

# New Landscape Report

2022

FRANCE and  
BELGIUM



TRAVEL  
SOUTH  
USA

# INTRODUCTION

The travel industry is constantly evolving and the pace of change is now faster than ever as emerging technologies and changing demographics alter expectations and standard practices. This has been further exacerbated by COVID, which has disrupted nearly every aspect of travel.

Tourism is resuming but many travelers will have changed, our “covidian world” having accelerated the transformations that were latent until now: awareness of the privilege of traveling, fragility and decadence of the planet’s biodiversity; citizens aware that their happiness requires a “management” of number of visitors; an economic model with unlimited growth that is unsustainable and has become truly inequitable; and, above all, climate change, which will force rapid transformations of all aspects of our lives, including telecommuting, local agriculture, and more collective transportation.

For the travel industry, sustainable tourism will necessarily involve a fairer distribution of the economic benefits of tourists, thus forcing the questioning of the cost and relevance of intermediaries between the traveler who pays, the jobs generated locally by the sales and especially the benefits in the areas visited.

In the post-COVID period, we will see the proportion reversed within 10 years. Tomorrow’s traveler will want to :

- Discover destinations by minimizing their carbon footprint throughout the chain of tourism suppliers by making real choices and/or offsets while avoiding greenwashing;
- Ensure that their money spending have a positive impact on the local environment visited while respecting the residents;
- Live truly transformational experiences
- To know which destinations are safe (sanitary and physically speaking) in the context of increased poverty and numerous climate refugees in addition to having the assurance of being repatriated in case of any sudden crisis.

It is not Expedia or Booking that can meet these expectations. It is not by booking directly with the suppliers either, given the difficulty and complexity of qualifying the information provided.

## INTRODUCTION cont...

Only a post-COVID travel agent will be able to answer the call. From technical advisor until 2020 to “multidisciplinary coach”, the travel agent will transform into a true qualified professional. They will become local development agents, ensuring that their trips are beneficial to the environments they visit; psychologists, proposing “meaningful” trips according to travelers’ individual expectations; guardians of the planet, recommending only truly sustainable services that avoid pollution and protect biodiversity; nurses, mastering international health practices and processes; and security agents, mastering these issues in real time for each of the destinations offered to travelers.

Tourism will rebound, but differently; mass tourism will return, but local rules will change and transform, sustainable travel will regain its place as an “essential service” for travelers. From a niche market for some professionals, the traveler segment will supplant tourists in the medium term, these excessive consumers (in the context of climate change) of goods and services.



### ARTICLE ONZE TOURISME

# Overview

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# **Factors Affecting Travel**

# FRANCE AND BELGIUM ECONOMY

## France

Economic activity is projected to gain momentum following a rebound in the third quarter of the year and to reach its pre-crisis level by the end of 2021. Despite high input prices and disruptions in the global supply chains assumed to last until mid- 2022, growth is expected to remain solid in 2022 and 2023. The sharp rise in consumer prices, mainly due to higher energy prices, is set to persist over the coming quarters but to moderate in 2023. The general government deficit is forecast to fall to 5.3% and 3.5% of GDP in 2022 and 2023, respectively, while public debt is set to start declining already in 2021.

### Economic recovery after a historic recession

Following a historic drop in 2020 (-7.9%), real GDP is set to rebound strongly by 6.5% in 2021, and by 3.8% in 2022 and 2.3% in 2023.

In the third quarter of 2021, activity is expected to have benefited from the easing of restrictions (after a lockdown in April) following a successful vaccination campaign. The growth momentum is then projected to moderate until mid-2022, suffering from the rise in input prices and global supply chain disruptions (real GDP being nonetheless forecast to reach its pre-crisis level by the end of 2021). Activity is forecast to accelerate in the second half of 2022, thanks to the deceleration in inflation, the improvement of international trade and the recovery of tourism. GDP is then projected to return progressively to historic growth trends in 2023.

The rebound is set to involve all demand components with the resilience of household purchasing power expected to be central to the recovery. Private consumption is projected to have rebounded sharply in the third quarter as the most severe restrictions weighing on the service sector were eased. With consumption patterns normalizing, the saving rate, which rose to 21.0% in 2020, is projected to decrease in 2021 and come back to its pre-crisis level in 2022 and 2023.

Investment recovered more quickly than consumption and exceeded its pre-crisis level already by mid-2021. It is set to continue growing, supported by the global rebound of demand. Public and private investment are also expected to benefit from favorable financing conditions and from the 'France Relance' plan over the forecast horizon.

After the sharp decrease in 2020, net exports are projected to recover with a delay and more slowly than the other GDP components. Net exports are expected to contribute positively to growth next year, mainly thanks to a rebound in tourism next summer, and to accelerate in 2023. However, the external trade cumulative contribution to growth is projected to remain negative by -0.4 ppt over the 2019-2023 period.

# FRANCE AND BELGIUM ECONOMY cont...

## Unemployment rate to decrease slightly

The labor market rebounded strongly mid-2021 and total payroll employment exceeded its pre-crisis level by the middle of the year. Total hours worked remained below pre-crisis levels, but are set to increase further in 2022 as the labor market strengthens on the back of job creation. The unemployment rate is projected to stabilize in 2022 at 8.0% before slightly diminishing in 2023, which should limit wage increases.

## Inflation is set to remain high in 2022

Inflation is set to surge towards the end of 2021, particularly due to high raw materials and energy prices. The significant increase in energy prices is expected to slow down gradually but will be passed onto industrial goods in the beginning of 2022. Inflation is projected to reach 2.1% in 2022 and slow down to 1.4% in 2023 thanks to a decrease in energy prices.

## Public debt expected to decline as of 2021

The general government deficit is set to narrow to 8.1% of GDP in 2021 from 9.1% in 2020. This is mainly due to the improvement of the macroeconomic situation and the dynamism of tax revenues, including those linked to the housing market. These were offset in part by the extension of some emergency measures, such as the partial activity scheme and direct subsidies via the solidarity fund, as well as those recovery measures included in the French recovery plan France Relance but not financed by the e Recovery and Resilience Facility (RRF) and the subsidies to assuage the rise in energy prices. The RRF is expected to partly finance recovery expenditure measures worth €16.5 billion (0.7% of GDP). The revenue-to-GDP ratio is set to dwindle by around ½ pp., due to the permanent cut in production taxes under France Relance, and low corporate profits in 2020. Moreover, by cushioning the shock on government revenues in 2020, income support schemes are set to lead to a lower-than-one elasticity of some tax revenues in 2021. In turn, the expenditure ratio is expected to shrink by 1½ pps., to 60.1%. A downward risk to these projections, presented by the possibility of public guarantees being called, appears limited. The general government deficit is set to decrease to 5.3% of GDP in 2022, mainly due to the unwinding of most emergency measures and to lower recovery measures under France Relance than in 2021. This forecast incorporates RRF financing worth 0.4% of GDP and an annual estimate of the budgetary impact of the investment plan France 2030 of 0.1% of GDP as of 2022. The revenue ratio is expected to further narrow, by ¾ pp. of GDP, due to the withdrawal of the housing tax, the cut of the corporate income tax rate, the reduction in electricity taxes and lower RRF grants. In turn, the expenditure ratio is set to decline by 3¾ pps.

## FRANCE AND BELGIUM ECONOMY cont...

For 2023, the government deficit is set to narrow further to 3.5% of GDP. While the revenue ratio is expected to increase only slightly mainly due to the unwinding of the cut in electricity taxes, the expenditure ratio is projected to decline by 1½ pps. Public debt is forecast to display a downward trend over the whole forecast horizon. From 115% of GDP in 2020, it is set to decline to 114.6% already in 2021 due to the dynamic growth and relatively high inflation. Public debt is then expected to fall to 113.7% in 2022 and to around 113% in 2023.

### Tourism economy

New research from the World Travel & Tourism Council (WTTC) reveals France's travel and tourism sector's recovery could achieve a growth of 34.9% in 2021. At the recently organized Destination France Summit, WTTC said the sector's growth this year is set to soar ahead of Europe's overall recovery at 23.9% and the global recovery at 30.7%. In 2019, the country's travel and tourism sector's contribution to GDP represented EUR 211 billion (8.5% of the national economy). In 2020, when the pandemic brought international travel to a grinding halt, the contribution of the travel and tourism sector fell to just EUR 108 billion (4.7% of the national economy).

However, according to the latest research, at the current rate of recovery, the sector can expect a year on year growth of almost 35%, representing an increase of EUR 38 billion. The data also reveals that the country could see a year on year increase of 21.8% in 2022, contributing a further boost to the economy of EUR 32 billion.

The global tourism body says that whilst a rise in domestic travel has provided some relief to the nation, it is not enough to achieve the full recovery needed to salvage its economy and the millions of jobs lost due to the COVID-19 pandemic. The research goes on to show that while domestic spending is set to increase by 56.6% year on year in 2021, international spending could decrease 1.9% this year.

However, while domestic spending is set to rise once again, with a year on year growth of 9.9%, international spending is expected to rebound 67.8% next year, in turn providing a massive boost to both jobs and employment. In terms of employment, the French tourism sector supported almost 2.7 million jobs before the pandemic struck.

After suffering a loss of almost 200,000 jobs last year, the research shows that employment is set to remain stagnant in 2021. However, again the outlook is more positive next year with an expected rise of 9.4%, providing an additional 236,000 jobs across the country.

WTTC President & CEO, Julia Simpson said: "Our latest research shows that France's travel sector is beginning to recover faster than its neighbors although there is still a long way to go. Last year the pandemic saw hundreds of thousands of jobs lost in France. This year employment remains flat, but we expect to see a big uptick in Travel & Tourism in France next year as long as the country remains open to vaccinated travelers."

# FRANCE AND BELGIUM ECONOMY cont...

## Aid measures

### Partial activity, the device extended until February 28 2022.

In view of the restrictions decided to fight against Covid-19, the government extends this measure until February 28, 2022. The compensation remains at 100% for the tourism sector under the same terms as in December and January 2021.

“The derogatory system of partial activity with no remaining costs for employers is renewed, explains the government. Companies in the affected sectors losing more than 65% of their turnover, or subject to health restrictions can benefit from the partial activity scheme without remaining expenses.”

### The “fixed cost” system

For the months of December and January, companies in the impacted sectors by the health situation, will be able to benefit from the “fixed costs” device when they lose more than 50% of their turnover compared to the same month in 2019.

This scheme will compensate 90% (70% for companies with more than 50 employees) of the operating loss. The amount of aid received by companies under the “fixed costs” scheme is capped at €12 million per group for the duration of the crisis

## COVID-19 Numbers

Epidemiological Update: Weekly Report 03 February 2022 - Santé Publique France

At the national level, after 15 weeks of increase, the incidence rate decreased by 8% in week 4, reaching 3,460 cases per 100,000 inhabitants, which is still more than 331,000 cases on average per day. It was decreasing among the under-50s and increasing for those aged 70 and over. The greatest increase was in the 90+ age group (1,667, +19%). It remained highest among 10-19 year-olds (6,212, -9%). The screening rate was falling for the third consecutive week. It was stable among 80-89 year-olds (5,152, -2%) and in the 90+ age group (8,949, -1%), and decreased in the other age groups, particularly among the under-60s. The highest rate was again observed among 10-19 year-olds (14,601, -17%). The positivity rate continued to increase but less markedly than in the previous week suggesting that self-testing remains in more frequent use, with results subsequently confirmed by PCR or antigenic test.

The number of deaths in hospitals and long-term care facilities continued to rise (1,897, +9%). The excess all-cause mortality observed since week 47-2021 particularly concerns 65-84 year-olds. In metropolitan France, the incidence rate was stable or falling in all regions. The greatest decline was in the Paris area, the region with the lowest rate in week 4 (2,303, -30%).

# FRANCE AND BELGIUM ECONOMY cont...

## Contact tracking

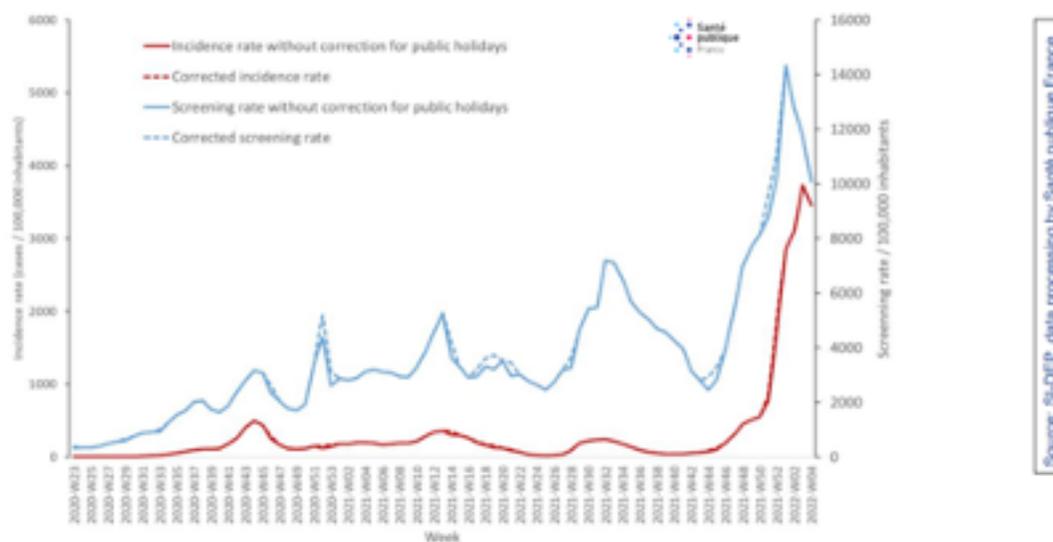
In week 4, a decrease in the average number of contacts identified per case called was observed, which could be explained by a less effective identification of contacts by the cases, or by a higher proportion of persons with a history of infection less than two months old (and therefore excluded by definition from the contacts).

## Prevention

The CoviPrev survey of 11-18 January (wave 31) shows an increase in adherence to prevention measures and the booster shot. 33% of parents were in favor of vaccinating their 5-11 year-old children (79% for parents of 12-17 year-olds).

On 1 February, 78.6% of the French population had completed a primary vaccination series. Vaccination cover for the booster shot reached 81.4% in the 65+ age group (representing 89.7% of those eligible at that date) and 73.2% in the 80+ age group.

Weekly evolution in incidence and screening rates, with or without correction for the effect of public holidays, since week 23, 2020, France (data on 2 February 2022)



## Measures & Restrictions

### “Vaccination Pass”

From February 15, 2022, the rules relating to the vaccination pass change for people over 18 years and 1 month old.

At this date, the booster dose will have to be given 3 months after the end of the initial vaccination schedule and within a maximum of 4 months.

# FRANCE AND BELGIUM ECONOMY cont...

## Education

School protocols have been simplified. The goal is to keep schools open as much as possible. Thus: When a positive case is detected in a classroom, parents will no longer be asked to pick up their child immediately, they can wait for the end of school day.

When a positive case is detected in a classroom, children will be able to use 3 free self-tests (instead of one PCR test followed by two self-tests).

Finally, parents will no longer be asked to provide a certificate after each self-test: a single certificate will be required.

## Vaccination

The time for the booster dose has been reduced to three months after the last injection or infection with Covid-19. The vaccine booster is open to all persons 18 years of age and older, and since January 24, it is open to all teenagers aged 12 to 17 years without obligation.

Vaccination is open to all children aged 5-11 years and requires the agreement of one or other of the holders of parental authority.

## Isolation

Isolation and quarantine rules have evolved in case of Covid-19 infection or contact cases.

The objective is to face the extremely rapid spread of the Omicron variant and to maintain, at the same time, the socio-economic life in France. 7 days of isolation for vaccinated people and 10 days when not or not fully vaccinated. No isolation for vaccinated people when contact case. 7 days isolation for non-vaccinated contact cases.

## Tests

It is no longer mandatory to perform a PCR test to confirm a positive antigen test. However, a PCR test is still required after a positive self-test.

## Work

In January and for 3 weeks, telecommuting was mandatory 3 days/week for positions that allow it, 4 when possible. As of February 2, telecommuting is no longer mandatory but is still recommended.

# FRANCE AND BELGIUM ECONOMY cont...

## Gatherings & leisure

Since February 2, lifting of the gauges in establishments receiving a seated public (stadiums, concert halls, theaters...). To access these places, wearing a mask remains mandatory.

Standing concerts are forbidden. They will be able to resume as of February 16 in compliance with the health protocol. In cafés and bars, standing consumption is prohibited. It will be allowed again from February 16. Clubs, closed since December 10th, will be able to reopen in compliance with the sanitary protocol as of February 16th.

## Barrier measures

Since February 2, the obligation to wear a mask outdoors has ended. Frequent ventilation of enclosed spaces is more necessary than ever.

## Travel

Any person aged 12 and over entering France must present a negative PCR or antigenic test less than 24 or 48 hours old, depending on the country of origin. The only exception is for people with a complete vaccination schedule who do not have to present a test when they arrive from a European Union member state, Andorra, Iceland, Liechtenstein, Monaco, Norway, San Marino, the Holy See or Switzerland. The Government is easing border health measures with the United Kingdom for vaccinated persons.

# FRANCE AND BELGIUM ECONOMY cont...

## Belgium

Real GDP bounced back strongly in 2021 after a severe decline of 5.7% in 2020 caused by the COVID-19 outbreak. The gradual easing of restrictions throughout the year allowed real GDP to surpass its pre-crisis level already in the third quarter, with a strong increase of private consumption. GDP growth is projected to reach **3.2% in 2022** before reverting towards potential at **1.4% in 2023**.

The labor market has recovered, with the unemployment rate expected to peak at 6.6% in 2022 and then decline. Labor and skill shortages in key sectors could weigh on growth. Inflation is edging up and rapidly rising energy prices could fuel wage inflation through indexation.

At the beginning of 2022, restrictions on activity and supply side constraints are still affecting the economy but are expected to gradually ease. Real GDP is forecast to be roughly flat in the first quarter before recovering strongly in the following quarters.

Investment is projected to grow strongly over the forecast horizon, supported by low interest rates, the Recovery and Resilience Facility, easing supply side constraints, robust private consumption and the energy transition.

On the back of increasing energy prices and strong economic recovery, headline HICP inflation reached 3.2% in 2021. After exceptionally high electricity and gas prices in the fourth quarter of 2021 and the first quarter of 2022, energy prices are expected to gradually decline over the forecast horizon, though remaining at a high level. The Belgian Government recently announced measures to help assuage electricity prices.

### Tourism economy

Tourism directly contributes 2.3% of total GVA in Belgium, while employment in tourism sectors represents 6.7% of the total employment, according to the Tourism Satellite Account. In Belgium, tourism is under the respective authority of three regions: Flanders, Wallonia, and Brussels. In Flanders, tourism is the responsibility of the Flemish Minister for Justice and Enforcement, Environment and Spatial Development, Energy and Tourism. In Wallonia, tourism is the responsibility of the Minister for Public Service, Tourism, Heritage and Road Safety.

## FRANCE AND BELGIUM ECONOMY cont...

	2014	2015	2016	2017	2018
<b>Outbound tourism</b>					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	13 272	12 499	15 773	14 638	15 626
Brussels	2 226	1 879	2 295	2 342	2 605
Flanders	7 256	7 344	9 253	8 077	8 514
Wallonia	3 790	3 277	4 225	4 219	4 507

Source: OECD Tourism Statistics (Database)

Belgium, just as the rest of the EU members, has been trying to halt the spread of the virus in its territory by, among others, imposing entry restrictions on incoming travelers. Currently, the country is applying the color-coded system, which categorizes countries in green, orange or red, depending on their most recent infection rates.

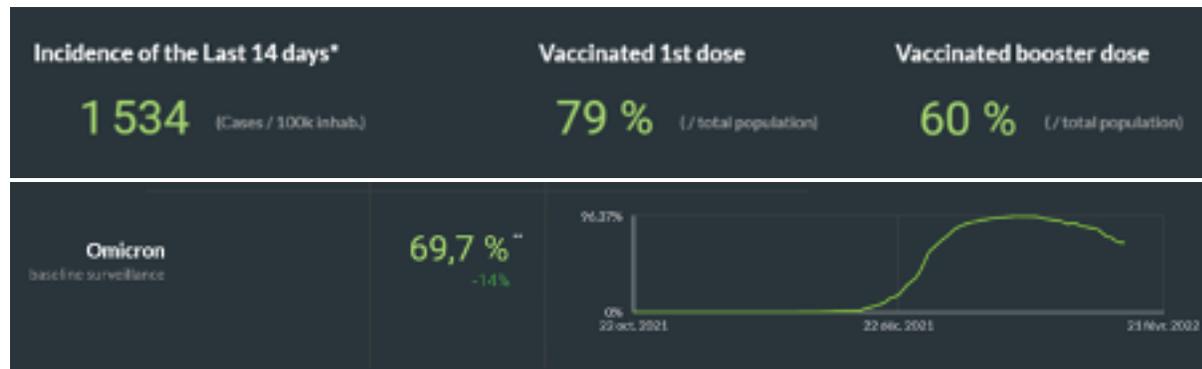
Belgium's Tourism Sector on Its Knees After 'Miserable' Summer Season. The representatives of tourism in Belgium have urged for the government to prolong the temporary unemployment measure since the country had minimum tourism activity this summer due to the Coronavirus crisis.

### Aid measures

The unemployment measure is granted to those that are temporarily unemployed, and the aid accounts for 65 per cent of their average salary, with a sum of €2,785.07 per month.

# FRANCE AND BELGIUM ECONOMY cont...

## View on COVID-19 Belgium



Source: Sciensano datastudio

## Measures & Restrictions

### Coronavirus barometer



On the morning of 18 February, the coronavirus barometer has switched from code red to code orange. This has been decided by the Consultative Committee. Among other things, the hospitality sector can resume its normal opening hours and nightclubs can reopen. All indoor and outdoor public events are also allowed. Teleworking will no longer be mandatory but will still be recommended.

The Consultative Committee has noted that the Omicron wave has peaked and the number of new infections has declined over the past two weeks. Meanwhile, the reproduction number for infections and

hospital admissions is below 1, confirming the decline in virus circulation. The number of new hospital admissions is also starting to decline, as are the number of coronavirus admissions to intensive care units.

Based on these developments, the Consultative Committee has decided to switch to code orange as of Friday 18 February. In concrete terms, this means:

### Hospitality sector

There will no longer be a specific closing time, nor will there be a restriction on the number of people per table. In addition, it will no longer be mandatory to be seated when eating and/or drinking. Face masks will only be mandatory for staff. Night clubs can reopen at a capacity of 70%.

# FRANCE AND BELGIUM ECONOMY cont...

## Events

All indoor and outdoor public events will be allowed at all times.

Wearing a face mask will be mandatory for:

- non-dynamic indoor activities
- dynamic indoor and outdoor activities, only for staff

The CST will be mandatory for all indoor activities with more than 50 participants and for all outdoor activities with more than 100 participants.

A capacity of 200 people is always allowed, but may be increased up to:

- 70% for dynamic indoor activities
- 80% for non-dynamic indoor activities and all outdoor activities
- 100% if the air quality at indoor activities is below an average measured target value of 900 ppm CO<sub>2</sub>
- 100% for outdoor activities if working with compartments of up to 2,000 people or if additional crowd-control measures are taken after favorable advice from the Local Security Unit.
- Weddings and funerals will remain allowed.

## Organized leisure activities

For organized outdoor leisure activities, there will no longer be a maximum capacity. For organized indoor leisure activities, there will be a maximum capacity of 200 people. This maximum number will not apply to sports activities, with the exception of sports camps.

## Ventilation

The Consultative Committee has emphasized the importance of proper ventilation of indoor spaces. When the limit value of 1500 ppm CO<sub>2</sub> or a flow rate of 18 m<sup>3</sup>/h ventilation and/or fresh air supply per person has been reached, the capacity must be reduced or other measures must be taken.

## Teleworking

Teleworking will no longer be mandatory. However, it will remain recommended where possible.

## Shopping

There will no longer be any restrictions on shopping, nor will there be a closing time for night shops.

## Face mask requirement

From 19 February, wearing a face mask will only be mandatory from the age of 12.

# FRANCE AND BELGIUM ECONOMY cont...

## Travel rules

People travelling to Belgium will no longer need to take account of the color code of the country they are travelling from. People who do not have their main residence in Belgium and who travel to Belgium from EU/Schengen countries or third countries must now have a valid vaccination, test or recovery certificate. However, the rules for very high-risk zones and essential and non-essential travel will continue to apply, as will the 48-hour rule and the exceptions for categories such as carriers and frontier workers.

In line with the Council Recommendation (EU) 2022/107 and the evolution of the global distribution of Omicron, the Consultative Committee has decided to adjust the certificates as follows:

- the vaccination certificate is valid for 270 days after the final dose of your primary vaccination and indefinitely with a booster vaccination.
- the test certificate will be valid for 24 hours for a Rapid Antigen Test (RAT). Please note: only RATs approved at European level are eligible. PCR tests are valid for 72 hours.

The Consultative Committee has asked health ministers to simplify testing and quarantine rules when travelling.

## France and Belgium early 2022: A still fragile recovery in travel

It is a strong signal this Tuesday, February 1. Despite the omnipresence of Covid-19, Denmark becomes the first country of the European Union to lift all its restrictions. Nightclubs reopen, gauges disappear. Very few restrictions remain in place on entry into the country, only for unvaccinated travelers. Quite a symbol.

Meanwhile, Morocco is finally preparing to reopen its borders on February 7. The ski resorts are filling up on almost (too) spring-like days. The horizon is clearing on many fronts, even in the sky. EasyJet is even starting a training and recruitment program for 1000 pilots. In France, Jean Castex's "liberating" speech has awakened the sleeping beauty of the travel industry, anaesthetized by the Delta-Omicron combo.

Tourism is taking off again, and some territories are taking up their old battles. Colmar is working to curb Airbnb-type rentals. The Calanques introduce a permit to visit.

## FRANCE AND BELGIUM ECONOMY cont...

For its part, the World Health Organization recommends “lifting or relaxing international travel bans, as they do not add value and continue to contribute to the economic and social stress of States Parties.” The World Tourism Organization (UNWTO) could not have said it better. For one simple reason: travel contributes to the mental health of travelers and the economic health of countries.

The world of before back? Not really. If the year 2022 starts with some good news, we should not get carried away either. There are still irritants and grains of sand in the mechanics of the journey, such as the fear of getting stuck at the destination, of a new variant, of new restrictions without notice. And tests at every turn, which exasperate the professionals of the sector. Not to mention the recruitment problems in this phase of fragile recovery.

For the spring vacations, the delay in reservations reached 57% compared to 2020, note the Travel Companies (EdV). The travel professionals nevertheless note an improvement for only 15 days. The recovery is more pronounced among online travel agencies (which we interviewed at netManagers), which seem to be taking advantage of the upturn more quickly. One more reason to encourage the entire travel stratosphere to position itself on the Internet.

Yannick Faucon, president of EdV Centre Est, is surprised to see traditional agencies still without a website. So are we, especially in 2022! Because digitalization has been a chestnut for over 30 years. And if clients don't push the doors of agencies, it's up to agencies to go and find them where they are all day long, on the Internet. The next world is also about taking risks on social networks, to renew its clientele.

The EdV are preparing a campaign on social networks for the spring. It will be an opportunity to remind the expertise of agencies, their ability to accompany even in times of trouble. And to rejuvenate their image.

As the entire industry is on a recovery pace, Tour Operators and Travel agencies are also facing the same issues with their receptive agencies: lack of staff mostly, making the rebound fragile and not as fast as the industry would hope.

# FRANCE AND BELGIUM ECONOMY cont...

## Global Industry Trends

### Traveling in Europe

The EU has recommended that from 1 February anyone travelling from within the bloc will need only a basic 'green pass' health certificate, which can be obtained via vaccination, recovery, or a recent negative Covid test, and remove the need for self-isolation. However, not all countries have stated that they will adopt this rule so check with your destination.

Greece removes testing requirements for vaccinated travelers from 7 February. Face masks are no longer mandatory in the UK. Travelers to the Netherlands with a booster vaccine will no longer have to quarantine from 2 February. Denmark and Norway lift all domestic travel restrictions from 1 February. Switzerland and Austria have relaxed travel restrictions for UK travelers. Sweden has dropped the requirement for proof of a negative test from arrivals.

### France

Travelers may enter France if they can show proof of vaccination, recovery, or a recent negative test result. Everyone must fill out an entry form stating that they don't have any COVID-19 symptoms. Since December 2021, non-EU arrivals are asked to provide a negative COVID-19 test taken within 24 or 48 hours depending on the country of origin, even if they have been vaccinated.

Unvaccinated individuals arriving from green list countries — currently all EU states alongside Andorra, Canada, Iceland, Liechtenstein, Monaco, Norway, San Marino, Switzerland and others — must present a negative PCR or antigen test, or proof of recovery from COVID-19. Vaccinated and unvaccinated individuals from scarlet red list countries (virus variant areas) may enter France only for compelling reasons. They must take a COVID-19 test prior to and upon arrival, and quarantine for 10 days.

### Belgium

All travelers aged 12 and older can enter Belgium if their 'EU Digital COVID Certificate' contains one of the following:

- ✓ Proof of full vaccination, completed at least two weeks before travelling. Accepted vaccines: vaccines authorized by the European Medicines Agency (EMA): Comirnaty (BioNTech and Pfizer), Moderna, Vaxzevria (AstraZeneca/Oxford), Janssen and Covid shield.
- ✓ Proof of recovery from COVID-19. Validity: 180 days.
- ✓ Negative molecular or antigen test result. Validity: 72 hours (PCR) and 36 hours (antigen).

Documents equivalent to the 'EU Digital COVID Certificate' (EUDCC) in French and English are also accepted, if they meet the same requirements listed above for the EUDCC.

# FRANCE AND BELGIUM ECONOMY cont...

## International Travel

Certificate of international travel. February 4th, 2022.

To deal with the virus and contain the introduction of its variants, border control measures are temporarily needed, both on entering and leaving the country.

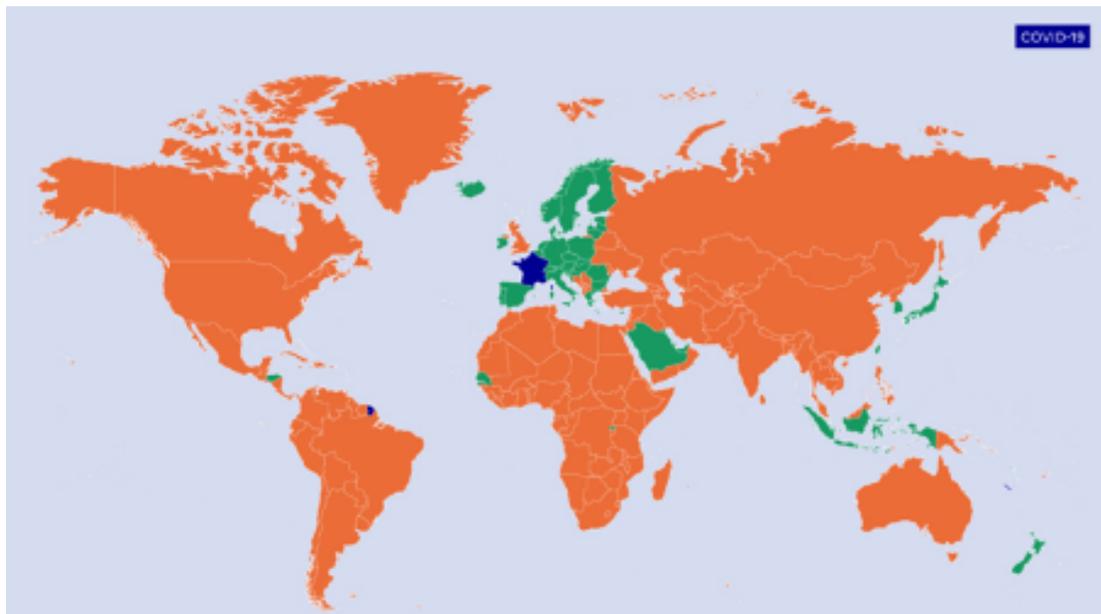
Therefore, each time the border is crossed, the traveler will need to comply with the different regulations: the mobility rules + the health control measures + the usual rules govern the right to stay. Countries have been classified based on health indicators. The countries have therefore been classified as follows:

**“Green list”** countries and territories: Countries or territories where no active circulation of the virus is observed and no variant of concern is identified.

**“Orange list”** countries: Countries where active circulation of the virus is observed in controlled proportions, without spread of any variants of concern. These are all countries not included in the “green” and “red” list countries.

**“Red list”** countries: Countries where active circulation of the virus is observed with the presence of variants of concern. To date, there are no countries classified as “red”.

**“Scarlet list”** countries: Countries where there is very active circulation of the virus and discovery of a variant that may pose a risk of increased transmissibility or immune escape. To date, there are no countries classified as “scarlet red”.



*source mobile.interieur.gouv.fr*

# FRANCE AND BELGIUM ECONOMY cont...

## Booking trends

According to many articles and studies, French travelers are looking for more flexibility (COVID related), nature and autonomy. Safety and affordability will stand out as well. Customization is still a keyword. Customers tend to travel for less time but more often. The French are giving up their long summer vacation in exchange for several short vacations all year long.

January 2022: a decline in traffic but a recovery in sales. While the number of flights in Europe was down in January according to Euro control, dry flight sales are up significantly from last year, particularly to the US and Mexico.

Travel restrictions related to the Covid-19 Omicron variant had the expected effect in January 2022, with the number of flights losing compared to December. In terms of traffic, even the low-cost airline segment was affected, with a low at 53% of 2019 levels. But the successive announcements of the lifting of these restrictions have boosted sales, and this in all countries: “after a very negative January, the February traffic is constantly increasing, week after week,” underlines Euro control, which manages air traffic control on the Old Continent.

From February 2 to 8, the number of daily take-offs was systematically up compared to the previous week.

Travel predictions 2022 from Booking.com, shows France is saying YES to travel, making up for lost vacation time (has grown from 24% to 59% in a year). As long as the whole vacation is within budget, 71% are open to any suggestion destination-wise. 79% believe travel helps their mental and emotional wellbeing. Some reports say that The French want to travel even more than in 2022 than they did 2021.

All nationalities included, 81% of respondents\* plan to travel during the first six months of 2022, according to this study conducted in November 2021. Even better: 90% of French travelers plan to travel. In comparison, according to the Travelers Value Index 2021 study, conducted in May 2021, “only” 59% of French travelers anticipated a trip within 12 months.

People would be interested in an innovative service that could predict which countries will be safe to travel to (59%), even months in advance, or automatically suggest destinations which are easy to travel to now based on their country's and the destination's current COVID-19 requirements (56%).

According to WTTC, 70% of French travelers plan on spending more money on their travels in 2022, than in the last 5 years (this including 2019) : Revenge Travel

A few terms to characterize the trends for this year 2022 : private travel, customization, once-in-a-lifetime trip, safe adventure, flexibility. Plus, French trends which have not changed since 2019:

## FRANCE AND BELGIUM ECONOMY cont...

### A la carte/tailor-made travel demand to the US is taking over the escorted tours.

Demand for escorted tours and groups is stepping back. On the other hand, à la carte, customized trips are more and more appealing to the French visitors because they focus on products where human added value is strong. French visitors want more and more to be free when traveling, not to be dependent on an escort or a group, and want to have the possibility to include activities on demand.

### Immersion

Tour operators are receiving more and more requests for immersive experiences, activities and accommodation. This translates into meetings with the “locals”, apartments and B&B stays, eating with locals or authentic food experiences, walking tours in small groups off the beaten path, etc.

### The new aspirations of the French in terms of vacation

Relaxation is the priority for the French: they want to take their time during their vacation (62%) in order to rest and “recharge their batteries” (61%).

Change of scenery, disconnection, discovery and enrichment: 78% of the French want to discover landscapes and 68% want to discover new places. There is also a strong demand for heritage (69%) and gastronomic (54%) discoveries. They confirm that they are looking for a change of scenery to contrast with their daily life (63%). 54% of French people feel the need to free themselves from time constraints.

Between the stays they have already made and those they wish to make in the future, the search for comfort and well-being as well as the return to nature will intensify, respectively +10 points and +4 points between the stays already made and those to come. They will prefer comfortable and private accommodations in the heart of restful environments conducive to rejuvenation and reunion with their loved ones, far from the hustle and bustle of crowded destinations. The question of time is crucial: currently, stays in commercial accommodation last on average 1 week, but ideally they would like to spend 2 to 3 weeks on vacation! In addition, there is the desire to practice a more “slow” form of tourism that is conducive to the contemplation of landscapes and the respect of nature.

Some trends have existed for several years, but their progression has accelerated in direct response to the crisis: to be able to telework at their vacation destination: 74% of French people could adopt this practice if they had the possibility; avoid taking the plane (65%); opt for mobile accommodation, such as a camper van, van, van (58%); book at the last minute (54%).

Others should stay for the long term and intensify: live a particular or even unique experience (71%); travel in a more responsible way (70%); live like a local (69%).

## FRANCE AND BELGIUM ECONOMY cont...

### The top 20 destinations in January 2022 for the French market

All destinations combined, travel sales by offline and online agencies are down 33% in January 2022, compared to January 2019, according to the Orchestra barometer for L'Echo Touristique. This is a significant decline, but the situation is improving compared to December 2021 (-57% versus December 2019). Many travel professionals also note a revival of sales for a good ten days, in the wake of the announcements of Prime Minister Jean Castex.

In January 2022, mainland France will be at the top of the podium, boosted by the success of ski resorts after a blank season in 2020/21. Spain and its islands are in second place, just ahead of Greece. Proof that Southern Europe is also part of the winter vacation dynamic.

On the long-haul, it is unsurprisingly the Dominican Republic that leads the dance with +12% compared to January 2019. But the best progressions of the month go to the United Arab Emirates (+95%) and Tanzania (+189%). Dubai thus confirms a spectacular and continuous breakthrough on the French market, despite a test on return to France - required for all non-EU destinations - which is causing tension among travel professionals and travelers alike.

In 15th position, Morocco shows the biggest drop in the ranking (-80%). However, the opening of the sky on February 7 and the resumption of flights should allow it to recover. Especially since the entry formalities are now known.

For the summer of 2022, the TUI group foresees "a very strong booking dynamic". While a trend in short-term bookings is "currently still noticeable, with the hope of the end of the pandemic, long-term bookings are increasing significantly," the group said. As of Jan. 30, as many as 3.5 million customers had booked travel for summer 2022 with TUI's European tour operators. This is 72% of the summer 2019 level for the same period. TUI CEO Fritz Jousen even anticipates a 22% increase in the average basket compared to summer 2021 caused by the increased demand for package travel for higher quality offers and additional services. "Every step toward normalcy gives people confidence, and demand for vacation travel increases immediately," Fritz Jousen adds.

## FRANCE AND BELGIUM ECONOMY cont...

A few weeks before the opening of its 45th edition, the World Tourism Fair has conducted an exclusive survey on the 2022 summer vacations of the people of Paris and its surroundings as well as North of France (Lille area) and South East (Lyon area). This survey reveals that the USA remain strong on the top 5 destinations: #1 for Paris area, #3 for Lyon area and #4 for Lille area.



**Le Cercle des Voyages** on February 9th : “Strong growth in requests in the USA since the beginning of January. Clearly, the Western USA requests stand out: people need to see the great outdoors, the national parks, more than the big cities. The health pass in NYC with mandatory vaccinations for young children has been a real hindrance and to date all children under 12 are not yet fully vaccinated. Overall, we are achieving 70 to 80% of the 2019 figure for all destinations, depending on the week.

Alexandre Vercoutre, General Manager of **Marco Vasco** on January 27th: “The United States has become our number one destination again. For the past two weeks, we have been on a very strong rebound in bookings. Nevertheless, we remain down 35% compared to 2019, due to the absence of Asia and our long-haul positioning. Trends should improve, given the health situation. We are benefiting from the great return of the United States, which has become our top destination again. We remain cautious and we anticipate a decline in activity of around 35% for the year, compared to 2019.”

**Voyageurs du Monde**, Jean-François Rial, CEO, on February 12th: “This time it’s really started again. We are almost at the level of 2019 on the current reservations. The best sellers are Southern Europe, USA, Tanzania, Mexico, Peru, Costa Rica, Egypt, French Polynesia, South Africa and Dubai. India has just opened as well as Australia. Great season in perspective”.

# FRANCE AND BELGIUM ECONOMY cont...

French travelers to the USA intentions (Brand USA 2021 study)



Top 5 Motivations for Selecting Last Intercontinental Destination



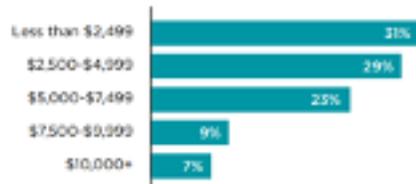
## DESTINATION DECISION



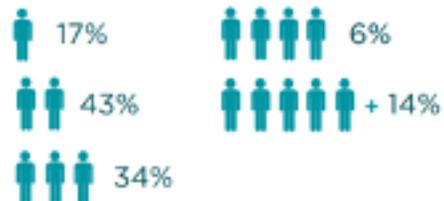
## AIR BOOKING



## Expected Household Travel Spending for Next Intercontinental Trip



## Expected Travel Party Size of Next Intercontinental Trip



# FRANCE AND BELGIUM ECONOMY cont...

## Travel to the US Pre-COVID-19: 2018 & 2019

Over the last few years, the number of French visitors was increasing every year.

The United States welcomed 1,767,461 million French travelers in 2018, with this new record, France confirmed its 9th position as Outbound Country. This stood for an increase of +6% compared to 2017. Among the French visitors, 27% were travelling to the US for the first time (compared to 25.7% in 2017). The airline prices drop from Paris may have enabled French people to afford a first trip to the US. Above all, within the Top 10, France achieved the second best growth and established itself firmly on the third step of the European podium, behind the United Kingdom (4.66 million visitors, +3.9%) and Germany (2.1 million, -0.9%). With a 9% increase from January to March 2019, versus 2018, which enabled France to overtake Germany for the first time. Finally, from January to September 2019, the number of French visitors to the US is up 4,3% vs 2018, with 1 404 262 French visitors.

USA ranked #1 in the top 10 long-haul destinations, in terms of number of passengers in summer 2019. On Oct. 31st 2019, the French bookings for US Travels in winter 2019-2020 was up +29%. According to the recent NTTO forecasts, the number of French traveling to the US was expected to increase by 20% over the next five years.

## Trends in the reservations of Belgians for 2022

Belvilla's figures show that Belgians continue to travel mainly within Belgium, even though stays abroad are increasing strongly.

This is what the figures of Belvilla, the international platform for booking vacation homes, reveal. It should also be noted that due to the COVID-19 crisis, reservations are later than usual. Those who want to travel with "their bubble" prefer a vacation home.

The numbers speak for themselves: as in 2021, Belgium remains our favorite vacation destination, with 83.5% of the total number of bookings for 2022. In the short term, most of our compatriots will travel within our borders. In January and February, Belgium is the big winner, with 87% of all bookings. For the spring, Belgium accounts for 78.3% of all bookings.

And for the summer of 2022, Belgium and France currently share first place, with 37% of all bookings. These high figures clearly show that demand for stays in Belgium is higher than before the pandemic. The trend is clear: Belgians are primarily booking in their own country, but Belvilla also notes that tourists have more confidence than in 2020 in renting a vacation home abroad.

First provisional figures: Austria attracts more winter sports enthusiasts in January and February. Italy sees a provisional increase of 26% in the number of Belgian tourists for the whole year. Austria shows a 20% increase for the whole year 2022. Germany, Croatia and Spain also show an increase of 27%, 28% and 18% respectively. France is still popular, with an increase of 7%. The number of Belgian tourists visiting France remains stable.

# FRANCE AND BELGIUM ECONOMY cont...

## Forecast for the 2022 school vacations

For those who are still hesitating about their choice of destination in 2022: based on the booking figures, Belvilla has made a forecast of the foreign travel desires of Belgians. For the carnival vacation, Belgians mainly choose the Netherlands and France. Our northern neighbors see the number of Belgian tourists rise by 330%, compared to the Carnival vacation 2021.

For the Easter vacations, Spain (+100%), the Netherlands (+300%), France (+467%) and Germany (+900%) attract Belgians. The Whitsun weekend shows good figures for France (+189%) and the Netherlands (+200%). France (+89%) also notes an increase in bookings by Belgians for the Ascension weekend, compared to 2021.

## Slow start to bookings for the second half of the year

The 2022 summer vacations do not show any increase in the number of Belgian tourists at the moment. But things can still change. Belvilla notes that, for the time being, Belgians are mainly making travel plans for the first half of the year. There is a lot of uncertainty about the pandemic. As a result, Belgians are mainly booking for the short term. And a lot of them are doing so. In January and February, 105% more bookings were made than in the same period last year. This means that we are certainly on our way back to the 2020 level.

**Tour operator TUI** expects booking levels for the summer of 2022 to match those before the coronavirus pandemic, CEO Fritz Jousen announced. The group recorded a net loss of almost 2.5 billion euros for the 2020-2021 fiscal year, which ran through September 2021. The net loss for the past fiscal year was one-fifth less than the previous year. TUI reported full-year revenue of €4.73 billion, while analysts were expecting revenue of €5.67 billion.

TUI also points out that TUI Hotels & Resorts and the tour operators in the western (Belgium, Netherlands, France) and central (Germany, Austria, Switzerland and Poland) regions were able to report positive quarterly results for the first time since the crisis began. Furthermore, the trends for the fiscal year 2021-2022 are considered positive by the group. In the first quarter of the current 2021-2022 fiscal year, TUI says it has already sold “93% of the first quarter program.” Average prices for winter are 15% higher than for the corona period, and for summer they are even almost 23% higher.

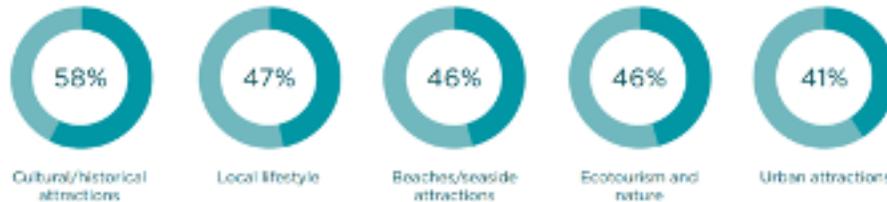
**USA Travel** has been overwhelmed with requests since the beginning of the rebound. Bookings are following but in a slower way. Their top 3 US destination requests are Western USA followed by Florida and NYC. Like for many Tour Operators they are noticing a change in prices particularly in Florida where travelers need a higher budget than precovid for the same product.

# FRANCE AND BELGIUM ECONOMY cont...

Belgian travelers to the USA intentions (Brand USA 2021 study)



Top 5 Motivations for Selecting Last Intercontinental Destination



## Destination Decision and Air Booking Windows for Next Intercontinental Trip

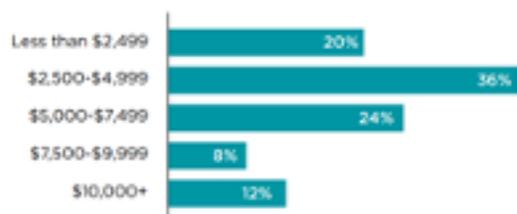
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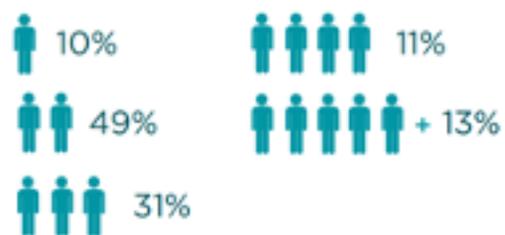
AIR BOOKING



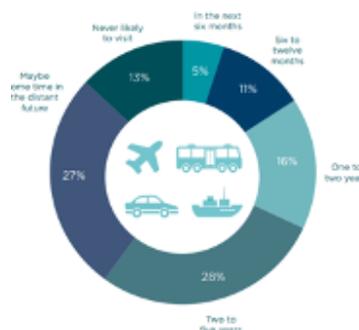
## Expected Household Travel Spending for Next Intercontinental Trip



## Expected Travel Party Size of Next Intercontinental Trip



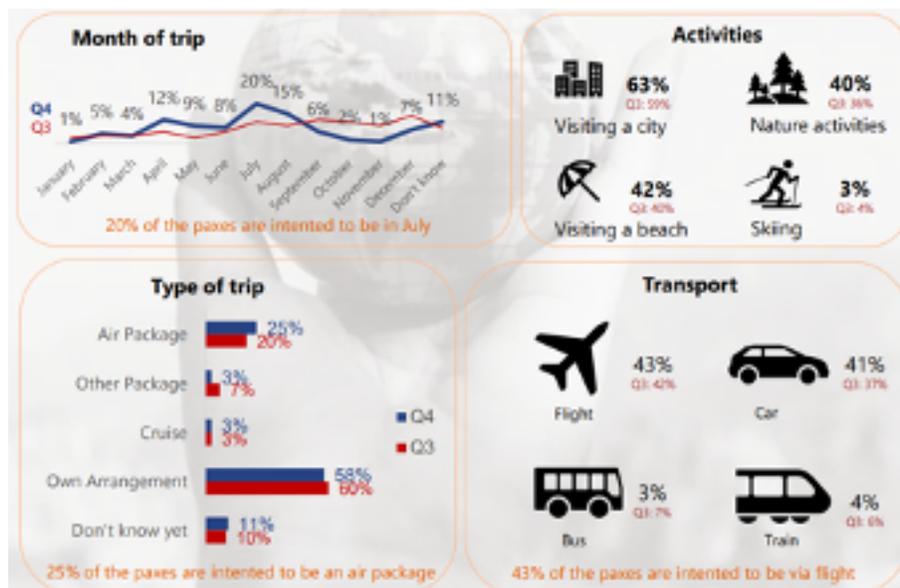
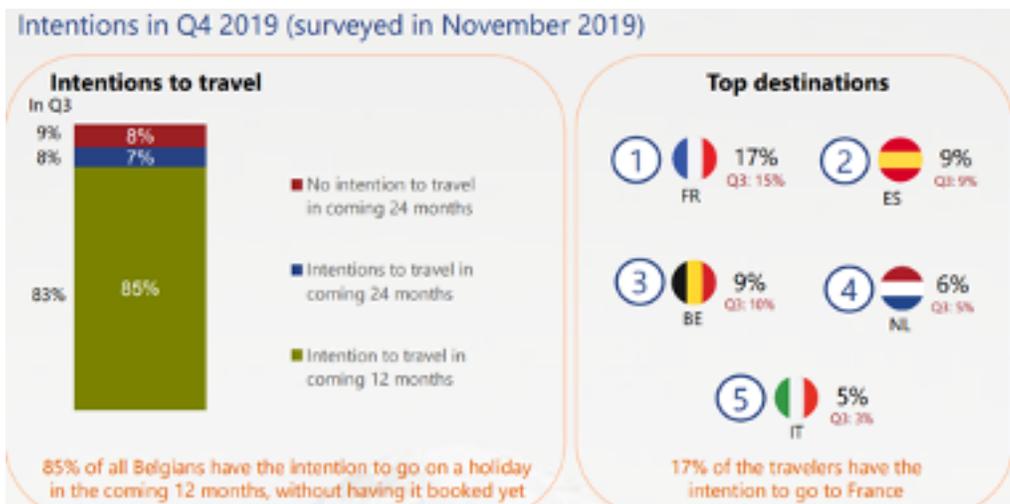
Likelihood of Travel to USA



# FRANCE AND BELGIUM ECONOMY cont...

## Travel to the US Pre-COVID-19: 2018

Since 2018, ABTO's Travel Trends Report provides a comprehensive overview of the entire Belgian travel market for 43 carefully selected parameters. These include sociographic data and data on sociographic data and data on booking, transport, accommodation, booking method, destination, departure and booking periods, activities on site, composition of travel participants and general travel habits. ABTO is the Association of Belgian Travel Organizers. Thanks to the quarterly survey, trends and developments become visible before they are even felt in the market.



# FRANCE AND BELGIUM ECONOMY cont...

## State of long-haul overseas flights

From France: Since the boarder reopening, airlines have slowly rescheduled their flights. With the Omicron variant, the summer programs are still fragile and can be revised anytime depending on the demand say the airlines. As per today, flights schedule are not back to “normal” like the pre Covid period.

From Belgium: The long haul flights from Belgium, like in Europe in general has been slowed down by the pandemic. The rebound in flight booking seem to go more slowly in Belgium, as an example, Delta was actually perfect as they had a direct flight every day to Atlanta but since the pandemic, they cancelled it and apparently they don't intend to put that flight back on right away.

In January 2022, air ticket prices from French airports increased by 5.5% compared to the same month last year, all destinations combined According to the DGAC index, which took comparisons with the previous year rather than with 2019 before the Covid-19 pandemic crisis, the year 2022 starts with prices

### What are the post-Covid trends for the air transport sector?

Aircraft construction, ecology, coordination of states... After two years of the pandemic, what trends are emerging in the complex world of air transport? A lack of coordination between states : this is the weak point. Instead of coordinating their health policies and implementing the WHO recommendations, the States have implemented their own health policies, which has killed international air transport. Countries have massively supported their air transport: basically, air transport has come out of the turbulence through which it has passed and through which it is still struggling. Indeed, the airlines have, on the whole, obtained massive support from their governments, which have clearly understood how essential this sector of activity is not only to the economy but also to the prestige of the States.

Of course, the environmentalists had to pay a price and in some countries, such as France and Germany, administrative measures were taken to limit domestic air transport. However, these measures have been taken on the margins and it is not certain that they will be validated by the European Commission.

## FRANCE AND BELGIUM ECONOMY cont...

The number of carriers has increased since 2019. Here's a paradox: the worse the airline industry got, the more new carriers were created. The numbers are in. In the last 5 years, between 2017 and 2021, 297 companies have disappeared, but during the same period 495 new carriers have been created, an average of almost two per week. This is enough to show the tremendous attraction of this sector of activity.

Also note that the same causes produce the same effects, so the arrival on the market of companies run by those who brought the ruin of poorly managed "low costs" like WOW air or Norwegian, can only be harmful to air transport.

Aircraft manufacturing is doing well. Aircraft orders continue to flourish. There have been many cancellations, but these have been offset by new orders. In 2021, Airbus received 771 orders and 264 cancellations, for a positive balance of 507 aircraft. Boeing, on the other hand, is on a par with Airbus, with 909 orders, 430 cancellations and a positive balance of 479 aircraft. Deliveries have resumed: 611 for Airbus and 340 for Boeing. Over the past three years, 1,762 aircraft have been retired, but replaced by new, more efficient and, whatever the grumblers say, more environmentally friendly machines. Basically, the trends are quite positive. Air transport will emerge more economically efficient and more environmentally friendly. There are still two small drawbacks: yield management as practiced up to now does not seem to be correcting its excesses and there is a certain arrogance on the part of the big players in air transport.

Besides, Ticket prices on Air France will increase again. But for the right reason, says the airline. Air France is raising its ticket prices from 1 to 12 euros as of Monday January 10th 2022 to offset some of the extra cost of using sustainable aviation fuel, which reduces CO2 emissions. "A 'Sustainable Aviation Fuel' contribution will be integrated in the price of the ticket: from 1 to 4 euros in Economy cabin, from 1.50 to 12 euros in Business cabin, depending on the distance. The group's other airlines, KLM and Transavia, are also affected by the measure. Sustainable aviation fuels (SAF), which are produced from used oil or forest and agricultural residues, allow for a 75% reduction in CO2 emissions over their life cycle, the main greenhouse gas, compared to fossil aviation fuel. Aviation kerosene currently represents between 20% and 30% of airline costs and SAF is four to eight times more expensive. They are currently produced in quantities far too small to meet the needs. "The emergence of large-scale production channels in France and Europe will help reduce these costs," according to Air France.

## FRANCE AND BELGIUM ECONOMY cont...

The borders reopened on Monday, November 8, 2021 as announced by the White House on October 15, 2021.

As of November 8, 2021, non-citizen and non-immigrant travelers to the United States by air are required to be fully vaccinated and provide proof of vaccination status before boarding a plane to travel to the United States. Airlines verify passenger documentation and proof of vaccination. Each airline has an application to record all documents. It is also recommended that travelers have a hard copy of their documents. Since December 6, 2021, the U.S. Government requires all travelers over 2 years of age arriving in the U.S. to have a negative viral test less than 24 hours prior to departure, whether or not they are vaccinated.

Since February 12, 2022, proof of vaccination is once again sufficient to come/return to France, regardless of the country of origin. A negative test is no longer required if the traveler presents a complete vaccination schedule (2 doses of vaccine, third dose mandatory at the latest 9 months after the second dose). For non-vaccinated travelers, the obligation to present a negative test to travel to France remains. The measures on arrival - test, isolation - are lifted when they come from countries on the green list. Finally, unvaccinated travelers from countries on the “orange” list (which currently includes the U.S.) will continue to be required to present a compelling reason and may still be subject to random testing upon arrival. Children under 18 years of age are exempt from the vaccination requirement for foreign travelers, given both the ineligibility of some young children for vaccination, and the global variability in access to vaccination for older children who can be vaccinated. Children between the ages of 2 and 17 should be tested prior to departure.

Other administrative conditions has not changed: biometric or electronic passport. ESTA authorization. Maximum stay of 90 days. Visa is still required for certain categories of travelers.



# **Travel Industry Landscape**

# TRAVEL INDUSTRY LANDSCAPE

The Travel Industry in France is still benefitting from the government aid measures in place since last year. But those measures will soon end and 2022 should mark a major change in the travel industry landscape.

- The solidarity fund has been set up to help companies particularly affected by the consequences of the Covid-19 epidemic and by the containment measures. Aid is now degressive since June 2021. The fund is extended **until March 31, 2022**.
- Partial activity, the device extended until **February 28 2022**. The compensation remains at 100% for the tourism sector under the same terms as in December and January 2021.
- The “fixed cost” system. For the months of **December 2021** and January 2022, companies in the impacted sectors by the health situation, will be able to benefit from the “fixed costs” device when they lose more than 50% of their turnover compared to the same month in 2019.

Most of the travel agencies and Tour Operators are still using the partial activity measures, meaning that the rebound in bookings since the progressive lifting of the sanitary restrictions is characterized by a lack of staff and the difficulty to manage such an amount of requests. Most of the professionals are working more hours, being paid less. And because of the lack of business for the past 2 years, the Tour Operators don't yet have the budget to recruit as many people as they would need to answer the amount of requests.

In the events, tourism and catering sectors, 40% of company managers say they are likely to have to probably lay off before the end of the year 2021, and large international groups have already announced restructuring plans that should notably affect their employees in France (notably Airbnb, Trip Advisor, TUI, Ryan Air, Sodexo...). In the end, the OFCE estimates revenue losses in tourism in the order of 30 to 50% depending on the segments.” While many support and recovery plans have been successively proposed by the government, the sector will have to reinvent itself and adapt its products and practices. In the short term, this has largely meant preparing its destinations to the new sanitary standards. In the long term, it also means to prepare its future in the face of probable structural changes in tourist behavior. The health and economic crises can indeed be identified as accelerators of the changes that have already begun in recent years.

## TRAVEL INDUSTRY LANDSCAPE cont...

The recovery in travel sales hides some paradoxes. “Since June, travel agents connected to our Mister Fly Pro solution have been selling as much as two years ago. But their number has dropped by 40% compared to 2019,” points out Frédéric Pilloud, digital director of Mister Fly. “There are fewer travel agents per outlet,” adds Frédéric Pilloud. Sometimes, often, staffing levels have been cut in half. Some networks have told us that they have only one person to open the agency, compared to two in the past. The staff has melted away. The fault of partial unemployment, but not only. With the health crisis, many professionals have left the sector: voluntary departures, sudden departures, reconversions have occurred in recent months. “If the sector does not manage to recruit, the recovery will be difficult. A remark that many tourism bosses also make.

The “fear of the unknown: Frédéric Pilloud fears another trend: “A growing number of agencies no longer want to sell flights on their own, to avoid the hassle of cancelled flights. They prefer to refocus on package tours. The cancellation of a flight as part of a stay or a tour is less complicated to manage, as the tour operator is called to the rescue.

Distribution has not picked up the pace of 2019, also confirms Laurent Briquet, director of development at Resaneo/Speed Media, “some travel agencies have closed. Mini networks have reduced their number of points of sale.”

The pandemic has left its mark. “At the beginning of the crisis, we lost 30% of customers, who unsubscribed from our solution, out of fear of the unknown, and did not return. I think half of them are at risk of disappearing: it’s almost impossible to be invisible for more than 18 months and then come back to the market.” “How can you not at least maintain a digital presence?” he wonders.

### Travel agencies: a sustained recovery and questions

“The recovery is well and truly here for travel agencies, whether they are online or physical. But while the professionals are starting to be overwhelmed with volumes that for some are slowly approaching the volumes of 2019, questions remain. Between the crying lack of manpower and a tour operator production that is not always up to par, will this recovery live up to expectations?” *Tourmag, February 13th.*

“We had 4,200 travel agents connected on our platform, at the end of last week, while we were at 6,000, in June 2021. They don’t react as fast as online players,” says Frédéric Pilloud, Mister fly’s digital director on February 13th. Here is a first indicator revealing a slower restart of the traditional distribution networks. Before the crisis, each week, nearly 10,000 professionals connected to the BtoB version of the online agency.

## TRAVEL INDUSTRY LANDSCAPE cont...

“The dynamic is positive, but the agencies are under-staffed. We observe this deficiency just about everywhere”. *Richard Vainopoulos, President of Tourcom on February 13th.*

And this issue of human resources repeatedly raised by the trade medias crystallizes all the attention, while some points of sale are still without staff. The hemorrhage within the distribution would reach between 30 and 35%.

“When we see people of 50 years, with 25 or 30 years of experience in the sector, leaving without any promise behind ... there is something to worry about,” fears the director of Eden Tour. Especially since out of all the departures of the network, that is to say 40 people, only 2 have remained in tourism. The problem is not only concentrated at the level of the sale, but would have spread to the whole industry.

“The phenomenon is seen in all service industries. It’s not easy to recruit right now. It’s even complicated, but we are seeing some positive signs. The question of income is not the only problem”. *Nicolas Delord, Salaun Holiday General Director.* The Group has increased the lowest incomes to attract new profiles, but this does not change anything, the candidates are absent.

After the health crisis, the industry is entering the social and economic crisis.

### **Fairmoove.fr, the French new travel site that focuses on ecology, ethics and immersion**

The former CEO of Easy voyage, Jean-Pierre Nadir, has launched in June 2021 the Fairmoove.fr site. Its objective: ecological and/or ethical holidays that are not reserved for very high-end customers. “I want to exceed 100 million euros in turnover within five years and place myself among the twenty biggest French players”, aims Jean-Pierre Nadir.

The platform brings together 5,000 accommodation offers, as well as tours, trips and activities selected because they respond to the new values of tourism: ecology, ethics and immersion. “For several years, we have seen the emergence of a new mentality of consumers, more responsible, ready to pay more and to consume less often. The “digital native vertical brand” have been able to develop a mature discourse in relation to their customers. But tourism did just the opposite: it put a lot of photos and superlatives, but on the spot, the quality was poor.”

A unique mix at the crossroads of the Guide du Routard, tailor-made travel specialists and Booking.com, Fairmoove.fr brings together both travel advice by destination, written in a relaxed tone by fifty freelancers, and a very large number commercial offers, sorted and selected according to eco-responsible criteria. “The idea is to have everything in one place: content, offer and opinions”, points out Jean-Pierre Nadir. Average budget: “between 2500 euros and 4000 euros per week for two, transport included. This places us between Voyageurs du Monde and Promovacances, which corresponds to 52% of the market.”

# TRAVEL INDUSTRY LANDSCAPE cont...

## 2022 in France is the year of the election of the new President

Elections: The major tourism groups call on the candidates : Alliance France Tourisme (AFT), an association that brings together some twenty major groups in the sector (Accor, Homair, Pierre et Vacances, GL Events ...), calls on the presidential candidates with a dozen proposals. The sector's professionals consider it "urgent" to restructure "the covid debt" over 10 years at a fixed rate in order to "safeguard the recovery". Another "urgent" proposal, the digital sovereignty. Tourism companies are indeed increasingly dependent on online visibility, and to cope with "foreign e-tourism professionals paid by substantial commissions", the AFT calls for the "mobilization of state resources (Insee, Bank of France, Ministry of Economy) allied to the Regions and large companies in the sector.

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS

## Kuoni France

KUONI, since the crisis of COVID, has experienced, like many long-haul TOs an absence of turnover which still persists and this in spite of the good performances of the seaside, Italy and Lapland which do not compensate for the absence of their business n°1 pre-COVID, the accompanied tours. It is thanks to its membership of the REWE group, the first consortium of supermarkets in Germany, that the company will be one of the players of tomorrow's tourism on the French market. Did not have to contract an EMP. The company has seen the departure of about 80 people since March 2022 (out of a workforce of more than 200 people), particularly in the sales team, which has been reduced **by half**, as well as at headquarters. The company took advantage of this period to automate certain productions but it is clear that just like the other TOs, the productions à la carte, circuits, ... requiring a certain knowledge will be difficult to value in time within the company. It is possible that the strategy of KUONI will change in the medium term.

## Voyageurs du Monde France

Voyageurs du Monde's sales teams have all gone back to work full time end of January to face with the rebound in requests and bookings. Voyageurs du Monde group and its other brands (Comptoir des Voyages, Terres d'Aventure, Nomade Aventure and Allibert Trekking) should be one of the least impacted TO on the French market. The group is strong financially and strategically. With a full staff back to work since mid-January their rebound will go faster than other TO still working partial time. They are recruiting.

## Comptoir des Voyages France

The team at Comptoir is also fully back at work. They are also recruiting (they already were end of 2021 as they had a few agents who left during the pandemic)

## Le Cercle des Voyages France

The entire USA sales team has come back to 100% in September 2021 but they are under-staffed anyway and could do much more sales if not, as per mid-February they were 50% less agents than same period in 2019.

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

## Premium Travel (Jet Set Voyages, Backroads) France

The rebound at Premium Travel is a challenge. The team is still working partial time (2 hours a day officially for Jet Set Voyages and up to 30 % work for Backroads) and as per today (February 18th), they don't know when they will be back full time, in March it should be only 50%. Both teams are overwhelmed with requests.

## Directours (NG Travel) France

The team is reduced to 2 agents + 1 booking agent helping with sales since the start of the rebound late January. 2 other US specialists are still on maternal leave, only one of them will be back in March.

## Travel Agencies in France

For the past two weeks, the leisure business has been going full steam ahead, whether at **Selectour** or **Havas**. Volumes are approaching 2019 levels, between 70 and 90% depending on the outlet. Regarding business travel, it is around 60%," says Laurent Abitbol with a new smile. The end of telecommuting could herald the full recovery of the sector. This recovery of the figures is combined with the return of employees to full-time work. It is true that this is "expensive" and "it is a risk", but the important thing is elsewhere. "The fact that everyone is working again is extraordinary. The moral is coming back. At the level of our tour operators, all destinations are working. The teams are overwhelmed." Laurent Abitbol for Marietton Group.

The **Salaün Group's agencies** have almost all resumed operations, with a few rare exceptions. "We are at full speed. We are seeing interesting growth, with volumes approaching 65 to 70% of pre-crisis levels. We are on track to return to 2019 activity". *Nicolas Delord, Salaun Group's general manager.*

**Univairmer network:** 1.9 million euros in bookings in a single week = 83% of 2019, over the same period. Short and medium-haul flights to Greece, including Corsica, are still very popular, but countries such as the United States, Thailand and the Dominican Republic are making a strong comeback in sales. "I'm no longer counting the staff I'm short, but recruiting to open branches." *Jean Dionnet, Univairmer CEO.*

**Resaneo:** "On the 1st decade of February 2022, we are at an activity that approaches 90% of 2019. It is even a level not seen since the beginning of the health crisis".

After a difficult month of January, not allowing to cover the expenses and with a network fully open since May 2021, François Piot also observes this gap. "Travel agents are overloaded with work, but only with requests. Not all of these requests are fulfilled, so the peak of activity is not always reflected in sales," moderates the CEO of **Prêt à Partir**.

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

## USA Travel Belgium

The team at USA Travel is almost back to full time (in March). They are working hard to answer the requests. Even Product Managers give a hand to reduce time for sending travel propositions as much as possible.

## Joker Belgium

Everybody is working full time. Product Team has grown (+1). They lost some travel agents (-10) during Covid. They are now in the process of being replaced. In terms of bookings since a few weeks, USA is still number one.

## Travel agencies in Belgium

“In many conversations with managers and business owners over the past two weeks, one pressing issue has come up: the lack of employees and the search for (preferably) younger people who want to work in the travel industry. Over the past two years, many professionals have left the travel industry. They have been pulled by other sectors. Today, the industry is trying to attract, or bring back, talent. It’s not going very well. The vacancy problem is acute today”. *Jan Peeters, journalist for Travmagazine on February 13th. Belgium Trade press.*

Travel agency sector gets a ‘**Belgian Travel Confederation**’: The Flemish and French-speaking travel agency trade associations (VVR and UPAV) have joined forces to form a new confederation, the Belgian Travel Confederation (BTC), they reported on Wednesday. The creation of this new body was announced on Tuesday during an event organized by the dome historically formed by the two representative regional associations.

“Through consultations with firms, at the regional and federal level, and with the contribution of the captains of industry, we have contributed to the survival of our profession, which included 10,000 jobs before the crisis, a little more than 6,500 today.”

The BTC aims to welcome other associations active in the tourism sector in the coming months and is pleased with the interest already expressed by representatives of the Belgian Association of Travel Organizers (ABTO), the Belgian Travel Organization (BTO) and the Belgian Federation of Bus, Coach and Tour Operators (FBAA). Continuous training, digitalization, labeling of serious and qualitative actors, as well as the collection of data for maximum exploitation at the service of all will be the four main pillars of the confederation.

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

Tour Operator	Pre-COVID 19 2020-2021 production	Post-COVID 19 2022 production
<p><b>KUONI</b> <b>Vacances</b> <b>Fabuleuses</b></p> <p>(USA and CAN travel brand)</p>	<p><b>FLY &amp; DRIVE</b> <b>A la carte production</b></p> <p><b>Hotels à la Carte</b> (2 pages) <i>Including: TN, GA, MS, LA</i></p> <ol style="list-style-type: none"> <li><b>On Route 66</b> 18 days – 16 nights Gateways: Chicago – Los Angeles <i>Including: MO</i></li> <li><b>Sur la Route de la Musique - NEW</b> 17 days – 15 nights Gateways: Atlanta - Atlanta <i>Including: GA, TN, MS, AL</i></li> </ol> <p><b>TOUR SERIES</b></p> <ol style="list-style-type: none"> <li><b>Bayous et Plantations</b> 9 days / 7 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i></li> <li><b>Sensations du Sud</b> 12 days / 10 nights Gateways: Houston – Atlanta <i>Including: LA, MS, TN, GA</i></li> <li><b>The American Way</b> 14 days / 12 nights Gateways: Dallas – Chicago <i>Including: LA, MS, TN</i></li> <li><b>De New York à Miami</b> 13 days / 11 nights Gateways: New York – Miami <i>Including: NC, SC, GA</i></li> <li><b>La Route 66 à Moto</b> 16 days / 14 nights Gateways: Chicago – Los Angeles <i>Including: MO</i></li> <li><b>Du Texas à La Louisiane</b> 13 days / 11 nights Gateways: Houston – Houston <i>Including: LA, MS</i></li> </ol>	<p><b>FLY &amp; DRIVE</b> <b>A la carte production</b></p> <ol style="list-style-type: none"> <li><b>On Route 66</b> 18 days – 16 nights Gateways: Chicago – Los Angeles <i>Including: MO</i></li> <li><b>Les Routes du Vieux Sud - NEW</b> 18 days – 16 nights Gateways: Atlanta - Atlanta <i>Including: GA, AL, LA, MS, TN, SC</i></li> <li><b>Historic Route 66 - NEW</b> 21 days – 19 nights Gateways: Chicago – Los Angeles <i>Including: MO</i></li> <li><b>Sur la Route de la Musique</b> 17 days – 15 nights Gateways: Atlanta - Atlanta <i>Including: GA, TN, MS, AL</i></li> <li><b>La Route Atlantique - NEW</b> 21 days / 19 nights Gateways: Boston / Miami. <i>Including: NC, SC, GA</i></li> </ol> <p><b>TOUR SERIES</b></p> <ol style="list-style-type: none"> <li><b>Bayous et Plantations</b> 9 days / 7 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i></li> <li><b>Sensations du Sud</b> 12 days / 10 nights Gateways: Houston – Atlanta <i>Including: LA, MS, TN, GA</i></li> <li><b>The American Way</b> 14 days / 12 nights Gateways: Dallas – Chicago <i>Including: LA, MS, TN</i></li> </ol>

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

Tour Operator	Pre-COVID 19 2020-2021 production	Post-COVID 19 2022 production
<b>KUONI</b> <b>Vacances</b> <b>Fabuleuses</b>  (USA and CAN travel brand)		<b>TOUR SERIES</b>  <b>4. De New York à Miami</b> 13 days / 11 nights Gateways: New York – Miami <i>Including: NC, SC, GA</i>  <b>5. La Route 66 à Moto</b> 16 days / 14 nights Gateways: Chicago – Los Angeles <i>Including: MO</i>  <b>6. “Du Texas à La Louisiane”</b> 13 days / 11 nights Gateways: Houston – Houston <i>Including: LA, MS</i>  <b>7. La Route 66 de Chicago à Albuquerque (online only, not in the printed brochure) - NEW</b> 10 days / 8 nights Gateways: Chicago / Albuquerque <i>Including: MO</i>

## Notes:

The 2022/2023 paper brochure was published in January 2022. It is valid from April 1st, 2022 until March 31st, 2023.

The 2021-22 brochure underwent a severe diet after containment, going from 192 to 128 pages. For the 2022-23 brochure KUONI went back to the same brochure as for 2021-22 (not distributed). Hotels à la Carte (2 pages) including: TN, GA, MS, LA have been removed.

Please note that our website Vacances Fabuleuses B2C will not exist anymore in a few weeks and all products will be available on the Kuoni website. Indeed, as the Kuoni brand is better known than Vacances Fabuleuses by the general public, our management has decided to put all the USA products on the Kuoni website.

On the other hand, the B2B site Vacances Fabuleuses still exists.

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

Tour Operator	Pre-COVID 19 2020-2021 production	Post-COVID 19 2022 production
<b>Marco Vasco</b>	<p><b>FLY &amp; DRIVE</b></p> <ol style="list-style-type: none"> <li><b>La Louisiane en liberté</b> 9 days / 7 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i></li> <li><b>La Route 66, on the Mother Road</b> 18 days / 16 nights Gateways: Chicago – Los Angeles <i>Including: MO</i></li> <li><b>Du Texas à la Louisiane</b> 12 days / 10 nights Gateways: San Antonio – New Orleans <i>Including: LA</i></li> <li><b>Jazz, Blues et Country</b> 16 days / 14 nights Gateways: Atlanta – Atlanta <i>Including: GA, TN, MS, LA, AL, SC</i></li> <li><b>Le Vieux Sud en musique</b> 12 days / 10 nights Gateways: Atlanta – New Orleans <i>Including: GA, TN, MS, LA</i></li> <li><b>De la Géorgie à la Caroline du Sud</b> 9 days / 7 nights Gateways: Atlanta – Atlanta <i>Including: GA, SC</i></li> <li><b>Iles et côtes sauvages des deux Carolines</b> 11 days/ 9 nights 12 days/ 10 nights Gateways: Atlanta – Raleigh <i>Including: NC, SC, GA</i></li> <li><b>Aux rythmes du Sud authentique</b> 12 days/ 10 nights Gateways: Atlanta – Cincinnati <i>Including: AL, GA, KY, WA</i></li> </ol>	<p><b>FLY &amp; DRIVE</b></p> <ol style="list-style-type: none"> <li><b>La Louisiane en liberté</b> 9 days / 7 nights Gateways: New Orleans – New Orleans <i>Including LA, MS</i></li> <li><b>La Route 66, on the Mother Road</b> 18 days / 16 nights Gateways: Chicago – Los Angeles <i>Including: MO</i></li> <li><b>Du Texas à la Louisiane</b> 12 days / 10 nights Gateways: San Antonio – New Orleans <i>Including: LA</i></li> <li><b>Jazz, Blues et Country</b> 16 days / 14 nights Gateways: Atlanta – Atlanta <i>Including GA, TN, MS, LA, AL, SC</i></li> <li><b>Le Vieux Sud en musique</b> 12 days / 10 nights Gateways: Atlanta – New Orleans <i>Including: GA, TN, MS, LA</i></li> <li><b>De la Géorgie à la Caroline du Sud</b> 9 days / 7 nights Gateways: Atlanta – Atlanta <i>Including: GA, SC</i></li> <li><b>Iles et côtes sauvages des deux Carolines</b> 11 days/ 9 nights 12 days/ 10 nights Gateways: Atlanta – Raleigh <i>Including: NC, SC, GA</i></li> <li><b>Aux rythmes du Sud authentique</b> 12 days / 10 nights Gateways: Atlanta – Cincinnati <i>Including: AL, GA, KY, WA</i></li> <li><b>Le Vieux Sud en musique - NEW</b> 12 days / 10 nights Gateways: Atlanta – New Orleans <i>Including: GA, TN, MS, LA</i></li> </ol>

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS *cont...*

Tour Operator	Pre-COVID 19 2020 2021 production	Post-COVID 19 2022 production
<b>Les Maisons du Voyage</b>	<p><b>FLY &amp; DRIVE</b></p> <ol style="list-style-type: none"> <li><b>De SoHo à SoBe</b> 16 days / 14 nights Gateways: New York – Miami <i>Including: VA, NC, SC</i></li> <li><b>De Chicago à la Nouvelle Orléans en train</b> 9 days / 7 nights Gateways: Chicago – New Orleans <i>Including: TN, LA</i></li> <li><b>Les charmes de la Louisiane</b> 9 days / 7 nights Gateways: New Orleans – New Orleans <i>Including LA, MS</i></li> <li><b>Vieux Sud et Nouvelle Vague</b> 16 days / 14 nights Gateways: Atlanta – Miami <i>Including: GA, TN, MS, LA</i></li> <li><b>Jazzy country &amp; so blues</b> 16 days / 14 nights Gateways: Chicago – New Orleans <i>Including: MO, TN, MS, LA</i></li> <li><b>La route des plantations</b> 9 days / 7 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i></li> <li><b>Sur les Pas de Martin Luther King</b> 14 days / 12 nights Gateways: Atlanta – New Orleans <i>Including: GA, AL, TN, MS, LA</i></li> <li><b>Les charmes du Mississippi</b> 12 days / 10 nights Gateways: Memphis – Memphis <i>Including: TN, MS</i></li> <li><b>“Sur la route 66”</b> 18 days / 16 nights Gateways: Chicago – Los Angeles <i>Including MO</i></li> </ol>	<p><b>FLY &amp; DRIVE</b></p> <ol style="list-style-type: none"> <li><b>“De SoHo à SoBe”</b> 16 days / 14 nights Gateways: New York – Miami <i>Including: VA, NC, SC</i></li> <li><b>De Chicago à la Nouvelle Orléans en train</b> 9 days / 7 nights Gateways: Chicago – New Orleans <i>Including: TN, LA</i></li> <li><b>Les charmes de la Louisiane</b> 9 days / 7 nights Gateways: New Orleans – New Orleans <i>Including LA, MS</i></li> <li><b>Jazzy country &amp; so blues</b> 16 days / 14 nights Gateways: Chicago – New Orleans <i>Including: MO, TN, MS, LA</i></li> <li><b>La route des plantations</b> 9 days / 7 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i></li> <li><b>Sur les Pas de Martin Luther King</b> 14 days / 12 nights Gateways: Atlanta – New Orleans <i>Including: GA, AL, TN, MS, LA</i></li> <li><b>Les charmes du Mississippi</b> 12 days / 10 nights Gateways: Memphis – Memphis <i>Including: TN, MS</i></li> <li><b>“Sur la route 66”</b> 18 days / 16 nights Gateways: Chicago – Los Angeles <i>Including MO</i></li> <li><b>“Sur la route 66”</b> 18 days / 16 nights Gateways: Chicago – Los Angeles <i>Including MO</i></li> </ol>

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS *cont...*

Tour Operator	Pre-COVID 19 2020 2021 production	Post-COVID 19 2022 production
<b>Les Maisons du Voyage</b>	<p><b>FLY &amp; DRIVE</b></p> <p>10. “Escapade Tennessee &amp; Kentucky” 15 days / 13 nights Gateways: Atlanta – Atlanta <i>Including GA, TN, KY</i></p> <p>11. “Où le Nord et le Sud se sont unis” 14 days / 12 nights Gateways: Washington DC – Washington DC <i>Including VA</i></p> <p>12. <b>De la guerre civile aux droits civiques</b> 17 days / 15 nights Gateways: Washington DC –Leesburg <i>Including VA, NC, TN, AL, GA</i></p> <p>13. <b>De l’Atlantique au Pacifique en train</b> 25 days / 23 nights Gateways: Washington – Los Angeles <i>Including TN, LA</i></p> <p>14. “La Musique au fil de l’eau” 16 days / 14 nights Gateways: Chicago – New Orleans <i>Including MO, TN, MS, LA</i></p> <p><b>TOUR SERIES</b></p> <p>1. <b>Grands sites de New York à Miami</b> 13 days / 11 nights Gateways: New York – Miami <i>Including: NC, SC, GA</i></p> <p>2. <b>Grands Sites du Charme Sudiste et des Bahamas</b> 12 days / 10 nights Gateways: Atlanta – Bahamas <i>Including: GA, SC</i></p>	<p><b>FLY &amp; DRIVE</b></p> <p>10. “Escapade Tennessee &amp; Kentucky” 15 days / 13 nights Gateways: Atlanta – Atlanta <i>Including GA, TN, KY</i></p> <p>11. “Où le Nord et le Sud se sont unis” 14 days / 12 nights Gateways: Washington DC – Washington DC <i>Including VA</i></p> <p>12. <b>De la guerre civile aux droits civiques</b> 17 days / 15 nights Gateways: Washington DC –Leesburg <i>Including VA, NC, TN, AL, GA</i></p> <p>13. “La Musique au fil de l’eau” 16 days / 14 nights Gateways: Chicago – New Orleans <i>Including MO, TN, MS, LA</i></p> <p>14. <b>De l’Atlantique au Pacifique en train</b> 25 days / 23 nights Gateways: Washington – Los Angeles <i>Including TN, LA</i></p> <p>15. <b>Bayou, plantations et palmiers - NEW</b> 16 days / 14 nights Gateways: Atlanta / Miami Including GA, TN, MS, LA,</p> <p><b>TOUR SERIES</b></p> <p>1. <b>Grands sites de New York à Miami</b> 13 days / 11 nights Gateways: New York – Miami <i>Including: NC, SC, GA</i></p> <p>2. <b>Grands Sites du Charme Sudiste</b> 9 days / 7 nights Gateways: Atlanta – Miami <i>Including: GA, SC</i></p>

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

Tour Operator	Pre-COVID 19 2020 2021 production	Post-COVID 19 2022 production
<b>Les Maisons du Voyage</b>	<p><b>TOUR SERIES</b></p> <p><b>3. Grands Sites du Charme Sudiste</b> 9 days / 7 nights Gateways: Atlanta – Miami <i>Including: GA, SC</i></p> <p><b>4. Grands sites de la Louisiane</b> 9 days / 7 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i></p> <p><b>5. Grands Sites du Vieux Sud</b> 12 days / 10 nights Gateways: Houston – Atlanta <i>Including: GA, TN, MS, LA</i></p> <p><b>6. Grands Sites du Vieux Sud (Version Longue)</b> 17 days / 15 nights Gateways: Houston – Miami <i>Including: LA, MS, TN, GA, SC</i></p> <p><b>CITY BREAK</b></p> <p><b>1. “Escapade à Memphis”</b> 5 days / 3 nights Gateways: Memphis - Memphis <i>Including: TN</i></p> <p><b>2. “Escapade à la Nouvelle-Orléans”</b> 5 days / 3 nights Gateways: New Orleans – New Orleans <i>Including: LA</i></p>	<p><b>TOUR SERIES</b></p> <p><b>3. Grands sites de la Louisiane</b> 9 days / 7 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i></p> <p><b>4. Grands Sites du Vieux Sud</b> 12 days / 10 nights Gateways: Houston – Atlanta <i>Including: GA, TN, MS, LA</i></p> <p><b>5. Grands Sites du Vieux Sud (Version Longue)</b> 17 days / 15 nights Gateways: Houston – Miami <i>Including: LA, MS, TN, GA, SC</i></p> <p><b>CRUISE</b></p> <p><b>3. Croisière sur le Mississippi - NEW</b> 10 days/8 nights Gateways: Memphis - New Orleans <i>Including: TN, MS, LA</i></p>

## Notes:

Les Maisons du Voyage have deactivated the escapades because they were only for 3 nights which is too short and does not fit in the logic of our *ATR label* (responsible tourism) where it is difficult to make our customers cross the Atlantic for only 3 nights packages.

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

Tour Operator	Pre-COVID 19 2020-2021 production	Post-COVID 19 2022 production
<b>Premium</b>	<b>FLY &amp; DRIVE</b>	<b>FLY &amp; DRIVE</b>
<b>Travel</b>	<b>1. Légendaire Route 66</b> 15 days /14 nights Gateways: Chicago – Los Angeles <i>Including: MO</i>	<b>1. Légendaire Route 66</b> 15 days /14 nights Gateways: Chicago – Los Angeles <i>Including: MO</i>
<b>Jetset</b>	<b>2. Sud Mythique</b> 10 days / 9 nights Gateways: Atlanta / Atlanta <i>Including GA, AL, TN, KY, NC</i>	<b>2. Sud Mythique</b> 10 days / 9 nights Gateways: Atlanta / Atlanta <i>Including: GA, AL, TN, KY, NC</i>
<b>Voyages</b>	<b>3. Jazz, Country, Blues &amp; Rock'n'roll</b> 15 days / 13 nights 11 days/ 9 nights Gateways: New Orleans –New Orleans <i>Including: LA, KY, MS, AL, TN</i>	<b>3. Jazz, Country, Blues &amp; Rock'n'roll</b> 15 days / 13 nights 11 days/ 9 nights Gateways: New Orleans –New Orleans <i>Including: LA, KY, MS, AL, TN</i>
<b>BtoB brand</b>	<b>4. Sous le charme des Carolines</b> 11 days/ 9 nights Gateways: Charlotte – Charlotte <i>Including: NC ,SC, WV</i>	<b>4. Sous le charme des Carolines</b> 11 days/ 9 nights Gateways: Charlotte – Charlotte <i>Including: NC ,SC, WV</i>
	<b>5. Sur la Route des droits civiques</b> 11 days / 10 nights 10 days / 9 nights Gateways: Memphis – Memphis <i>Including: AL, TN, MS</i>	<b>5. Sur la Route des droits civiques</b> 11 days / 10 nights 10 days / 9 nights Gateways: Memphis – Memphis <i>Including: AL, TN, MS</i>
	<b>6. Louisiane côté charme</b> 10 days / 9 nights Gateways: New Orleans - New Orleans <i>Including: LA, MS</i>	<b>6. Louisiane côté charme</b> 10 days / 9 nights Gateways: New Orleans - New Orleans <i>Including: LA, MS</i>
	<b>TOUR SERIES</b>	<b>TOUR SERIES</b>
	<b>1. Découverte de la Louisiane</b> 9 days / 7 nights 8 days / 7 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i>	<b>1. Découverte de la Louisiane</b> 9 days / 7 nights 8 days / 7 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i>
	<b>2. Echappée sudiste</b> 8 days / 7 nights Gateways: Atlanta – Miami <i>Including: GA, SC</i>	<b>2. Echappée sudiste</b> 8 days / 7 nights Gateways: Atlanta – Miami <i>Including: GA, SC</i>
	<b>3. Splendeurs de l'Est » NEW</b> 12 days / 11 nights Gateways: New York – Miami <i>Including: SC, GA</i>	<b>3. Splendeurs de l'Est » NEW</b> 12 days / 11 nights Gateways: New York – Miami <i>Including: SC, GA</i>

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

Tour Operator	Pre-COVID 19 2020-2021 production	Post-COVID 19 2022 production
<b>Premium Travel</b>	<b>SHORT STAYS</b>	<b>SHORT STAYS</b>
<b>Jetset Voyages</b>	<ol style="list-style-type: none"> <li><b>1. Old South - NEW</b> 5 days / 4 nights Gateways: Atlanta &amp; Savannah <i>Including: GA</i></li> </ol>	<ol style="list-style-type: none"> <li><b>1. Old South</b> 5 days / 4 nights Gateways: Atlanta &amp; Savannah <i>Including: GA</i></li> </ol>
<b>BtoB brand</b>	<ol style="list-style-type: none"> <li><b>2. Forever Elvis - NEW</b> 4 days / 3 nights Gateways: Memphis <i>Including: TN</i></li> <li><b>3. Entre Terre et Mer - NEW</b> 5 days / 4 nights Gateways: Wilmington - Charlotte <i>Including: NC</i></li> <li><b>4. Escapade Sudiste - NEW</b> 5 days / 4 nights Gateways: Hilton Head Island - Myrtle Beach <i>Including: SC</i></li> <li><b>5. Pur-sang, Bourbon &amp; Bluegrass - NEW</b> 5 days / 4 nights Gateways: Bowling Green - Louisville <i>Including: KY</i></li> <li><b>6. AU PAYS DES CAJUNS - NEW</b> 3 days / 2 nights Gateways: Plantation &amp; Houma <i>Including: LA</i></li> </ol>	<ol style="list-style-type: none"> <li><b>2. Forever Elvis</b> 4 days / 3 nights Gateways: Memphis <i>Including: TN</i></li> <li><b>3. Entre Terre et Mer</b> 5 days / 4 nights Gateways: Wilmington - Charlotte <i>Including: NC</i></li> <li><b>4. Escapade Sudiste</b> 5 days / 4 nights Gateways: Hilton Head Island - Myrtle Beach <i>Including: SC</i></li> <li><b>5. Pur-sang, Bourbon &amp; Bluegrass</b> 5 days / 4 nights Gateways: Bowling Green - Louisville <i>Including: KY</i></li> <li><b>6. AU PAYS DES CAJUNS</b> 3 days / 2 nights Gateways: Plantation &amp; Houma <i>Including: LA</i></li> </ol>
	<b>CRUISE</b>	<b>CRUISE</b>
	<ol style="list-style-type: none"> <li><b>1. A BORD DE L'AMERICAN QUEEN</b> 9 days / 8 nights Gateways: Memphis - New Orleans <i>Including: LA</i></li> </ol>	<ol style="list-style-type: none"> <li><b>1. A BORD DE L'AMERICAN QUEEN</b> 9 days / 8 nights Gateways: Memphis - New Orleans <i>Including: LA</i></li> </ol>
	<b>ACTIVITIES</b>	<b>ACTIVITIES</b>
	Long list of à la carte activities in LA, TN, MS	Long list of à la carte activities in LA, TN, MS

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

Tour Operator	Pre-COVID 19 2020-2021 production	Post-COVID 19 2022 production
<b>Premium Travel</b>	<b>FLY &amp; DRIVES</b>	<b>FLY &amp; DRIVES</b>
<b>Backroads</b>	<ol style="list-style-type: none"> <li><b>1. Sur la Route des Droits Civiques» - NEW</b> 14 days – 12 nights Gateways: Atlanta – Memphis <i>Including: GA, AL, MA, TN</i></li> <li><b>2. Côte Est américaine</b> 15 days – 13 nights Gateways: New York – Orlando <i>Including: VA, NC, SC, GA</i></li> <li><b>3. L'Est colonial Américain</b> 20 days / 18 nights Gateways: Washington –Philadelphia <i>Including: VA, NC, TN, GA, SC</i></li> <li><b>4. Musiques du Vieux Sud</b> 16 days / 14 nights Gateways: New Orleans – Atlanta <i>Including: LA, MS, TN, GA</i></li> <li><b>5. Floride &amp; Louisiane</b> 22 days / 20 nights Gateways: Miami – New Orleans <i>Including: LA, MS</i></li> <li><b>6. Louisiane: de B&amp;B en plantations</b> 10 days / 8 nights Gateways: New Orleans – New Orleans <i>Including: LA</i></li> <li><b>7. La Route 66, le rêve Américain</b> 21 days / 19 nights Gateways: Chicago – Los Angeles <i>Including: MO</i></li> <li><b>8. Texas et Louisiane</b> 15 days / 14 nights Gateways: Dallas – Dallas <i>Including: LA</i></li> <li><b>9. Washington, DC et sa région</b> 14 days / 12 nights Gateways: Washington –Washington <i>Including: VA</i></li> </ol>	<ol style="list-style-type: none"> <li><b>1. Sur la Route des Droits Civiques</b> 14 days – 12 nights Gateways: Atlanta – Memphis <i>Including: GA, AL, MA, TN</i></li> <li><b>2. Côte Est américaine</b> 15 days – 13 nights Gateways: New York – Orlando <i>Including: VA, NC, SC, GA</i></li> <li><b>3. L'Est colonial Américain</b> 20 days / 18 nights Gateways: Washington –Philadelphia <i>Including: VA, NC, TN, GA, SC</i></li> <li><b>4. Musiques du Vieux Sud</b> 16 days / 14 nights Gateways: New Orleans – Atlanta <i>Including: LA, MS, TN, GA</i></li> <li><b>5. Floride &amp; Louisiane</b> 22 days / 20 nights Gateways: Miami – New Orleans <i>Including: LA, MS</i></li> <li><b>6. Louisiane: de B&amp;B en plantations</b> 10 days / 8 nights Gateways: New Orleans – New Orleans <i>Including: LA</i></li> <li><b>7. La Route 66, le rêve Américain</b> 21 days / 19 nights Gateways: Chicago – Los Angeles <i>Including: MO</i></li> <li><b>8. Texas et Louisiane</b> 15 days / 14 nights Gateways: Dallas – Dallas <i>Including: LA</i></li> <li><b>9. Washington, DC et sa région</b> 14 days / 12 nights Gateways: Washington –Washington <i>Including: VA</i></li> </ol>
<b>BtoB brand</b>		

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

Tour Operator	Pre-COVID 19 2020-2021 production	Post-COVID 19 2022 production
<b>Premium</b>	<b>FLY &amp; DRIVES</b>	<b>FLY &amp; DRIVES</b>
<b>Travel</b>	<b>10. Floride du Sud et Louisiane des Cajuns</b>	<b>10. Floride du Sud et Louisiane des Cajuns</b>
<b>Backroads</b>	16 days / 14 nights Gateways: Miami – New Orleans <i>Including: LA</i>	16 days / 14 nights Gateways: Miami – New Orleans <i>Including: LA</i>
<b>BtoB brand</b>	<b>11. La Route du Blues</b>	<b>11. La Route du Blues</b>
	16 days / 14 nights Gateways: Chicago – New Orleans <i>Including: MO, TN, MS, LA</i>	16 days / 14 nights Gateways: Chicago – New Orleans <i>Including: MO, TN, MS, LA</i>
	<b>12. Route 66</b>	<b>12. Route 66</b>
	16 days / 14 nights Gateways: Chicago – Los Angeles <i>Including: MO</i>	16 days / 14 nights Gateways: Chicago – Los Angeles <i>Including: MO</i>
	<b>MOTORBIKE</b>	<b>MOTORBIKE</b>
	<b>13. La Route 66, le rêve Américain</b>	<b>13. La Route 66, le rêve Américain</b>
	21 days / 19 nights Gateways: Chicago – Los Angeles <i>Including: MO</i>	21 days / 19 nights Gateways: Chicago – Los Angeles <i>Including: MO</i>
	<b>14. Road Trip Road 66</b>	<b>14. Road Trip Road 66</b>
	16 days / 14 nights Gateways: Chicago – Los Angeles <i>Including: MO</i>	16 days / 14 nights Gateways: Chicago – Los Angeles <i>Including: MO</i>
	<b>TOUR SERIES</b>	<b>TOUR SERIES</b>
	<b>1. De New York à Miami</b>	<b>1. De New York à Miami</b>
	12 days / 11 nights Gateways: New York - Miami <i>Including: NC, SC, GA</i>	12 days / 11 nights Gateways: New York - Miami <i>Including: NC, SC, GA</i>
	<b>2. Bayous et Plantation</b>	<b>2. Bayous et Plantation</b>
	8 days / 7 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i>	8 days / 7 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i>

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

Tour Operator	Pre-COVID 19 2020-2021 production	Post-COVID 19 2022 production
<b>Premium</b>	<b>TOUR SERIES</b>	<b>TOUR SERIES</b>
<b>Travel</b>	<b>3. Route du Blues, Jazz et Country</b> 13 days / 12 nights Gateways: Dallas – Chicago <i>Including: LA, MS, TN</i>	<b>3. Route du Blues, Jazz et Country</b> 13 days / 12 nights Gateways: Dallas – Chicago <i>Including: LA, MS, TN</i>
<b>Backroads</b>	<b>4. Grand Tour du Sud</b> 15 days / 14 nights Gateways: Dallas – Miami <i>Including: LA, MS, TN, SC, GA</i>	<b>4. Grand Tour du Sud</b> 15 days / 14 nights Gateways: Dallas – Miami <i>Including: LA, MS, TN, SC, GA</i>
<b>BtoB brand</b>	<b>MOTORBIKE / GROUP</b>	<b>MOTORBIKE / GROUP</b>
	<b>1. Racines du Blues</b> 16 days / 14 nights Gateways: New Orleans – Chicago <i>Including: MO, TN, MS, LA</i>	<b>1. Racines du Blues</b> 16 days / 14 nights Gateways: New Orleans – Chicago <i>Including: MO, TN, MS, LA</i>
	<b>2. Historique Route 66</b> 16 days / 14 nights Gateways: Chicago – Los Angeles <i>Including: MO</i>	<b>2. Historique Route 66</b> 16 days / 14 nights Gateways: Chicago – Los Angeles <i>Including: MO</i>
	<b>CRUISE</b>	<b>CRUISE</b>
	<b>1. Mississippi: la Route des Plantations</b> 8 days / 7 nights Gateways: News Orleans – New Orleans <i>Including: LA, MS</i>	<b>1. Mississippi: la Route des Plantations</b> 8 days / 7 nights Gateways: News Orleans – New Orleans <i>Including: LA, MS</i>

## Notes:

Jet Set Voyages (BtoB) and Backroads (BtoC) have merged under the group Premium Travel. Former Product Manager Charles Julien (Jet Set) and Jennifer Aubry (Backroads) are no longer working at Premium Travel. US Production is managed by one person : Valérie Heurtel (also marketing manager for the group). With the new position and the Covid-19 crisis, she has not been able yet to update the entire Premium Travel production. Regarding brochures : Jet Set won't have any printed brochure for 2022. Backroads only has the website, no brochure in general.

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

Tour Operator	Pre-COVID 19 2021 production	Post-COVID 19 2022 production
<b>Voyageurs du Monde</b>	<p><b>FLY &amp; DRIVE</b> <b>A la carte production</b></p> <ol style="list-style-type: none"> <li><b>Blues, plantations et bayous, le grand tour de Louisiane</b> 12 days / 10 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i></li> <li><b>De Chicago à New Orleans: la route de la musique Américaine</b> 15 days / 13 nights Gateways: Chicago – New Orleans <i>Including: MO, TN, MS, LA</i></li> </ol>	<p><b>FLY &amp; DRIVE</b> <b>A la carte production</b></p> <ol style="list-style-type: none"> <li><b>Blues, plantations et bayous, le grand tour de Louisiane</b> 12 days / 10 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i></li> <li><b>De Chicago à New Orleans: la route de la musique Américaine</b> 15 days / 13 nights Gateways: Chicago – New Orleans <i>Including: MO, TN, MS, LA</i></li> </ol>

## Notes:

Voyageurs du Monde only has a hybrid brochure : half travel brochure/half travel magazine named *Vacances, 6 months around the world* (Holidays) printed every 6 month. Right at the beginning of the pandemic (march 2020), Liore Zeitoun US Product Manager has just named a new regional product manager : Laura Hubert to develop the southern states, starting with Louisiana. Laura has started updating the database and will be working on the products updates and development now she has attended the TS International showcase. Production period for Voyageurs du Monde goes from July to November.

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

Tour Operator	Pre-COVID 19 2020-2021 production	Post-COVID 19 2022 production
TUI	<p><b>FLY &amp; DRIVE</b> <b>A la carte production</b></p> <p><b>PRIVATE TOURS</b></p> <p>1. “Combiné Chicago, Nouvelle - Orléans, New York” - NEW 12 days / 10 nights Gateways: Chicago – New York <i>Including: LA</i></p> <p><b>TOUR SERIES</b></p> <p>1. <b>Bayous et plantations</b> 8 days / 7 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i></p> <p>2. <b>Autant en emporte la musique</b> 12 days / 11 nights Gateways: Atlanta – New Orleans <i>Including: LA, MS, TN, GA</i></p> <p>3. <b>De New York à Miami, la côte est du Nord au Sud</b> 12 days / 11 nights Gateways: New York – Miami <i>Including: NC, SC, GA</i></p> <p>4. <b>Rythmes Américains</b> 13 days / 12 nights Gateways: Dallas - Chicago <i>Including: LA, MS, TN</i></p>	<p><b>FLY &amp; DRIVE</b> <b>A la carte production</b></p> <p><b>PRIVATE TOURS</b></p> <p>1. “Combiné Chicago, Nouvelle - Orléans, New York” - NEW 12 days / 10 nights Gateways: Chicago – New York <i>Including: LA</i></p> <p><b>TOUR SERIES</b></p> <p>1. <b>Bayous et plantations</b> 8 days / 7 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i></p> <p>2. <b>Autant en emporte la musique</b> 12 days / 11 nights Gateways: Atlanta – New Orleans <i>Including: LA, MS, TN, GA</i></p> <p>3. <b>De New York à Miami, la côte est du Nord au Sud</b> 12 days / 11 nights Gateways: New York – Miami <i>Including: NC, SC, GA</i></p> <p>4. <b>Rythmes Américains</b> 13 days / 12 nights Gateways: Dallas - Chicago <i>Including: LA, MS, TN</i></p>

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

Tour Operator	Pre-COVID 19 2020-2021 production	Post-COVID 19 2022 production
USA Travel	<p><b>FLY &amp; DRIVE</b> <b>A la carte production</b></p> <p><b>PRIVATE TOURS</b></p> <ol style="list-style-type: none"> <li><b>1. Antebellum plantations</b> 8 days / 6 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i></li> <li><b>2. Mississippi Delta Blues</b> 11 days / 9 nights Gateways: Memphis – New Orleans <i>Including: LA, MS, TN</i></li> <li><b>3. Southern belle</b> 14 days / 12 nights Gateways: Atlanta – Atlanta <i>Including: GA, SC, MS, TN, LA</i></li> <li><b>4. Route 66</b> 17 days / 15 nights Gateways: Chicago – Los Angeles <i>Including: MO</i></li> </ol>	<p><b>FLY &amp; DRIVE</b> <b>A la carte production</b></p> <p><b>PRIVATE TOURS</b></p> <ol style="list-style-type: none"> <li><b>1. Antebellum plantations</b> 8 days / 6 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i></li> <li><b>2. Mississippi Delta Blues</b> 11 days / 9 nights Gateways: Memphis – New Orleans <i>Including: LA, MS, TN</i></li> <li><b>3. Southern belle</b> 14 days / 12 nights Gateways: Atlanta – Atlanta <i>Including: GA, SC, MS, TN, LA</i></li> <li><b>4. Route 66</b> 17 days / 15 nights Gateways: Chicago – Los Angeles <i>Including: MO</i></li> <li><b>5. Blues Rock N’Roll &amp; bayous - NEW</b> 18 days / 16 nights Gateways: Chicago – New Orleans <i>Including: LA, MS, KY, TN</i></li> <li><b>6. Travel the Carolinas - NEW</b> 17 days / 15 nights Gateways: Atlanta – Atlanta <i>Including: GA, SC, NC</i></li> </ol>

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

Tour Operator	Pre-COVID 19 2020-2021 production	Post-COVID 19 2022 production
USA Travel	<p><b>TOUR SERIES</b></p> <ol style="list-style-type: none"> <li><b>1. Bayous et plantations</b> 9 days / 7 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i></li> <li><b>2. Sensations du Sud</b> 12 days / 10 nights Gateways: Houston – Atlanta <i>Including: LA, MS, TN, GA</i></li> <li><b>3. The American Way</b> 14 days / 12 nights Gateways: Dallas - Chicago <i>Including: LA, MS, TN</i></li> </ol> <p><b>EXCURSIONS/SERVICES</b></p> <ol style="list-style-type: none"> <li><b>1. Graceland Platinum Tour</b> <i>Including: TN</i></li> <li><b>2. Swamp and Tour</b> <i>Including: LA</i></li> </ol>	<p><b>TOUR SERIES</b></p> <ol style="list-style-type: none"> <li><b>1. Bayous et plantations</b> 9 days / 7 nights Gateways: New Orleans – New Orleans <i>Including: LA, MS</i></li> <li><b>2. Sensations du Sud</b> 12 days / 10 nights Gateways: Houston – Atlanta <i>Including: LA, MS, TN, GA</i></li> <li><b>3. The American Way</b> 14 days / 12 nights Gateways: Dallas - Chicago <i>Including: LA, MS, TN</i></li> </ol> <p><b>EXCURSIONS/SERVICES</b></p> <ol style="list-style-type: none"> <li><b>1. Graceland Platinum Tour</b> <i>Including: TN</i></li> <li><b>2. Swamp and Tour</b> <i>Including: LA</i></li> </ol>

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

## Factors responsible for new travel trends

### Using technology

Advances in technology are at the heart of many travel trends, with voice search making it easier for customers to find travel products and voice ordering improving the customer experience. In addition, artificial intelligence is improving customer service, while contactless payments and the Internet of Things are eliminating friction.

### Lifestyle factors

In addition to the above factors, there are a number of lifestyle factors influencing global travel trends. Concerns about animal health and welfare have led to the rise of organic foods and an increase in vegetarian and vegan diets. Environmentally friendly travel has also become more popular, while emphasizing local experiences.

### Covid-19 pandemic

The coronavirus pandemic has accelerated a number of travel trends, including contactless payments and a greater emphasis on local rather than international travel. At the same time, the need to reduce the spread of COVID-19 has led to the introduction of new health and safety measures, many of which may remain in place for the foreseeable future.

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

## 6 new travel trends due to COVID

### 1. Prioritizing health and safety

Depending on the local setting and regulations, these measures may require travel industry businesses to provide hand gel, facilitate social distancing, require masking, and/or generally improve cleanliness. Clearly, hygiene and safety measures have always been necessary, but they have become one of the top travel trends because, in the context of COVID, they are now a key area for customers when making purchasing decisions. With this in mind, it is essential that companies highlight health and safety measures in their marketing content and actually take the necessary steps to keep people safe and avoid negative publicity.

### 2. A greater focus on leisure travel

One of the most important travel trends to be aware of involves business events. With travel restrictions, limits on household mixing in some countries and a focus on working from home, many of these events are being cancelled and fewer events are being booked in the first place. This is causing some travel agencies to adapt. In some cases, those involved in Travel Management may want to shift their focus from business customers to leisure. While leisure travel has also been impacted by the pandemic, travel demand is still strong, people in the same household can travel more easily, and vacation periods can still attract customers.

### 3. Focus on local (vs. international)

With travel restrictions and quarantine requirements in place in some countries, as well as more generalized anxiety about international travel, another of the key travel trends related to COVID has been a focus on local customers. In this context, local can mean travelers from your own country or a neighboring country.

### 4. Wider adoption of contactless payments

Contactless payments have been a major trend in travel technology for some time, but the situation with COVID has made this even more important. Accepting contactless payments is a great way to convince your customers that you're taking steps to protect them by minimizing the number of shared surfaces they have to touch. In addition to the hygiene benefits of using contactless payments as much as possible, the technology can also offer travelers greater convenience and a faster payment process. It can also be useful in encouraging spontaneous purchases, which can help your travel business maximize revenue.

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

## 5. The Power of Virtual Reality

Virtual reality technology has been one of the revolutionary technology trends of recent times, and its role in the travel industry surpasses almost every other area of use. After all, virtual reality allows you to showcase destinations, view properties and explore attractions, all via a digital experience. This can be especially useful in the age of COVID, when travelers want to be sure they are going to the right place.

## 6. Voice-activated technology

Voice-activated technology is another way in which travel agencies can provide touchless environments and reduce the risks associated with COVID. This particular travel trend has been particularly prevalent in the hotel industry, where a growing number of companies are using voice-activated devices in their hotel rooms. The same technology can also be easily applied to other areas of the travel industry, offering additional levels of security and convenience.

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

## 12 Upcoming Travel Trends for the Travel Industry

### 1. Voice Search Travel

An important travel technology trend that has emerged in recent years involves the use of voice search to book travel or learn about travel destinations. This has been facilitated by the growing number of smart speakers and similar products on the market, including Amazon Echo and Google Home, as well as digital assistants like Alexa and Siri. Capitalizing on this involves a process that shares similarities with what web designers experienced with mobile optimization several years ago. Here, however, websites must be optimized to gain visibility in Google code snippets, while airline and hotel booking engines must be configured to enable voice search. Voice search is expected to continue to grow in the coming years, so it makes sense to take advantage of it immediately.

### 2. Personalization

Personalization is a hot travel trend these days, especially in marketing, is becoming easier in today's data-driven world. It's also increasingly important. Personalized marketing takes data about a customer and uses it to tailor advertising and promotion specifically to that person. A simple example would be targeted ads that appear in your web browser when you visit certain sites, which use information derived from your browsing habits and past purchases to show you products that might interest you. A regular traveler might be offered deals on airline or train tickets, or useful gadgets such as adapters, power banks or noise-canceling headphones.

### 3. Recognition Technology

Recognition technology is a broad category of devices, systems and protocols. One branch of this technology uses individual biometrics to identify specific individuals. An example might be the facial recognition technology used in some airports to speed up passport control, or simple fingerprint locks on cell phones and other devices. Another example of recognition technology is voice control, where voice commands are used to control, for example, the systems in a hotel room: lights, heating, entertainment, etc. Voice control can be configured to respond to any speaker; it is also possible to restrict voice-activated systems to a specific individual.

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

## 4. Robots

Automation is one of the top travel trends to watch, with many tasks that were once handled by humans now being handled by robots or automated systems. A familiar example would be chatbots that have become widely used in the industry, which are designed to help people find and book tours, transportation and accommodations by asking a series of questions. More sophisticated examples might include the robotic “staff” used by some hotels to manage the front desk or even serve food and drinks. In the future, robots in the form of autonomous cars are likely to be one of the major travel trends.

## 5. Local Experience

The days when travelers expected to be cooped up in a resort, eating the same food they ate at home and interacting primarily with people from their own country, are coming to an end. Instead of looking out from a hotel balcony with only the weather to distinguish home from abroad, today’s travelers now seek engagement with the people, cultures and landscapes of the countries they visit. Local food is a key component of many trips, with people eager to try new things. Cultural experiences are a highlight of many trips and modern travelers are eager to witness and participate in local traditions.

## 6. Artificial Intelligence (AI)

AI systems are becoming one of the top trends in travel. Many types of AI are now being used throughout the travel industry. There are the aforementioned chatbots that use artificial intelligence to automate and streamline many sales and customer service tasks. As customers require faster response times and more interactions, chatbots are bridging the gap when human operators are not available. Although limited in functionality, chatbots can provide a wealth of useful information to customers. Machine learning allows these systems to learn from each interaction and continually improve. AI is also widely used today in data collection and analysis, important tools for improving efficiency, safety and customer satisfaction.

## 7. Internet of Things (IoT)

The IoT has gone from a geeky curiosity to one of the most important trends in the travel industry. Internet-connected, microprocessor-controlled devices (smart appliances) have become increasingly prevalent. From dedicated iPad tablets used to provide information to museum visitors to smart hotel rooms where lights and HVAC systems can be controlled using voice commands, the IoT is permeating all aspects of travel and tourism. With Amazon introducing a hospitality-focused version of its popular Alexa virtual assistant, this trend is firmly set to continue. Guests can use the Alexa for Hospitality hub to control their room environment, book sessions at gyms or spas and request services.

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

## 8. Green travel

Today's customers are more environmentally conscious than ever and current trends reflect this. Airlines, tour operators, car rental companies, hotels and a whole range of industry businesses have embraced this trend, which will only become more pronounced in the future. Some changes have been minor and fairly simple, such as allowing air travelers to purchase carbon credits when booking a flight to offset the environmental impact. Another example would be car rental companies that now offer, or even specialize in, electric vehicles. Hotels and resorts with an emphasis on sustainable technology are springing up around the world.

## 9. Augmented Reality

Augmented reality (AR) is closely related to virtual reality. Augmented reality combines virtual elements with real-world experiences. AR travel trends include museum exhibits where visitors can see objects and structures in the real world, then see them overlaid with a reconstruction of their original appearance; for example, Greek marbles with a virtual overlay of their original colors. Augmented reality can also be used to provide information about the location a visitor is exploring - cultural or historical data or entertainment and travel listings. Augmented reality is easily achieved using common devices such as smartphones, further enhancing these travel trends.

## 10. Pleasure travel

Pleasure travel (also known as “bizcation”) combines both business or commercial travel and leisure activities. While not the latest travel trend - extending a business trip to enjoy some free time in a destination has been a common practice for as long as business travel has existed - leisure travel has been enthusiastically embraced by Generation Y. For the frugal traveler under 40, combining work and leisure is the most efficient way to visit places they might not otherwise be able to afford. The most extreme version of bleisure travel is the “digital nomad” phenomenon, where online workers travel the world with a laptop.

## 11. Healthy and organic food

Travel and healthy eating used to be mutually exclusive concepts, but not anymore. A more health-conscious clientele is driving these travel trends, increasing the demand for healthier foods and options for those on special diets. Vegetarians, vegans, those who need to avoid gluten, lactose or other common allergens - all of these groups are better served than ever. Hotels and resorts are combining health and leisure with innovative new cuisine, often with an emphasis on fresh local ingredients and regional recipes. Some resorts are focusing on specific goals such as weight loss. Food-related travel trends also emphasize organic products.

# OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

## 12. Customer Experience

Enriching the customer experience is vital in the modern travel and tourism industry. Customers have more options than ever, so it is increasingly important to ensure loyalty and satisfaction. All of the strategies and technologies listed above have their role to play in creating a positive customer experience. From chatbots used to book a trip, to food on offer, to smart devices in the hotel room and AR apps that help guests navigate to their destinations, it's all about improving how the guest feels about their trip or stay. When adopting a new trend, it's important to ask, "How can this improve the guest experience?"

## Development of Europe & France Production

"DESTINATION FRANCE", the vast plan to win back French Tourism put in place by the government. The program has been allocated nearly 2 billion euros and will run for ten years.

Here are the main points:

- Conquering and winning back talent, through a major communication campaign aimed at showing all the wealth of the tourism professions, and in particular to young people.
- Strengthen the resilience of the sector and support the increase in quality of supply, in particular by supporting demand in certain sectors that have been particularly affected by the health crisis, such as major events, fairs, trade shows and conventions with an international dimension.
- Promote and develop French tourism assets, by creating a "Destination France" fund with a 51 million euro component dedicated to supporting and developing French tourism assets, and another 55 million euro component dedicated to promoting and strengthening a tourism engineering offer for the territories.
- Responding to the challenges of transforming the sector, by promoting sustainable tourism, reducing the ecological footprint, investing in sustainable tourism infrastructures, and digital transformation.
- Promote France as a destination and consolidate its market share by strengthening communication actions with tourists and investors.

## OVERVIEW OF THE MAJOR TOUR OPERATORS ON THE FRENCH AND BELGIAN MARKETS cont...

Since the pandemic the travel industry has been widely developing France products. In April 2021, a dedicated virtual trade show has been created : #JevendslaFrance et l'Outre-Mer (#I sell France and overseas departments) and the trade media Tourmag has created a dedicated database for professionals #partez en France (# travel in France). Tourism: travel agencies and tour operators retreat to France. In order to limit the damage caused by the pandemic, which has completely wiped out international tourism, many tour operators and travel agencies have had to reinforce, or even hastily develop, their offers for stays in France. Another difficulty in the equation: the French will be avoiding mass tourism.

“France meets all expectations of a change of scenery”. This little phrase, chosen by Voyageurs du Monde to present its itinerant trips in France, sums up the challenge that all tour operators have been facing in 2021 to meet the demand of the French travelers. “Our offers for France were essentially intended for non-French customers, but we decided to put them more prominently on the home page of the Voyageurs du Monde website” Jean-François Rial, president of the group.

# DURATION AND TYPE OF VACATIONS TO THE USA

Duration: The average length of the summer stay has been decreasing in France within the past 30 years. It is now 2 weeks. The main reason? The French now split their vacations throughout the year. This trend has enabled the travel industry to develop an all year round production as well as shorter and thematic itineraries (special events like Halloween, New Year, etc.). It is a great opportunity for the Tour Operators and the travel agencies to spread the US sales for any season on top of the summer season that remains the major period for US travel.

## Select Traveler Characteristics

[various metrics]	2000	2005	2010	2015	2016	2017	2018	2019	2020
Advance Trip Decision (mean days)	70	81	116	122	119	118	125	124	101
Advance Trip Decision (median days)	30	60	90	90	90	90	90	90	60
% Used Prepaid Package	15.3	16.0	16.2	16.7	12.9	12.0	9.8	8.8	9.4
% First International U.S. Trip	21.4	25.2	36.1	27.9	24.4	25.7	27.3	23.4	25.8
Length of Stay in the U.S. (mean nights)	14.3	15.4	15.9	15.7	15.9	16.5	14.3	15.0	16.4
Length of Stay in the U.S. (median nights)	7	10	10	10	10	9	10	10	8
U.S. Trips Past 12 Months (mean )	2.3	1.9	1.5	1.7	1.6	1.7	1.6	1.7	1.6
U.S. Trips Past 12 Months (median)	1	1	1	1	1	1	1	1	1
U.S. Trips Past 5 Years (mean )	7.0	5.3	3.8	---	---	---	---	---	---
U.S. Trips Past 5 Years (median)	3	3	2	---	---	---	---	---	---
Number of States Visited (% 1 state only)	61.8	58.9	62.6	68.3	67.4	71.4	71.3	70.7	81.7
Number of States Visited (mean average)	1.7	1.7	1.7	1.6	1.6	1.6	1.5	1.5	1.3
Hotel/Motel (% used 1+ nights)	76.4	75.2	75.7	74.1	78.7	78.5	76.6	79.0	74.9
Hotel/Motel (mean average # of nights)	7.1	8.2	8.6	8.9	9.0	10.2	10.4	9.8	8.3
Travel Party Size (mean # of persons)	1.5	1.5	1.7	1.7	1.7	1.7	1.7	1.8	1.7
Gender (% Male-among respondents)	65.0	65.4	54.2	53.5	52.3	46.9	48.4	52.1	48.2
Household Income (mean average)	\$81,200	\$78,300	\$83,500	\$82,660	\$76,834	\$75,739	\$86,584	\$82,655	---
Household Income (median average)	\$63,300	\$67,200	\$71,100	\$65,605	\$60,000	\$59,436	\$61,738	\$67,241	---
Age: Female (mean average among respondents)	36.3	39.3	40.1	40.7	40.7	39.3	41.0	40.7	38.5
Age: Male (mean average among respondents)	44.9	41.1	40.8	43.2	41.4	42.2	41.1	42.4	38.3

Expenditure: How do the French divide their vacation budget? The distribution of expenses tends to remain stable. The choice of accommodation represents 35% of this budget. They are fond of home-sharing applications and websites: 48% would rent through this channel. Other expenses include transportation (25%), food (13%) and finally shopping (10%).

## DURATION AND TYPE OF VACATIONS TO THE USA cont...

Booking time: 3 out of 4 French people want to travel in 2022. Among the French people most likely to travel in 2022, we find the 18-25 (50%), the 26-35 (44%) and the 65+ (50%). However, only 3 out of 10 French people have already booked a trip for 2022. Another trend to follow is the caution with which the French decide whether or not to book a trip. Indeed, if the majority of respondents are ready to leave in 2022, 69% have still not booked a trip for 2022, that is to say nearly 7 out of 10 French people. This result remains constant compared to last year (77%), even though there has been a drop of 8 points. Conversely, 31% of respondents have already booked a trip or are in the middle of planning a trip for 2022, an 8-point increase compared to 2020.

Type of Travel: Visiting family and friends, road trips or wellness stays are the types of travel favored by the French travelers. Meanwhile, and according to a survey carried out by the travel comparator Kayak, the coronavirus has changed the desires of the French. They are moreover 70% to declare that the pandemic has made them re-evaluate the types of vacations they now wish to spend. In the current context of health crisis, the French say they are ready to adapt their behavior: they intend to favor outdoor activities and avoid crowded places. FIT travel remain the most important activity for Tour Operators with the need for more and more advanced personalization (hotels selection, local experiences, hidden gems, local tips). The group tours have evolved, the offer for large groups (35 – 50 pax in average) is slowing down and is being replaced by smaller groups (up to 15 pax) as more and more tour operators are facing that kind of demand. Bleisure travel is “asleep” as the business travel has not returned yet.

### Travelers from Belgium trends

Summer is less and less sacred to travel. Belgian's vacations are now fragmented throughout the year and are more and more decided at the last minute. They aspire to a new tourism: slower, more respectful of the environment. The trend is to travel several times a year and even more than once during the summer for ¼ of Belgians. The average duration of a trip for a Belgian resident is now 6.5 nights. A duration that is getting shorter every year as holidaymakers increase the number of opportunities to get away. We plan less. We like to leave on a whim. The ability to control vacation locations, transportation and excursions online increases the amount of desire and improvisation. Greg, who hasn't planned anything yet, bets on a last minute trip “by plane or by car, it all depends on what we find”.

For those who can afford travelling, Belgians go abroad eight times out of ten, according to Eurostat. More than half of them travel by car, whether privately owned or rented. More than three out of ten holidaymakers travel by plane. Belgians, especially young people, are increasingly expressing their desire to reduce their ecological footprint on vacation, but habits are still strong. The train and the bus remain on the fringe. In terms of planned activities, Belgians are the most likely to visit a city, followed by the beach and swimming. More than three out of ten Belgians are interested in hiking. Only 5% of people say that they will not really do any activities.

# ROUTE TO MARKET

Flights schedules have been evolving for the past months. Airlines are slowly adding more flights and rescheduling flights from before the pandemic.

## France

### DELTA AIR LINES

- Spring/Summer 2022
- Paris CDG / Atlanta: 2 flights per day
- Paris CDG / Cincinnati: 3 flights per week starting August 4th
- Paris CDG / Raleigh: 3 flights per week starting August 3rd
- Winter 2022/2023
- Paris CDG / Atlanta: 2 flights per day
- Paris CDG / Cincinnati: back to 1 daily
- Paris CDG / Raleigh: back to 1 daily

### AIR FRANCE

- Until March 2022
- Paris CDG / Atlanta : 14 flights per week
- Starting April (summer 2022, prevision)
- Paris CDG / Atlanta : 14 flights per week

### AMERICAN AIRLINES

- Spring/Summer 2022
- Paris CDG / Dallas: 1 daily
- Paris CDG / Chicago: 1 daily
- Paris CDG / Philadelphia: 1 daily
- Winter 2022/2023
- Paris CDG / Dallas: 1 daily
- Paris CDG / Chicago: 1 daily
- Paris CDG / Philadelphia: 1 daily
- Paris CDG / Miami: 1 daily

## ROUTE TO MARKET cont...

### France

#### UNITED AIRLINES

- Winter 2022
- Paris / Washington DC: 1 daily
- Paris / Chicago: 1 daily
- Summer 2022
- Pending

### Belgium

#### UNITED AIRLINES

- Winter 2022
- Brussels / Washington DC: 1 daily
- Brussels / Chicago: 1 daily
- Summer 2022
- Pending

#### BRUSSELS AIRLINES

- Doesn't serve the South

#### DELTA AIR LINES

- Brussels / Atlanta: cancelled, no visibility yet.

## LODGING TRENDS

The demand for unusual accommodation is increasing. The customers are asking the TOs for a lodging experience and not just for a place where to sleep. The accommodation is part of the trip, for example: an airstream, glamping, a library, a quirky B&B, a glamorous apartment, a boutique hotel that is different, etc. In general, French clients are asking for small structures. They like to change and vary their accommodation depending on the environment: on a city trip boutique hotels and historic hotels are the most popular. The French are used to walk and can easily select a hotel within a walking distance to points of interests or a property that has easy access to trams or any other local transportation facility.

On a road trip, atypical accommodations such as log cabins, treetop cabins and glamping are very popular especially for a great outdoor adventure experience. Since the French travelers are very attracted by culture, authenticity and local experiences, Bed and Breakfasts are also very attractive, especially on the eastern and southern part of the USA. They allow the travelers to meet with local, to avoid crowded places, to experience local way of life, and to dive into local culture and heritage.

These kind of accommodations are mostly offered by Tour Operators offering tailor made itineraries and Fly & Drive products as their clients will be avoiding chain hotels. Chain hotels are mostly offered for the escorted tours for budget and logistic reasons. It has to be affordable, it has to accommodate larger groups and it has to be convenient for buses to park as well.

FIT travelers also avoid chain hotels to avoid groups and a more business environment. Another accommodation selection has appeared in the past years and it gaining grounds since the pandemic, is the sustainable lodging. This is becoming such an important criteria that some Tour Operators are now pushing that kind of accommodation as a selling argument. The number of green labels have bloomed in the travel industry. In France the most important one is ATR (Agir pour un Tourisme Responsable = to Act for a Sustainable Tourism) : transparency, partnership and consistency are the three axes of the ATR label, broken down into sixteen criteria. It is intended for all travel operators who wish to structure and have their commitment to responsible tourism recognized.

## LODGING TRENDS cont...

The association is made up of active members, associate members and honorary members. Active members are travel operators who fall into three categories: operators labeled following an inspection carried out every year by Ecocert Environment, operators in the process of labeling who are preparing for the compliance check and those who are committed but who have not yet demonstrated it using the ATR labeling reference system. Tour Operators that are ATR labelled are: the group Voyageurs and all its brands (Voyageurs du Monde, Comptoir des Voyages, Terres d'Aventure, etc.), Les Maisons du Voyage, Les Ateliers du Voyage, Salaun Holidays.

In Belgium, Vacation homes more popular than ever. Another clear consequence of the COVID-19 pandemic is that we're trading the classic hotel room for a vacation home more often. And this trend will continue in 2022. Vacation homes are especially attractive to families and groups of friends. They can stay comfortably and safely in their own "bubble". All this in a quiet environment, far from the crowds and bustle. Other traveler profiles, such as couples, have now also opted for a stay in a vacation home.

# ATTRACTIONS AND EXPERIENCES

The ideal trip for the French travelers is filled with local experiences. Whether it is outdoor adventure, culinary experiences, museums or guided tours, there must be at least one or more local attraction or experience included. DMCs have a strong opportunity to develop business with French Tour Operators by offering a wide range of activities at destination. This trend is growing on the French market and has been accelerated by the pandemic. Since Tour Operators have to book mostly through DMCs (for payments and contracts reasons) DMCs should develop as much as possible that kind of added value to the trip.

In France the DMC Cali Fun has understood it many years ago by developing a wide range of activities and tours in the West USA mostly and have been very successful. They are now developing the South and are gradually adding local experiences (with a focus on sustainability). Cali Fun is planning to keep attending Travel South International Showcase in that purpose and is already in contact with several states since the 2021 edition. It is very important to note that local experiences development is key in developing a destination on a market. It participates in the destination's awareness and knowledge, it helps increasing the average basket of sales and length of stay among tour operators. It is a real added value.

Guided tours are also important and represent a large amount of requests with travel agencies and Tour Operators. The issue is the language. French are not so comfortable with foreign languages and guides tours needs to be done in French when it comes to city tours or any other place with history or culture that need to be shared. This is mostly developed in Louisiana thanks to the French heritage. A great alternative would be to create multi languages self-audio tours in smaller cities and places where it's not possible to have French speaking guides.

Most popular activities/visits in the Southern states are : plantations, culinary experiences, music tours and experiences, museums, and 100 % US products like World of Coca Cola, Tabasco and Bourbon. Anything that is typical to the destination will become a must see and do for the French traveler as it is part of the American culture and this is why they come at first to the US. On the other hand, anything that is not typical like zoos, tree climbing, fishing are not taken into consideration.

# ATTRACTIONS AND EXPERIENCES cont...

Here is a list of top activities for the French market (NTTO doesn't provide Belgian figures)

1. Sightseeing
2. Shopping
3. National Parks / Monuments
4. Art galleries, Museums
5. Dining
6. Small Towns
7. Guided tours

[percent of respondents]	2009	2005	2010	2015	2016	2017	2018	2019	2020
American Indian Communities	7.3	7.0	5.9	9.3	8.2	9.0	10.8	9.4	6.0
Amusement/Theme Parks	25.2	16.4	27.1	25.6	24.5	27.2	21.5	24.7	21.7
Art Gallery/Museum	32.0	30.8	37.9	42.4	42.0	41.3	43.2	42.2	38.0
Camping/Hiking	4.8	2.8	6.8	5.0	6.3	6.7	6.8	8.4	4.0
Casinos/Gamble	12.2	14.0	14.9	11.1	10.3	9.2	10.6	9.6	5.5
Concert/Play/Musical	17.6	12.3	19.7	17.4	18.9	17.7	15.4	14.0	9.2
Cruises (see note below)	3.5	4.3	6.2	---	---	---	---	---	---
Cultural / Ethnic Heritage Sites	---	---	---	20.6	18.8	20.4	21.2	19.7	14.8
Cultural Heritage Sites	23.6	27.2	37.1	---	---	---	---	---	---
Ethnic Heritage Sites	6.0	5.8	8.8	---	---	---	---	---	---
Dining (Experience Fine)	---	---	---	46.5	27.7	21.4	18.4	19.0	22.3
Dining in Restaurants	85.3	80.8	80.7	---	---	---	---	---	---
Environmental Eco. Excursions	9.6	9.1	7.9	3.9	3.3	5.4	3.3	4.4	3.1
Golfing/Tennis	3.5	3.3	2.5	2.4	2.0	2.4	1.0	2.6	3.2
Guided Tours	13.3	14.7	14.8	21.7	20.5	17.8	20.5	16.0	21.9
Historical Locations	---	---	---	30.1	29.8	29.7	28.1	30.8	18.4
Historical Places	38.7	46.0	54.6	---	---	---	---	---	---
Hunting/Fishing	1.6	2.0	1.5	1.9	1.0	0.8	0.7	0.8	0.3
National Parks/Monuments	---	---	---	48.2	50.2	49.6	50.6	49.0	47.6
National Parks	26.7	24.2	30.9	---	---	---	---	---	---
Nightclubbing/Dancing	13.2	13.9	12.1	11.6	12.8	10.2	9.5	11.6	13.3
Ranch Vacations	1.0	0.8	0.7	---	---	---	---	---	---
Shopping	80.1	86.1	86.1	86.4	84.7	85.0	84.8	82.9	81.1
Sightseeing	---	---	---	77.7	78.3	74.6	75.0	75.6	68.1
Sightseeing in Cities	49.0	49.0	55.0	---	---	---	---	---	---
Touring Countryside	23.3	22.3	17.1	---	---	---	---	---	---
Small Towns	30.7	30.0	29.9	32.8	28.1	29.8	32.3	34.3	23.8
Snow Sports	---	---	---	0.9	0.7	0.6	0.4	0.4	3.4
Snow Skiing	1.2	1.3	1.1	---	---	---	---	---	---
Sporting Event	---	---	---	11.8	11.4	10.1	13.7	12.0	16.2
Attend Sporting Event	5.0	8.4	6.9	---	---	---	---	---	---
Water Sports	---	---	---	8.4	6.9	7.7	8.4	6.2	5.8
Water Sports/Sunbathing	17.1	18.6	17.1	---	---	---	---	---	---
Other	---	---	---	2.7	1.2	0.6	0.5	2.1	2.4

# KEY TRAVEL INDUSTRY EVENTS

## BtoC fairs

In 2022, Comexposium is back with its major Tourism fairs in France : Lille with Tourissima from February 25th to 27th and where Travel South will be exhibiting with the Visit USA (Lille also targets the Brussels area, French speaking Belgium), Lyon with Mahana from March 4th to 6th and Paris with Salon Mondial du Tourism from March 17th to 20th where Visit USA France is also exhibiting.

The Brussels Holiday Fair, which was to be held at Brussels Expo from 3 to 6 February 2022, has been moved from 24 to 27 March 2022 inclusive. This is the second year in a row that the organizer of FISA has had to cancel the vacation show on the scheduled dates due to the pandemic. This year the Visit USA Belgium has cancelled its participation due to a lack of participation from members. Travel South who had registered had to cancel as well.

In November, the SITV Colmar France (but also targets French speaking Belgium) will have Louisiana as a destination of Honor. Discussion between the Visit USA France and LOT has just started to plan a partnership and participation to the fair.

## BtoB fairs

**IFTM Top Resa:** new direction and new format for the show. The tourism industry's annual mega-show has a new director: Laurence Gaborieau has been appointed director of the tourism, fitness, transport and logistics division of Reed Expositions France (RX France), and thus becomes the director of IFTM Top Resa. She thus replaces Frédéric Lorin, who embodied the show with French tourism professionals from 2016 to 2022. With a Master's degree in Communication and Marketing coupled with a thesis in History, Laurence Gaborieau joined RX France in 1998. "Six months after her arrival, she took over as deputy director of Apple Expo and then specialized in events (conferences and trade shows) dedicated to health. In 2013, she launched the first international civil nuclear exhibition, World Nuclear Exhibition, which in 8 years has become a global reference. In 2019, she will take over the Forum Labo exhibition dedicated to research, as well as Rééduca, the event that brings together professionals in physical therapy," explains RX France in a release. The appointment of Laurence Gaborieau also marks a new turn for IFTM Top Resa, which will now be held over **three days**, compared to the usual four. The opening hours will be extended (**9:30am-7:30pm**). The next edition of the show will take place from **September 20 to 22, 2022**, at the Porte de Versailles, in Hall 1 of the Parc des Expositions. The 2021 edition was nicknamed "the fair of the reunion". Because of the first rebound in the industry (later spoiled by the Omicron variant), the September 2021 edition has been a qualified edition as many key players from the industry attended the show. Most Tour Operators were there with their Product Manager and sales managers.

## KEY TRAVEL INDUSTRY EVENTS cont...

The most missed at the show were the travel agents, almost none of them could attend for many reasons : no budget, no time, no availabilities due to the lack of staff, and the borders were still closed mostly.

**ILTM Cannes** (South of France) from December 5 to 8, 2022. The flagship of the ILTM Collection, Cannes is the end-of-year show that everyone in the luxury travel industry wants to be at. The industry's most influential names become the talk of the town as they create exciting new itineraries, do business and build lifelong bonds. Four days of high-quality pre-scheduled appointments, educational sessions, networking, parties and invaluable exposure sum up the incredible ILTM experience.

### Workshops

The 2021 workshops with the **Visit USA France** were held on November 23rd in Lyon, on November 25th in Paris, on November 30th in Lille and on December 2nd in Nice. Travel South USA has been exhibiting in Lyon and Paris where attendance was high: 71 travel agents and Product Managers in Lyon and 139 in Paris.

The new cities for the 2022 workshops are Strasbourg (north east) and Toulouse (south) + Paris like every year. Travel South USA has registered to Paris and Strasbourg. Toulouse being during the TS International Showcase.

The 2021 workshop with **Visit USA Belgium** was held on October 15th and 67 travel agents and Product Managers attended (the event was held while the borders were still closed). Visit USA Belgium is planning last minute another workshop in April, the ReLaunch Workshop in replacement of the BtoC fair event they have been cancelling earlier. Travel South USA won't be attending as we have planned a webinar in March with them, and also because the event is during the TS Global Summit in Atlanta.

## KEY TRAVEL INDUSTRY EVENTS cont...

### **Tour Operators workshops in 2021 did not happen.**

The 2022 French Tour Operators workshops are less in number than previous years. Because of the Omicron variant, every workshops that were planned in January and February 2022 have been postponed to March 2022. Travel South USA France has registered to 1 **KUONI** workshop as well as 2 **VISITEURS** workshops, all 4 are now scheduled in March.

In the winter 2021 Travel South USA has been scheduling **4 webinars** (Louisiana, South Carolina, Alabama and Tennessee) on the French and Belgium markets to keep the destination alive and the agents aware of the destination during the hard time the tourism industry was going through. Those webinars were both educational and entertaining as local musicians and chefs participated. They have gathered a total of 477 travel agents + 444 thanks to the replays. A webinar with the Tour Operator Del Tour in Belgium has also been added to the Webinar series with 41 travel agents.

### **Webinars are also planned for 2022.**

The first ones will be in the frame of the BtoBtoC campaign with Visiteurs in March on the French market for which we have planned 2 dates. The second one is with the Visit USA Belgium in the frame of our annual membership and is also planned in March.



# **Media Landscape**

# COVERAGE OF THE USA AND TRAVEL SOUTH USA REGION

In 2021 the USA media coverage in France and Belgium was marked by 4 main subjects: Politics with the beginning of Joe Biden's presidency, the Covid-19 situation, the 20th anniversary of September 11 and the borders reopening. The subject of the pandemic is half as present in September as it was at the beginning of the year in the regional daily press.

- Joe Biden must take one last step to power. [Les Echos](#) January 2021.
- What will Joe Biden's first decisions be when he takes office? [Europe 1](#) January 2021.
- United States: what to learn from Joe Biden's first 100 days in office? [Konbini News](#) April 2021.
- Coronavirus: 2021 starts with sad records in the US. [L'Express](#) January 2021
- Covid-19: the United States exceeds 500,000 deaths. [La Croix](#) February 2021
- United States: more and more companies are daring to implement mandatory vaccination. [RTL Info Belgium](#) August 2021.
- The 20th Anniversary of 9/11. [Le Monde](#) September 2021.
- 20 years of 9/11: stories and memories. [France Culture](#) September 2021.
- 20 Years of 9/11: the striking images of the day America stood still. [BFM TV](#) September 2021.
- The United States reopens its borders, the return of activity will be gradual. [Les Echos](#) November 2021
- US reopens borders to vaccinated travelers: "The number of flights is still relatively limited from Belgium". RTBF Belgium November 2021
- United States, the great reunion. [Le Figaro](#) November 2021
- Covid-19: What are the requirements to travel back to the United States? [Géo](#) November 2021.
- Reopening of the borders: what are the conditions to travel back to the United States? [Le Parisien](#) November 2021
- United States: Travelers flock after border reopening. [Challenges](#) November 2021
- Covid-19: the United States reopens its borders to the delight of the French. [France TV Info](#) November 2021

## COVERAGE OF THE USA AND TRAVEL SOUTH USA REGION cont...

In 2021 the media coverage for Travel South in France and Belgium has been relatively quiet due to the pandemic and the borders being closed. The coverage really took off when the borders reopened and when the media could make the readers dream again.

During the first semester in trade and professional media, the central topics were the webinars:

- Travel South USA: meet on February 11 for a webinar on Alabama. [Tourmag](#) March 2021
- Traveling from your couch: today, we're learning about the United States – May 2020, [L'Echo Touristique](#)
- United States, Malta, Guadeloupe, Abu Dhabi...: the agenda of the next webinars – January 2021, [L'Echo Touristique](#)
- A webinar to learn more about South Carolina – January 2021, [Le Quotidien du Tourisme](#)

Louisiana has been popular around the Mardi Gras period. Both for its special Covid Mardi Gras celebrations or for the French heritage.

- États-Unis: à la Nouvelle-Orléans, un Mardi Gras sur Internet, Covid-19 oblige. RFI February 2021
- Surprising carnival in Louisiana. [Le Parisien](#) Week-end March 2021
- Discover the Vieux Carré, the French Quarter of New Orleans. [Radio LCF](#) February 2021
- How the inhabitants of Louisiana reclaim the French language. [Europe 1](#) February

# COVERAGE OF THE USA AND TRAVEL SOUTH USA REGION cont...

During the pandemic, readers were dreaming about great escapes. The Travel South coverage has been a lot focusing on outdoor: road trips and nature.

- Discovering the most beautiful roads in the Southern United States. [Le Temps d'un Voyage](#) March 2021
- From Yellowstone to the Grand Canyon: top 10 most visited U.S. national parks in 2020. [Le Figaro](#) March 2021
- Travel to the USA: the most beautiful beaches to discover after the confinement! [MCE.fr](#) April 2021
- US mythical roads - Top 5. [Le Repère des Motards](#) May 2021
- Dream beaches: discovering the Outer Banks in the United States. LCI August 2021
- The Southern United States in the colors of autumn. [Voyager Pratique](#) September 2021
- Here are the 10 most underrated and least visited American national parks. [Marseilles News](#) October 2021
- Indian summer : flamboyant colors of the Apalaches. [France 2](#) October 2021

Since October 2021 after the announcement of the boarder reopening date, more topics are being covered in the media to speak about the South. Also thanks to a more intensive press releases activity on both markets it allows the readers to discover more about the 10 states like food and music. The boarder reopening also allows the readers to project themselves, therefore the media coverage includes more travel ideas and products like accommodations.

- The top 10 regions of the world to discover in 2022. [Lonely Planet](#) October 2021
- In this natural park, visitors can search the ground for diamonds. [Ouest France](#) October 2021
- The treasures of South Carolina. [Destination USA](#) October 2021
- In Louisiana, Casey's oysters au gratin. Arte Invitation au voyage November 2021
- 15 experiences made in America. [Le Figaro](#) November 2021
- On the road to music. [Le Figaro](#) November 2021
- United States: the tastiest road. [TF1](#) December 2021
- From Missouri to Kansas, jazz in the wheat fields. [Le Journal du Dimanche](#) December 2021
- The most anticipated museum openings in 2022. MSN December 2021
- From Denver to Miami, ten new places to stay. [Le Figaro](#) January 2022
- The world tour of the most beautiful whisky bars. [AD Magazine](#) January 2022
- Here are the most liked Airbnb on Instagram in 2021. [Marie-France](#) January 2022

# CHANGES IN PUBLICATIONS, DIGITAL AND PRINT, POST COVID

## 2021 From print to digital accelerated by the pandemic

Press sales are down in 2021, but the digital craze is confirmed. Sales of newspapers and magazines in their digital version jumped by 19.2% compared to 2020. The enthusiasm of press readers for digital is confirmed in France. Sales of newspapers and magazines in their digital versions have increased by 19.2% over one year, according to the annual report on paid press distribution.

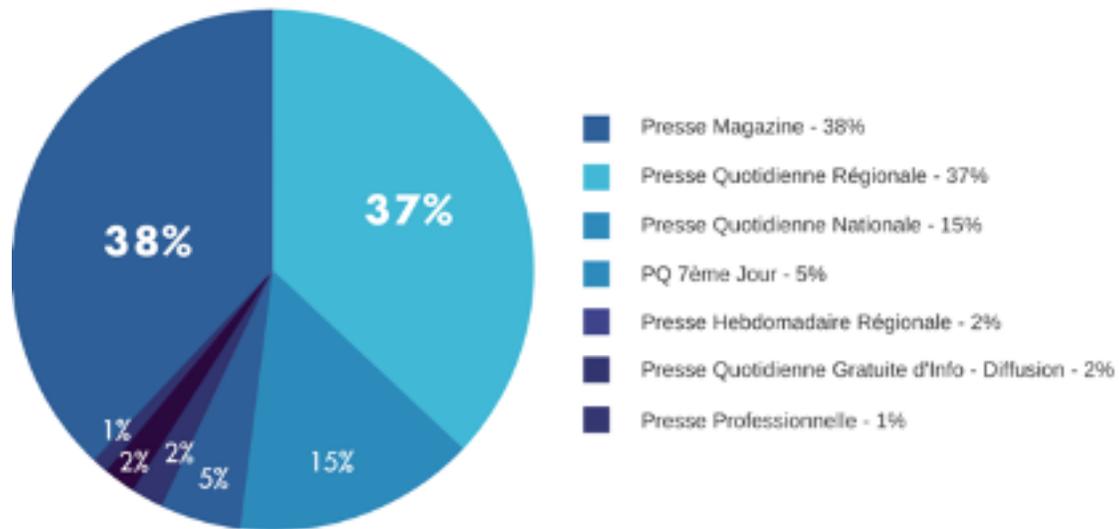
This digital dynamism has almost offset the decline in sales of paper copies. In this year 2021, which is still marked by the Covid-19 pandemic, health restrictions have led to a significant drop in the number of sales outlets and newsstands. The consumer press was down 2.9% compared to the year 2020.

In this context of declining overall circulation, the national daily press is an exception. It is the only mainstream press family to show an increase in sales (5.4% year-on-year). The national daily press continues to reap the benefits of its investments in digital. Among the national dailies, Libération recorded the strongest growth (+18.5%) over one year. With nearly 67,000 subscribers, digital now represents nearly three quarters of its paid circulation. On the other hand, Aujourd'hui en France (Groupe les Echos Le Parisien) recorded the biggest drop (-14.2%).

For its part, the regional and departmental daily press, which has positioned itself later on the digital field, recorded a decline of 2.3% . The newspaper Ouest-France is one of the few regional titles to record an increase (+ 0.5%) in 2021. Magazine circulation fell by 5.4% over the year to 709 million copies, including 116 million digital versions (+15.3% over one year). The segment was particularly affected by the health crisis. With the impossibility of traveling for many months, kiosks in train stations and airports, where readers are used to buying a lot of magazines, were very little used. This situation has reinforced the transition of paper magazine readers to the web.

*Source Le Figaro.fr*

# CHANGES IN PUBLICATIONS, DIGITAL AND PRINT, POST COVID cont...



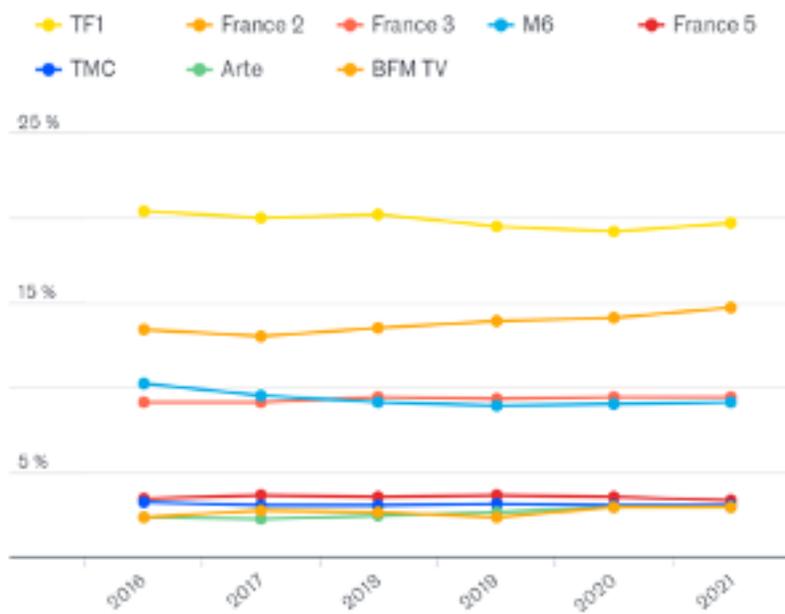
Distribution of press families by circulation volume (source ACPM)

# CHANGES IN PUBLICATIONS, DIGITAL AND PRINT, POST COVID cont...

Top 10 of the media website  
(Source ACPM)

1		LeFigaro.fr
2		FranceInfo.fr
3		Ouest-france.fr
4		Télé-Loisirs.fr
5		Orange.fr
6		Bfmtv.com
7		LeMonde.fr
8		L'Equipe.fr
9		LeParisien.fr
10		Closemag.fr

Audience share of the top eight French TV channels from 2016 to 2021 (source Médiamétrie)



With the digital transformation of their respective professions and the particular context of health restrictions, journalist/communicator relationships are being shaken up. According to Benoît Désveaux, Managing Director of Hopscotch, the profession of journalist is being challenged by digitalization. “Companies are engaging in conversations via social networks with their entire ecosystem and there is therefore a proliferation of content and stakeholders and not just the Press anymore.”

Besides, only 29% of French people think that journalists are independent from political and financial powers, the question of trust is central in the relationship between communicators/journalists/public.

# EMERGING TRENDS IN CONSUMER AND TRAVEL TRADE PRESS & OPPORTUNITIES AND TRENDS FOR EDITORIAL PITCHING

According to a Kantar study, 4 out of 5 consumers use media powered by UGC (User Generated Content), these contents created by Internet users themselves, as sources of information and news. No doubt: the consumption of “mass media” is confirmed.

The typical profile in 2021: an Internet user, a big user of social networks, a video enthusiast. Without much surprise, e-commerce is making an unprecedented leap. From social ads to click & collect, all the conditions are in place for the acceleration of online purchases and for the flight of “direct-to-consumer” brands.

## Opportunities and trends for editorial pitching

- Relying on the natural human being. All the targets are in dire need of reassurance: health security, physical security, customer recognition, digital facilities, etc.
- Be as engaging as you are committed. Being useful and responsible has become a major issue for brands. It is high time to go beyond the consumerist relationship. Acting responsibly is indeed the most influential criterion on a brand's reputation.

### Top tourism angles identified for 2022 (source Tendance hôtellerie)

- Travel for well-being
- Reconnecting with travel
- Local experiences at the heart
- To new destinations (and new people)

# EMERGING TRENDS IN CONSUMER AND TRAVEL TRADE PRESS & OPPORTUNITIES AND TRENDS FOR EDITORIAL PITCHING cont...

Beyond these major trends, the study conducted by Booking.com identified the 8 most trending destinations in 2022, globally:

- Atlanta, USA
- Taichung, Taiwan
- Gramado, Brazil
- Santo Domingo, Dominican Republic
- Brasov, Romania
- Llandudno, United Kingdom
- Montpellier, France
- Malacca, Malaysia

In general, journalists are always in search for the unseen or the unknown to create the surprise among its readers/audience. The last hidden gem, the more unusual accommodation, the “greenest” hotel, new luxury experiences, less popular places away from the crowds, the super local product you won’t find on our market, the history behind the product, ect. Sharing dedicated content (outdoor/food/culture/music) among the appropriate targeted list of media is efficient only if it also meets with the trends of the market. This is why the content needs to be adapted to the actual trends : sustainable tourism, reconnecting with original travel by experiencing and discovering instead of consuming.

# FUTURE OF PRESS TRIPS

It is essential to include press trips to a destination communication strategy. The journalist and the media will be a voice to speak for the destination on the market. They know how to speak to their readers/audience and therefore will amplify the destination's awareness using the proper "language" to reach the audience they speak to.

- Any content resulting from a press trip is an additional and more "market friendly" asset/tool for the destination.
- Individual press trips should be favored as it allows to be more specific and to spread media coverage through the year.
- Ideally each pillar should have its own media press trip to offer a wider visibility among the readers/audience.

## KEY MEDIA EVENTS

- Les rencontres de la presse de l'**ADONET** March 29, 2022 PARIS  
This is a press workshop during which the member TOs present their destination and the main events and press trips of the coming year to journalists and tourism bloggers.
- **IMM** France March 16, 2022 PARIS  
An event for travel journalists who can meet tourism brands from all over the world.

## CAMPAIGN AND ADVERTISING

Advertising allows greater BtoC visibility. In 2021 Travel South USA have benefitted from this visibility through the Visit USA France website with banner ads. Visit USA France website has an average of **1.5 million unique visitors per year** from many French-speaking countries, the website has become a popular tool for potential travelers and professionals but also for USA lovers. The Visit USA increases its visibility in a consistent way each year and has today a real impact on social networks as well.



For 2022, the advertising campaign with banner ads with Visit USA is also planned from March to December.

The crisis of the covid has considerably accelerated online advertising investments thanks to the success of merchant sites. Internet advertising revenues reached 3.8 billion euros in the first half of 2021 in France, according to the Observatoire de l'e-pub, a 42% growth driven by the rise of online commerce.

This increase comes after a slight decline last year over the same period, 4% according to the corrected figures of the firm Oliver Wyman, which conducts this study for the Syndicat des régies internet (SRI) and the Union of consulting and media buying companies (UDECAM).

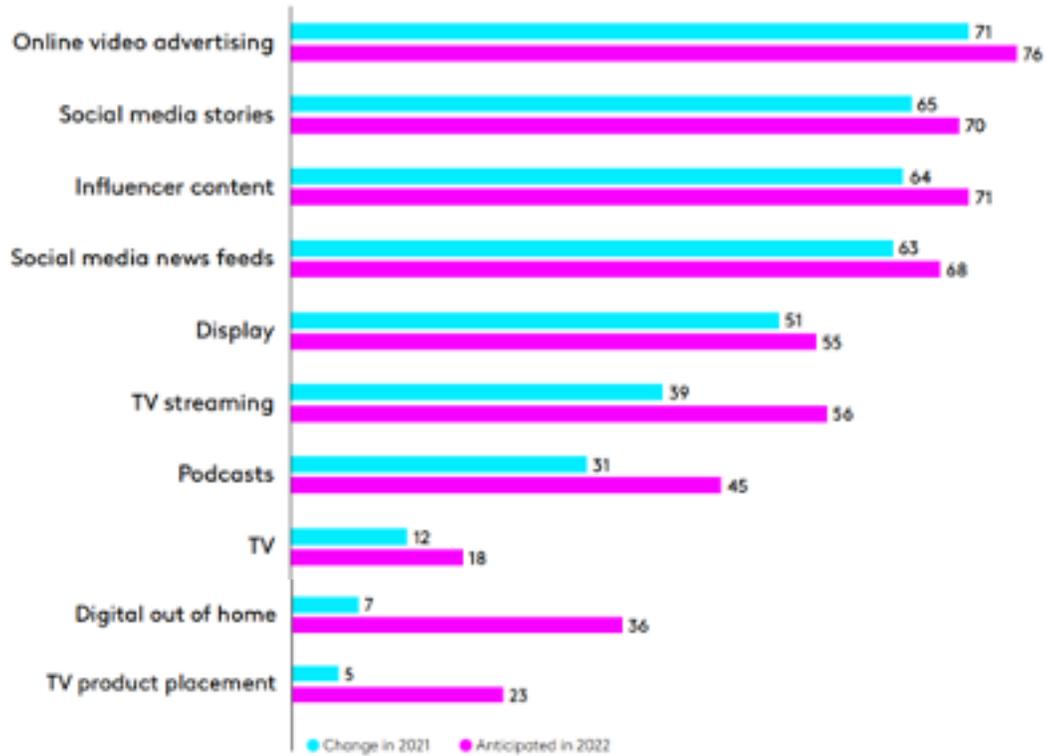
+25 to 30% expected this year in 2022.

The sector has been boosted by online trade, but also by the recovery of some sectors such as automotive or tourism, with the easing of health restrictions.

# CAMPAIGN AND ADVERTISING cont...

## Online media spend is increasing 2021 and expected to continue in 2022

Changes in budget/resource allocation (% net +ve)



Source: Kantar Media Reactions 2021.

Figures shown are the difference between the % of marketers saying investment will increase vs saying it will decrease.

Q. How has your allocation of budget and/or resources for the following channels for 2021 changed (compared to 2020)? Q. How do you expect allocation of your budget and/or resource to change, in 2022?



# **Social Media & Influencers**

# SOCIAL MEDIA & INFLUENCERS

The use of social networks is growing and the influencer is a vector of notoriety, image or sales for a brand. They are essential in turning audiences into leads. In this case, a paid partnership with a qualified and targeted influencer is then useful for the brand. When partnering with a Tour Operator, ROI is easily measurable by setting up a call to action. A clickable link on a blog post with a personalized promo code can drive to the Tour Operator products.

## Key figures for social networks 2021 in France (source Digimind)

- French Internet users consult on average 2.7 social networks and messaging every day (+0,4 compared to 2020) and an average of 3,9 social networks among the 15/24 years old (+1 compared to 2020).
- Message and social networks: 8 out of 10 French people visit them each month, 49.1 million unique visitors.
- 40% of French Internet users declare to have created an account for a social network or an instant messaging during the lock down and 55% of French people would have had difficulty in living the lock down without the social networks.
- 27% increase in usage for TikTok in the 15-24 years old in France compared to 2019

### Top 5 applications downloads in 2021

- 1  TousAntiCovid – Gvt Fr;
- 2  WhatsApp – Meta
- 3  TikTok – ByteDance
- 4  Instagram – Meta
- 5  Doctolib – Doctolib

### Top 5 active users

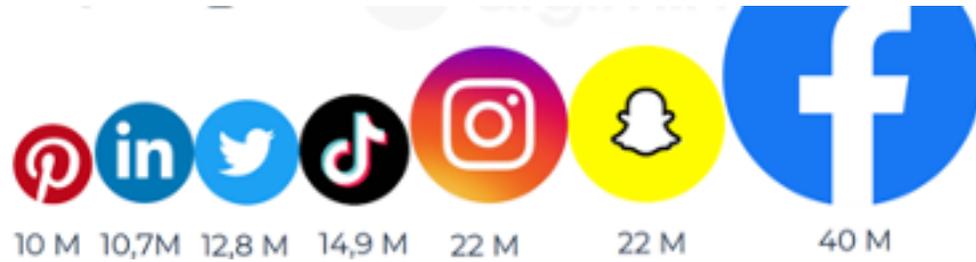
- 1  WhatsApp – Meta
- 2  Facebook – Meta
- 3  Messenger – Meta
- 4  Instagram – Meta
- 5  TousAntiCovid – Gvt fr

### Top 5 spendings per user

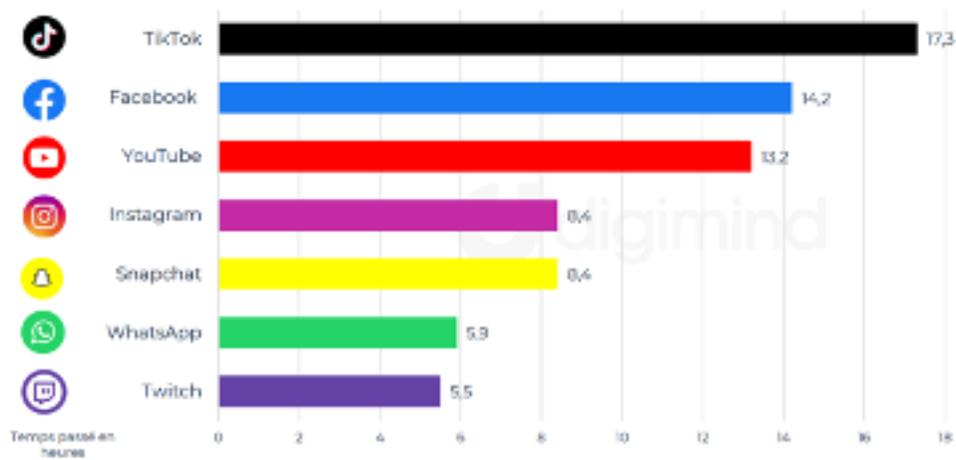
- 1  Deezer – Deezer
- 2  Disney+ – Disney
- 3  Tinder – Tinder Inc.
- 4  Netflix – Netflix
- 5  Google One – Google

# SOCIAL MEDIA & INFLUENCERS<sub>cont...</sub>

Active internet users on social networks in France in 2022 (source Digimind)



Time spent on social networks and messaging in hours per month (source Digimind)



# DESCRIBE HOW KEY TARGET DEMOGRAPHICS USING AND RESPONDING TO SOCIAL MEDIA

**Generation Z** has an average of 9.9 social network accounts per user. Generation Z is less present on Facebook than the previous generation - the Millennials - which is often why we see studies that predict the death of the social network. Generation Z prefers images, Generation Z has always known the Internet and was born into a world saturated with content. Gen Z has therefore learned to sort through and consume information quickly. That's why they have the highest usage rate on YouTube and Instagram.

**Millennials**, the generation before them, have a lower consumption of social networks: 2h38 on average per day. Millennials are still in the lead with an average of 10.1 social media accounts per user. 83% of Millennials use Facebook every month

**Generation X** uses social networks for an average of 1h49 per day and has an average of 7.3 accounts. 77% of Gen X use Facebook every month.

**Baby Boomers**, unsurprisingly, connect to social networks for only 1h12. Baby Boomers are the users with the fewest accounts, "only" 5.3. They are showing the highest growth in Instagram and Whatsapp users..

## Nostalgia marketing and back to basics

Millennials (62%) and Generation Z (64%) use social networks to search for a product ahead of Generation X (47%) and Baby Boomers (31%). Social networks have surpassed search engines in the search for information related to purchase consideration among Generation Z. 48% of Generation Z use social networks to learn about a brand or product, compared to 47% who use search engines. Social networks used to be more used to interact with friends, now they are more often used to follow celebrity news (+27% in 3 years) and search for **products to buy** (+30%). It is therefore essential for a brand to use social networks in its communication strategy.

Some potential travelers don't know yet where they want to go or what they want to do. They're one of the groups of people who go on Facebook and Instagram to get inspiration and see other travelers' ideas for the perfect vacation. Vacation photos and videos are among the most popular content on social networks. studies have shown that about 40% of millennials choose their travel destinations based on Instagram-worthy images.

## **DESCRIBE HOW KEY TARGET DEMOGRAPHICS USING AND RESPONDING TO SOCIAL MEDIA** cont...

Since most customers trust reviews from other consumers more than brand advertisements, research on social media is enough to make a decision. Travel South should be encouraging user-generated content and partnering with influencers to create destination awareness and build that trust with new visitors. Influencer content is a more effective way to engage with target audiences.

Studies show that 88% of consumers trust online reviews as much as recommendations from their personal contacts. This means that user-generated content can work as effectively as word of mouth and create a climate of trust between the targets and Travel South.

The travel and leisure industry is inherently social, so it's not a surprise that it is directly linked to social media.

# INFLUENCERS, CONTENT CREATORS, PODCASTS AND MICRO INFLUENCERS AND INVESTMENT

Influencer marketing is one of the top forms of digital marketing in terms of ROI. For every \$1 spent on influencer marketing, brands earn up to \$5.78 in return. Influencer marketing is an effective form of marketing according to Influencer Marketing Hub. One of the biggest challenges with influencer marketing is how to choose the right influencers for the campaign.

## Outlook for the podcast market 2022

### 1. Growth in usage

It's a fact, the number of podcast listeners has been growing for years and it will continue to do so in 2022. If more than one out of three French Internet users consume podcasts (already one out of two in the United States) it is simply because there is more and more good content supported by a very rich and diverse production sector. On the other hand, it is a format that puts an end to the dictatorship of screens, allows you to close your eyes and use your imagination. And we all need it, small and large.

### 2. Branded Podcasts

Every company can find authentic stories related to their brand, whether those narratives are in the form of interviews, immersive surveys or slice-of-life sharing.

## Micro Influencers (10K–100K followers)

Even though they have a pretty large following, micro influencers are still viewed as relatable to their followers and tend to have an engaged audience. At this level, influencers tend to specialize in a particular niche. They also typically have high engagement rates and a targeted audience. Travel South could invest in micro influencers for each of its pillar. This would allow the destination to have a wider and more qualified/interested audience on each. Also it would be very interested for the French and French speaking Belgian markets to discover the destination from their own "codes" and perspective. The content resulting from such an investment would also be very much qualified and relevant to the targets. It is important to make a selection of influencers with blogs on top of social networks. They are providing content closer to a journalist's content and therefore they provide a more qualified content that will last on the website. Blogs encourage trust and promotion on a blog can generate traffic to a website for a call to action (if partnering with a trade partner) or website traffic grow.