers, smartphones, headsets, etc.). This deployment has nevertheless not given rise to new income for some major cultural sectors, but has more generated costs. This development was conceived in particular from the angle of mediation, promotion and communication. Being deprived of their usual economic model, based in particular on the appeal of the location and the values of the activities on-site, museums, theatres and other performance venues needed to find new resources.

By offering innovative and adapted online productions and editions, models based on individual purchases or subscriptions, like VOD and SVOD, are starting to come to museums. Visits to exhibitions and heritage sites, independently or with a guide, in 360° mode or with an interactive video, have come about in recent months, for example visits of heritage sites of the CMN (French centre for national monuments), Museums of Paris, the Giacometti Institute or the Cité du Design de Saint-Étienne, to name but a few. But there have also been series of lessons and conferences that people can subscribe to on a one-off basis or for a season. The "Noir et Blanc, chefs d'œuvres de la photographie" exhibition, which could not open at the Grand Palais found a new audience online, for independent visits of the digital exhibition, accompanied by an audio guide or through a live encounter with a lecturer before or after the visit.

Another format that is being used is live tours of Versailles Palace or the Grand Palais, which is closed for works; original tours that offer unique access and views of places that are inaccessible, sometimes even when visiting on site. The fact that the guide and the visitor are online at the same time makes it an appointment—a destination in time—which contributes to creating value and makes it exceptional.

The commitment of an audience who pays for their online "entrance" considerably increases the time spent on the web page. The geographical and international range is greater, sometimes even in different time zones. In addition to one-off payments there are also subscriptions; for example, thousands of people signed up for a season of online art history lessons. This package was added to the offerings of face-to-face lessons on the one hand and on the other hand complements the series of free MOOCS to teach people about art history (see the Grand Palais website: www.grandpalais.fr).

Other paying offerings came into being, like live broadcasts or playback of live shows, concerts or plays, such as those by the Paris Opera. This recent step, where online offerings can have an economic value in addition to their symbolic value, is an important development.

This change in the model and source of income will continue even after the crisis, with increasing diversity and varieties of operating models, which will continue to multiply, and that must find their place in the landscape of online offerings—much like

OTT media services in relation to cinemas and the audio-visual industry. And yet, this context of highly competitive offerings, which is in hyperbolic expansion, obliges players in the cultural sector to find their place and the elements that set them apart. NFT (Non Fungible Tokens) could represent new resources even in addition to the original digital works. This new process could give rise to editions and productions where tracking their authenticity and their uses through Blockchain will develop new practices; which could diversify revenue sources for artists, creators and institutions, even if the configuration of this market is yet to be defined.

The online market is, by its very nature, disparate and dispersed, multiple and hyperbolic, it is in itself a rhizome; the context of the hyper offering does not in any way offer a single solution or a new model, but it opens the possibility of multiplying and diversifying resources, creating rhizomes for hybrid models. The development of online cultural offerings is evolving from its secondary position with regard to the main offering, it is now considered as an integral and integrated part of the models. At the same time the values of the institutions are still there and represent an important differentiating factor; they may help to make offerings unique and add more value to the digital aspects—a rhizome that is physical and digital at the same time.

Extensions of the in-situ domains

Physical places have not disappeared as a destination, an attraction and an important source of value... On the contrary. The "everywhere and all the time" aspect offered by the internet also enhances the values of the "here and now". In-situ remains a pivot, a true magnet, but one that is increasingly mobile, with digital appendages online— physical and temporal presence is a safe value that interlocks with the potential of digital technology. The Palais Augmenté [Augmented Palace] Festival that took place

in June 2021 at the Ephemeral Grand Palais on the Champs de Mars by the Eiffel Tower is an example. "Virtual" works, but which were anchored in a space that was empty to the naked eye, created a presence that was just as real, even if they could only be seen on screens.

This first festival dedicated to the new born field of augmented reality artistic creation, was also an example of a new model where an industrial player developing technical infrastructures, a player developing hardware and new participative media come together to support an event and its artists. Another example of the mutation of the in-situ cultural offering presented in a new model is the creation of the Immersive Grand Palais—a subsidiary of the RMN-GP (a joint enterprise between the French national museums and the Grand Palais) dedicated to exhibitions based essentially on digital technology. This is a format that combines immersion, narration and interaction in a physical space on a large scale where the public is invited to explore a range of simultaneously emotional and informative offerings. The Pompeii exhibition amassed more than 200,000 visitors in the summer of 2020 after being presented online during the first lockdown in France when it had over 1.3 million visitors.

The creation of this subsidiary was made possible thanks to a commitment by Caisse des Dépôts and its Programme of Investment in the Future and Vinci Immobilier, who both share the vision of blending the physical and the digital to create new cultural sites at the centre of tomorrow's urban environments. These new hybrids are also at the centre of the "Scan Pyramide" experience from the company Emissive. Members of the public with virtual reality headsets are taken on a guided tour of the Great Pyramid of Giza, whilst remaining physically in Paris (Cité de l'Architecture); a renewed price grid could position this type of visit as being more like a show than visiting a museum. Its exportability also makes it possible to model its profitability over the long term.

The "HoloLens" augmented reality visit of the Gallery of endangered and extinct species at the French Natural History Museum presented by Saola offers another variation, with an experience that blends digital animation and physical observation, in this case with an additional ticket price that is split between the museum and the production company.

The new types of offerings that mix the physical and the digital invite us to think about how business models in the cultural sector can be reinvented; where public and private, start-ups and institutions, work together to develop their models, their expertise and their know-how.

Rhizome

A Rhizome is a means of thinking about multiplicity and the innovation of offerings like the business models that support them. The concept of the Rhizome is that of structures that are constantly evolving, in several directions, which now more than ever deserves more attention, whether it is in terms of content as channels for sharing, under the banners of diversity, hybridisation and ecology.

We need to keep cultivating culture and inventing models, associations and interconnections that are bold, intentional and with a sense of responsibility, so that a constantly shifting culture can continue to live in us and be better shared with as many people as possible.

Immersion as a new model for experience

Tristan Desplechin | CEO & co-founder of Dream Factory

Dream Factory is the first immersive cinema experience in France, creating events that are somewhere between film, theatre and video games. This article offers a reflection on the new business models for cultural events and how they have changed over recent years, taking into account the influence of COVID in particular.

The Experience Economy

The experience economy was first written about by **B. Joseph Pine II and James Gilmore*** to describe the fact that people's desire to have memorable and striking experiences has an impact on all economic sectors. The cultural sector is no exception. Cultural experiences are more user-friendly, smooth; digital technology makes it possible to better prepare your visit, to augment it, to offer access to more people.

One of the most advanced aspects of this development is the arrival of immersive experiences. The word immersive is now becoming overused. A definition that we like at Dream Factory is the one from UX Immersive, which has done a world tour on the subject and therefore knows it pretty well: *"An immersive experience invites its participants to enter into a creation in which the boundaries between the imaginary and the real are blurred with the aim of having a great impact on their feelings and/or to modify their behaviour**"*.

In the same way that many sectors have an annual report prepared by large consultancy firms, immersive technology has a study carried out by No Proscenium. In their excellent rapport from 2020, No Proscenium revealed the following figures:

● The immersive entertainment industry was valued at $61.8 billion in 2019, before the COVID-19 epidemic (+19% compared with 2018).
● There were more than 775 new immersive projects around the world in 2019***.

The graph below illustrates these major developments:
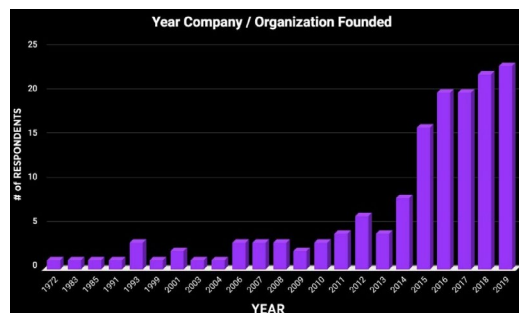
@Credit: Immersive Entertainment Industry Annual Report - Written by Ricky Brigante & Sarah A.S. Elger - Editor: No Proscenium

These projects are mostly carried by the American market.
But, France is doing well with places such as the Atelier des lumières, the boom of escape games (more than 800 centres have been created in just a few years) and the development of immersive theatre.
A report from the CNC**** illustrates how well these new forms are faring.
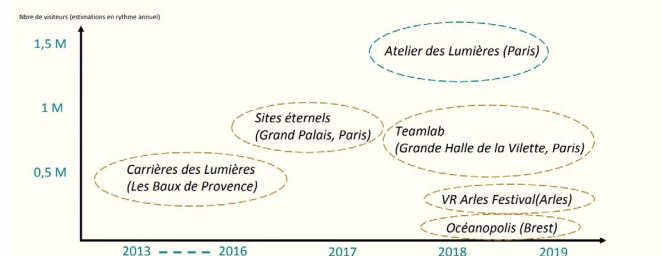
@Credit CNC 2019 - Immersive experiences of new cultural practices in the public space - By Evermind and Fabbula

The arrival of hybrid models

The COVID crisis has greatly changed how things stand by accelerating the development of digital forms. Many institutions have digitised their collections and offered an online experience. To keep a connection with China, the Louvre offered Chinese tourists online visits through a partnership with Fliggy, the Travel subsidiary of the Alibaba Group. More than 380,000 Chinese web users were able to attend the first virtual tour of the Louvre.

Players in immersive theatre also took the step of going 100% digital like the Big Drama Company with *Parfum de Famille*, an immersive online mystery, or Mondes sauvages with an adaptation of Chekhov's The Bear that was staged via Zoom. On the global stage, the success of the virtual concert held by rapper Travis Scott, which was organised by Epic Games, amassed more than 12 million simultaneous participants, a record for an event of that kind.

Business models that are still under construction

However, the COVID crisis has not really brought about any real business model for these formats of 100% digital cultural events, nor confirmed any real desire from the public, except of course for video games, a real boom industry that is digital by nature. The figures for the reopening of cultural spaces shows a major desire from the public to reclaim them and how much they missed these venues.

However, digital technology has opened up new outlooks (access to a bigger audience, customising experiences, easy access for a young audience, etc.). Hybrid formats are also beginning to emerge. The current sanitary situation that remains complicated and the fact that fewer and fewer people are inclined to take a plane***** and travel to limit their carbon footprint will open up new opportunities.

So how will the sector develop?

Dream Factory's vision

At Dream Factory, we aim to make you enjoy your favourite films physically and reconnect with your imaginations. Somewhere between the worlds of film, immersive theatre and video games, Dream Factory offers events that combine the performing arts, technology and new stories.

The Dream Factory experience means that you do not just watch a film, you live in it; it offers you the possibility of interacting with the characters in the film, to observe them close up and to discover facets of the story that nobody could reach before. At Dream Factory, we believe in hybrid models, where physical and digital experiences rub shoulders.

A few practical illustrations:

Before the experience opens, a pre-experience introduces the world of the film by mixing digital narration with ephemeral physical experiences. The digital experience offers the possibility of creating your character and to dive into the story. Participants are able to talk to the characters in the film, who have accounts on social media. Using deep learning tools, AI Dungeon type chatbots make it possible to explore different facets of the story and to create open and unlimited plots. Some stories invite the more adventurous to physical places (Alternate Reality Game) for exclusive interactions that make the collective narrative progress. The aim of this pre-experience that combines the digital and the physical is to no longer be a spectator, but to be emotionally and physically involved to become a participant in the experience. During the main event, we offer a hybrid experience:

- Physically for people who are present on site and who can, for an evening, explore the world of a film.
- A digital experience for people at a distance; who can participate in the experience and influence the story.

Our aim is that anybody who wants to can participate in a Dream Factory experience, even from the other side of the world, can do so and interact with the participants who are physically present.

In addition to the immersive experience, we will offer debates and conferences, both online and in person, with sociologists, philosophers and big name journalists about themes from the film to prolong the experience and to ask questions about society through the prism of film.

In conclusion, the outlook for the industry is vast and there are an infinite number of possibilities opened up by these different channels. At Dream Factory, we are supported by an ecosystem of technological partners and companies from the performing arts to offer the participant the richest experience possible according to the chosen film and universe.

* Pine, B. Joseph II and Gilmore, James, "Welcome to the Experience Economy," Harvard Business Review, 1 July 1998
** Qu'est-ce qu'une expérience immersive ? UXmmersive - 15 October 2018
*** 2020 Immersive Entertainment Industry Report No Proscenium 9 June 2020
**** Expériences immersives, des nouvelles pratiques culturelles dans l'espace Public - CNC - 2019
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Festivals: making requirements and the spectacular work together

Aurélien Dubois

Chairman ROKH and Constellation
Chairman of the Chambre syndicale des lieux musicaux festifs et nocturnes

If we take a moment to consider the definitions of festivals proposed by researchers, public institutions, private players such as Emmanuel Négrier who sees each festival as an *"event that is limited in time and space, offering a programme that is centred around a theme, a look, an instrumental practice or any other cultural and artistic intention, associating the idea of a show and a festive event"*, and if we attempt to lay the foundations of these cultural objects, it is easy to understand the difficulty of grasping this subject in an absolute and unique manner.

There are many festivals, with as many aims as their associated social and corporate functions.

These complex cultural objects are part of our history and everybody's personal story. Although they come from many origins, Pascal Ory reminds us that it was during the 20th century that they really took off. They rapidly became an original symbol of expression for a territory like the cultural sector. Today, festivals offer limitless potential but their survival in the long term often proves hard.

Trend #1: Independence

Festivals have been particularly supported by successive French governments and have developed largely thanks to public grants. This has been a precious help that has embodied the treatment that the political world has offered to Culture and artistic creation. Wavering between defending culture and its innovative development, the political cultures have broadly influenced the construction of the business model of festivals. Governmental assistance obviously has advantages and limits: whilst financial support for the development and staging of cultural events allows these structures to promote talent and to reveal it to everybody, the structural conservatism of the economic reasoning that comes from this model of public grants has repercussions both on the budget and on the content of an event.

It must be stressed that public investment in culture has fallen significantly: between budget cuts and a desire to support as many events as possible, access to the precious grants has become more complex although economic dependency remains high.

Logically speaking, the role of these grants now needs to be limited, not by reducing the role of cultural policies, but by encouraging independence through the diversification of resources and expertise. This may seem complex to implement, but we have good examples to inspire us: Hellfest is a model for independence from grants: the festival finances itself almost 100% with just 0.1% of public grants in 2018.

And although for some making it work takes time, the Arles Photography Festival or the Mawazine Festival in Morocco took 10 years to be able to get by without a grant, independence seems to be the ultimate source of satisfaction. Mawazine is also an example due to its capacity to have reduced the space for private sponsors and still have existed with no public grant in 2012.

Trend #2: Openness

A business model based on different types of resources: own resources (self-financing, ticket sales), private funding (patronage, sponsoring, donations of equipment or even fund raising) and public grants. To facilitate the diversification of resources, you need a certain number of skills, which offer the possibility of diversifying. As each resource has its players, its challenges, its codes and trends.

Several strategies are already put forward for provoking a transformation: networking between participants, cooperation and pooling expertise or even creating ties with a region and managing the community. This goes with a necessity to broaden the offering. That is what contributes most to transforming a festival that is obliged to abandon having just one activity. Diversifying your offer can allow you to generate new resources thanks to additional, side products including the creation of new formats that allow you to reach other audiences.

The team from Arty Farty won their gamble by creating multiple offerings and at different levels: from the very local to the most international, Arty Farty has exported the Nuits Sonores to Tangier and Brussels and, has territorial anchoring with innovative places such as Le Sucre or Hotel71. The Electric Daisy Carnival is also exported around the world: USA, Portugal, Porto Rico and even the UK. These numerous installations demonstrate that diversification facilitates both an opening to the world and the renewal of resources. Diversification opens up new horizons, without neglecting the connections with the audience you have already won over and partners you have already convinced.

Trend #3: Awareness

To go even further, now you need to build specific business models for each structure and to make them work for a vision and a reason for being: the future of cultural events must be designed with a virtuous and systemic business model that will make the artistic world and values tangible. We also see an increase in festivals that are positioned to promote ecology, improving social well-being, and the inclusion of excluded audiences. Some players have been raising awareness about these issues for many years, such as the team from the Terraforma Festival that is held every year in the Villa Arconati Forest, near Milan. The teams from We Love Green or Solidays also work in the field to promote good behaviour. And the report from The Shift Project, "*Décarbonons la culture*" (Let's decarbonise culture), which came out in May 2021 recalls that all cultural sectors have a role to play in safeguarding our plant.

But all too often, the reality in the field means that ethical charters cannot really be implemented: administrative delays, competition related to the pricing policy and/or the area, counterparties, etc. often lead to making choices that weaken the consistency between the values and the available resources. Not to mention the difficulty of sorting the waste when the festival is over. In the future, festivals need to be able to proclaim their values and their reason for being at every level. For that, they need to step away from the ephemeral and the temporary, and make their mark in the long term. This will enable them to promote the emergence of new forms and new talents sympathetically and to be in-line with the challenges of our times that are well known to the general public. Their audience will be aware and therefore demanding with regard to the capacity for the actors to take real, committed and socially responsible actions. We need to learn to make environmental intransigence work alongside dreams and pleasure, and the only way to achieve that is through a business model that is demanding and aware of the impacts it may have.
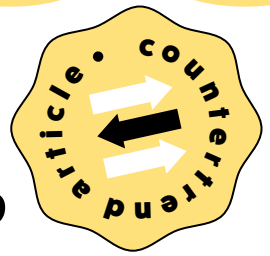
Chartres In Lights, a free of charge model for tourist growth!

Philippe Rossat | **CEO of C'Chartres Tourisme SPL**

Chartres in Lights is the biggest event promoting heritage through lighting: 23 sites are illuminated including Notre Dame Cathedral, the Fine Art Museum, the bridges and wash-houses on the banks of the Eure river, the Theatre, the multimedia library, etc. A free or guided stroll of more than three kilometres around the centre of the city from April to December, 7 days a week.

Free access to human heritage

Chartres Cathedral has been classified as a world heritage site by UNESCO since 1979, in the same manner as Mont Saint-Michel, Versailles, Vézelay or the Decorated Grottoes of the Vézère Valley. More than 1.5 million visitors come to see the Gothic jewel every year, and even more since the fire at Notre Dame Cathedral in Paris: the Cathedral is more than ever the region's key attraction. Since 2004, the City of Chartres has developed the illumination of many more sites and monuments around the Cathedral, with the best lighting designers and technicians from around the world. The staging is partially renewed every year to highlight the history (the founding of the City by the Carnutes, the Cathedral builders, the aeronautical pioneers, etc.), famous personalities from the City (the aviator Hélène Boucher, Jean Moulin, the Prefect of the Aure & Loire in 1940, etc.) or promote the original creations from the Fine Arts Museum for example.

If they wish, each visitor can have a map, an application (which is also free) to help them to find their way around from nightfall until 1 a.m. The choice to make the event free from the outset allows the visitors to enjoy all the charms of the city centre, and the terraces of all the bars and restaurants.

But the tour can take many forms and involve different means of transport: electric bikes, by kayak, with a specialist guide, etc., people can enjoy the experience as they wish and as they feel. And local service providers, including the Tourist Office, enjoy this influx of visitors over 9 months of the year.

Arcades Saint-Hilaire - Staging ©Faune et Flore

An additional 30% of visitors who talk about the city

The hotels, gites and guest houses have all noticed: visitors who once just passed through Chartres now stay for nearly 2 nights (1.8 on average). The fact that the main event is free of charge means that they can devote their budget to accommodation, restaurants, leisure activities—a rope course through trees in the city centre, which is the only one of its kind in France has just been installed and is constantly busy, like the Odysée water park, with its 850,000 annual entries... The city therefore sees a real economic run-off from Chartres in Lights as a wonderful showcase for the city's growth.

During the health crisis, the appeal of the city was enhanced by the 100 kilometre travel limit imposed on Paris, which highlighted the value of the city as a peaceful getaway where the French lifestyle is king. Chartres in Lights continued to be held to offer a beacon of hope in this difficult period. As life gradually returns to normal, Chartres has changed dimension in terms of tourism and appeal. At just one hour from Paris, there are many who go from being tourists to regular visitors, who come for the heritage, the Véloscénie (a route from Paris to Mont St Michel by bike) or decide to join the ever growing family of new inhabitants of Chartres.

Chartres Cathedral - Staging ©Spectaculaires Allumeurs d'images
Photo ©Studio Martino

A spotlight on local development

Far from being limited to Chartres city centre, the phenomenon of Chartres in Lights extends to other municipalities in the area. Thrilling initiatives have come about in Bonneval for example, or in Nogent le Rotrou, capital of the historic county of Perche. At Bonneval, the little Venice of Beauce, you can take a trip down the canals in an electric boat and, in the summer, see the heritage sites illuminated... just as in Nogent le Rotrou, where the magnificent castle of the Counts of Perche is lit up every summer.

In fact, we can see the whole area joining the illuminations, with a virtuous business model: a public/private investment, which is large at the start then gets smaller as it becomes a question of annual maintenance, that makes the area stand out, based on the local history that it magnifies or even "dusts off". What is at stake is the renewal of our rural areas...

After 17 years, on the cusp of adulthood, Chartres in Lights is a shining illustration that a public initiative, supported by partnerships with many private companies, can be durable and grow, offering real economic profitability: technological innovations (LED, 8k resolution) are being included in the development of the creative process, which avoids any risk of obsolescence and on the contrary traces a history of lighting from glass slabs to the latest in hi-tech.

Establishing new innovative business models for cultural experiences: best practices from Quebec

Lorea Goudour	Analyst from the Monitoring network of the Transat Chair in tourism of ESG UQAM
Martin Lessard	CEO MT Lab, incubator for tourism, culture and entertainment

Virtual experiences, hybrid festivals, travelling shows...
During the pandemic, professionals from the cultural and event sectors demonstrated an impressive capacity to find solutions to the sanitary constraints. Some were even able to transform these challenges into business opportunities.

In Quebec, from March 2020, several organisations offered aficionados rich cultural offerings, totally free of charge. In a period of uncertainty and with a temporary outlook, these initiatives appeared as an act of generosity and solidarity, or even resilience. Then, the survival of the companies came into play: the industry understood that getting through this crisis would require a change to its business model.

A boost for virtual reality

Virtual reality (VR) is enjoying a new lease of life. In addition to benefiting from the arrival of affordable headsets and an increasingly diverse range, it offered immersive experiences at a distance.

● PHI VR TO GO: a take away virtual experience

During lockdown, the Centre Phi in Montreal, which is positioned at the crossroads between art, film, music, design and technology, could no longer host the general public on-site. So, the team from the museum offered a service of renting VR headsets, which were available to collect or could be delivered.

The deal was simple: a programme of ten VR works to be enjoyed over 48 hours in the comfort of your own home. When the cultural institutions reopened in the summer of 2020, the PHI VR TO GO project was so successful that the concept survived and a second programme was added. Safe, customised to the users taste and accessible to all, the concept has even been exported abroad. It was available, amongst other places from CENTQUATRE-PARIS.

Source: PHI VR TO GO

● Hoppin' World, social VR

Hoppin' World takes people on a trip to discover the regions of Quebec with 360° videos in social VR. Social VR allows you to be "teleported" in a group to enjoy an emotion, without the feeling of isolation imposed by the headset. This makes it possible to promote cultural tourist attractions before the visit with a guided experience including unique views (e.g. being on stage alongside a musician, flying on a helicopter, etc.). It offers a great opportunity for travel agencies to promote the tourist experiences offered by a destination.

Hybrid experiences

● Satisfying your sweet tooth at home: coopetition at the service of Quebec's folklore

In Quebec "Maple sugar time" is the season when the maple syrup producers start production. Every year when the snow melts, from mid-March to the end of April, maple syrup flows in sugar shacks, where the people of Quebec meet to enjoy a traditional feast. When the pandemic was declared in 2020, these institutions were deprived of their seasonal income. As a second season of lockdown approached, they decided to initiate the "*Ma cabane à la maison*" (My shack at home) project to get financial support in 2021.

Customers could go online to choose a menu devised by one of the maple syrup producers. Then, they got it delivered or came to collect their feast. A musical show, with stars from Quebec, was available on a digital platform to accompany the meal made up essentially of local produce. The concept was a great success and 500,000 boxes were ordered over two months. Several of the participating companies are planning to keep the service running all year and it may even become available in other Canadian provinces. What a wonderful way to encourage the sharing of the culture of Quebec!

● Extended reality (XR) as a hybrid pathway

Prologue is a start-up from Quebec that designs immersive experiences in real time based on localisation. Using augmented reality, industrial vision and sound spatial effects, portable XR content tells stories located in specific areas, both public and private, to extend the experience offered by attractions and public events. The pandemic led Jonathan Rouxel, CEO & Creative Director at Prologue to promote its entertainment platform VoiceTrip™ as a new way to create open air galleries that offer a fun way to discover different places in Montreal in a fun, artistic and entertaining way.

A shifting business model

Catalina Briceno, a lecturer at Quebec University Media School in Montreal, however insists that no clear business model has emerged, in spite of several tests during the pandemic of 2020-21. *"Some practices will remain, online musical or theatre performances, for example, if only to reach fans that were previously unavailable"*. She believes that the general public will want to maintain a degree of social distancing in the short term. *"The people of Quebec and France did not adhere to and apply the sanitary instructions in the same way. Will that mean that the consumption of culture online will take off in a different way in Quebec an in France?"*. Will health anxiety act as a brake or will it drive the economy?

At MT Lab, the entrepreneurs closely monitor this type of new user behaviour. The unexpected success of the start-up 1point6 in 2020 demonstrates this well. In 2019, it dedicated itself entirely to installing physical spaces in trade fairs. In 2020, the company developed "virtualB", a platform of 100% online virtual kiosks that was used for commercial exchanges for export assignments for the Quebec's Ministry of the Economy. How was it a success? It offered the possibility of being together on the platform, without feeling isolated in front of your screen.

But according to a survey by Léger carried out in summer 2020 with visitors to the entertainment district in Montreal (54%) were already prepared to return to a festival when lockdown ended (71% for people under 34). Three quarters of those who had seen online performances did not intend to favour this means of listening if it were possible to get back into venues. Screen fatigue is therefore definitely around and some people are still reticent about paying for virtual content. However, "the fact that a hockey match is on the television does not stop the arena from being full". Therefore, hybrid experiences can be planned to target a different audience and can correspond to a new reality, whilst strengthening social bonds.

Report by Léger - Fréquentation du Quartier des spectacles après le déconfinement 02/06/2020

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Festivals and the COVID crisis, cultural diversity at the heart of the regions and dynamics for development

BY HÉLÈNE PÉBARTHE-DÉSIRÉ, LECTURER - UNIVERSITY OF ANGERS

BEFORE

Festivals, multiple identities

• How many and what type? Around **4,000 festivals** in France, including **2,600 music festivals**[1]

It is hard to put a number on the festivals in France, which are also highly diverse: with budgets ranging from €10,000 to €30 million or more (for example: a budget of €8.5 million for Eurockéennes, a festival with huge returns that was cancelled in 2020 and 2021).

• Considerable regional issues: **between April and September, festivals generate between €2.3 and 2.6 billion**[2] (for hotels, restaurants, technical service provider, shops, etc.). Many festivals offer good, international visibility to very diverse types of regions (urban and rural all over the country): from Cannes to Avignon or even Marciac. The health crisis has had the virtue of demonstrating the importance of cultural and social life in France.

• There are several types of business models for festivals:

- Festivals that operate essentially from their own resources (in particular big festivals like Vieilles Charrues), and ticket sales as a primary resource, which have been placed in great difficulty by the crisis.

- Festivals (of all sizes) whose budgets depend essentially on public grants.

[1] Source: Emmanuel Négrier, from a speech given to the Festivals Convention held by the French Ministry of Culture on 2 and 3 October 2020

[2] Source: Alexandra Bobes, Director of France Festival quoted in Alternatives économiques, June 2021. See also the study published by France Festivals in July 2020: "SoFest ! Empreinte sociale et territoriale des festivals".

DURING

The scale of the crisis and its management

More than a year of closures for shows: from March 2020 to May 2021. A weak resumption in the summer and autumn of 2020 and an attempt to maintain contact between festivals and their audiences using digital technology and audio-visual products could still be seen.

• **Diagnosis of a crisis**

2020: business in the performing arts was only 59% of the activity in 2019[3]

• **Remedies and measures**

In addition to the general measures taken by the State (short time working, increased aid for companies), there was some sectoral aid, such as measures for intermittent workers and ticket sales, as well as public grants at every level in the regions. The issue of increasing in-house resources remains central of course.

• **How much of a recovery will 2021 bring?**

- Mid-May 2021: reopening of the cultural sector with attendance limits of 35%

- 30 June 2021: end of limits on attendance.

From the end of June 2021, concerts could be held with an audience, but this came after several large festivals had already been cancelled.

[3] Source: Alternatives économiques, June 2021

AFTER

What about after the crisis? New models?

The efforts made by the State and local authorities are still central to the solutions: the first edition of the Festivals Convention was held in October 2020 and the second at the end of June 2021.

What are the strategies for future innovations?

• **Strategies for the players:** The festivals are increasing how much they cooperate with each other, consulting on programmes, moderating fees.

• **Promoting online versions:** New business models: these are also new instruments, like promoting online versions. For example: in 2020, the Avignon Festival produced audio-visual content to be exported. In the government's recovery plan: €400 million has been allocated to developing policies to increase culture at a distance.

• **New efforts from venues:** Interactions between festivals and cultural institutions: performances in museums (e.g. Musica Festival, Strasbourg).

• **Development of third places** (e.g. La Halle Tropisme in Montpellier on a former military site)

All in all, festivals are a dynamic world with a great capacity for adaptation. With the assistance of the authorities, they should be able to overcome this crisis, even if the industry has been greatly impacted in 2020 and 2021.

Museums, exhibitions and the COVID crisis: weakening, permanence and renewal

BY HÉLÈNE PÉBARTHE-DÉSIRÉ, LECTURER - UNIVERSITY OF ANGERS

During closure

- Closures and losses
- Closed museums: 6 months for the Louvre in 2020 with a drop of **72% in the number of visitors compared with 2019.** (Alternatives économiques, June 2021)
- A de facto reduction in income.

The crisis as an opportunity
- Innovations to maintain a connection with the general public
- The increasing role of digital technology, places and exhibitions to visit online
- Communication via social media

Reopening but also restarting

- There are 3,000 museums in France and only a few hundred are private.
- Losses have been compensated for by the State and/or local authorities for national museums (exceptional grants).
- The museums in Paris have been hardest hit by the crisis as they depend more on tourists than museums elsewhere in France.

Making the recovery a success
- At the end of June 2021, full reopening (with no attendance limits) for all museums. Previous attendances must be matched: the digitisation of exhibitions did not compensate for the losses. **€10 to €20 for an entry ticket for the real museum compared to €3 or €4 online**.
- Loss of income for shops and museums as well, and for catering outlets.
- Teams on the sites have high hopes for full reopening: performing well, restarting the machine, particularly thanks to in-person visits and events.

Restarting, does it mean changing?

A durable model…
The model for organising events will doubtlessly remain very close to how it was before:
- Planned exhibitions have been pushed back (with additional costs related to the unnecessary transportation of works, new programmes to be prepared)
- Continued efforts from authorities (the State and local authorities) and patrons
- Increasing use of own resources (moving from 1/4 to 1/3 of the total resources for big national museums): this idea was already around before the COVID crisis and has been enhanced by it.

But there will also be changes:
A move towards greater proximity?
Did the crisis have indirect environmental benefits? Moving towards a new balance between temporary exhibitions, which often require a large number of works to be moved, and promoting permanent collections[1].
All the more so as the global cultural model has been showing its limits in recent years[2]: large exhibitions that tour around the world are very expensive in terms of transport costs and insuring the works.

Digital technology, which has been omnipresent throughout the crisis, as an opportunity for the future:
- To go and find new audiences: far away (abroad for example), with reduced mobility (handicapped people for example), younger people and/or those who are not in the habit of visiting museums
- To create a more continuous connection with audiences from the world of education
- To enrich the connection between the general public and the offering: completing or repeating a visit, taking out a subscription including a virtual visit or even entirely virtual visits to exhibitions, offering specific online products for sponsors and patrons (conferences and/or reserved tours)

[1] Source: Juliette Raoul-Duval, Chairperson of Icom France (Icom: International Council of Museums)
[2] Source: Jean-Michel Tobelem, "Le nouvel âge des musées : les institutions culturelles au défi de la gestion", Armand Colin, 2010.

Looking for new business models for the events sector

Véronique Renard | Manager of the hospitality.brussels cluster at hub.brussels

During the health crisis, many companies had no choice other than to switch quickly to virtual methods to stay in touch with their target. What will the events sector look like in the future?

The best of both worlds

Coronavirus, accelerating new uses of digital technology

The fact that a good part of the planet was put into quarantine shook up the events sector. In a few weeks, companies and professionals in events "MICE" had to rethink the organisation of their scientific conferences and international symposiums, reconsider their training seminars and reinvent the format of their exhibitions and trade fairs. Digital technology had of course already entered the scene before the health crisis, but it was never at the heart of an event. In a record time, video conference services made it possible to attend 100% virtual initiatives all around the world, and often free of charge. With access to high quality speakers, and the risks of infection and travel costs reduced to nothing, plus optimised working time... the advantages of online versions quickly conquered our screens. However, over the following months, the motivation to participate in virtual events waned with "Zoom fatigue", which highlighted the difficulty in keeping the audience's attention and making them return.

The new standard for events will be hybrid

The future of the events sector will see a multitude of configurations and combinations of virtual and in person features, which will have a large scale impact. Professionals in the sector want to adjust their strategy whilst integrating the necessary steps to reduce their carbon footprint and to make their events sustainable.

This is why virtual conferences will be a preferred option for transferring knowledge or communicating information.

Connections and user experience over content

These virtual experiences also highlighted the unique and irreplaceable nature of physical meetings: they offer an opportunity to test some things, to create interesting contacts for doing business, they stimulate brainstorming and the co-creation of new projects... in other words they encourage innovation!

The new challenge for event organisers will be to give added value to real world events and ensure that on-site participants have an exclusive programme, with world renowned speakers, upmarket networking evenings, specialist workshops, etc. The audience will pay even greater attention to the return on investment of the expenses incurred to travel and the long term impact of physical participation. So it is now the experience offered to the participant and the quality of the exchanges that will be more important that the content of the conference.

A boom for technologies that connect the two worlds

If hybrid events are to become the new standard, managing such an event requires a varied skill set and event organisers will be seeking to cover the whole value chain: from finding speakers to bring to the site, to facilitating all the aspects of travel as far as a faultless staging of the physical and virtual events.

To capture and retain the attention of virtual participants, technological innovations are becoming central to events: event staging, virtual reality and gamification to offer people an experience, 2D, 3D and 4D platforms with Avatars to facilitate networking, artificial intelligence to match up participants with shared interests, etc.

A major change in how the content of events is distributed and monetised

Before the health crisis, the main sources of revenue for a conference or trade fair came from ticket sales and sponsors.
What strategy and solid business model can be chosen to generate viable income from events that are now hybrid?

Optimising the revenue models for hybrid events

Events that were **free** before the pandemic will remain so and must be managed like **trade fairs**. The aim for the organisers is to get the biggest audiences by facilitating access in the real world and online. To optimise revenue from sponsors and exhibitors, appealing platforms need to be found that encourage online networking, that create spaces for individual encounters with potential customers and to demonstrate products face to face.

In order to recover the whole budget from sponsors, event organisers will aim to market a mix of the possibilities to enhance their presence on-site and online: a stand at the trade fair, a banner on the website, visibility during a webinar, etc.

In a hybrid model, the data gathered before, during and after an event are a gold mine. Analysing the interactions on the event's platforms and apps allows sponsors and exhibitors to target their actions on certain potential customers that have shown an interest and thereby to improve the conversion rates for their leads.

Building an enthusiastic community

However, professional events where participants **paid** before the pandemic will operate like **conferences**. To optimise the revenue from hybrid conferences and congresses, the strategy involves increasing the life cycle of the event by moving towards a model that goes well beyond the 3 days of the conference. The key will be building a **permanent community** around regular events to stimulate interactions between the participants 365 days a year.

A new medium is born

Now, **all-in-one platforms** that are entirely customisable based around your event make it possible to develop a whole range of

marketing tools to stimulate and make your communities act by creating a new communication channel. It plays host to content produced during the events, which is often repackaged, completed with additional content and downloadable.

Event organisers must create packages of different event opportunities (physical and virtual) and themed content, available all throughout the year. In this way, the event becomes a new separate medium that regularly distributes to its community content that is informative, interesting, interactive or even fun, free of charge or on-demand.

Thanks to the development of all these complementary tools, the organiser will be able to compensate for the lost opportunities from 100% physical events.

The pandemic has disrupted the events sector that is seeking a new balance by adapting its strategy and its tools. If the new standard is to be hybrid, the challenge will be to mix the two communities with real encounters. As they garner experience, professionals in the sector will be able to use the latest technology to allow participants in different locations to interact with virtual participants and to offer everybody a unique experience and high quality networking.

Sources:
● The traditional business model for events is dead. The future is going to be a hybrid, 30 September 2020
● Virtual Events Need a Better Business Model by Julius Solaris, 29 October 2020
● 9 major Event industry trends in 2021 by Josh Howarth, 23 March 2021

Photo credit: Vincent Dehon - Bruxelles, une destination connectée - Natural History Museum, 19 September 2019
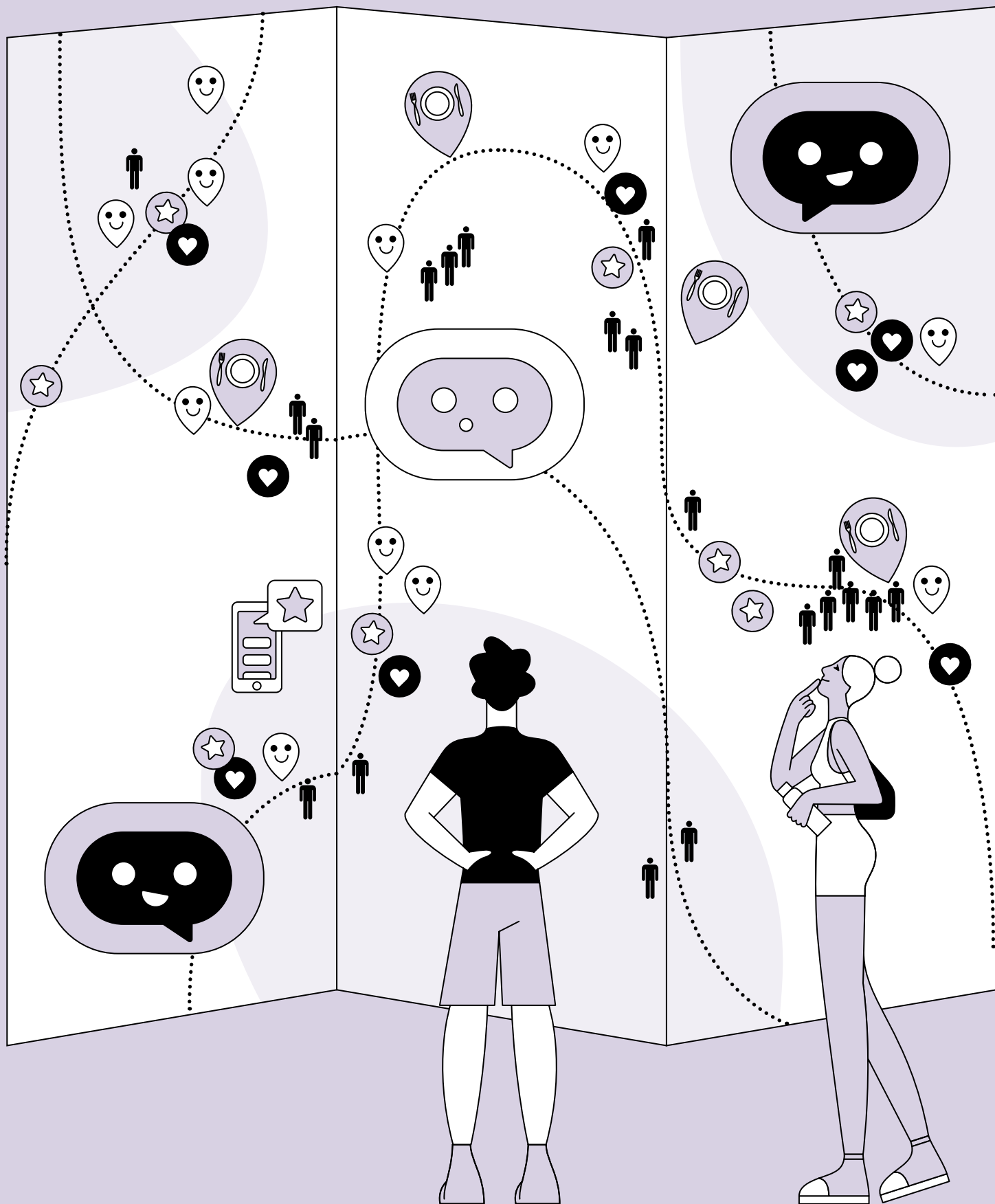
Offering visitors permanent access to information:

a major issue for specific and suitable offerings.

Offering visitors permanent access to information is one of the major challenges for towns and cities. When it comes to choosing your holidays, getting information, making a booking or buying services, and increasingly to review and share your experience on the web, technology, through smartphones, has reinvented tourism, more than anybody had imagined. It is a fact that visitors like to have quick and instant access to tourist information of any kind. By offering clear and efficient information players in tourism will be able to provide offerings that perfectly match what tourists are hoping for.

From classifying data to offering assistance, from geopositioning to pull and push systems, the whole challenge is to provide the right information and the right offering at the right moment and in the right place, and above all when the customer wants it.

Some start-ups are tackling the issue and offering travel concierge service systems with a personal assistant or interactive maps with points of interest. Destinations are using artificial intelligence and robotics, institutional players are refining their data, private players are implementing systems of synergies with all the participants in the chain, to deliver this information at any time.

But if information is abundant, accessible and often free, there is a risk of information overload, of too much canvassing and too many offerings. Infobesity is a danger and accumulating information does not make tourists better informed. The challenge is therefore to ensure the quality and the relevance of the information provided and how well it meets the traveller's expectations.

Offering visitors permanent access to tourist information: how can you make information accessible 24/7 in rural areas?

Stéphane Bénèdit	Director of Agence d'Attractivité de la Nièvre
Sophie Lacour	Attractiveness Manager. Media relations. Agence Nièvre Attractive

Areas with low urban density (medium and small towns, and rural areas) are faced with two major problems: falling interest in Tourist Information Offices (TIO) and the difficulty of having access to information throughout the whole of a stay.

Nièvre's Agence d'attractivité (Attractiveness Agency—AA) wanted to offer tourists Tourist Information Points that are available over a large range of time. However, this area had to counter the issues commonly faced in the tourist information sector, such as TIO that are not always open or with restricted opening hours, or information that is often disparate and not very relevant, which tourists obtain themselves using their devices. So a solution to these problems had to be found.

The new tourists and information

According to a study by Opinium/Amadeus (2019), customisation is a growing trend in tourism. 61% of travellers want more customised travel options, 52% of them would be prepared to share their personal data to get a bespoke experience. Players in tourism are therefore faced with several challenges in terms of information: providing real value by associating the right services with customer expectations, offering a memorable experience thanks to the accuracy of their answers, finding the means to immediately satisfy visitors who have become impatient, and finally, offering relevant and customised information.

PITACA: A Tourist Intelligence Portal with an Animated Conversational Agent

In this context, the AA of Nièvre decided to equip itself with a "digital tourist intelligence portal" for which the purpose is to give a human feel to the digital information service offered to visitors by creating a welcome, information and recommendations portal coordinated by a conversational agent that could be consulted using natural language.

This platform is accessible from digital displays or touch-sensitive terminals in tourist locations, on the front of TIO and at certain private tourist operators that host many tourists. It can also be accessed using a smartphone application and by a widget on different platforms on social media (Facebook, Messenger, Skype, etc.) developed by the tourist areas.

To meet the expectations of visitors as closely as possible, this platform first integrates the data from the experiences and opinions of travellers and data from the Departmental tourist information system. Upstream, it deploys a conversational agent that is clever and sensitive, which can use natural language to answer users' questions. This conversational interface is coupled with standard tactile services (search engine, lists, etc.).

The technological core of the platform is its capacity to access structured, carefully categorised databases (DATAtourisme [the French government's tourist database] / Tourist information systems, customer data, POI, etc.) coupled with data from consumers (sensitive and emotional data).

All of the data is processed using artificial intelligence and a "conversational agent" (chatbot) with whom the tourist can converse in a natural way to get a personalised and

contextual response 24/7. This platform is therefore a 360° service for users as it provides information on current affairs, good deals, or even booking and online payments for services as well as access to all the shops and services in the region that are often hard for customers to find during their stay.

Léa, an avatar with emotions at your service

The main originality of this project is the form that was chosen to deliver the information. It is a 3D animated avatar whose graphical features closely resemble a person. The animated conversational agent is capable of understanding a huge number of questions asked in natural language by visitors and answering them. Ultimately, the solution will be multilingual. This original creation was proposed by the AA and created by a company located in Nièvre, DAVI founded by Pascal Arbault.

The other strength of this avatar is its capacity to be "emotional". Indeed, a visitor's experience can be seen by the comment that they leave on big booking platforms (Booking, Airbnb, etc.), ratings platforms (Tripadvisor, etc.), on the website of the service provider themselves or on social media. The experience of ambassadors or "greeters" can be found on their blogs and on social media, and that of service providers in their answers to their customers' reviews and their own reviews of their customers (see Airbnb). In this online history there is of course information about the quality of the service and a description of it: all the assessments made based on the logical, objective thought, which is most of the content. But there is also an expression of how people felt based on personal values, the sensitive and subjective side: the emotional content. As it is not easy to aggregate these opinions and to process them "intelligently", they are under exploited, these are dormant assets. The aim of this project is to make them "active" assets: extracting from this Big Content knowledge that can help to get people interested and make them return.

Other functions can be used to involve the user via emotional levers drawn from this content. For example, enriching "cold" content that is purely descriptive with emotional quotes, optimising SEO, feeding into the CRM, enriching audience segmentation and predictive systems and making recommendation systems more sensitive. This process also helps to overcome the "mainstream" side of the answers generally provided by global applications.

Conclusion

This approach of digitising tourist information and preparing a customer relations strategy should help to face up to all the trends that are drastically changing how visitors act: a major fall in attendance at TIO and a habit of getting information 24/7.
This platform therefore makes it possible to increase tourist consumption in the regions and to encourage customer loyalty. IT enhances the relationship between TIO and tourist operators in their area in a collaborative approach on issues of promotion, marketing and sales.
The fact of having chosen a human avatar and being able to interact using natural "emotional" language meets a need to humanise customer relationships that, particularly in the context of tourism, can

give rise to frustration when discussions are limited to a simple "text" exchange. The difficulty lies not in the complexity of interpreting the information, but in the availability of rich and high quality information.

The deployment of this kind of project as part of a regional tourism strategy makes it possible to naturally create a synergy between the different participants in tourism: customers, local people, companies, institutions and local authorities. Finally, this solution can be used to overcome one of the tourist issues faced by medium sized towns and less urban areas with regard to the availability of sources of information and the possibility to talk to somebody at any time of day and on any day of the week.

Access to information, a digital and mapping challenge

Timothée Lairet | Co-founder of Vizity

Will the health crisis (COVID-19) have an impact on how travellers want to have access to information?

Temporary information, related to this situation, was for example exclusively shared on digital platforms and paper media was largely absent (lost?) during this period. Does this mean that it is dead? Not necessarily... However, this crisis seems likely to accelerate the use of digital tech, which was already a strong trend in 2020.

Google Maps, a solution that opens up a new era

I once read that 80% of travellers use Google Maps at least once, either before or during their holiday. Sadly, I cannot find the source, but such a figure certainly seems to be realistic, when we know that the company has built a significant part of its business model around tourism and claims to have over one billion users per month.

This solution, which accounts for a 70% market share in the field of mapping applications, is in the process of becoming a super-app with which you can do almost everything, starting with easily finding reliable local information.

This is a trend that has been exploding for 3 years, independently of the health crisis.

"In 2017, when Google started sharing the figures for searches on Google Maps with its partners, 10 to 20% of the searches for local players like hotels, restaurants or brands went via Google Maps," explains Georges-Alexandre Hanin (director of a local digital marketing agency). *"The rest of the searches still happened using the standard search engine. Now, we are talking about 60 to 70% (and even 80 % in some cases) of searches on Google Maps.".*

At Vizity, we can see three reasons for the global success of Google's mapping tool - their "magic sauce":

● 1 - **Functional features that cover a wide range of needs:** a powerful search engine, a route finder, recommendations for contextualised points of interest, etc.

● 2 - **Up-to-date data:** Thanks to its "Google my Business" service, which encourages local players to update the information on their company data sheet, as well as the artificial intelligence tools, Google has won our trust. To such a point that there are shops that have had to change their opening times as they did not know how to change the ones that were entered on their data sheet.

● 3 - **The mapping behind the tool:** Google Maps is above all a mapping tool, and that is what makes all the difference. How else can you explain that users massively favour it over a standard search engine (google.com) for local searches?
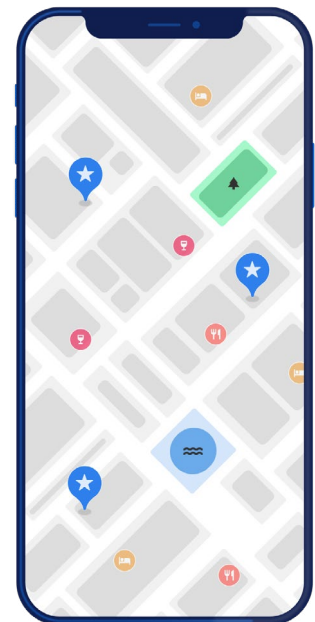
Re-inventing yourself to offer services that meet visitors' expectations

Having permanent access to information has become a fundamental need for visitors. Google has opened the way to these new uses, now players in the tourist sector need to take inspiration from that, without being afraid to reinvent themselves, in order to keep their place as a trusted third party for travellers.

Close your eyes and imagine a tool that would allow you to:

● choose accommodation according to certain criteria such as the dates of your stay, a price range or even its proximity to points of interest (must-see places, transport, night spots, etc.)

● identify the most suitable means of transport for getting there and manage the various bookings required;

● select the places that you want to visit or be guided by a selection suggested by skilled people (professionals, bloggers, locals, friends and relatives, etc.)

● have knowledge of the different events that will be held during a stay and their location - *I have always wondered if the foreign tourists arriving in France on 22 June were aware that they had just missed the National Music Festival by one day;*

● choose the best means of transport between your different visits;

● receive alerts (weather, security, events, etc.)

In short... to have easy access to the information you need during a trip finally, without using three different applications and four different websites.

All the technological bricks needed to implement this type of solution are now available. APIDAE, *DataTourisme* or even *Dahub* make it easy to manage and distribute information about points of interest. OpenAgenda allows you to create event calendars and to distribute them. *Affluences* provides data on the attendance of a place, and we, Vizity, make it possible to easily create interactive maps based on all this data and pre-developed functional features.

While the main consumer innovations in mapping have come first from mobility-related needs (Waze, Google Maps, Citymapper, etc.), the new needs now are in the search for information. By enabling tourism professionals to offer services that meet visitors' expectations, we are convinced that we provide an answer to the challenges of the world that is beginning to emerge.

"Mapping capabilities have grown considerably in recent years, thanks to technical bricks from players like Mapbox, Maptiler and Jawg. But these tools remain exclusively for developers. Our daily mission is to propose a solution that makes these tools accessible to everybody, with no need for coding."

Ambroise, Technical Director
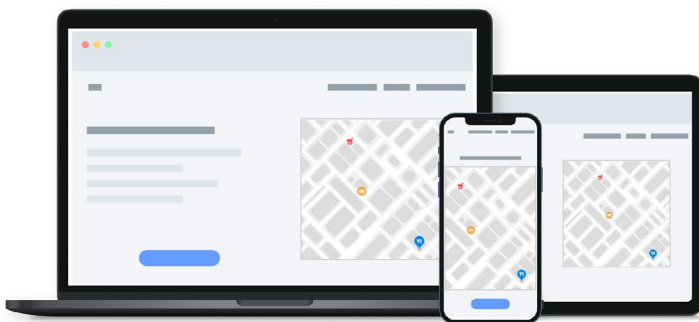
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Travellers are constantly seeking tourist information, before, during and after their trip

AUTHOR: SYLVAIN CAUCHETEUX, CO-CEO & PARTNER CIRKWI

"Cirkwi helps tourism professionals reach their direct sales potential by turning their products into true tourist destinations, in order to attract visitors to their website and convert them into customers. Because we all know that the destination is the key, and experiences are the reason we travel. That's why we provide the whole world's tourist industry with real-time access to all types of destination marketing content: amazing experiences in any language around their product that will make their destination unique, in the form of a new type of digital guide throughout the whole of the customer's journey!"

The traveller's permanent search for tourist information illustrates simultaneously:
- **The lack of structured, credible, and up-to-date information available in their language**
- **Their difficulty in making choices and the resulting need for reassurance**
- **The value of having this tourist info for professionals**

When they are preparing their holiday, **4 out of 5 French people** first look for **information on activities/points of interest** at the destination and **29% book in advance.**

(Source: TripBarometer annual study, conducted by the Ipsos MORI Institute)

Selecting accommodation: **86% of travellers** choose their accommodation based on the **points of interest / activities nearby.**

(Source: Ipsos TripBarometer study)

When they arrive: **85% of travellers** have not yet decided on the activities they will try when they arrive at their destination.

(Source: Google via PXCom onboard Digital Media)

**50% of guests** access the Storyguide application at the hotel reception
(Source: Cirkwi metrics based on 2,500 destinations), which shows that about **50% of people expect** / want to **have info on the spot.**

During their stay: **80% of travellers** use **their smartphones** to find information / access **tourist information** once they are there.

(Source: Thinkwithgoogle, "L'Aventure commence sur le smartphone")
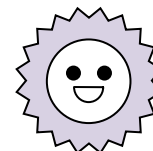
Extending their stay: **10% are ready to extend their stay** if they are given a good reason to do so (tour, etc.).

(Source: Cirkwi Storyguide metrics)

Information at the right distance, without losing touch!

Tristan Daube | CEO of TravelAssist.io

Ever since the appearance of the first Reichard tourist guide in 1784, visitors' insatiable appetite for information has no longer been up for debate. From paper to online media, all that has changed is the means of access: the demand remains consistent. How can tourism professionals contribute to fulfilling this vital need?

Visitors, beings of needs and desires

The phenomenon is easy to see in these troubled times. For business travellers and tourists, desires (visits, restaurants, etc.) and needs (safety, health) condition whether or not they travel.

It is not easy to travel what with traffic restrictions, the health conditions in a particular region, suspended flights, etc. all of which must be mitigated. **Without up-to-date real-time information, it is almost impossible to move around at the moment.**

The tourist visitor: a motivated person in need of reassurance

How can we reconcile the desire to travel with the need to be safe? There is currently a real passion for travel. We can see it from the internet searches and requests made to hotels.

"You also have to be on top of things in digital terms. You need to be able to communicate, to stay connected with customers as they travel, to bring health information to them, and to be very responsive if the customer encounters a problem during their trip."
Rémy Oudghiri – sociologist.

People are eager to get away, but they are afraid—and we can understand why. They need to be reassured about everything: the flight will take off on time, the taxi driver will wear a mask at the airport, the rooms at the hotel comply with sanitary standards, the museums will definitely be open, the tours will be running, in case of health problems they will get help... Tourists want access to both logistical guarantees and fun information in real time to offer them peace of mind.

Business travellers: efficiency and safety imperatives

Unlike tourists, business travellers do not hesitate to travel, because they must do so. It is a matter of continuity of service and a financial imperative.

However, it is important that business travellers are able to travel with confidence, because they too have fears. Will the flight go ahead? How are the local health conditions? Is there health care available at the destination? Professional travellers have logistical needs that determine their efficiency at the destination and therefore the success of their business.

Business tour operators need a **tool that provides real time reassurance** to users who are afraid that they will not have access to information due to the language barrier, when confronted with health problems abroad. This is a triptych relationship: companies entrust the logistics of business travel and the well-being of employees to tour operators—**they must ensure both the journey and that everything goes smoothly at the destination.**

**The Personal Travel Assistant:
Visitor Assistance 2.0**

At a time when everything has to be kept at a safe distance, there is still a demand for reassuring contact. By offering a personal travel assistant, TravelAssist helps to keep visitors informed 24/7 in a reassuring, caring and relevant way by "chat"!

Being able to live at your own pace also means fulfilling a need for freedom. Having confident access to well-meaning information at all times is a big part of this.

The service manages both the logistics during the journey and the during the stay itself. Travellers can ask for advice on what to visit and hotel information, to make their choice easier. But they can also request information on local risks in real time to alert people and react together (weather, politics, health, terrorism, etc.). The service can also offer advise on routes, transport timetables, choices of restaurants right up to booking, and even manage (or facilitate) little points for attention during the journey (birthdays, romantic situations, etc.).

Tour operators get a point of contact that allows you to be reachable 24/7 without additional staff. The Travel Assist.io tool **is a high quality personal assistant, which as available when needed, at the traveller's pace.** The caring presence of a real advisor on a daily basis is reassuring, the contribution of technology guarantees effective assistance for your customers.

Travellers can count on a quick response whatever the time, day or place, they benefit from the continuity of service of an agency. With this tool, professionals in the travel industry can monitor the doubts, questions and experience of their users live.

Visitors are never isolated. Better still: they enjoy their stay with a feeling of security. Language is no longer a barrier: our chat support service is available in English and French, and soon in other languages.

Reassure and strengthen the connection with your travelers 24/7 during the entire trip

A premium white label service for 3€/day (VAT excluded)

Information to support professionals in the tourist industry

What if providing information is an opportunity for industry professionals to express their humanity? "There is no love, there are only demonstrations of love." - What if by offering memorable points of contact, you were helping to relax your customers while building a relationship of trust through conversation (and later through loyalty).

In the face of new uses, providing information to tourists on demand enables professionals to collect precise data on their customers and thus adapt their offering. It is a virtuous circle. Hotels and other accommodation also have an interest in quickly providing this type of service in order to facilitate human proximity, their responsiveness and their customer knowledge. While limiting physical contact is a must, the human relationship remains intact!

It is no longer a matter of simply waiting for the customer's final satisfaction score. With a travel assistant, professionals are involved in ensuring the quality of their service in real time by offering bespoke information and peace of mind—which are invaluable in times of crisis.
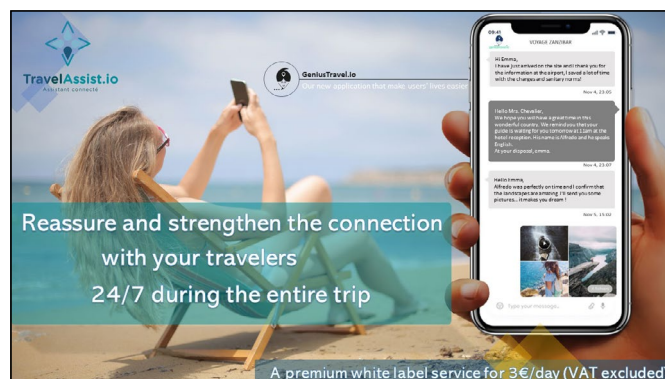

4.2 hours
SPENT PER DAY ON AN ANDROID MOBILE (UP BY 20%)
With a global average of 4 hours and 10 minutes spent on mobile devices during the pandemic, the time spent in this way each day increased by 20% between 2019 and 2020.
Source: "AppAnnie" study: https://www.appannie.com/en/go/state-of-mobile-2021

63 % OF TRAVELLERS THINK THAT
CUSTOMER RELATIONSHIPS ARE MORE IMPORTANT THAN PRICE.
Source: "Amadeus traveler tribe" study Sept 2020

THE "REVENGE TRAVEL" PHENOMENON.

After the lifting of the restrictions linked to the health crisis, there should be a travel binge. According to Simon-Kucher & Partners, 83% of French travellers plan to spend as much on travel in 2021 (44%) or more (39%) as they did before the pandemic. This is an opportunity not to be missed for tour operators.
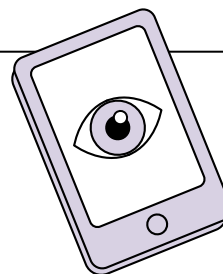*Source: Simon-Kucher & Partners study June 2021*

Big Mother is cocooning you
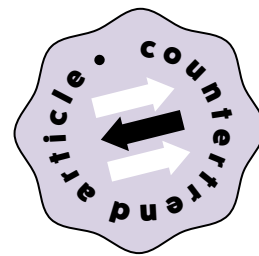
Dominique Hummel | Tourism Expert

We hadn't seen it coming… the futurologists had told us that the robots would erupt (wrongly), the advances in artificial intelligence or means of transport (rightly), but no expert had identified how the smartphone and its use would take off! Within 10 years, in our country alone, more than ¾ of people have adopted them and use them for several hours a day. Tourism has been an extraordinary field of application for this massive spread. When it comes to choosing holidays, getting information, booking or buying services, and increasingly to review and share experiences on the web, this little piece of technology has reinvented tourism, more than anybody had imagined. And it is, of course, smartphones that hold the possibility of further information sharing. Yesterday's scepticism has given way to today's enthusiastic unanimity, because professionals, governments, and consumers alike would have much to gain from this inexorable development.

It would be ludicrous to challenge the progress brought by this innovation and pretentious to want to stem an almost civilisation building movement. But should we indiscriminately embrace this belief in a digital Eden? Should we embrace without clear thinking the advance of a technical, social, economic and cultural system that makes information and its multi-source, multi-channel, multi-use bombardment the miracle cure?

This article is less a matter of detecting a "countertrend" than of issuing a few alerts and making the players, which we all are, query what this development is building towards. As humanity reinvents itself through technology: are we advancing our free will, autonomy, our capacity to be more available to oneself, to others, to the world? A generic question about the future of our species you might say, yes, but one that is having a big impact on the issues faced by our industry, which is often at the forefront of social transformations. If tomorrow's tourism is to be made more meaningful, more respectful, more responsible, more empathetic, more personalised, more sharing, will these developments give it the means (and how)?

The illusion of choice

Let's start from the beginning, the power of all that is 'digital'.

We know that it is the upstream segment of the customer pathway that has been most transformed by the internet. Nearly 80% of those seeking their destination find their inspiration online. This is a great opportunity for those making the offers because anyone can be seen by a billion internet users and the scores will keep going up! Is it also an opportunity also for those on the demand side? It would appear so because 90% of users believe that the internet has enabled them to "gain autonomy".

Is this a reality or an illusion? A little of both… the information that reaches us or … that does not reach us obeys a sorting system that works using both our anticipated desires ("without us knowing" thanks to tracking) and indecision on our part: we are addressed by "influencers", we are "targeted," and we like that… 91% of Google users are satisfied with the proposals that appear on only the first page of the search engine. The internet traps us at the same time as it reassures us and boosts our ego by giving us a sense of greater power over the world. Which inspires Alain Damasio, author of SF, with a hat tip to George Orwell: Big Mother is cocooning us… Certainly recommendations have always existed, but advances in computer technology have not only enabled the exponential growth of offerings but have also changed their nature. What is behind it? Search algorithms. A well-kept secret of digital platforms (while most industries are subject to transparency requirements), boosted by artificial intelligence and big data, these algorithms are the fabric of the new world.

By their very design, they make "filter bubbles" that focus on our interests at the risk of trapping us in our reference social group or in our own beliefs. Few people change their opinions on the web, which is not the agora dreamed up by its founders… so we must impose strict measures to return to the fundamentals of a web that opens us up to the world and enriches us!

Digital hygiene

Dominating the digital tool rather than being manipulated by it—a vast endeavour! The rules are quite simple to write but so difficult to implement. Yesterday, information was scarce. Today, it is prolific, accessible, and often free. But what is rare today is our ability to digest this flow and simply to focus our attention. Our brain, is overloaded by demands, and transforms its habits and its average duration of concentration significantly. Infobesity is the other challenge of the web. Accumulating information does not make tourists better informed. A small insidious transformation is that is has hanged how we read and that has changed us. You can surf the web by scrolling through the information, without filtering, as if you were unfurling a 141-metre-long parchment every day! This is indeed the origin of the word "scroll" … some champions even exceed 700 metres a day in Asian countries. Our attention span is reduced as the time spent in front of screens gets close to 5 hours a day (over 10 hours for our champions). For younger people, the duration of concentration on social networks is 8 seconds, for a time spent there that has doubled in 10 years. The WHO recommends reducing the exposure of children under 5 to screens to less than one hour a day, and not giving smartphones to children under 12. Restrictions that web bosses impose on their own children.

The subject is sensitive for young people, it is also exploding in the world of work causing intense stress to one in four French adults. So there is a good chance that the digital detox offerings for adults that are emerging in holiday offerings will have a great future ahead of them… Have we not reached the point of inversion of the curves where the benefit/disadvantage ratio is likely to shift to the wrong side? The digital revolution is not only a socio-economic revolution; it is also an anthropological revolution. Smartphones have become an icon, as an extension of ourselves that increase our physical and mental capacities. And the field of travel and leisure has been transformed.

They gave us an increased POWER, that of getting things done. And it works all the better as the tool empowers our laziness, distracts us from our fear of loneliness, and cradles us in the transhumanist dream of augmented man.

But does it not rob us of some of our POWER to act, to do things ourselves, to live in the world, to be present for others, for ourselves, for the world. Don't all of the faculties that we delegate—orientation, memory, our very way of seeing—expose us to the risk of a form of insensibility, a loss of feeling, of living, and therefore what is profoundly human? The result is a weakening of our ability to go beyond ourselves, to open ourselves to surprise, to meet people, and the impossibility to let go. Which is precisely one of the greatest ambitions of the tourist experience!

"Our paths invent us, we have to live each step". We have gone full circle. It is through a return to the true meaning of tourism that everyone will have to make the right use of digital technology to make "good use of the world."
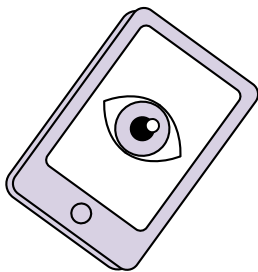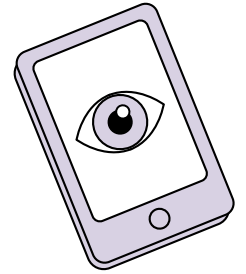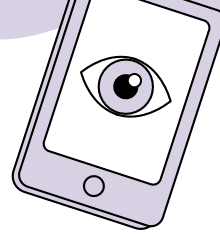
Firing on all cylinders: How Singapore is reimagining tourism through tech

Wong Ming Fai | **Chief Technology Officer, Technology Transformation Group
Singapore Tourism Board**

With technology set to play a pivotal role in revitalising global tourism under the new normal, Singapore's tourism sector is embracing Augmented Reality, Artificial Intelligence, automation and other disruptive tools to enhance products and services for the long-term.

As a tiny nation with scarce land and water, Singapore needs to constantly think ahead to survive. When the pandemic hit, our tourism sector already had a tech-oriented mindset in place, thanks to our government's digital transformation efforts and thriving start-up scene. That enabled companies to embrace cutting-edge technologies as they pivoted to new business models and safety requirements. However, these efforts alone are not sufficient to ride out the crisis. In anticipation of COVID-19's long-term impact on travel, tourism players strengthened partnerships with local and international stakeholders as they explored the benefits of digital experiences, contactless interfaces and artificial intelligence. Their efforts, elaborated through the examples below, do not just serve customer needs during this pandemic but are meant to last for years to come.

The first example is in **Health and Safety**, which is now more important now than before. To understand travellers' perceptions and behaviour in this new environment, the Singapore Tourism Board (STB) surveyed close to 200 respondents across ten key markets late last year. We found that 88% of respondents considered health and safety as the most important factors when choosing their next overseas destination—a clear indicator that destinations must be able to reassure the public of high hygiene standards. Shortly after the first few cases of COVID-19 infection were detected, Singapore implemented the SG Clean certification programme in February 2020. The whole-of-government initiative is intended to rally the public and businesses to adopt best practices and good hygiene standards, so

as to help increase the overall resilience of the destination. More than 31,000 individual premises have been certified in Singapore as of May 2021, with continual efforts to drive more participation.

Besides broad-based initiatives, technology facilitates contactless interactions and helps to reassure visitors. An example is Vouch, a local start-up and an alumni of the Singapore Tourism Accelerator (STA) programme, which boasts a contactless solution to reassure guests of their safety, while improving operational efficiency for hotels. To avoid crowds at lobbies, gyms and swimming pools, Vouch has created digital concierges that enable guests to receive instant, accurate responses to common questions and pre-book time slots at facilities. A client of Vouch, PARKROYAL COLLECTION Marina Bay, saw 87% of their guests utilising this service, and booking the gym and pool slots themselves. This self-service initiative has also resulted in the reduction of guest enquiries.

Another example is in **digital experience**. The overall demand for digital experiences has surged throughout the pandemic and it is likely to stay that way. Whether it is e-commerce or using augmented reality (AR) for way-finding at attractions, digital experiences are increasingly in demand. For example, in the retail space, an overwhelming majority of global consumers expressed a desire to experiment with new technologies, according to a 2020 report from IBM. To maintain visitor engagement and stay on top of trends, Singapore's tourism sector is doubling down on virtual and augmented reality services. Tour operators such as The Intan and Everyday Tour Company have created online offerings as they collaborate with partners such as Airbnb Experiences and Amazon Explore to leverage scale. Meanwhile, The Ritz-Carlton, Millenia Singapore collaborated with Plattar, STA alumni company, to create a self-guided, AR tour that showcases its extensive art collection. AR, overall, is incredibly valuable to tourism players since it has the potential to facilitate brand experience, drive conversion and promote products all while prioritising convenience and safety.

A third example is in **sustainability**, which has grown to become a key driver behind consumer preferences. As the world recovers from the crisis, travellers will want to know that their stay made a difference. Several hospitality players have embarked on sustainability initiatives that correspond to their respective goals, and technology is a key enabler. Local start-up and another STA alumni Lumitics, for example, combines AI, data analytics and image recognition software to help hotel partners reduce food waste and lower costs. Meanwhile, the JW Marriott Singapore South Beach adopted a SmartPower programme that is more efficient and sustainable to clean, enhancing its Food and Beverage operations. The Ritz-Carlton, Millenia Singapore has collected ring tabs from aluminium drink cans which are later transformed into artificial limbs for those in need, amongst other efforts to reduce plastic waste and achieve higher energy efficiency.

The potential of tech in shaping travel's future is limitless but businesses need a strong support network to reimagine tourism experiences and prepare for the future. That is why STB launched the **Tourism Technology Transformation Cube** (Tcube), a resource powerhouse to help tourism players with digital transformation, in April this year. Partner with us through Tcube to exchange insights, access resources to scale business models and test some of the best ideas here in Singapore.

As we look ahead to the future of travel, the benefits of digital transformation are clear. From enhancing guest experiences to elevating hygiene standards, innovations and collaborations will not only attract new visitors, it will make tourism safer and more sustainable.

Tcube, or the Tourism Technology Transformation Cube, is a hybrid innovation space that brings STB's digital initiatives, resources and thought leadership content onto a single platform to support our sector's digital transformation. Through Tcube, STB aims to groom transformational leaders, cultivate a community of innovators in tourism, and facilitate partnerships between like-minded stakeholders to drive transformation.

Visit https://go.gov.sg/tcube or more info.

Attendance: high potential "tourism data"

Paul Bouzol | CEO of Affluences

Who has never wondered, when visiting a museum, monument, or more generally a tourist site: will there be too many people? How long will I wait in the queue? Measurements of attendance and above all informing people about this data are thus emerging in the world in order to respond to these different questions and many others.

Data on attendance: an issue for tourists and the places that host them

While this is simple and well-known data, it is often empirical: the actual waiting time and how it is perceived are often different. The issue of how to manage the number of people and waiting times has often been seen as a real enigma for tourist sites. Faced with levels of attendance and sometimes incomprehensible waiting times, these places are more than keen to adopt solutions that can anticipate attendance, improve the perception of waiting and thus the perceived quality of the service. Before the health crisis that closed all tourist sites in 2020, the issue was already a major concern: 64% of Parisians who have not visited a museum in a year explained it was because of a fear they would be too busy, and 72% of French people said that they went less than they wanted to because of queues. While some museums are sometimes victims of an unwarranted sense of crowding, other tourist sites are victims of their own success. This is the case of some natural sites like most Mediterranean beaches in summer, Mont Ventoux in Provence, hiking trails in the mountains, the calanques of Marseille... which are neither suitable nor prepared to welcome as many visitors. The Calanques National Park, which attracts nearly 3 million visitors each year, has opted for a communication strategy aimed at informing people about the state of saturation of the beaches, which are faced with mass tourism. It seems essential today that these sites find solutions to regulate their visitor flows and thus reduce over-tourism, which, beyond degrading the tourist experience, has real consequences for the environment and the preservation of these exceptional places. Therefore, regardless of the place hosting the public, the conditions under which they are greeted, the waiting time and the number of people present are data that are increasingly indispensable for a good experience. Transparency and providing this information will help to reassure visitors and reduce their stress. Just as we always look at timetables, weather, or directions to a location, the attendance indicator is becoming a key factor in the decision to go somewhere. This is all the more true today, given the current health crisis and the attendance restrictions that can be a source of frustration for tourists if they are not informed beforehand.

Real-time attendance figures: data that visitors want

As satisfaction surveys point to their usefulness, data about attendance is becoming more widespread. At Affluences, whose goal is to offer better access to these data, we understood this from the outset. That is why its founders gambled on a cost-free, add-free application for the general public as the flagship medium for real-time attendance data. With 1,000,000 downloads, the Affluences application is now popular with its users, who give it an average rating of 4.7/5, which proves its usefulness. In addition to the mobile application, Affluences also offers a web application that attracts as many as 300,000 visitors a month.

In addition to which, each of Affluences' partner institutions has the possibility to share this information on its own media (website, screens, mobile application) through the web APIs provided to them.

The Affluences application and its web APIs
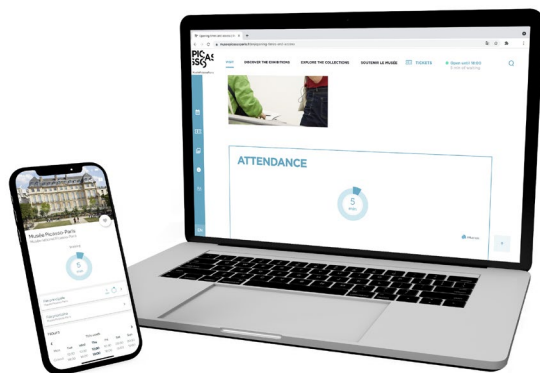
Attendance forecasts: an aid to organising tourist routes

Knowing the attendance in real time is good, but knowing the attendance forecasts over a whole day or even a week is better. Tourists are usually constrained by time during their stay: they plan to visit a large number of tourist sites in a very short time. That is why the predictive analytics algorithm developed by Affluences will be able to provide attendance forecasts for the day and for a week in 30-minute segments, based on different criteria such as the calendar, history, weather, and real-time attendance, the number of consultations on the mobile application ,etc. Thanks to this information, tourists can better organise themselves and save precious time on their tourist journey.

Offering tourists and site managers control over attendance

It is possible to improve the daily lives of visitors while optimising the services offered by tourist sites. By better knowing their flows, sites can smooth out their attendance over time at the level of a place, and over space at the level of a city. They can better manage the distribution of resources to be allocated in each area in terms of both human resources and financial and logistical means. This is the case with all major tourist sites, starting with the Louvre Museum, which has been informing people about waiting times since 2016, or the beaches of Marseille, which have tested measuring the numbers of people since 2018. On the other hand, information about attendance is particularly useful for monitoring safety levels related to the health crisis, and for responding in real time in case the number of authorised visitors is exceeded.
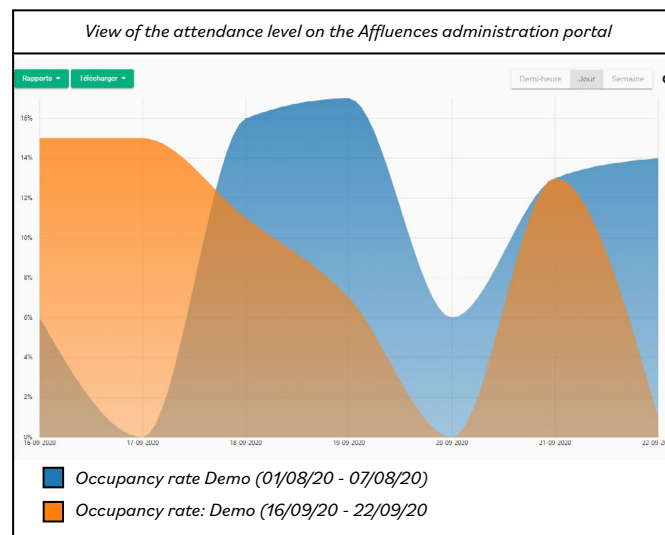

Example of a dashboard on the Affluences administration portal
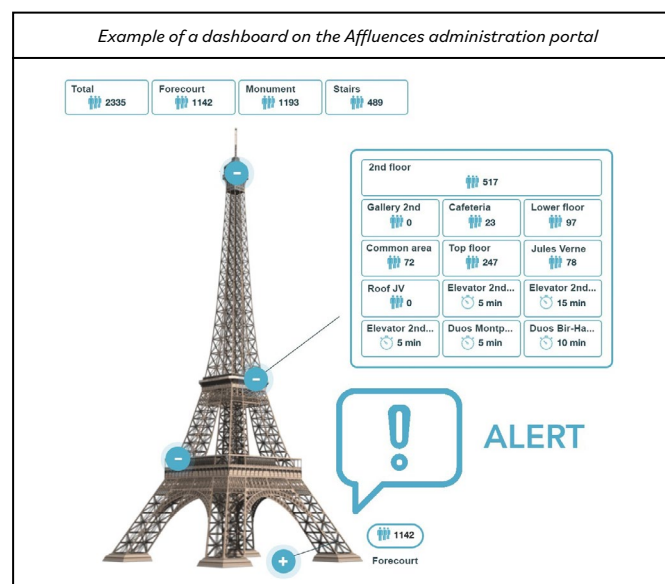
Attendance forecasts on the Affluences administration portal

Closed
Low attendance
Average attendance
High attendance
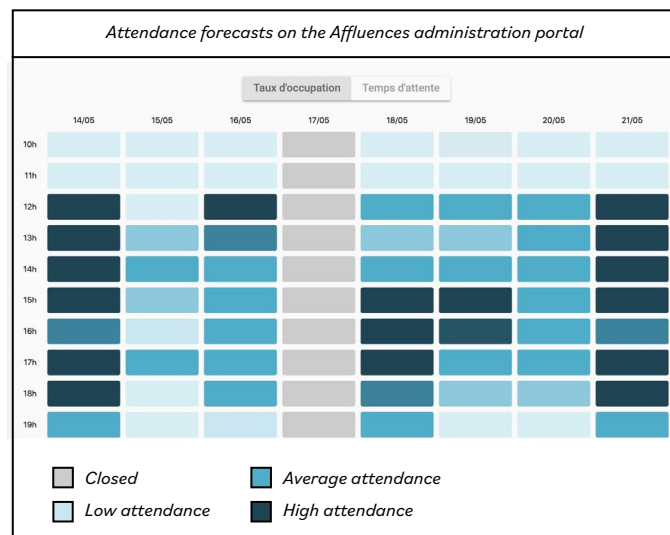
View of the attendance level on the Affluences administration portal

Occupancy rate Demo (01/08/20 - 07/08/20)
Occupancy rate: Demo (16/09/20 - 22/09/20)

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