

# New Landscape Report

FRANCE



TRAVEL  
SOUTH  
USA

# INTRO

In France, it is still too early to talk about the aftermath of COVID. Currently, the French are still under the constraints of a curfew from 6:00 pm and they do not have access to leisure activities and restaurants; bars, restaurants, cinema and museums among others are closed. Local confinements are applied because there is a rebound of the pandemic in this month of March 2021. Still, the situation in France is under control compared to other European countries but remains fragile. If the number of cases increases, a third lockdown will be implemented.

Also, since the end of January, international travel is prohibited and travel within Europe is subject to PCR testing on departure and return.

Nevertheless, the light at the end of the tunnel is approaching thanks to the arrival of vaccines and discussions around health passports, health certificates and applications set up by airlines. We must be patient.

For the moment, the tourism industry in France remains moderately impacted thanks to a series of aids put in place by the government. In particular, the government has taken charge of the partial unemployment which has prevented companies from laying off employees. Another regulation that saved our industry from the beginning of the crisis, the implementation of an ordinance from March 2021 allowing customers of tour operators and travel agencies to postpone their trips instead of being refunded.

Most of the businesses are still working heavily reduced hours. Most of the travel agents and product managers are working 20 to 50% of their usual time.

However, the government's aid schemes, and the ordinance are approaching their expiry date. The impact of the crisis will be greatly felt in the coming weeks and months.

State schemes to protect employment ends in some countries risking dismissals and higher unemployment also in the tourism sector and within our partner companies. Also, European legislation contradicted the compulsory voucher (instead of refund scheme) and hence some markets are forced to now allow consumers to pick refunds over vouchers resulting in cancellations and financial strains for companies.

This pandemic leads to many changes in the way they live, travel and consume. In the post-COVID era, the health safety aspect is now added to the sustainable aspect that was important. Climate change and environmental impact in destinations have become the focus of attention and concern for travelers. A great debate is being generated on the benefits or disadvantages of tourism and on the need or not to control it.

## INTRO cont...

In recent years, our society has been immersed in a series of changes that are caused by the acceleration of the digital world and this is especially true with the COVID-19. That said, many tourists have suffered from the lack of reimbursement of their trips bought directly without going through travel agencies or tour operators. This is also a change that must be considered. Studies show that the French will book more through a TO or TA in the post COVID era.

Everyone agrees that as soon as it is possible to travel internationally, the French will leave. There is a real expectation of border reopenings. As soon as it will be possible to leave, it will be chaos and travel reservations will be numerous.

On the other hand, other elements plead for not rushing and waiting to book your summer vacations. The Covid epidemic is still unpredictable and new restrictive measures may occur in France as well as abroad, including quarantine periods that could ruin a stay. Moreover, what will be the terms of the health pass at the European level that the European Commission will soon propose? And above all, will we be vaccinated, knowing that Emmanuel Macron has promised a vaccine for all by the end of the summer, i.e. September 22... Booking later therefore reduces the risk of having to cancel everything.

The final version of the New Landscape Report will be submitted at the end of June 2021 when we will have more visibility on the impact of the crisis and when travel will resume.



**ARTICLE ONZE**  
**TOURISME**

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# **Factors Affecting Travel**

# BRIEF OVERVIEW OF FRANCE'S ECONOMY AND FORECAST FOR 2021 AND BEYOND

## The Economy In General

The economic situation in the first quarter “is on a ridge, or in-between, with signs of weariness and others of resistance,” commented Julien Pouget, head of the business cycle department at INSEE (National Institute of Statistics & studies), recalling that, since the outbreak of the epidemic, “we can almost model the economic situation on the health situation as the two are linked.

This correlation can be clearly seen in the relative health of the different sectors of the economy. While industry has almost returned to a normal level of activity, this is not the case for a large part of the services sector due to the restrictions - 6 p.m. curfew, closure of bars and restaurants, localized confinements, etc. With the situation still deteriorating compared to the summer of 2020, it is these services that are expected to weigh on salaried employment in the first half of 2021.

After an atypical year, the **labor market** should return to a more normal functioning. The year 2020 resulted in the loss of 323,000 jobs (including 284,000 salaried jobs), a figure contained by short-time working, which prevented an explosion in layoffs, and by support for businesses. State-guaranteed loans have thus greatly reduced the number of bankruptcies, which have fallen by 40% over one year, according to data from the Banque de France on Wednesday 10 March.

The result has been a drop in unemployment to 8% of the working population at the end of 2020. But this “trompe-l'œil” improvement is expected to dissipate in the first quarter, with unemployment returning to 8.5 percent of the labor force, 0.4 points above the end-2019 level. Insee believes that the lasting nature of the crisis will lead “companies to gradually give up retaining workers in their workforces, in particular by reducing the extent of their recourse to short-time working”.

Another curve that is expected to rise again in 2021 is **inflation**, which has become a global concern. France will not be spared by this phenomenon, which is fueled in large part by rising oil prices. Consumer prices in France rose by 0.6% in January, due to the postponement of the winter sales, and by 0.4% in February. This trend is expected to accelerate “significantly” from March onwards, reaching +1.3% year-on-year in June.

The waltz of labels will automatically have an impact on household purchasing power. This has been rather preserved in 2020 thanks to the partial activity scheme and social benefits, which have more than compensated for the drop in income.

# BRIEF OVERVIEW OF FRANCE'S ECONOMY AND FORECAST FOR 2021 AND BEYOND cont...

According to INSEE (National Institute of Statistics and Studies) calculations, **household gross disposable income** rose by 1.1%, after +3.1% in 2019, and their purchasing power by 0.6% after +2.1% the previous year. In the first quarter of 2021, this gain in purchasing power would only be 0.4%, while incomes would increase by 1%.

This is not enough to encourage the French to consume: INSEE does not foresee any significant improvement on the trade and services front. Consumption will remain down 5% in the first quarter compared to pre-crisis levels. Unable to go to restaurants, concerts, or engage in certain leisure activities, the French will continue to save for better days. The savings rate is expected to remain particularly high, at 21.5% of gross disposable income. Far, far from the 14.9% savings rate recorded in 2019, before the pandemic.

## **Growth will be “at least equal to 5%” in 2021, compared to 2020 according to the Banque de France**

While the Banque de France will unveil its new forecasts next week, its governor is optimistic. France's growth “will be one of the strongest in Europe, well above average,” he says. A confidence shared by Bruno Le Maire.

“Once health restrictions are lifted, everything will depend on confidence: we will move from health confidence to economic confidence,” said François Villeroy de Galhau, for whom the recovery of the French economy “will depend on consumer confidence. And in particular of their choice to use the savings they have accumulated to consume, as it was the case last year at the end of the first confinement in particular.

A confidence in the future shared by the Minister of Economy, Bruno Le Maire. “The French economy will surprise the euro zone and the rest of Europe with its ability to rebound by the end of 2021,” he said, just hours before Eurostat reported that the euro zone's GDP fell by 6.6% last year, slightly less than expected.

And to affirm being “convinced” that “the French economy will recover very quickly as soon as the health restrictions are lifted”, thanks to “maintaining business investment”, but also “the mobilization of entrepreneurs” and finally “the resistance of the labor market thanks to which we have taken to protect employees and avoid mass unemployment”.

# BRIEF OVERVIEW OF FRANCE'S ECONOMY AND FORECAST FOR 2021 AND BEYOND cont...

## Tourism Economy

### France: tourism receipts drop by 41% in 2020

France's overall tourism revenues reached 89 billion euros in 2020, according to Atout France's first estimates. The decline thus reaches 41%, compared to the 150 billion euros of the year 2019. A significant decline, but less pronounced than other European destinations, according to Jean-Baptiste Lemoyne, Secretary of State for Tourism.

Thanks to a blue-white-red summer for the French, domestic revenues have dropped by "only" 31%, from 93 billion euros in 2019 to 64 billion euros in 2020. As a reminder, about 94% of French holidaymakers stayed in their own country.

The Covid-19 crisis has had a stronger impact on foreign customers, due to worldwide travel restrictions and border closures. Revenues from international tourism alone fell by 56% to 25 billion euros in 2020, compared to 57 billion euros in 2019. The vast majority of these revenues were lost to far-flung foreign visitors.

### Aid measures:

Details regarding the French Government's aid measures are available in the Travel Industry landscape section.

**"At the national level, we are at 20 billion euros of support set up for the Tourism sector," the Secretary of State said.**

In detail, tourism concentrates 11.5 billion euros of state-guaranteed loans (9% of EMPs), which companies will nevertheless have to reimburse. It also represents 4.7 billion euros of activity partially taken care of, out of the 27 billion euros granted all sectors combined. Our industry accounts for 17.5% of the aid granted in this respect. Finally, "a quarter of the 14 billion euros of solidarity funds is earmarked for the sector. This means that the tourism-HCR sector is among the first sectors to benefit from the support measures. And this is normal. As soon as the State imposes constraints on the normal functioning of establishments, it must be there to help professionals to get through this difficult period."

# BRIEF OVERVIEW OF FRANCE'S ECONOMY AND FORECAST FOR 2021 AND BEYOND cont...

**Jean-Baptiste Lemoyne (Secretary of State for Tourism): “We will maintain the aid measures as long as necessary”.**

“We will maintain the measures as long as necessary,” said Jean-Baptiste Lemoyne, Secretary of State for Tourism on January 8, 2021 about measures to support actors in tourism. Asked about the fragility of this sector, which has been hit hard by the crisis linked to covid-19, the Secretary of State said: “with Bruno Le Maire (Minister of the Economy editor’s note) we have put the package together. I can tell you that 16 billion euros have already been disbursed.” He assured that the aid measures for the sector will be maintained.

About the upcoming bankruptcies, he said that in 2020 they were not higher than in previous years because there are these aids. This is why it is important to continue them: thinking of partial activity, the solidarity fund...

“France has been more resilient than other destinations” according to him.

## **French travel agencies: €20 billion loss in 2020**

According to Jean-Pierre Mas, President of Entreprises du Voyage (EdV), the union of tour operators in France, the losses are 20 billion euros in 2020, French travel agencies have lost between 70% and 80% of its turnover.

According to him, the French who went on vacation in 2020 are “four times less than usual”, which represents “about 2 to 3 million people”. “The French have favored France and second homes and rentals,” said the president of the **View on COVID-19 (spikes, vaccines...)**.

# BRIEF OVERVIEW OF FRANCE'S ECONOMY AND FORECAST FOR 2021 AND BEYOND cont...

## COVID-19 Numbers

### General data:

|                 |                |                 |
|-----------------|----------------|-----------------|
| Hospitalized    | In Reanimation | Returns to home |
| <b>25 469</b>   | <b>4 219</b>   | <b>273 771</b>  |
| (+1,92%)        | (+1,92%)       | (+0,3%)         |
| Test Positivity | Incidence rate |                 |
| <b>7,39</b>     | <b>243,90</b>  |                 |

Stats from March. 15th, 2021 - Santé Publique France

*\*In the last report, the Direction Générale de la Santé provided only hospital data on the coronavirus, since statistics for Ehpad are now updated twice a week. As a consequence, the total number of deaths that we display above only takes into account the evolution in hospitals for the last 24 hours.*

*Hospitalizations and resuscitation cases represent patients undergoing care. In resuscitation, Santé Publique France includes patients in the resuscitation unit (SR), intensive care unit (ICU) and continuous surveillance unit (CSU).*

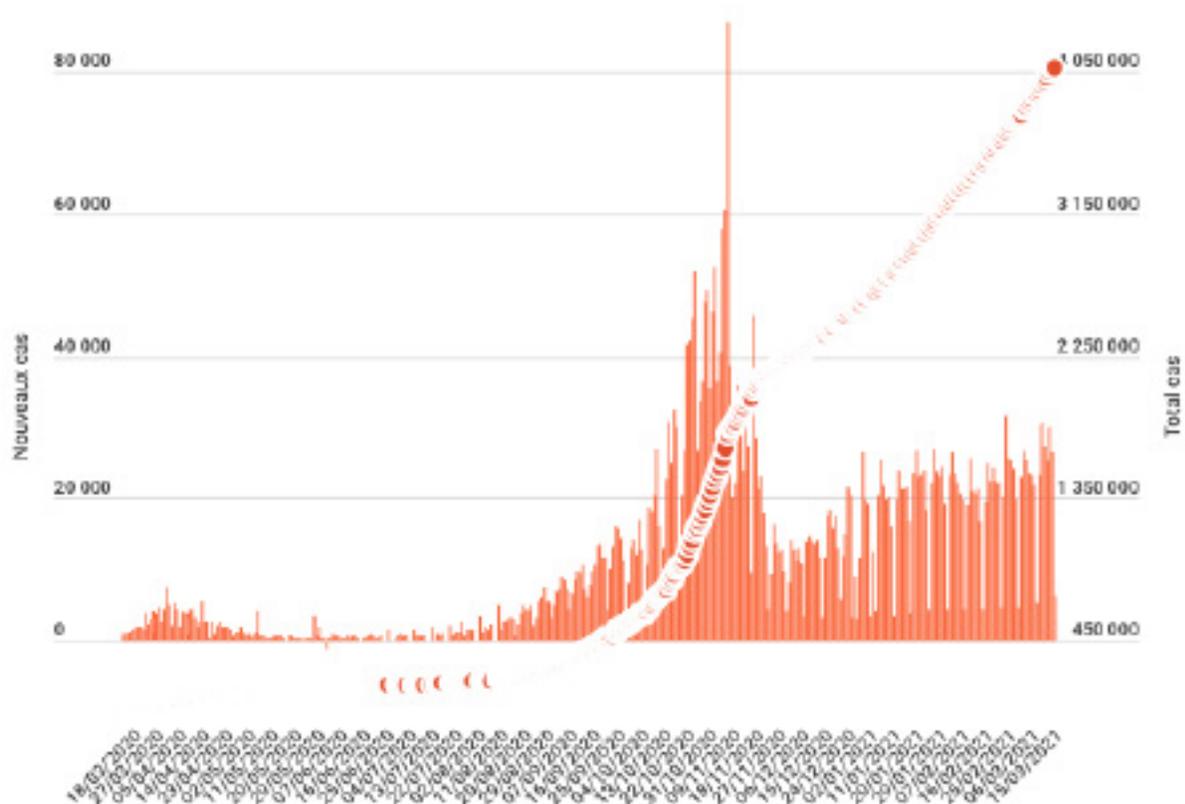
*Test positivity is expressed as a percentage. Incidence in number of cases per 100,000 population over a rolling week.*

*Figures in parentheses are percent changes from the previous day.*

# BRIEF OVERVIEW OF FRANCE'S ECONOMY AND FORECAST FOR 2021 AND BEYOND cont...

## COVID-19 Numbers

### Number of Cases confirmed



Orange: new cases; red: total cases.

Figures on the left: new cases; Figures on the right: Total cases

# BRIEF OVERVIEW OF FRANCE'S ECONOMY AND FORECAST FOR 2021 AND BEYOND cont...

## Measures & Restrictions

### As of March 4th, 2021 – French Prime Minister's announcements

**France is under a curfew:** Since January 16th, a curfew has been implemented in the entire country from 6pm to 6am. Before that, France was lockdowned for the second time in November and the first two weeks of December. From December 15th until January 16th, a curfew replaced the lockdown, starting at 8pm, it was then extended to 6pm. Exemption certificates / authorizations are required for authorized outings between 06:00pm to 06:00am

### Local lockdowns:

The department of Nice (South of France) and Pas-de-Calais (North of France) are confined on weekends until the end of March. The incidence is indeed increasing very rapidly in these departments. 23 departments are under reinforced surveillance.

On March 4th, the Prime Minister said "Containment is not impossible, but it is not inevitable": Castex insisting on the "quid pro quo" of mass screening and vaccination. "We are not facing, at least not at this stage, an exponential increase in the epidemic, as some models predicted," he said, pointing out that "over the last seven days, the number of daily contaminations has increased by 1.4%, while the same figure was +14% in the previous week.

On March 18th, the Prime Minister has announced the lockdown of the Ile-de-France region (Paris) and Haut-de-France (Northern France) due to the raise of cases (+23% in one week). Parisians are allowed to leave their homes with any limits of time during the day, but needs to stay in a limit of 10km. Curfew has been moved from 6:00pm to 7:00pm. Only necessary shops will remain open. Schools remain open. This new (& third) local lockdown will last for 4 weeks.

### What is closed/open nationally:

- non-food shopping malls of more than 10,000 square meters, and not only those of more than 20,000 square meters as until now, are closed in 23 departments.
- Cinemas, theatres, museums, casinos are closed.
- Bars and restaurants are closed.
- Schools are opened
- Shops are open with capacity restrictions.

# BRIEF OVERVIEW OF FRANCE'S ECONOMY AND FORECAST FOR 2021 AND BEYOND cont...

## Vaccinations

- Twenty million people vaccinated by mid-May: “By the summer, we will have received enough doses to have offered vaccination to 30 million people, two-thirds of the population over 18 years of age,” according to the head of government, while 3.2 million people have so far received a first injection, and more than 1.7 million have been vaccinated with two doses.
- Vaccination will also be authorized in pharmacies as of the week of March 15 for people over 50 years old and presenting a comorbidity. People between 50 and 74 years of age who have no particular pathology will be able to be vaccinated starting in mid-April.
- On Monday, March 15, France decided to “suspend as a precaution” the use of AstraZeneca’s vaccine against Covid-19, pending an opinion from the European Medicines Agency (EMA), announced Emmanuel Macron. The French president is following the example of several other European countries, including Germany, Italy and Spain, which have noted side effects in vaccinated people.

## Health Certificate, Sanitary Pass & Vaccination passport:

### **Covid-19: Jean-Baptiste Djebbari, our transportation minister, in favor of a “digital health certificate” for air passengers**

While the debate on the adoption of a “vaccination passport” continues to divide decision-makers, a “digital health certificate” such as the Travel Pass or AOKpass applications seems to be gaining ground.

There is a subject of knowing how to “digitalize” all documents today. Jean-Baptiste Djebbari listed the test certificate, the certificate of compelling reason for travel or the certificate of non-symptoms. These are all “paper” documents that must be presented at boarding and which slow down the flow of passengers in airports, even with the current reduced traffic, noted the minister. This digitization to facilitate air travel, “we must go now, it is still the meaning of history,” he said.

# BRIEF OVERVIEW OF FRANCE'S ECONOMY AND FORECAST FOR 2021 AND BEYOND cont...

## Health passport: a European proposal at the end of March ?

Postponed sine die last week, the creation of a “digital health certificate” to mitigate the transport effects of the Covid-19 pandemic could finally be announced by the end of March, to allow Europeans to travel across the continent and beyond, for both business and tourism. The president of the European Union said on social networks that by the end of this month of March 2021 “a legislative initiative” will be presented for what she calls a “Digital Green Pass”. The purpose of the pass will be to provide “proof that a person has been vaccinated, test results for those who have not yet been able to get vaccinated, and information on recovery” for Covid-19 patients. This application “will respect data protection, security and confidentiality,” promises Ursula von des Leyen.

## Emmanuel Macron evokes the creation of a “sanitary pass”.

The President of the Republic indicated that the principle of a “health pass” was currently being studied. This was an opportunity for the President of the Republic to make a distinction between this health pass and the European certificate of vaccination, at a time when the deployment of vaccination campaigns in recent weeks has insistently revived the subject ... and the controversy.

Health pass: We must prepare, organize, reopen structures when possible, said Emmanuel Macron, taking the example of museums, theaters, restaurants and festivals. This digital tool would include several functions. “We will probably be able to integrate in this health pass elements of recent negative tests - in many situations we ask to have 48 or 72 hours negative tests - we will be able to see if you have been vaccinated”. “We’re going to ask people to register to facilitate the alert system, if someone comes to attend an event, so that they can be registered with a code, so that we can find their contact details much more easily. “I immediately draw attention to the fact that when I say ‘health pass’, it means that it cannot be subjected to the vaccine,” said Emmanuel Macron.

# BRIEF OVERVIEW OF FRANCE'S ECONOMY AND FORECAST FOR 2021 AND BEYOND cont...

## Focus: Covid-19: The vacations of the French in five trends

Two studies, one observation: in spite of Covid, the French are already dreaming of their next vacations. If this year again, they will not be vacations like the others, the vaccine seems to be gradually changing the situation.

### #1. The French are in need of vacation plans...

According to the survey\* carried out by Yougov for Home Exchange, for 36% of the French, no longer being able to exchange, projecting into vacation plans is one of the hardest things morally.

### #2. ...but they are planning to go on all about summer

### #3. A vaccine that opens up opportunities

According to the study, conducted by Abritel, 41% of French families said that the announcement of a vaccine had a positive impact on their decision to schedule a vacation in 2021. Indeed, 22% of French families felt reassured by the upcoming vaccination and it opened up prospects for future vacations, Abritel explains. In fact, 19% even immediately began researching future trips immediately after the vaccine was announced. However, 31% indicated that they were still reluctant to plan a vacation because of continuing uncertainties.

### #4. A strong need for reinsurance

27% of respondents say that they expect above all flexible cancellation policies from the tourism sector players to organize their vacations with confidence.

### #5. Travel abroad: not before 2022?

As for going abroad again, French families are more cautious, since only 27% of them are able to consider it between July and September, and as many believe that it will not be possible before 2022, according to the Abritel study.

# GLOBAL INDUSTRY TRENDS

## (Where is open/what is being booked)

### Traveling in Europe

Since January 31, French nationals have the right to move anywhere in France and in Europe. Any entry into France and any exit from the territory to or from a country outside the European Union is now prohibited, except for compelling reasons. According to the French government, tourist travel in Europe is authorized but strictly discouraged.

Currently, European borders are open to residents of EU countries and the Schengen area. French travelers in Europe are free to return to their home country at any time. Traveling to Europe for the Spring school vacations is possible, but several countries apply restrictions upon arrival and on the spot. France allows travel but has contraindications for travel without compelling reasons.

The only countries where it is not forbidden to travel are those making up the European area, i.e. the 27 member states of the European Union as well as Switzerland, Andorra, Iceland, Liechtenstein, Monaco, Norway, San Marino and the Vatican, indicates the site of the Ministry of Foreign Affairs. However, these movements between countries are “totally and strictly” discouraged “until further notice”, says the Quai d’Orsay.

Important: France will impose a negative PCR test on Covid-19 for all air transport passengers from other European countries, test within 72 hours before their departure to French airports. Land transport is exempted from this new measure. The observation of a seven-day isolation period upon arrival is strongly recommended but not mandatory.

# GLOBAL INDUSTRY TRENDS

## (Where is open/what is being booked)

### International Travel

It is no longer possible to travel outside Europe, except for “compelling reasons” since Sunday, January 31st, at midnight. A decision taken to fight against the coronavirus pandemic and to limit population movements, a few days before the beginning of the winter vacations.

To travel to a country outside the European area, it is necessary to show a “compelling reason” which can be of three types: health, family or professional.

This reason must be detailed on a certificate, available on the website of the Ministry of the Interior, as well as on the certificates that derogate from the curfew. In airports, a control of this certificate is carried out when the passenger is checked in by the airline company.

In a press release dated January 14, 2021, the Ministry of Europe and Foreign Affairs “totally and strictly” advises against all international travel - from abroad to France and from France to abroad - “until further notice.

It specifies “Given the unpredictable nature and rapid evolution of the COVID-19 pandemic, as well as the measures taken by States around the world, with a very short deadline, to limit the movement of travelers, the color of the travel advice cards does not currently take into account, as an exception, this epidemic risk”.

The government justifies this decision by stating: “Strict travel restrictions are necessary to slow the spread of the epidemic worldwide, due to the very active circulation of the COVID-19 virus and its variants”.

The Ministry of Abroad affairs further states that “when travel is necessary for compelling reasons, “the restrictive measures put in place upon entry into France must be respected, with the aim of limiting the spread of the virus”.

Important: In addition to the negative PCR test on Covid-19 within 72 hours before their departure to French airports, all travelers from non-EU countries must, upon arrival in France, isolate themselves for 7 days, with a sworn commitment to honor, and then pass a second negative test before breaking the quarantine.

Note: PCR testing is free of charge in France.

# GLOBAL INDUSTRY TRENDS

## (Where is open/what is being booked)

### What is being booked

#### Winter 2020/21

Booking prior the new travel restrictions implemented by the French Government at the end of January 2021 (see the above section regarding European and International travel)

France is the number 1 destination obviously.

Number two in the ranking, the Dominican Republic is doing well, as it stabilizes (+1%) compared to December 2019. In third place, Spain remains in free fall year-on-year (-77%). The destination severely restricted access to its territory at the end of December.

The other destinations that are holding up well are Dubai (-19% for the United Arab Emirates), and above all the French West Indies (Guadeloupe +63%, Martinique +20%). Not forgetting the Maldives (-14%) and Tanzania (-17%).

Many countries are down by 80% or more, often due to travel restrictions, including quarantine, put in place by their governments.

#### February 2021

The injunction not to travel internationally, the compelling reason for many destinations and health uncertainties lead the tourism industry in February 2021. All destinations combined, travel sales fell by 88% compared to the same month in 2019, after -86% January 2021, according to the Orchestra barometer for L'Echo touristique. December showed a better resistance (-76%, compared to December 2019).

France remains at the top of the destinations. The Hexagon shows an erosion of orders of 62%, compared to February 2019. Failing to be able to take off abroad, many French people have gone to their own country, on the coast, in the countryside or in the mountains.

Spain and Greece close the podium of Orchestra/L'Echo touristique. The Dominican Republic follows, the leading long-haul destination in the ranking, ahead of Italy.

Austria (-30%), the United Arab Emirates (-67%) and Tanzania (-77%) are the foreign destinations with the least significant declines. In general, not surprisingly, the decreases reach about 90%.

It is difficult right now for all the European to understand where they can travel to inside the EU, and where they cannot, thus the lack of bookings. Each country applies its own restrictions which can differ one country from another.

# VIEW ON TRAVEL TO THE USA

Travel to the USA from France is not allowed since the Travel Ban implemented by the US Government at the beginning of the crisis.

Different surveys show that the French are ready to travel again (all destinations included), as soon as the borders are open.

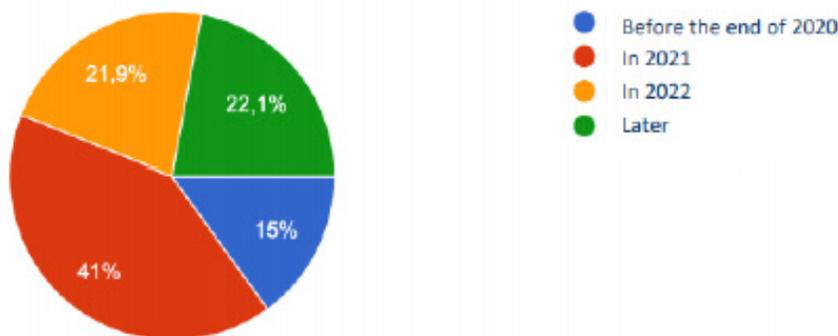
French interest in the United States remains strong. The results of surveys conducted by Visit USA France are proof of this.

## Visit USA France's Surveys

In May 2020, the U.S. Office of Tourism conducted a survey of its general public database to measure the impact of the pandemic on their desire to travel to the United States but also to learn more about a possible evolution of their consumption habits in terms of stays in the USA.

### The French and the USA: a strong desire to travel

Proof of the loyalty of the French with the USA, 90% of the respondents are willing to travel again to the USA once the pandemic crisis is over: 41% are aiming at a trip in 2021 and even 15% are willing to travel to the US before the end of 2020.



It is mainly the USA West that is targeted by the respondents for their future trip (40,7%), followed by the East (29,1%) and then, the South of the USA (17,8%).

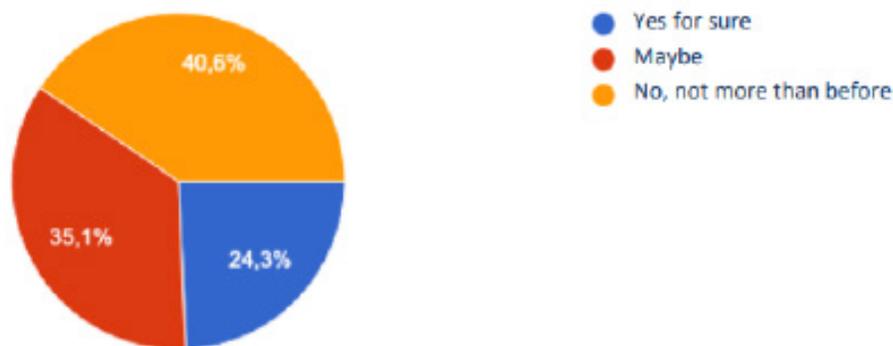


## VIEW ON TRAVEL TO THE USA cont...

**One of the consequences of the pandemic: travelers seem to be willing to appear ready to make greater use of the services of travel professionals.**

When asked, “Do you plan to use the services of a tourism professional in the future? particularly in light of the difficulties encountered during the health crisis by individuals who had organized their individuals who have organized their stay themselves (cancellation, repatriation difficulties...)”, more than half of the respondents plan or consider calling on a tourism professional in the future.

It should be noted that 71% of respondents who had already traveled to the USA had organized their trip themselves.



## VIEW ON TRAVEL TO THE USA cont...

### It is not the fear of catching the virus on the plane or on the spot that weighs most on travel decisions to the USA

To the question: “What factor impacts or could impact negatively on your decision to travel to the USA”, the first element is the perception of a bad management of the crisis by the USA, followed by a decrease in purchasing power due to the crisis. The fear of catching the virus in the US (13.4%) and the fear of flying for health reasons closing the gap (9.5%).



Survey conducted May 5-17, 2020 on the US Office of Tourism’s general public database. Results are based on 766 respondents contacted by email directly by the Office.

### The Visit USA France has carried out a small survey on LinkedIn in early January 2021 with the question: Where will you go in the USA as soon as the borders open?

200 people responded to this survey. Here are the percentages for the proposed answers:

- The West Coast, its cities and parks: 31.5%.
- The East Coast and its capitals: 22%.
- The great historical South: 21.5%.
- Alaska or Hawaii: 10%.
- The Rocky Mountains: 8%.
- Florida: 7%.

## **VIEW ON TRAVEL TO THE USA** 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 NTTTO forecasts, the number of French traveling to the US was expected to increase by 20% over the next five years.

# STATE OF LONG-HAUL OVERSEA FLIGHTS

After a near complete shutdown in the spring of 2020, flight programs have gradually resumed.

When we ask airlines serving the United States about their flight schedules, they insist that these are only valid for a short time and can be changed at any time. They currently have no visibility on short term flight schedules, or even on very short-term schedules.

Paris CDG airport has closed its Terminal 1 which will not open before 2022. All international flights are now gathered on one single terminal: T2E. This terminal is now saturated at 85% so the airport is thinking about opening a second terminal. Airlines such as AA dream to return to their former terminal (T2A) because their lounge is there, and all the AA signage is also in this terminal.

## Airlines are now testing the Health/Sanitary Passports:

It is not a health passport to travel, but it will certainly be part of the solutions put in place to revive air traffic after the Covid-19 crisis. Starting on March 11th, Air France is launching an experiment that offers its passengers to use an application that acts as a “digital certificate”. A device that allows, among other things, to ensure that the results of the PCR test presented are fully reliable. This application, called “AOK Pass”, allows passengers to record the results of their PCR test, carried out in a partner laboratory, in complete security. Two major networks have been chosen by the airline for this experiment: Biogroup and Cerballiance. If the test is negative, a QR code is then sent to the patient’s phone.

This is also a way to help make boarding more fluid for each passenger, as explained by Emmanuelle Ferracci, in charge of the project at Air France. “There will be a dedicated line for this customer who will have priority in the boarding queue. So he will have to present his QR code to the agent and it will tell him exactly if the test performed complies with the requirements of the destination he is going to,” she details. “The objective is to prepare for the future, because in the long run we will have to find solutions to be able to take over the traffic. And this ‘health pass’ is going to be part of that.

AA has chosen the App VeriFLY to gather all the health and travel documents of the passenger. AF is testing the App AOK on their flights to the West Indies.

## TRAVEL RESTRICTIONS TO THE USA (are borders open/visa requirements)

Since March 14, 2020, the United States has closed its borders until further notice. Today, passengers who have transited or been in France in the last 14 days are not allowed to enter the U.S. U.S. citizens and legal permanent residents, as well as their spouses and minor children, may still travel to the United States. (Please, also refer to the International Travel section above).

If the outgoing president, Donald Trump, had called before his departure to reopen the borders to European and Brazilian travellers, the new head of state has just decided the opposite. The president-elect, Joe Biden, announced on January 25 a tightening of the conditions of entry to the U.S. territory from this Tuesday. Travelers from Europe, the United Kingdom, China and Brazil are simply prohibited from entering the United States.

As of January 26, the U.S. requires all travelers to the U.S. - including all U.S. citizens and transit passengers - who are 2 years of age or older to test negative for the COVID-19 virus or antigen. Otherwise, proof of having contracted, and being recovered from, COVID-19 must be presented prior to boarding the aircraft. This proof must be dated within 72 hours of the flight. U.S. citizens and legal permanent residents, as well as their spouses and minor children, may still travel to the United States.



# **Travel Industry Landscape**

## Introduction

To date, the impact of the crisis on the tourism industry in France remains moderate thanks to the numerous aids and financial support put in place by the government since the beginning of the crisis. Tour operators and travel agencies have made very few layoffs for the moment. On the other hand, the whole profession is currently working on short-time working. The percentage of working time varies from 10% to 60%.

Some PSE (Job Protection Plan) have been put in place by some tour-operators. This is a legal mechanism set up by the French Labor Code, in order to limit the consequences of collective redundancies, in particular through reclassification and adaptation measures.

The impact of the crisis will take effect when the aids stop, mainly the implementation of partial unemployment by the government. This is something we will have to analyze to evaluate clearly the impact on the industry.

## Details of the aids

- The 100% coverage of short-time/furlough working benefits has been extended until April 30th, 2021. Hopefully, it will be extended further to this date.
- The solidarity fund has been considerably strengthened: companies can now claim it (up to €10,000 per month) if they employ fewer than 50 employees and if they have lost more than 70% of their turnover compared to the same period in 2019.
- Solidarity funds for the Tourism Industry: Entreprises du Voyage (Travel agencies syndicate) also won the case for the reinforcement of the solidarity fund for tourism companies. Thus, according to the Ministry of Employment, companies in the S1 and S1bis sector (including travel agencies and TOs), with less than 20 employees and a turnover of less than 2 million euros, benefit from the strengthening of the solidarity fund.
- Concerning the State Guaranteed Loans (PGE): the companies will be able to contract a PGE until June 30, 2021, that is to say 6 months of additional time to contract it. Amortization can be spread over 1 to 5 additional years, with interesting rates. The companies will also be able to obtain a new deferment of repayment which can go in total over two years.
- “In addition, France will ensure that businesses in the tourism sector benefit from the European Recovery Fund, in addition to the national recovery plan”

## **Focus: Coronavirus: up to 500,000 jobs threatened in French tourism?**

What will be the impact of the pandemic, in the medium and long term, on employment in the French tourism industry? “Between 300,000 and 500,000 jobs are currently on the tightrope in France”, said Didier Arino, president of the Protourisme firm, who spoke at the first edition of the IFTM Workshops. “That is to say that they will disappear when the aid stops”, estimates the analyst. A pessimistic forecast which would strongly mark the job market in tourism in France, capping 1.3 million salaried jobs, and 700,000 non-salaried jobs. To which two million additional indirect and induced jobs must be added, estimates Didier Arino. “On an international scale, 300 million tourism jobs have already been lost. 100 million people have had to return to work in the fields, in Asia, Latin America, Africa, because they did not benefit from the social airbag offered in Europe”, he continues. Moreover, 2021 “will inevitably be better than the year 2020”, according to Protourisme. “But it will be marked by a relatively slow recovery” ... and “a wall of debt” that continues to rise for tourism companies.

# STATUS OF TOUR-OPERATORS WHO HAVE PREVIOUSLY WORKED WITH TRAVEL SOUTH USA

To date, and thanks to the multiple aids from the government, the status of the tour operators has not changed. The implementation of partial unemployment/furlough (government coverage) has allowed to avoid major layoffs for the moment.

Below, you will find the information we were able to collect either via the travel trade media or via the product managers. Most of the below information comes from the travel trade media because product managers remain very silent and discreet regarding the situation of their companies.

From our knowledge, all of the tour-operators who have previously worked with Travel South USA in the past remain standing.

**Hereafter are some updates regarding specific tour-operators:**

## TUI

Social Plan and new ambition:

The “new project” presented in June by the French subsidiary of the German group, the world’s leading tour operator, provides for the elimination of 583 positions out of 904 and the closure of the 65 integrated “TUI Store” - there are also 168 franchised agencies. This is the first job protection plan (PSE) announced in the tourism sector since the outbreak of the Covid-19 crisis, but the latest in a long series of departure plans at TUI since its arrival in France in 2002. The teams have already undergone several redundancy plans (600 positions eliminated in 2012, 330 positions in 2013, more than 300 positions in 2017). “

The social plan “with a call for volunteers phase” threatens 2 out of 3 jobs.

Directe has approved TUI France’s Job Protection Plan (PSE), which provides for the elimination of 588 positions. The call for volunteers was held from Wednesday, December 16 to Wednesday, December 30 inclusive.

TUI’s ambition is also that its TUI application becomes the “concierge” for its customers at destination, being able to satisfy “all aspects” of the holiday. The group will therefore extend its digital services to its largest destinations, starting with Spain, through its subsidiary TUI Destination Experiences.

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## KUONI-Vacances Fabuleuses

While his activity has been reduced like a skin of sorrow, with a turnover going from 165 million euros to 35 million, Emmanuel Foiry, president of Kuoni France (Travel Lab) has had no choice but to reorganize the company, with the help of a PSE (Plan sauvegarde emploi/ Employment Protection Plan).

Emmanuel Foiry admits, “we are in the process of setting up a Job Protection Plan (PSE)” he says, “a plan that consists of preserving the jobs of the employees who will remain.

No, he has nothing to reproach the government, which, according to him, will have done its utmost to support the companies. “Unfortunately, that won’t be enough. We have huge losses in 2020, we don’t expect a tremendous recovery in 2021. In addition, assets will have to be repaid one day, not to mention state-guaranteed loans.

We are in the process of completing our Employment Protection Plan, which will affect approximately 25% of the staff, for 60 people.

The agencies are also part of Kuoni’s reorganization plan. We have already closed eight of our 13 Paris agencies. We are also keeping our two provincial agencies. We have voluntarily reopened our agencies on a part-time basis.

Today, we are clearly safe from any misfortune, because behind us you have a group called DER Touristik and above that Rewe. If the latter has taken a big hit with its tourism activities, the whole of its business allows us to look at the future a little more serenely.

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## Voyageurs du Monde

Interview with Jean-François Rial, the notorious boss of the Groupe Voyageurs du Monde (Tourmag)

“The main challenge for Voyageurs du Monde in 2021 is very simple. It is a question of finding a level of activity that will allow our employees to rework at least 30% of their activity, on the basis of 2019. The Group is not facing major economic challenges because we have significant reserves and very little debt. Our stakes, and therefore our social stakes, are not in terms of layoffs, which will not exist at Voyageurs du Monde, but more because we want to put our teams back to work. Running a company that carries out 20% of their usual activity and 100% remotely becomes very complicated. This is why our objective is to recreate social ties within the company and not to lose the formidable know-how that we have accumulated over the last 25 years because, after a while, it disintegrates. A minimum of 30% in the first half of the year, then 65% in the second half, or even more, and we would be delighted.”

All their travel agencies around France are opened. 80% of the team is not working at all (0%), furlough). Only 8 out of 32 US sales specialists are working (partial time).

## Jetset

Charles Julien, who has been US Product Manager for Jetset for almost 15 years has been laid off at the end of 2020. Valérie Heurtel, Product Director, has taken over the production for the moment. The rest of the staff is working short time/furlough.

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## Maison des Voyages

The tour operator is supported by their shareholder Le Figaro. Of their two agencies, one is open to the public since last summer. They have recourse to short-time working with a percentage of non-working time that varies according to the opening of borders and the health situation.

Maureen Lachant, Business Developer left the tour-operator (not directly linked to the COVID crisis) and now Nadège Ruiz-Bruisseau is the new US product Manager. However, she will go on maternity leave starting from April 2021.

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## Evaneos

The Evaneos receptive platform must reduce its workforce and revise its strategy, explained to L'Echo touristique its co-fondateur Eric La Bonnardière. (November 2020)

“About fifty people are concerned by this workforce reduction, out of 220 employees present at the beginning of the year. Departures will be spread out until the first quarter of 2021. From the outset, our priority has been to protect jobs for as long as possible. However, while the start of the year was very good, business has been virtually at a standstill for our sector since March 2020 due to the closure of borders and the successive confinements throughout Europe. At Evaneos, the loss of activity reached 90% in some months.

We now want to bring our costs in line with a sales forecast that will certainly not return to normal before 2022-2023. Unfortunately, government support will not last forever, so we have to be prepared for that.

We are leaving with a reduced staff but very motivated to make the Europeans travel all over the world again. Afterwards, we organized ourselves to be financially solid enough to last as long as we had to.

We have benefited from a PGE (Loan guaranteed by the State) which we have not touched, and we have the support of solid shareholders who trust us.

Currently, the staff work 50 to 70% of their time.

## **Directours (NG Travel subsidiary) buys the Jet Tours brand from Hervé Vighier**

Directours (a subsidiary of the NG Travel Group) acquired the Jet Tours brand in order to increase its presence and visibility on the Internet and develop its sales in the high-end and custom travel segment. The new [www.jettours.com](http://www.jettours.com) website is currently being finalized and will be launched in February 2021. It will offer the full range of Directours products, a selection of products from complementary Tour Operators as well as a customized travel offer. The Jet Tours brand was acquired by Hervé Vighier in January 2020, following the liquidation of the Thomas Cook Group France.

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## **Le Cercle des Vacances becomes Cercle des Voyages**

Along with the new brand name, the tour-operator has revealed a new logo and brand identity. No redundancies as of today, all their employees are working 25%. They have launched their new brand a few weeks ago. The new website is ready but is currently being tested before the B2C launch.

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## **Travel Agencies**

22% of the professionals questioned in a L'Echo touristique/Entreprises du Voyage survey open their point(s) of sale every day of the week, as before Covid-19. Another 17% of respondents do so every day of the week, but on a half-time basis, either in the morning or afternoon.

Other distributors have chosen to serve the public on a different schedule. For example, 25% of respondents only open on certain days of the week. Finally, 14% have chosen to keep the doors closed.

Provide market sample from pre-COVID and post-COVID from a cross section of operators that represent the market and view what was on sale pre-COVID-19 and now Post COVID-19.

| Tour Operator       | Pre-COVID 19 production  | Post-COVID 19 production  |
|---------------------|--|---|
| <p><b>KUONI</b></p> | <p><b>FLY &amp; DRIVE</b><br/> <b>A la carte production</b></p> <ol style="list-style-type: none"> <li><b>1. On Route 66</b><br/> 18 days – 16 nights<br/> Gateways: Chicago – Los Angeles<br/> <i>Including: MO</i></li> <li><b>2. Les Routes du Vieux Sud - NEW</b><br/> 18 days – 16 nights<br/> Gateways: Atlanta – Atlanta<br/> <i>Including: GA, AL, LA, MS, TN, SC</i></li> <li><b>3. Historic Route 66 - NEW</b><br/> 21 days – 19 nights<br/> Gateways: Chicago – Los Angeles<br/> <i>Including: MO</i></li> <li><b>4. Magie du Sud - NEW</b><br/> 16 days – 14 nights<br/> Gateways: Orlando – New Orleans<br/> <i>Including: SC, GA, LA, MS, TN</i></li> </ol> <p><b>TOUR SERIES</b></p> <ol style="list-style-type: none"> <li><b>1. Bayous et Plantations</b><br/> 9 days / 7 nights<br/> Gateways: New Orleans – New Orleans<br/> <i>Including: LA, MS</i></li> <li><b>2. Sensations du Sud</b><br/> 12 days / 10 nights<br/> Gateways: Houston – Atlanta<br/> <i>Including: LA, MS, TN, GA</i></li> <li><b>3. The American Way</b><br/> 14 days / 12 nights<br/> Gateways: Dallas – Chicago<br/> <i>Including: LA, MS, TN</i></li> <li><b>4. De New York à Miami</b><br/> 13 days / 11 nights<br/> Gateways: New York – Miami<br/> <i>Including: NC, SC, GA</i></li> <li><b>5. La Route 66 à Moto - NEW</b><br/> 16 days / 14 nights<br/> Gateways: Chicago – Los Angeles<br/> <i>Including: MO</i></li> <li><b>6. Du Texas à La Louisiane - NEW</b><br/> 13 days / 11 nights<br/> Gateways: Houston – Houston<br/> <i>Including: LA, MS</i></li> </ol> | <p><b>FLY &amp; DRIVE</b><br/> <b>A la carte production</b></p> <p><b>Hotels à la Carte</b> (2 pages)<br/> <i>Including: TN, GA, MS, LA</i></p> <ol style="list-style-type: none"> <li><b>1. On Route 66</b><br/> 18 days – 16 nights<br/> Gateways: Chicago – Los Angeles<br/> <i>Including: MO</i></li> <li><b>2. Sur la Route de la Musique - NEW</b><br/> 17 days – 15 nights<br/> Gateways: Atlanta – Atlanta<br/> <i>Including: GA, TN, MS, AL</i></li> </ol> <p><b>TOUR SERIES</b></p> <ol style="list-style-type: none"> <li><b>1. Bayous et Plantations</b><br/> 9 days / 7 nights<br/> Gateways: New Orleans –<br/> New Orleans<br/> <i>Including: LA, MS</i></li> <li><b>2. Sensations du Sud</b><br/> 12 days / 10 nights<br/> Gateways: Houston – Atlanta<br/> <i>Including: LA, MS, TN, GA</i></li> <li><b>3. The American Way</b><br/> 14 days / 12 nights<br/> Gateways: Dallas – Chicago<br/> <i>Including: LA, MS, TN</i></li> <li><b>4. De New York à Miami</b><br/> 13 days / 11 nights<br/> Gateways: New York – Miami<br/> <i>Including: NC, SC, GA</i></li> <li><b>5. La Route 66 à Moto</b><br/> 16 days / 14 nights<br/> Gateways: Chicago – Los Angeles<br/> <i>Including: MO</i></li> <li><b>6. “Du Texas à La Louisiane”</b><br/> 13 days / 11 nights<br/> Gateways: Houston – Houston<br/> <i>Including: LA, MS</i></li> </ol> |

**Notes:**

The 2021 paper brochure was published in January 2021. It is valid from April 1st, 2021 until March 31st, 2022

Shortened brochure (128 pages vs 196 last year). They removed all the City Guides pages (destinations presentations)

The double page on LA has been suppressed because they decided to concentrate their brochure on the Western USA and the big cities. (many hotel pages for big cities).

| Tour Operator      | Pre-COVID 19 production  | Post-COVID 19 production   |
|--------------------|--|--|
| <b>Marco Vasco</b> | <ol style="list-style-type: none"> <li>1. <b>La Louisiane en liberté</b><br/>9 days / 7 nights<br/>Gateways: New Orleans – New Orleans<br/><i>Including: LA, MS</i></li> <li>2. <b>La Route 66, on the Mother Road</b><br/>18 days / 16 nights<br/>Gateways: Chicago – Los Angeles<br/><i>Including: MO</i></li> <li>3. <b>Du Texas à la Louisiane</b><br/>12 days / 10 nights<br/>Gateways: San Antonio – New Orleans<br/><i>Including: LA</i></li> <li>4. <b>Jazz, Blues et Country</b><br/>16 days / 14 nights<br/>Gateways: Atlanta – Atlanta<br/><i>Including: GA, TN, MS, LA, AL, SC</i></li> <li>5. <b>Le Vieux Sud en musique</b><br/>12 days / 10 nights<br/>Gateways: Atlanta – New Orleans<br/><i>Including: GA, TN, MS, LA</i></li> <li>6. <b>De la Géorgie à la Caroline du Sud</b><br/>9 days / 7 nights<br/>Gateways: Atlanta – Atlanta<br/><i>Including: GA, SC</i></li> <li>7. <b>Capital Region, entre culture et nature</b><br/>9 days / 7 nights<br/>Gateways: New York – Washington D.C<br/><i>Including: VA</i></li> </ol> | <ol style="list-style-type: none"> <li>1. <b>La Louisiane en liberté</b><br/>9 days / 7 nights<br/>Gateways: New Orleans – New Orleans<br/><i>Including LA, MS</i></li> <li>2. <b>La Route 66, on the Mother Road</b><br/>18 days / 16 nights<br/>Gateways: Chicago – Los Angeles<br/><i>Including: MO</i></li> <li>3. <b>Du Texas à la Louisiane</b><br/>12 days / 10 nights<br/>Gateways: San Antonio – New Orleans<br/><i>Including: LA</i></li> <li>4. <b>Jazz, Blues et Country</b><br/>16 days / 14 nights<br/>Gateways: Atlanta – Atlanta<br/><i>Including GA, TN, MS, LA, AL, SC</i></li> <li>5. <b>Le Vieux Sud en musique</b><br/>12 days / 10 nights<br/>Gateways: Atlanta – New Orleans<br/><i>Including: GA, TN, MS, LA</i></li> <li>6. <b>De la Géorgie à la Caroline du Sud</b><br/>9 days / 7 nights<br/>Gateways: Atlanta – Atlanta<br/><i>Including: GA, SC</i></li> <li>7. <b>Capital Region, entre culture et nature</b><br/>9 days / 7 nights<br/>Gateways: New York – Washington D.C<br/><i>Including: VA</i></li> </ol> |

| Tour Operator                      | Pre-COVID 19 production  | Post-COVID 19 production  |
|------------------------------------|--|---|
| <b>Marco Vasco</b><br><i>cont.</i> | <p><b>8. Balade au Coeur de Washington DC, du Maryland et de la Virginie!</b><br/>13 days / 11 nights<br/>Gateways: Washington D.C – Washington D.C<br/><i>Including: VA</i></p> <p><b>9. Iles et côtes sauvages des deux Carolines - NEW</b><br/>11 days/ 9 nights 12 days/ 10 nights<br/>Gateways: Atlanta – Raleigh<br/><i>Including: NC, SC, GA</i></p> <p><b>10 Aux rythmes du Sud authentique - NEW</b><br/>12 days/ 10 nights<br/>Gateways: Atlanta – Cincinnati<br/><i>Including: AL, GA, KY, WA</i></p> | <p><b>8. Balade au Coeur de Washington DC, du Maryland et de la Virginie!</b><br/>13 days / 11 nights<br/>Gateways: Washington D.C – Washington D.C<br/><i>Including: VA</i></p> <p><b>9. Iles et côtes sauvages des deux Carolines</b><br/>11 days/ 9 nights 12 days/ 10 nights<br/>Gateways: Atlanta – Raleigh<br/><i>Including: NC, SC, GA</i></p> <p><b>10. Aux rythmes du Sud authentique</b><br/>12 days/ 10 nights<br/>Gateways: Atlanta – Cincinnati<br/><i>Including: AL, GA, KY, WA</i></p> |

| Tour Operator             | Pre-COVID 19 production   | Post-COVID 19 production  |
|---------------------------|---|---|
| <b>Maison des Voyages</b> | <p><b>FLY &amp; DRIVE</b></p> <p><b>1. “De SoHo à SoBe”</b><br/>16 days / 14 nights<br/>Gateways: New York – Miami<br/><i>Including: VA, NC, SC</i></p> <p><b>2. De Chicago à la Nouvelle Orléans en train</b><br/>9 days / 7 nights<br/>Gateways: Chicago – New Orleans<br/><i>Including: TN, LA</i></p> <p><b>3. Les charmes de la Louisiane</b><br/>9 days / 7 nights<br/>Gateways: New Orleans – New Orleans<br/><i>Including LA, MS</i></p> <p><b>4. Vieux Sud et Nouvelle Vague</b><br/>16 days / 14 nights<br/>Gateways: Atlanta – Miami<br/><i>Including: GA, TN, MS, LA</i></p> <p><b>5. Jazzy country &amp; so blues</b><br/>16 days / 14 nights<br/>Gateways: Chicago – New Orleans<br/><i>Including: MO, TN, MS, LA</i></p> | <p><b>FLY &amp; DRIVE</b></p> <p><b>1. “De SoHo à SoBe”</b><br/>16 days / 14 nights<br/>Gateways: New York – Miami<br/><i>Including: VA, NC, SC</i></p> <p><b>2. De Chicago à la Nouvelle Orléans en train</b><br/>9 days / 7 nights<br/>Gateways: Chicago – New Orleans<br/><i>Including: TN, LA</i></p> <p><b>3. Les charmes de la Louisiane</b><br/>9 days / 7 nights<br/>Gateways: New Orleans – New Orleans<br/><i>Including LA, MS</i></p> <p><b>4. Vieux Sud et Nouvelle Vague</b><br/>16 days / 14 nights<br/>Gateways: Atlanta – Miami<br/><i>Including: GA, TN, MS, LA</i></p> <p><b>5. Jazzy country &amp; so blues</b><br/>16 days / 14 nights<br/>Gateways: Chicago – New Orleans<br/><i>Including: MO, TN, MS, LA</i></p> |

| Tour Operator                             | Pre-COVID 19 production   | Post-COVID 19 production  |
|---|---|---|
| <b>Maison des Voyages</b><br><i>cont.</i> | <p><b>FLY &amp; DRIVE</b></p> <p><b>6. La route des plantations</b><br/> 9 days / 7 nights<br/> Gateways: New Orleans – New Orleans<br/> <i>Including: LA, MS</i></p> <p><b>7. Sur les Pas de Martin Luther King</b><br/> 14 days / 12 nights<br/> Gateways: Atlanta – New Orleans<br/> <i>Including: GA, AL, TN, MS, LA</i></p> <p><b>8. “Les charmes du Mississippi”</b><br/> 12 days / 10 nights<br/> Gateways: Memphis – Memphis<br/> <i>Including: TN, MS</i></p> <p><b>9. “Sur la route 66”</b><br/> 18 days / 16 nights<br/> Gateways: Chicago – Los Angeles<br/> <i>Including MO</i></p> <p><b>10. “Escapade Tennessee &amp; Kentucky”</b><br/> 15 days / 13 nights<br/> Gateways: Atlanta – Atlanta<br/> <i>Including GA, TN, KY</i></p> <p><b>11. “Où le Nord et le Sud se sont unis”</b><br/> 14 days / 12 nights<br/> Gateways: Washington DC – Washington DC<br/> <i>Including VA</i></p> <p><b>12. De la guerre civile aux droits civiques</b><br/> 17 days / 15 nights<br/> Gateways: Washington DC –Leesburg<br/> <i>Including VA, NC, TN, AL, GA</i></p> <p><b>13. De l’Atlantique au Pacifique en train</b><br/> 25 days / 23 nights<br/> Gateways: Washington – Los Angeles<br/> <i>Including TN, LA</i></p> <p><b>14. “La Musique au fil de l’eau”</b><br/> 16 days / 14 nights<br/> Gateways: Chicago – New Orleans<br/> <i>Including MO, TN, MS, LA</i></p> | <p><b>FLY &amp; DRIVE</b></p> <p><b>6. La route des plantations</b><br/> 9 days / 7 nights<br/> Gateways: New Orleans – New Orleans<br/> <i>Including: LA, MS</i></p> <p><b>7. Sur les Pas de Martin Luther King</b><br/> 14 days / 12 nights<br/> Gateways: Atlanta – New Orleans<br/> <i>Including: GA, AL, TN, MS, LA</i></p> <p><b>8. “Les charmes du Mississippi”</b><br/> 12 days / 10 nights<br/> Gateways: Memphis – Memphis<br/> <i>Including: TN, MS</i></p> <p><b>9. “Sur la route 66”</b><br/> 18 days / 16 nights<br/> Gateways: Chicago – Los Angeles<br/> <i>Including MO</i></p> <p><b>10. “Escapade Tennessee &amp; Kentucky”</b><br/> 15 days / 13 nights<br/> Gateways: Atlanta – Atlanta<br/> <i>Including GA, TN, KY</i></p> <p><b>11. “Où le Nord et le Sud se sont unis”</b><br/> 14 days / 12 nights<br/> Gateways: Washington DC – Washington DC<br/> <i>Including VA</i></p> <p><b>12. De la guerre civile aux droits civiques</b><br/> 17 days / 15 nights<br/> Gateways: Washington DC –Leesburg<br/> <i>Including VA, NC, TN, AL, GA</i></p> <p><b>13. De l’Atlantique au Pacifique en train</b><br/> 25 days / 23 nights<br/> Gateways: Washington – Los Angeles<br/> <i>Including TN, LA</i></p> <p><b>14. “La Musique au fil de l’eau”</b><br/> 16 days / 14 nights<br/> Gateways: Chicago – New Orleans<br/> <i>Including MO, TN, MS, LA</i></p> |

| Tour Operator                             | Pre-COVID 19 production   | Post-COVID 19 production  |
|---|---|---|
| <b>Maison des Voyages</b><br><i>cont.</i> | <p><b>TOUR SERIES</b></p> <ol style="list-style-type: none"> <li><b>Grands sites de New York à Miami</b><br/>13 days / 11 nights<br/>Gateways: New York – Miami<br/><i>Including: NC, SC, GA</i></li> <li><b>Grands Sites du Charme Sudiste et des Bahamas</b><br/>12 days / 10 nights<br/>Gateways: Atlanta – Bahamas<br/><i>Including: GA, SC</i></li> <li><b>Grands Sites du Charme Sudiste</b><br/>9 days / 7 nights<br/>Gateways: Atlanta – Miami<br/><i>Including: GA, SC</i></li> <li><b>Grands sites de la Louisiane</b><br/>9 days / 7 nights<br/>Gateways: New Orleans – New Orleans<br/><i>Including: LA, MS</i></li> <li><b>“Sur la route 66 en Harley-Davidson”</b><br/>16 days / 14 nights<br/>Gateways: Chicago – Los Angeles<br/><i>Including: MO</i></li> <li><b>Grands Sites du Vieux Sud</b><br/>12 days / 10 nights<br/>Gateways: Houston – Atlanta<br/><i>Including: GA, TN, MS, LA</i></li> <li><b>Grands Sites du Vieux Sud (Version Longue)</b><br/>17 days / 15 nights<br/>Gateways: Houston – Miami<br/><i>Including: LA, MS, TN, GA, SC</i></li> </ol> <p><b>CITY BREAK</b></p> <ol style="list-style-type: none"> <li><b>“Escapade à Memphis”</b><br/>5 days / 3 nights<br/>Gateways: Memphis - Memphis<br/><i>Including: TN</i></li> <li><b>“Escapade à la Nouvelle-Orléans”</b><br/>5 days / 3 nights<br/>Gateways: New Orleans – New Orleans<br/><i>Including: LA</i></li> </ol> | <p><b>TOUR SERIES</b></p> <ol style="list-style-type: none"> <li><b>Grands sites de New York à Miami</b><br/>13 days / 11 nights<br/>Gateways: New York – Miami<br/><i>Including: NC, SC, GA</i></li> <li><b>Grands Sites du Charme Sudiste et des Bahamas</b><br/>12 days / 10 nights<br/>Gateways: Atlanta – Bahamas<br/><i>Including: GA, SC</i></li> <li><b>Grands Sites du Charme Sudiste</b><br/>9 days / 7 nights<br/>Gateways: Atlanta – Miami<br/><i>Including: GA, SC</i></li> <li><b>Grands sites de la Louisiane</b><br/>9 days / 7 nights<br/>Gateways: New Orleans – New Orleans<br/><i>Including: LA, MS</i></li> <li><b>Grands Sites du Vieux Sud</b><br/>12 days / 10 nights<br/>Gateways: Houston – Atlanta<br/><i>Including: GA, TN, MS, LA</i></li> <li><b>Grands Sites du Vieux Sud (Version Longue)</b><br/>17 days / 15 nights<br/>Gateways: Houston – Miami<br/><i>Including: LA, MS, TN, GA, SC</i></li> </ol> <p><b>CITY BREAK</b></p> <ol style="list-style-type: none"> <li><b>“Escapade à Memphis”</b><br/>5 days / 3 nights<br/>Gateways: Memphis - Memphis<br/><i>Including: TN</i></li> <li><b>“Escapade à la Nouvelle-Orléans”</b><br/>5 days / 3 nights<br/>Gateways: New Orleans – New Orleans<br/><i>Including: LA</i></li> </ol> |

**Notes:**

No paper brochure available this year since little traffic in the agency.

They are working on developing escorted tours. The TO is known for its tours of high quality and culture-focused available for many countries. Now is the time to develop them for the USA.

Are currently in touch with Rey Royals to develop a LA product in 2022.

| Tour Operator         | Pre-COVID 19 production   | Post-COVID 19 production   |
|-----------------------|---|--|
| <b>Jetset Voyages</b> | <p><b>FLY &amp; DRIVE</b></p> <ol style="list-style-type: none"> <li><b>Légendaire Route 66</b><br/>15 days /14 nights<br/>Gateways: Chicago – Los Angeles<br/><i>Including: MO</i></li> <li><b>“Histoire en Capitales”</b><br/>12 days / 11 nights<br/>Gateways: Philadelphia – Philadelphia<br/><i>Including: VA</i></li> <li><b>Sud Mythique</b><br/>10 days / 9 nights<br/>Gateways: Atlanta / Atlanta<br/><i>Including GA, AL, TN, KY, NC</i></li> <li><b>Jazz, Country, Blues &amp; Rock’n’roll - NEW</b><br/>15 days / 13 nights 11 days/ 9 nights<br/>Gateways: New Orleans –New Orleans<br/><i>Including: LA, KY, MS, AL, TN</i></li> <li><b>Sous le charme des Carolines - NEW</b><br/>11 days/ 9 nights<br/>Gateways: Charlotte – Charlotte<br/><i>Including: NC ,SC, WV</i></li> <li><b>Sur la Route des droits civiques - NEW</b><br/>11 days / 10 nights 10 days / 9 nights<br/>Gateways: Memphis – Memphis<br/><i>Including: AL, TN, MS</i></li> <li><b>Louisiane côté charme - NEW</b><br/>10 days / 9 nights<br/>Gateways: New Orleans - New Orleans<br/><i>Including: LA, MS</i></li> </ol> | <p><b>FLY &amp; DRIVE</b></p> <ol style="list-style-type: none"> <li><b>Légendaire Route 66</b><br/>15 days /14 nights<br/>Gateways: Chicago – Los Angeles<br/><i>Including: MO</i></li> <li><b>“Histoire en Capitales”</b><br/>12 days / 11 nights<br/>Gateways: Philadelphia – Philadelphia<br/><i>Including: VA</i></li> <li><b>Sud Mythique</b><br/>10 days / 9 nights<br/>Gateways: Atlanta / Atlanta<br/><i>Including: GA, AL, TN, KY, NC</i></li> <li><b>Jazz, Country, Blues &amp; Rock’n’roll</b><br/>15 days / 13 nights 11 days/ 9 nights<br/>Gateways: New Orleans –New Orleans<br/><i>Including: LA, KY, MS, AL, TN</i></li> <li><b>Sous le charme des Carolines</b><br/>11 days/ 9 nights<br/>Gateways: Charlotte – Charlotte<br/><i>Including: NC ,SC, WV</i></li> <li><b>Sur la Route des droits civiques</b><br/>11 days / 10 nights 10 days / 9 nights<br/>Gateways: Memphis – Memphis<br/><i>Including: AL, TN, MS</i></li> <li><b>Louisiane côté charme</b><br/>10 days / 9 nights<br/>Gateways: New Orleans - New Orleans<br/><i>Including: LA, MS</i></li> </ol> |

| Tour Operator                        | Pre-COVID 19 production  | Post-COVID 19 production  |
|--------------------------------------|--|---|
| <b>Jetset Voyages</b><br><i>cont</i> | <p><b>TOUR SERIES</b></p> <ol style="list-style-type: none"> <li><b>Découverte de la Louisiane</b><br/>9 days / 7 nights 8 days / 7 nights<br/>Gateways: New Orleans – New Orleans<br/><i>Including: LA, MS</i></li> <li><b>Echappée sudiste - NEW</b><br/>8 days / 7 nights<br/>Gateways: Atlanta – Miami<br/><i>Including: GA, SC</i></li> <li><b>Epopée du Texas au Lac Michigan - NEW</b><br/>13 days / 12 nights<br/>Gateways: Dallas – Chicago<br/><i>Including: LA, MS, TN</i></li> </ol> | <p><b>TOUR SERIES</b></p> <ol style="list-style-type: none"> <li><b>Découverte de la Louisiane</b><br/>9 days / 7 nights 8 days / 7 nights<br/>Gateways: New Orleans – New Orleans<br/><i>Including: LA, MS</i></li> <li><b>Echappée sudiste</b><br/>8 days / 7 nights<br/>Gateways: Atlanta – Miami<br/><i>Including: GA, SC</i></li> <li><b>Splendeurs de l'Est » NEW</b><br/>12 days / 11 nights<br/>Gateways: New York – Miami<br/><i>Including: SC, GA</i></li> </ol> <p><b>SHORT STAYS</b></p> <ol style="list-style-type: none"> <li><b>Old South - NEW</b><br/>5 days / 4 nights<br/>Gateways: Atlanta &amp; Savannah<br/><i>Including: GA</i></li> <li><b>Forever Elvis - NEW</b><br/>4 days / 3 nights<br/>Gateways: Memphis<br/><i>Including: TN</i></li> <li><b>Entre Terre et Mer - NEW</b><br/>5 days / 4 nights<br/>Gateways: Wilmington - Charlotte<br/><i>Including: NC</i></li> <li><b>Escapade Sudiste - NEW</b><br/>5 days / 4 nights<br/>Gateways: Hilton Head Island - Myrtle Beach<br/><i>Including: SC</i></li> <li><b>Pur-sang, Bourbon &amp; Bluegrass - NEW</b><br/>5 days / 4 nights<br/>Gateways: Bowling Green - Louisville<br/><i>Including: KY</i></li> <li><b>AU PAYS DES CAJUNS - NEW</b><br/>3 days / 2 nights<br/>Gateways: Plantation &amp; Houma<br/><i>Including: LA</i></li> </ol> <p><b>CRUISE</b></p> <ol style="list-style-type: none"> <li><b>A BORD DE L'AMERICAN QUEEN</b><br/>9 days / 8 nights<br/>Gateways: Memphis - New Orleans<br/><i>Including: LA</i></li> </ol> <p><b>ACTIVITIES</b></p> <p>Long list of à la carte activities in LA, TN, MS</p> |

## Notes:

No paper brochure this year, only digital. No change in 2021 versus 2020, only products and rates updates.

They plan to adapt the production at the borders reopening when the activity resumes if necessary. It will depend on the demand from one part and what the destination will offer. It will also depend on Marketing opportunities from their partners.

| Tour Operator                  | Pre-COVID 19 production   | Post-COVID 19 production  |
|--------------------------------|---|---|
| <b>Comptoir des Etats-Unis</b> | <p><b>FLY &amp; DRIVES</b></p> <ol style="list-style-type: none"> <li><b>1. Jazz, Bayous &amp; Coconuts</b><br/>19 days / 17 nights<br/>Gateways: New Orleans – Miami<br/><i>Including: LA</i></li> <li><b>2. Capitales et Barbecue</b><br/>14 days / 12 nights<br/>Gateways: Washington – Washington<br/><i>Including: VA, NC</i></li> <li><b>3. Louisiane Authentique</b><br/>13 days / 11 nights<br/>Gateways: New Orleans – New Orleans<br/><i>Including: LA, MS</i></li> <li><b>4. Le Grand Sud en musique</b><br/>12 days / 10 nights<br/>Gateways: Atlanta – New Orleans<br/><i>Including: GA, TN, MS, LA</i></li> <li><b>5. Rodéo et Fais Dodo</b><br/>17 days / 15 nights<br/>Gateways: Houston – New Orleans<br/><i>Including: LA</i></li> <li><b>6. La Route du Blues</b><br/>16 days / 14 nights<br/>Gateways: Chicago – New Orleans<br/><i>Including: MO, TN, MS, LA</i></li> <li><b>7. Flânerie Dans le Big Old South</b><br/>9 days / 7 nights<br/>Gateways: Atlanta – Atlanta<br/><i>Including: GA, SC, TN</i></li> <li><b>8. Get your kicks on route 66</b><br/>18 days / 16 nights<br/>Gateways: Chicago – Los Angeles<br/><i>Including: MO</i></li> <li><b>9. Les 1001 Accents du Sud Est</b><br/>18 days / 16 nights<br/>Gateways: Washington – Miami<br/><i>Including: VA, NC, SC, GA</i></li> </ol> | <p><b>FLY &amp; DRIVES</b></p> <ol style="list-style-type: none"> <li><b>1. Jazz, Bayous &amp; Coconuts</b><br/>19 days / 17 nights<br/>Gateways: New Orleans – Miami<br/><i>Including: LA</i></li> <li><b>2. Capitales et Barbecue</b><br/>14 days / 12 nights<br/>Gateways: Washington – Washington<br/><i>Including: VA, NC</i></li> <li><b>3. Louisiane Authentique</b><br/>13 days / 11 nights<br/>Gateways: New Orleans – New Orleans<br/><i>Including: LA, MS</i></li> <li><b>4. Le Grand Sud en musique</b><br/>12 days / 10 nights<br/>Gateways: Atlanta – New Orleans<br/><i>Including: GA, TN, MS, LA</i></li> <li><b>5. Rodéo et Fais Dodo</b><br/>17 days / 15 nights<br/>Gateways: Houston – New Orleans<br/><i>Including: LA</i></li> <li><b>6. La Route du Blues</b><br/>16 days / 14 nights<br/>Gateways: Chicago – New Orleans<br/><i>Including: MO, TN, MS, LA</i></li> <li><b>7. Flânerie Dans le Big Old South</b><br/>9 days / 7 nights<br/>Gateways: Atlanta – Atlanta<br/><i>Including: GA, SC, TN</i></li> <li><b>8. Get your kicks on route 66</b><br/>18 days / 16 nights<br/>Gateways: Chicago – Los Angeles<br/><i>Including: MO</i></li> <li><b>9. Les 1001 Accents du Sud Est</b><br/>18 days / 16 nights<br/>Gateways: Washington – Miami<br/><i>Including: VA, NC, SC, GA</i></li> </ol> |

| Tour Operator              | Pre-COVID 19 production   | Post-COVID 19 production   |
|----------------------------|---|--|
| <b>Cercle des Vacances</b> | <p><b>A la carte production</b></p> <ol style="list-style-type: none"> <li><b>Smoky Mountains, Memphis, Nashville, New Orleans: aux rythmes du Sud</b><br/>16 days / 14 nights<br/>Gateways: Atlanta – New Orleans<br/><i>Including: GA, TN, MS, LA</i></li> <li><b>Autotour en Louisiane: Sur la route des plantations</b><br/>9 days / 7 nights<br/>Gateways: New Orleans - New Orleans<br/><i>Including: LA, MS</i></li> <li><b>Voyage Louisiane, Mississippi et Tennessee, le vieux sud en musique</b><br/>16 days / 14 nights<br/>Gateways: New Orleans –Nashville<br/><i>Including: LA, MS, TN</i></li> <li><b>Road Trip Louisiane et Texas en Hébergement de Charme</b><br/>16 days / 14 nights<br/>Gateways: Dallas – New Orleans<br/><i>Including: LA</i></li> <li><b>Road trip sur la route du Blues: De la Nouvelle Orléans à Chicago</b><br/>16 days / 14 nights<br/>Gateways: New Orleans – Chicago<br/><i>Including: LA, TN, KY, MO</i></li> <li><b>Voyage culturel au Coeur de la Virginie et du Maryland</b><br/>15 days – 13 nights<br/>Gateways: Washington –Washington<br/><i>Including: VA</i></li> <li><b>Washington, Maryland et Virginie en famille - NEW</b><br/>13 days – 11 nights<br/>Gateways: Washington –Washington<br/><i>Including: VA</i></li> </ol> | <p><b>A la carte production</b></p> <ol style="list-style-type: none"> <li><b>Smoky Mountains, Memphis, Nashville, New Orleans: aux rythmes du Sud</b><br/>16 days / 14 nights<br/>Gateways: Atlanta – New Orleans<br/><i>Including: GA, TN, MS, LA</i></li> <li><b>Voyage Louisiane, Mississippi et Tennessee, le vieux sud en musique</b><br/>16 days / 14 nights<br/>Gateways: New Orleans - Nashville<br/><i>Including: LA, MS, TN</i></li> <li><b>Voyage Louisiane, Mississippi et Tennessee, le vieux sud en musique</b><br/>16 days / 14 nights<br/>Gateways: New Orleans –Nashville<br/><i>Including: LA, MS, TN</i></li> <li><b>Road Trip Texas et Louisiane en hébergement de charme</b><br/>16 days / 14 nights<br/>Gateways: Dallas – New Orleans<br/><i>Including: LA</i></li> <li><b>Road trip sur la route du Blues: De la Nouvelle Orléans à Chicago</b><br/>16 days / 14 nights<br/>Gateways: New Orleans – Chicago<br/><i>Including: LA, TN, KY, MO</i></li> <li><b>Voyage culturel au Coeur de la Virginie et du Maryland</b><br/>15 days – 13 nights<br/>Gateways: Washington –Washington<br/><i>Including: VA</i></li> <li><b>Washington, Maryland et Virginie en famille</b><br/>13 days – 11 nights<br/>Gateways: Washington –Washington<br/><i>Including: VA</i></li> </ol> <p><b>CRUISE</b></p> <ol style="list-style-type: none"> <li><b>CROISIÈRE EN BATEAU À VAPEUR SUR LE MISSISSIPPI</b><br/>13 days – 11 nights<br/>Gateways: Memphis – New Orleans<br/><i>Including: TN, MS, LA</i></li> </ol> |

**Notes:**

No change in 2021 versus 2020 apart from the removal from our website of the large escorted tours (large groups of individuals). Numerous changes to come in 2022, but nothing in 2021.

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

| Tour Operator                    | Pre-COVID 19 production  | Post-COVID 19 production  |
|----------------------------------|--|---|
| <b>Back Roads</b><br><i>cont</i> | <p><b>FLY &amp; DRIVES</b></p> <p><b>10. Floride du Sud et Louisiane des Cajuns</b><br/> 16days / 14 nights<br/> Gateways: Miami – New Orleans<br/> <i>Including: LA</i></p> <p><b>11. La Route du Blues</b><br/> 16 days / 14 nights<br/> Gateways: Chicago – New Orleans<br/> <i>Including: MO, TN, MS, LA</i></p> <p><b>12. Route 66</b><br/> 16 days / 14 nights<br/> Gateways: Chicago – Los Angeles<br/> <i>Including: MO</i></p> <p><b>MOTORBIKE</b></p> <p><b>13. La Route 66, le rêve Américain</b><br/> 21 days / 19 nights<br/> Gateways: Chicago – Los Angeles<br/> <i>Including: MO</i></p> <p><b>14. Road Trip Road 66</b><br/> 16 days / 14 nights<br/> Gateways: Chicago – Los Angeles<br/> <i>Including: MO</i></p> <p><b>TOUR SERIES</b></p> <p><b>1. De New York à Miami</b><br/> 12 days / 11 nights<br/> Gateways: New York - Miami<br/> <i>Including: NC, SC, GA</i></p> <p><b>2. Bayous et Plantation</b><br/> 8 days / 7 nights<br/> Gateways: New Orleans – New Orleans<br/> <b>Including: LA, MS</b></p> <p><b>3. Route du Blues, Jazz et Country</b><br/> 13 days / 12 nights<br/> Gateways: Dallas – Chicago<br/> <i>Including: LA, MS, TN</i></p> <p><b>4. Grand Tour du Sud</b><br/> 15 days / 14 nights<br/> Gateways: Dallas – Miami<br/> <i>Including: LA, MS, TN, SC, GA</i></p> | <p><b>FLY &amp; DRIVES</b></p> <p><b>10. Floride du Sud et Louisiane des Cajuns</b><br/> 16 days / 14 nights<br/> Gateways: Miami – New Orleans<br/> <i>Including: LA</i></p> <p><b>11. La Route du Blues</b><br/> 16 days / 14 nights<br/> Gateways: Chicago – New Orleans<br/> <i>Including: MO, TN, MS, LA</i></p> <p><b>12. Route 66</b><br/> 16 days / 14 nights<br/> Gateways: Chicago – Los Angeles<br/> <i>Including: MO</i></p> <p><b>MOTORBIKE</b></p> <p><b>13. La Route 66, le rêve Américain</b><br/> 21 days / 19 nights<br/> Gateways: Chicago – Los Angeles<br/> <i>Including: MO</i></p> <p><b>14. Road Trip Road 66</b><br/> 16 days / 14 nights<br/> Gateways: Chicago – Los Angeles<br/> <i>Including: MO</i></p> <p><b>TOUR SERIES</b></p> <p><b>1. De New York à Miami</b><br/> 12 days / 11 nights<br/> Gateways: New York - Miami<br/> <i>Including: NC, SC, GA</i></p> <p><b>2. Bayous et Plantation</b><br/> 8 days / 7 nights<br/> Gateways: New Orleans – New Orleans<br/> <b>Including: LA, MS</b></p> <p><b>3. Route du Blues, Jazz et Country</b><br/> 13 days / 12 nights<br/> Gateways: Dallas – Chicago<br/> <i>Including: LA, MS, TN</i></p> <p><b>4. Grand Tour du Sud</b><br/> 15 days / 14 nights<br/> Gateways: Dallas – Miami<br/> <i>Including: LA, MS, TN, SC, GA</i></p> |

| Tour Operator                    | Pre-COVID 19 production  | Post-COVID 19 production   |
|----------------------------------|--|--|
| <b>Back Roads</b><br><i>cont</i> | <p><b>MOTORBIKE</b></p> <p>1. <b>Racines du Blues</b><br/>16 days / 14 nights<br/>Gateways: New Orleans – Chicago<br/><i>Including: MO, TN, MS, LA</i></p> <p>2. <b>Historique Route 66</b><br/>16 days / 14 nights<br/>Gateways: Chicago – Los Angeles<br/><i>Including: MO</i></p> <p><b>CRUISE</b></p> <p>1. <b>Mississippi: la Route des Plantations</b><br/>8 days / 7 nights<br/>Gateways: News Orleans – New Orleans<br/><i>Including: LA, MS</i></p> | <p><b>MOTORBIKE</b></p> <p>1. <b>Racines du Blues</b><br/>16 days / 14 nights<br/>Gateways: New Orleans – Chicago<br/><i>Including: MO, TN, MS, LA</i></p> <p>2. <b>Historique Route 66</b><br/>16 days / 14 nights<br/>Gateways: Chicago – Los Angeles<br/><i>Including: MO</i></p> <p><b>CRUISE</b></p> <p>1. <b>Mississippi: la Route des Plantations</b><br/>8 days / 7 nights<br/>Gateways: News Orleans – New Orleans<br/><i>Including: LA, MS</i></p> |

| Tour Operator             | Pre-COVID 19 production   | Post-COVID 19 production  |
|---------------------------|---|---|
| <b>Voyageurs du Monde</b> | <p><b>FLY &amp; DRIVE</b><br/><b>A la carte production</b></p> <p>1. <b>Blues, plantations et bayous, le grand tour de Louisiane</b><br/>12 days / 10 nights<br/>Gateways: New Orleans – New Orleans<br/><i>Including: LA, MS</i></p> <p>2. <b>De Chicago à New Orleans: la route de la musique Américaine</b><br/>15 days / 13 nights<br/>Gateways: Chicago – New Orleans<br/><i>Including: MO, TN, MS, LA</i></p> | <p><b>FLY &amp; DRIVE</b><br/><b>A la carte production</b></p> <p>1. <b>Blues, plantations et bayous, le grand tour de Louisiane</b><br/>12 days / 10 nights<br/>Gateways: New Orleans – New Orleans<br/><i>Including: LA, MS</i></p> <p>2. <b>De Chicago à New Orleans: la route de la musique Américaine</b><br/>15 days / 13 nights<br/>Gateways: Chicago – New Orleans<br/><i>Including: MO, TN, MS, LA</i></p> |

**Notes:**

The production has not changed at all. However they are working on product updates, checking what supplier/hotels/museums has definitely closed their doors.

| Tour Operator | Pre-COVID 19 production  | Post-COVID 19 production  |
|---------------|--|---|
| TUI           | <p><b>FLY &amp; DRIVE</b><br/> <b>A la carte production</b></p> <p>1. <b>“Charmes de la Louisiane”</b><br/> 9 days / 7 nights<br/> Gateways: New Orleans – New Orleans<br/> <i>Including: LA, MS</i></p> <p><b>TOUR SERIES</b></p> <p>1. <b>“Bayous et plantations”</b><br/> 8 days / 7 nights<br/> Gateways: New Orleans – New Orleans<br/> <i>Including: LA, MS</i></p> <p>2. <b>Autant en emporte la musique</b><br/> 12 days / 11 nights<br/> Gateways: Atlanta – New Orleans<br/> <i>Including: LA, MS, TN, GA</i></p> <p>3. <b>“De New York à Miami, la côte est du Nord au Sud”</b><br/> 12 days / 11 nights<br/> Gateways: New York – Miami<br/> <i>Including: NC, SC, GA</i></p> <p>4. <b>“Rythmes Américains”</b><br/> 13 days / 12 nights<br/> Gateways: Dallas - Chicago<br/> <i>Including: LA, MS, TN</i></p> | <p><b>FLY &amp; DRIVE</b><br/> <b>A la carte production</b></p> <p><b>PRIVATE TOURS</b></p> <p>1. <b>“Combiné Chicago, Nouvelle - Orléans, New York” - NEW</b><br/> 12 days / 10 nights<br/> Gateways: Chicago – New York<br/> <i>Including: LA</i></p> <p><b>TOUR SERIES</b></p> <p>1. <b>“Bayous et plantations”</b><br/> 8 days / 7 nights<br/> Gateways: New Orleans – New Orleans<br/> <i>Including: LA, MS</i></p> <p>2. <b>Autant en emporte la musique</b><br/> 12 days / 11 nights<br/> Gateways: Atlanta – New Orleans<br/> <i>Including: LA, MS, TN, GA</i></p> <p>3. <b>“De New York à Miami, la côte est du Nord au Sud”</b><br/> 12 days / 11 nights<br/> Gateways: New York – Miami<br/> <i>Including: NC, SC, GA</i></p> <p>4. <b>“Rythmes Américains”</b><br/> 13 days / 12 nights<br/> Gateways: Dallas - Chicago<br/> <i>Including: LA, MS, TN</i></p> |

# CURRENT AND FUTURE TRENDS FOR DIFFERENT SECTORS OF TRAVEL INDUSTRY

Undermined by the pandemic, tour operators must reinvent themselves. To ensure their future, they must offer more flexibility and services to travelers. “The future belongs to those who bring a true differentiating experience to their trips and flexibility

According to the data platform European Traveler Intelligence Monitor (ETIM), three main trends are emerging: a need for flexibility, a desire for nature and a preference for autonomy. The French also want to rely more on tourism professionals to manage logistics that have become more complicated.

For the French, the most important criteria this year are the offer of a destination in terms of nature and outdoor activities (51%), the level of its safety standards (41%) and its accessibility in terms of price (25%). Deprived of contacts last year, the French also want to be able to socialize: they particularly value the possibility of meeting new people (21%) and interacting with locals (13%). The other priorities of French travelers clearly revolve around leisure activities, with a marked interest in seaside destinations (18%) and family activities (13%) such as visits to amusement parks (17%). Finally, the accessibility of a destination by direct flight will play a very important role in the French people's choice (19%), as will the availability of flights to and from local airports (13%).

Finally, 45% of French people say their travel budget will remain unchanged in 2021, against only 25% who say their budget will decrease, 23% who are undecided and still nearly 7% who expect their budget to increase.

Asked about their travel plans outside Europe, 38% of French people say they are ready to leave as soon as they are vaccinated.

# CURRENT AND FUTURE TRENDS FOR DIFFERENT SECTORS OF TRAVEL INDUSTRY cont...

## “Travel agencies have become more relevant to the French”

The French want to rely more on tourism professionals: all-inclusive formulas and packaged offers have become more important for travelers since the crisis (+9% and +7% respectively), bringing more certainty and peace of mind when organizing a trip.

Similarly, travel agencies have become more relevant for the French (+6%), who prefer to rely on professionals to manage logistics that have become more complicated. (according to ETIM)

“Before Covid, our main competitor was the customer, who composed his trip himself on the Internet,” says Gilbert Cisneros, CEO of the TO Exotismes. The health crisis has highlighted the added value of intermediation. Those who do not offer added value (follow-up and supervision of the customer before, during and after the trip) will die. The others will take market share.”

## Insurance & Flexibility

When asked about services that have become more important since the pandemic, the French initially cite an increased need for health and cancellation insurance (+32%). (according to ETIM)

Flexibility:

This requires buying airplane seats as you go, not months in advance.” They will have to be nimble and adapt to the new expectations of French travelers who want to leave when they want, cancel without difficulty. “Because of the crisis, the consumer will be more intransigent about the ability to cancel his trip and the conditions of reimbursement, insists René-Marc Chikli, president of Seto, the French tour operators’ union. Professionals will have to integrate this risk into their prices and negotiate cancellation conditions without charge with airlines and hoteliers. Today, tour operators have tens of millions of euros blocked with airlines, corresponding to unused tickets purchased for a flight.”

# CURRENT AND FUTURE TRENDS FOR DIFFERENT SECTORS OF TRAVEL INDUSTRY cont...

## Last Minute Bookings

The Christmas vacations and the winter vacations (February) have shown it: the French wait until the last minute to book their vacations. This is due to the constant changes in travel restrictions in France and Europe. The French don't want to take risks.

Before the pandemic, the French tended to book quite early. However, while 17% of travelers worldwide booked their stay each year at the same time, the French were more willing to book when they found a good deal. (according to ETIM).

If booking last minute will be the new trend in 2021, this is not expected to last long-term.

### What the survey conducted by Worldia says:

The uncertainties generated by the health crisis are pushing the French to change their booking behavior.

The French used to book several months in advance, yet in 2021, the first precaution that the French plan to take in this context is to book at the last minute for 37% of them. Thus, only 9% of the French will book their vacations in advance this year.

Among the other precautions planned for 2021, 31% of French people plan to take out travel insurance and 27% want to be accompanied by a professional (tour operator or travel agency) to protect themselves from possible difficulties related to the crisis (flight cancellation, repatriation, etc.).

## Environmental Costs

The crisis should serve as a motor. Already this summer, more tour operators have focused on their country of origin. "More and more, they are also working on niches (thalassotherapy, slow tourism, camping, atypical accommodation...)", says Didier Arino, director of the cabinet ProTourisme.

The price of travel will increase," warns Alain Capestan, of Voyageurs du monde. They will include more and more ecological costs. The rebalancing of salaries, which we have been seeing in the world for the last ten years, will also continue." Some travel is only happening because it's so cheap. "I doubt that will continue in the future," the executive predicts.

# CURRENT AND FUTURE TRENDS FOR DIFFERENT SECTORS OF TRAVEL INDUSTRY cont...

## New Themes, Niches, Trends

Like we just said above, tour-operators must reinvent themselves during and in the outcome of the crisis. Below are some samples that illustrate the general trend of new themes & trends taken by tour operators.

**Key words:** Eco-friendly travels, Slow-travel, local & unique experiences, wellness, local conciergerie for a 24/24hrs assistance, à la carte customized trips. This new era may announce the end of the escorted tour series for big groups (motor coach tours).

**Think local to act global:** The search for better travel, in good health, in symbiosis with its environment, by showing exemplarity, which is a source of recognition, brings us back to the same behavioral point: localism. What is local is what is mastered. Trust is all the more easily placed in a local offer if the proof is marked by authenticity, simplicity and traceability. Whereas the undifferentiated and impersonal global is seen and experienced today as a threat. We recognize ourselves more in what is similar to us.

Of course, this trend will not be as intense for all. The other markers of recognition, including accumulation and differentiation, remain present and, in some cases, powerful.

But these markers will nevertheless undergo this process of rationalization: luxury yes, but not ostentatious luxury, that of the search for rarity, durability and excellence. Long-distance travel, yes, but that of discovery, experience, sharing and even usefulness. Breaks, yes, but perhaps longer, less distant, more diversified, more exclusive, more educational. Holidays, of course, but to recharge our batteries, to share, to take time, to breathe and to enjoy the benefits of nature. In reality, it is an insidious but profound transformation of the reasons for travelling.

**Maison des Voyages:** They wish to develop slow travel programs, train travels, tour series and fly & drives with less stops and at a slower pace, with a real destination experience in line with their CSR commitment.

**Directours:** They are developing long-stays, family or groups of friends trips. New themes include gastronomy, culture and Eco-friendly.

## CURRENT AND FUTURE TRENDS FOR DIFFERENT SECTORS OF TRAVEL INDUSTRY cont...

**Evaneos:** They continue their policy of responsible travel, tailor-made and off the beaten track. They emphasize the selection of new partners on the themes of environmental and social responsibilities. (Evaneos connects customers with the receptive directly). They are starting to promote IRMs for small groups (14 people maximum). Finally, they are focusing on domestic and cross-border trips. Last minute bookings and more responsible travel are the future norm. They are pushing their receptive partners to work with local accommodations and not with international chains.

**Cercle des Vacances:** with the launch of their new website they will increase their production to follow the new trends that they are convinced will accelerate: eco-friendly travel, slow-tourism, immersive travel, authenticity and wellness.

**Del-Tour:** They plan to suppress their escorted tour series exclusively French-speaking, which will no longer be in demand due to the pandemic. In contrast, the request for à la carte, tailor-made trips are rising and should be prioritized in the future. They will create a new à la carte production, of quality with true local experiences, a 24/24hrs 7/7days assistance, et a conciergerie service locally. They are thinking about producing their own small group tours that they will escort themselves (20pax max), and a Premium Service which will have an even more important place for a real customized service.

### What the survey conducted by Worldia says:

Nature, unusual experiences and immersion are on the agenda. In 2021, being in contact with nature is the first expectation of the French (85%). The second priority for the vast majority of French people (72%) will be to live unusual experiences in less known and touristy areas. Finally, the survey shows that the third priority of the French will be to live immersive experiences meeting local people and discovering different cultures.

# CURRENT AND FUTURE TRENDS FOR DIFFERENT SECTORS OF TRAVEL INDUSTRY cont...

## Development of Europe & France Production

To avoid problems of closed borders, French people plan to travel more in France than before (+19%) or to neighboring countries (+8%). (according to ETIM)

Therefore, Tour-Operators (global, Asia-specialized, US-specialized) are developing their existing or brand new Europe Production. And a production dedicated to domestic travel of course.

**Looking at the Tour-operators selling the US we know well, here are some examples to illustrate this change:**

**Maison des Voyages:** The TO already had a production for Southern and Eastern Europe, and the pandemic has accelerated things. The TO launched new destinations such as Northern Europe, Portugal, France....

**KUONI:** The TO already selling Europe has reinforced its Europe Production.

**Directours:** The production has evolved during 2020 with a craze for destinations that have remained open since last summer until January 2021: Dubai, French Indies, Maldives, Dominican Republic, Spain, the Canaries and Greece (the star of summer 2020). They have expanded the product range and opened new destinations like Sweden.

**Evaneos:** They have been concentrating on destinations close to France, mainly European, since the beginning of the crisis.

**Marco Vasco:** Several European destinations added sooner than expected, in May/June 2020.

**Française des Circuits:** they already had a Europe production, therefore they have developed it for the 2021 brochure.

**Voyamar:** They will focus their production on Europe, with Spain, Italy, and the Mediterranean basin, with Tunisia. They are going to put the package on these destinations, with a flexible, French-speaking and qualitative offer. They want to develop their clubs. They are in negotiations to open 4 or 5 additional villages-clubs, one for each nearby destination that are Spain, Italy in Croatia and Greece, for Voyamar. "Today they we can foresee the summer of 2021. The French will want to travel. They will choose ease, security and proximity. On the circuit part it will be the same, we will target Europe and the Mediterranean basin. I'm aiming for double or even triple in terms of activity. I estimate that we will do about 40 or 50% of the 2019 activity in 2021. It's really feasible, what's at stake is not so much the turnover as the margin." says Aurélien Beaufort, Production director.

# CURRENT AND FUTURE TRENDS FOR DIFFERENT SECTORS OF TRAVEL INDUSTRY cont...

## Recovery To Come

According to the Secretary of State for Tourism Jean-Baptiste Lemoyne: “The recovery in tourism will be very strong and competitive”.

“The recovery, when it will be done at the level of international mobility, will be very strong and very competitive,” explained Jean-Baptiste Lemoyne, Secretary of State for Tourism. “We feel it, the tourists have ants in their legs, they could not travel for several months. It is a little bit the concept of the ‘trip-hunting’. France has to be at the rendezvous,” he added at a press conference on February 16. “It is very important to prepare for the rebound.”

### Worldia survey: travel is one of the top spending priorities for the French in 2021

Nearly one out of two French people have made travel one of their spending priorities in 2021. The 1st of their precautions will be to book at the last minute. They will prefer closer destinations in individual accommodations and will be looking for nature, unusual experiences and immersion. 64% of them are now ready to be vaccinated to travel if the vaccination passport becomes mandatory.

The anxiety generated by the health crisis and the inability to consume during the confinements put in place have pushed the French to save in 2020.

One of the main findings of the study published today is that part of these savings should be used for travel. Indeed, for nearly one French person out of two (45%), travel is one of the spending priorities for the year 2021. In fact, 12% of them have made it their top priority.

Conversely, given the health crisis, 26% of French people plan not to travel in 2021. Although the current health crisis is obviously not favorable to travel, this study shows that the desire to travel remains very strong among the French. And it is a safe bet that this quest for escape will become even more pressing once the pandemic is really behind us. Considering the many postponed trips in 2020 but also the strong accumulation of savings since the beginning of the crisis, we are convinced that 2021 will be the year of rebound for tourism. This is excellent news for all professionals in one of the sectors most affected by this unprecedented health crisis! Moreover, more than ¼ of the French people questioned in our study now want to go through a tour operator to plan their stay. We are ready to assist all travelers in their reservations.

# BRIEF ON DURATION AND TYPE OF VACATIONS TO THE USA

Since it is not possible to travel from France to the USA since March 2020, **the information is based on previous years.**

## Duration

The French are the European champions of the length of travel: 7 to 21 days.

In 2018, the French preferred long trips - 58% of bookings were for trips of 7 to 21 days or more, the highest rate among European travelers. 32% of bookings were for short stays of 2 to 4 days (city breaks). (study e-Dreams Odigeo)

The average length of stay is approx. 15 days which enable the French visitors to travel around one or several states. This applies to fly & drives and tour series. Travels to the Western USA can sometimes last 20 days or 3 weeks, versus shorter travels in the Eastern and Southern USA, 10 to 15 days. Travels to the USA can be shorter, such as 5 days or a week when it applies to a City Break.

| Traveler Characteristics                     | 2000     | 2005     | 2010     | 2013     | 2014     | 2015     | 2016     | 2017     | 2018     | 2019     |
|--|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| Advance Trip Decision (mean days)            | 70       | 81       | 116      | 109      | 112      | 122      | 119      | 118      | 125      | 124      |
| Advance Trip Decision (median days)          | 30       | 60       | 90       | 90       | 90       | 90       | 90       | 90       | 90       | 90       |
| % Used Prepaid Package                       | 15,3     | 16,0     | 16,2     | 13,6     | 15,7     | 16,7     | 12,9     | 12,0     | 9,8      | 8,8      |
| % First International U.S. Trip              | 21,4     | 25,2     | 36,1     | 29,6     | 26,9     | 27,9     | 24,4     | 25,7     | 27,3     | 23,4     |
| Length of Stay in the U.S. (mean nights)     | 14,3     | 15,4     | 15,9     | 16,2     | 16,0     | 15,7     | 15,9     | 16,3     | 14,3     | 15,0     |
| Length of Stay in the U.S. (median nights)   | 7        | 10       | 10       | 9        | 9        | 10       | 10       | 9        | 10       | 10       |
| U.S. Trips Past 12 Months (mean)             | 2,3      | 1,9      | 1,5      | 1,6      | 1,8      | 1,7      | 1,6      | 1,7      | 1,6      | 1,7      |
| U.S. Trips Past 12 Months (median)           | 1        | 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     | 67,6     | 67,5     | 68,3     | 67,4     | 71,4     | 71,3     | 70,7     |
| Number of States Visited (mean average)      | 1,7      | 1,7      | 1,7      | 1,5      | 1,6      | 1,6      | 1,6      | 1,6      | 1,5      | 1,5      |
| Hotel/Motel (% used 1+ nights)               | 76,4     | 75,2     | 75,7     | 75,0     | 77,5     | 74,1     | 78,7     | 78,5     | 76,6     | 79,0     |
| Hotel/Motel (mean average # of nights)       | 7,1      | 8,2      | 8,6      | 11,8     | 9,3      | 8,9      | 9,0      | 10,2     | 10,4     | 9,8      |
| Travel Party Size (mean # of persons)        | 1,5      | 1,5      | 1,7      | 1,6      | 1,6      | 1,7      | 1,7      | 1,7      | 1,7      | 1,8      |
| Gender (% Male among respondents)            | 65,0     | 65,4     | 54,2     | 51,9     | 51,3     | 53,3     | 52,3     | 46,9     | 48,4     | 52,1     |
| Household Income (mean average)              | \$81 200 | \$78 300 | \$83 500 | \$81 325 | \$82 342 | \$82 669 | \$76 824 | \$75 739 | \$80 584 | \$82 055 |
| Household Income (median average)            | \$63 300 | \$67 200 | \$71 100 | \$64 907 | \$68 000 | \$65 616 | \$60 000 | \$59 436 | \$61 738 | \$67 241 |
| Age: Female (mean average among respondents) | 36,3     | 39,3     | 40,1     | 37,7     | 38,3     | 40,7     | 40,7     | 39,3     | 41,0     | 40,7     |
| Age: Male (mean average among respondents)   | 44,9     | 41,1     | 40,8     | 41,0     | 40,7     | 43,2     | 41,4     | 42,2     | 41,1     | 42,4     |

Source: NTTO

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

Since it is not possible to travel from France to the USA since March 2020, **the information is based on previous years.**

## Expenditure

The priority for the French people in 2019 ? : travelling ranks third in their list of priorities. 28% of them wants to travel long haul French and spend 2,277€/pax in average for their travels.

According to a Study led by TripAdvisor (January 2019), French spends 35% of their budget in accommodation, 25% in transports, 13% in food, 10% in shopping, 9% in local transportation, and 8% in activities.

## Booking Time

Before the crisis, the French tended to decide to travel a relatively long 128 days before their trip (compared to 106 days for the average overseas visitor). Also, the French tends to book when the rates are the best. Which means that the booking period changes from year to year.

This will definitely change in the Post-Crisis context with French visitors expected to book at the very last minute their trips, at least at the beginning when travels resume. But not in the long-term.

## Type of Travel

“Personalization” or customization, is the key word to describe the changes in the French market. This concerns mostly the general FIT Tour operators and the luxury agencies/TOs: 100% à la carte trips, optional activities, development of guided tours in small groups, etc. Escorted tours are also concerned, with the group capacity being constantly reduced. French visitors are not attracted by coach tours and travelling in a group of 50pax. If they want to be escorted on their trip, they are now looking for smaller sized groups. Even groups of 28 pax (until now, this was considered as “small group”) is too much. Tour operators are therefore working on small group packages to satisfy these requests and meet the trend.

More and more individual requests, or semi-escorted tours in small groups (Min 8 pax, 12 max). Tours that are “half private” or “semi-escorted” (they don’t all use the same terms).

Escorted tours for large groups (such as Go West), where the clients stay in a hotel far away from everything, seduce less and less.

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

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 travelling, not to be dependent on an escort or a group and wants to have the possibility to include activities on demand.

”Be different”: is the second major trend. TOs are constantly looking at activities or properties that would differentiate them from the others, and specially from the OTAs.

# BOOKING CONFIDENCE AND PROCEDURES (changes to booking windows, deposits, travel insurance, etc).

## The Saving Ordinance of March 26<sup>th</sup>

As soon as the crisis started in March 2020, specific measures were installed to prevent the travel trade industry from going bankrupt.

Published on 26 March, Order No 2020-315 of 25 March 2020 on the financial conditions for cancelling certain tourist travel and holiday contracts in the event of exceptional and unavoidable circumstances or force majeure allows tourism professionals to offer a credit note instead of an immediate refund for any cancellation notified between 1 March and 15 September 2020. If the travel professional offers you an 18-month credit note, you are obliged to accept it. However, you are not obliged to use it. You can then request a refund after the credit has expired.

Clarification: the order covers contracts for the sale of travel and accommodation, and contracts for isolated travel services: dry accommodation, car rental, and “any other tourist service that is not an integral part of a travel service”. This includes excursions, visits, spas, park entries, ski rentals”. The ordinance does not target B2B, but B2C relations, i.e. those established between customers on the one hand and professionals in the sector on the other, such as agencies and service providers (accommodation providers, car hire companies, etc.). This excludes TOs in their relations with agencies and airlines, in particular. Another important clarification: the order covers contract cancellations that occur between 1 March and 15 September 2020, regardless of the dates of travel and tourist services.

As of September 2021, the 18 months of the Ordinance that allowed the Distribution sector to keep the clients’ assets will be over. Concerns are therefore being raised: will travel agencies and tour operators be able to reimburse customers after several months of health crisis? What is the scenario for the State in protecting consumers, when it is estimated that the sums thus deposited will amount to more than 1 billion euros?

Laurent Abitbol, Director of the travel agencies networks Selectour and Havas Voyages said on TV recently: “We are going to propose to our customers to postpone the trips, we hope they will accept, underlined Laurent Abitbol on BFMTV on Saturday evening. If the customer does not want to postpone, we will refund the trip. “It is indeed the law, in the name of the Tourism Code, since the end of the ordinance on assets. “We prefer customers to postpone. But if we don’t have the choice, we will refund according to the conditions of the airlines. If a company does not reimburse, we will not be able to reimburse immediately. This does not apply to B2B tour operators such as Jetset Voyages, since their sales are from TO to travel agencies.

# BOOKING CONFIDENCE AND PROCEDURES (changes to booking windows, deposits, travel insurance, etc) cont...

## Some examples of what tour-operators are implementing

**Française des Circuits:** They follow the instruction of the travel syndicates SNAV and SETO, and the Ordinance presented above. They have not implemented anything in particular, besides the fact they find arrangements with the travel agencies they work with (they are B2B).

**Del-Tour:** because they work in B2C, they decided to meet with the clients in-person only with appointments, respecting the sanitary measures. Regarding bookings, they are working on the possibility of reduced down payments and cancellation at no fees until 24hrs before departure to motivate the clients. Same with the B2B, reduced prices for the à la carte only on appointments (visio meeting) and down payment/cancellations similar to the B2C.

**Evaneos:** Since their role is to connect local receptive operators and clients, they incitate DMCs to review their cancellation policies: at no fees until D-15.

**Directours:** they have softened their cancellation policies. A newsletter will be sent soon with conditions even more flexible in order to boost bookings until April 15th, with a down payment of 100euros/pax.

**Maison des Voyages:** They have obtained early enough from their insurer a “pandemic guarantee” on all their travel insurances. This guarantee includes for example: fever control at the airport preventing the embarkation because above the accepted norms, the client can ask for cancellation and refund of his trip; the trip is going well but the return flight has been cancelled because of a pandemic, while waiting for the solution and a new return flight, the costs of the quarantine will be covered.

**Cercle des Vacances:** They offer more flexibility when booking trips on cancellation conditions, including the possibility of postponing trips and cancelling them free of charge up to one month before departure (without justification).

## ROUTE TO MARKET (RTO, direct or both)

Airlines have absolutely no visibility and communicate on short-term flight schedules. Flight schedules are never 100% confirmed, they are subject to change and changes happen.

After a total suspension of flights in the spring of 2020, flights have gradually resumed from France to the US on certain routes. Airlines have launched flight schedules for this summer, but these will be modified by the summer depending on announcements, border openings or new restrictions.

### Delta Air Lines:

|               | MARCH     | APRIL     | MAY       | JUNE      | JULY      | SUMMER    |
|---------------|-----------|-----------|-----------|-----------|-----------|-----------|
| <b>CDGATL</b> | <b>11</b> | <b>14</b> | <b>14</b> | <b>14</b> | <b>14</b> | <b>14</b> |
| <b>CDGBOS</b> |           |           | <b>7</b>  | <b>7</b>  | <b>7</b>  | <b>7</b>  |
| <b>CDGDTW</b> |           | <b>3</b>  | <b>7</b>  | <b>7</b>  | <b>7</b>  | <b>7</b>  |
| <b>CDGJFK</b> | <b>7</b>  | <b>7</b>  | <b>12</b> | <b>14</b> | <b>14</b> | <b>14</b> |
| <b>CDGLAX</b> |           |           |           |           | <b>7</b>  | <b>7</b>  |
| <b>CDGSLC</b> |           |           |           |           | <b>7</b>  | <b>7</b>  |
| <b>CDGSEA</b> |           |           | <b>7</b>  | <b>7</b>  | <b>7</b>  | <b>7</b>  |
| <b>CDGCVG</b> |           |           |           |           | <b>7</b>  | <b>7</b>  |
| <b>CDGRDU</b> |           |           | <b>5</b>  | <b>5</b>  | <b>5</b>  | <b>5</b>  |
| <b>CDGMSP</b> |           |           | <b>7</b>  | <b>7</b>  | <b>7</b>  | <b>7</b>  |
| <b>CDGIND</b> |           |           |           |           |           |           |
| <b>NCEJFK</b> |           |           | <b>7</b>  | <b>7</b>  | <b>7</b>  | <b>7</b>  |

*As of March 10th, 2020*

In principle, only the Indianapolis flight would not be renewed but everything can still change as Delta Air Lines explained to us.

## ROUTE TO MARKET (RTO, direct or both) cont...

### American Airlines:

Flight program planned until May 2021 for AA's flights from Paris CDG.

| Departure Airport | Arrival Airport         | Frequency                      |
|-------------------|-------------------------|--------------------------------|
| Paris – CDG       | Dallas - Fort Worth DFW | Daily flight as of 12 FEB 2021 |
| Paris – CDG       | New York – JFK          | Daily flight as of 28MAR 2021  |
| Paris – CDG       | Miami - MIA             | Daily Flight as of 6 MAY 2021  |

\*CDG – MIA/ORD/PHL will be back for the summer 2021.

Their flight Paris/Charlotte will not resume in 2021. We will have to wait for 2022.

### Air France:

Air France has always served the US throughout the crisis. Each month they have added new destinations by adjusting our schedule.

This is the flight schedule that is planned for this summer (end of March to end of October 2021). It is valid to date (11/03) and remains subject to the evolution of government and health restrictions.

- SFO until 5/7 then from June 14/7
- LAX until 10/7 then from June until 14/7
- NYC until 21/7 then from June until 35/7
- MIA 3/7 then from June until 7/7
- AHI up to 3/7 then from June to 7/7
- IAD until 5/7 then from June until 14/7
- ORD 3/7 then from June to 7/7
- **ATL 7/7 then from June until 14/7**
- BOS until 5/7 then from June until 7/7
- DTW 3/7 then from May 7/7
- MSP resumed in May until end of September - seasonal line - until 7/7

In terms of news, AF is launching a test to digitize COVID test results. From 15 March 2021 and for a period of 4 weeks until 11 April 2021, on all Air France flights from Paris-CDG to Los Angeles and San Francisco. It will be carried out on a voluntary basis only.

### United Airlines:

Pending.

# LODGING TRENDS

## (chains, boutique, rentals, indépendants, RVs)

### For City stays:

Apartments requests are increasing. They come from all types of French visitors: groups of friends, families, and couples.

### For Fly & Drives:

In general, French clients are looking for small and charming/cosy hotels, B&Bs, boutique hotels, everything that is not a “factory” hotel. We call a factory hotel, a large & impersonal hotel with a high number of rooms with no charm at all, where profitability comes before service.

Maison des Voyages for example has an ATR label, which means that they tend to include more and more in their production environmentally friendly accommodations, adopting a CSR approach in their establishment.

High-end tour-operators are looking for comfort for their clients with quality hotels, very well located.

However, in the USA? it is difficult not to offer hotels from international chains, but depending on their budget and the customers desires, tour-operators tend to avoid them if there are alternatives available in the destination. Chain hotels work well for the French market of relatively small or medium size, comfortable, cozy and well located.

An example to illustrate Tour-operators’ new trend in terms of accommodation preparing themselves for the post-COVID era: Cercle des Vacances is currently selling a bit of everything depending on the clients’ profile and budget. The new website will be oriented more towards eco-friendly accommodation, more independent and authentic: boutique-hotels, glamping, rentals...).

Finally, never forget that the French love to walk. Therefore, priority is given to centrally located hotels, that are located at a walking distance from the major attractions and entertainment areas if possible.

# LODGING TRENDS

(chains, boutique, rentals, indépendants, RVs) cont...

**When booking a trip in the Southern region**, it is mainly Bed and Breakfasts that are in demand, with charm and contact with the owners. Clients and TOs are booking typical accommodation such as plantations, antebellum houses, original hotels such as the Shack Up Inn at Clarksdale...).

## **Tour Series:**

Clients do not have the choice in terms of accommodation. However, more and more French tour-operators give 2 to 3 options in terms of hotels category: 2/3\*, 3/4\*, 4/5\* either for fly & drives or Tour series.

## **Focus: Input from Gerald Ponsard, Del-Tour:**

The pandemic will certainly raise the awareness of many travellers who will travel more responsibly. They will be looking for unique experiences, meeting the locals and the great outdoors. After a year of deprivation, we feel that the budget is no longer the main driver, but rather the experience! Last minute reservations? This year, yes, as soon as we reopen the borders, we risk having a mass effect in bookings, so we will have to be ready, but by next year, I think the situation will be quite different.

# ATTRACTIONS AND EXPERIENCES (included, add on, or not featured)

## Kind of Activity

Important note: if a supplier wants a French tour-operator to sell its product, he will have to work with DMcs and receptive operators. Most of the tour-operators only sell to their clients products that they can contract through their DMCs or bedbanks. Same with the hotels.

In general, this would be the primary activities sold by tour-operators (contracted directly or through a receptive operator):

- Sightseeing (bus tours)
- Museums/art galleries
- Monuments
- Guided tours
- Concerts/shows
- Historical locations
- Sporting events
- Cultural sites
- Fine dining
- Shopping is one the top reasons

| Activity Participation While in Other Countries (multiple responses, % of profiled) | 2000 | 2005 | 2010 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|---|------|------|------|------|------|------|------|------|------|------|
| American Indian Communities   | 7.3  | 7.0  | 5.9  | 7.6  | 9.3  | 9.3  | 8.2  | 9.0  | 10.8 | 9.4  |
| Amusement/Theme Parks   | 25.2 | 16.4 | 27.1 | 20.6 | 22.1 | 25.6 | 24.5 | 27.2 | 21.5 | 24.7 |
| Art Gallery/Museum  | 32.0 | 30.8 | 37.9 | 44.2 | 41.9 | 42.4 | 42.0 | 41.3 | 43.2 | 42.2 |
| Camping/Hiking  | 4.8  | 2.8  | 6.8  | 6.7  | 7.1  | 5.0  | 6.3  | 6.7  | 6.8  | 8.4  |
| Casinos/Gamble  | 12.2 | 14.0 | 14.9 | 10.2 | 11.5 | 11.1 | 10.3 | 9.2  | 10.6 | 9.6  |
| Concert/Play/Musical  | 17.6 | 12.3 | 19.7 | 18.7 | 18.7 | 17.4 | 19.0 | 17.7 | 15.4 | 14.0 |
| Cruises (see note below)  | 3.5  | 4.3  | 6.2  | ---  | ---  | ---  | ---  | ---  | ---  | ---  |
| Cultural / Ethnic Heritage Sites  | ---  | ---  | ---  | 20.9 | 19.0 | 20.6 | 18.8 | 20.4 | 21.2 | 19.7 |
| Cultural Heritage Sites   | 23.6 | 27.2 | 37.1 | ---  | ---  | ---  | ---  | ---  | ---  | ---  |
| Ethnic Heritage Sites   | 6.0  | 5.8  | 8.8  | ---  | ---  | ---  | ---  | ---  | ---  | ---  |
| Dining (Experience/Fine)  | ---  | ---  | ---  | 45.1 | 47.1 | 46.4 | 27.7 | 21.4 | 18.4 | 19.0 |
| Dining in Restaurants   | 85.3 | 80.8 | 80.7 | ---  | ---  | ---  | ---  | ---  | ---  | ---  |
| Environmental/Eco. Excursions   | 9.6  | 9.1  | 7.9  | 4.4  | 5.4  | 3.9  | 3.3  | 5.4  | 3.3  | 4.4  |
| Golfing/Tennis  | 3.5  | 3.3  | 2.5  | 3.1  | 2.9  | 2.4  | 2.0  | 2.4  | 1.0  | 2.6  |
| Guided Tours  | 13.3 | 14.7 | 14.8 | 21.2 | 21.2 | 21.7 | 20.5 | 17.8 | 20.5 | 16.0 |
| Historical Locations  | ---  | ---  | ---  | 29.6 | 28.3 | 30.1 | 29.8 | 29.7 | 28.1 | 30.8 |
| Historical Places   | 38.7 | 46.0 | 54.6 | ---  | ---  | ---  | ---  | ---  | ---  | ---  |
| Hunting/Fishing   | 1.6  | 2.0  | 1.5  | 1.5  | 1.1  | 1.9  | 1.0  | 0.8  | 0.7  | 0.8  |
| National Parks/Monuments  | ---  | ---  | ---  | 48.6 | 48.7 | 48.2 | 50.2 | 49.6 | 50.6 | 49.0 |
| National Parks  | 26.7 | 24.2 | 30.9 | ---  | ---  | ---  | ---  | ---  | ---  | ---  |
| Nightclubbing/Dancing   | 13.2 | 13.9 | 12.1 | 14.6 | 16.0 | 11.6 | 12.8 | 10.2 | 9.5  | 11.6 |
| Ranch Vacations   | 1.0  | 0.8  | 0.7  | ---  | ---  | ---  | ---  | ---  | ---  | ---  |
| Shopping  | 80.1 | 86.1 | 86.1 | 86.6 | 88.4 | 86.4 | 84.7 | 85.0 | 84.8 | 82.9 |
| Sightseeing   | ---  | ---  | ---  | 77.6 | 74.9 | 77.7 | 78.3 | 74.6 | 75.0 | 75.6 |
| 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 | 32.2 | 31.6 | 32.8 | 28.1 | 29.8 | 32.3 | 34.3 |
| Snow Sports   | ---  | ---  | ---  | 1.4  | 1.0  | 0.9  | 0.7  | 0.6  | 0.4  | 0.4  |
| Snow Skiing   | 1.2  | 1.3  | 1.1  | ---  | ---  | ---  | ---  | ---  | ---  | ---  |
| Sporting Event  | ---  | ---  | ---  | 12.6 | 13.3 | 11.8 | 11.4 | 10.1 | 13.7 | 12.0 |
| Attend Sporting Event   | 5.0  | 8.4  | 6.9  | ---  | ---  | ---  | ---  | ---  | ---  | ---  |
| Water Sports  | ---  | ---  | ---  | 7.8  | 10.2 | 8.4  | 6.9  | 7.7  | 8.4  | 6.2  |

Source: NTT0 - French visitor profile

## ATTRACTIONS AND EXPERIENCES (included, add on, or not featured) cont...

With regards to French requests for trips to the USA, the demand for activities, shows, guided tours and for sports games is increasing. These demands are becoming more and more specific. Clients do not want to travel around the US, they want to “experience it”, live it like a local. Tour operators are following this trend and are adding more and more activities to their packages – or expand their list of optional activities (à la carte).

Themed walking guided tours in French such as those available in New Orleans thanks to the guiding tours company Le monde Creole are key. This type of activity is an added value to the TO, as tour operators are fighting hard with the OTAs.

As seen in other US cities such as Los Angeles, NYC, San Francisco or Las Vegas, French-Speaking tours provided by companies such Voyage en Français and Destinations Off Road are very successful. And we are talking here about walking tours and not bus tours. Off the beaten track tours including street art activities, treasure hunts, cupcakes cooking class, etc. Most of the Fit tour-operators are now selling these tours, included as à la carte in their brochures.

Walking tours in French, along with Passes, are the activities the most sold by the tour operators in France.

Tour operators’ top activities booked for trips in the USA also depends on the profile of clientele they target. TOs such as Maison des Etats-Unis or Intermèdes will mostly book cultural activities, ethnical heritage sites, art galleries, museums, guided tours, sporting events, and this ranking would end with shopping, concerts and nightclubbing.

When travelling to the Southern region, French visitors are looking for activities related to the History, heritage and music. This along some local experiences such as a swamp tour or a Bourbon tasting.

The French loves culture, art, history and museums, this is why they are interested in travelling to the Southern region. This stands for the top activities done by French visitors when visiting the South.

Tops activities sold by French TOs with regards to the Southern region are in general: Plantation tours; Museums; guided tours (Le Monde Creole for LA, Savannah Trolley Tour in GA, etc), Cruise tours; Pass; Jazz brunch; historical venues such as Civil Rights related sites; music related venues such as a VIP entrance at Preservation Hall, Graceland, Sun Studios, Grand Ole Opry, etc; unique experiences such as The World of Coca Cola

However, in the light of the post-COVID 19, we can already see that the future trends will be eco-friendly activities, immersion nature, and a growing interest and demand for outdoors activities.

Parks, kayaking, SUP, horse riding, hiking, cruise in the Outerbanks, etc are expected to be more and more sought after.

# KEY TRAVEL INDUSTRY EVENTS

## Tourism B2C Fairs

Faced with the sanitary crisis, Comexposium postpones the world tourism fair and other French tourism events (the Tourissima, Mahana Lyon, Mondial du Tourisme Paris and Destinations Nature) until 2022.

Comexposium decided to launch instead the 100% Digital Tourism Week instead, taking place from March 15th - 21st:

<https://www.salons-du-tourisme.com/Semaine-du-Tourisme/Semaine-du-Tourisme-du-15-au-21-mars-2021>

The week includes a series of virtual events, mostly conferences. Geoffrey Duval, President of the Visit USA France will present a conference on the USA in general.

SITV Colmar: this excellent B2C travel fair based in Colmar (Eastren France) will take place in person from November 11th-14th, 2021.

## Tourism B2B Fairs

IFTM Top Resa 2020 was cancelled just like ITB and IPW 2020.

IFTM Top Résa is supposed to take place from October 5th-8th, 2021 in Paris.

They also worked on a new format: from January to May, a series of TV programs broadcast on the web (with weekly meetings called 'IFTM Workshops').

# KEY TRAVEL INDUSTRY EVENTS cont...

## Workshops

The Visit USA workshops of November 2020 have been first postponed, then cancelled. Destinations were given either a refund or a credit note for the new 2021 roadshow.

The dates and cities are:

Lyon - Tuesday 23 November 2021 - Venue to be announced

Paris - Thursday 25 November 2020 - Salons France-Amériques

Lille - 30 November 2020 - Hôtel Hermitage Gantois de Lille

Nice - Thursday 2 December 2021 - Hyatt Nice Hotel

The timetable will remain the same, i.e. 5:00 pm / 8:30 pm for the “Workshop” part. Cocktails and prize-giving will take place from 8.30 pm.

Workshops organized by tour-operators and travel agencies networks have not resume yet. But these are great opportunities to train sales agents at low cost. And they are very efficient.



# **Media Landscape**

# COVERAGE OF THE USA AND TRAVEL SOUTH STATES

## Overview of the 2020 and 2021 USA related coverage in France

From a media perspective, in France, the year 2020 was marked by two major topics related to the United States: the presidential elections and the COVID pandemic and its impact in the USA. The media coverage was saturated by these two topics, so much so that the lock-down of the borders left very little room for lighter content or content directly related to tourism itself. 2020 and early 2021 are mostly about actualities. In the same way that news topics, such as COVID and its repercussions, dominate the media space, U.S.-related topics have for nearly 18 months been exclusively news-related.

### COVID: restrictions, opening and closing borders, Trump / Biden management of the crisis

- 2020 was focused on the dramatic situation in the USA:
  - Coronavirus: more than 20,000 deaths in the United States, the highest official death toll – April 2020, [Le Monde](#)
  - United States hit hard by Covid-19 – April 2020, [Le Figaro](#)
  - Coronavirus: 21% of New Yorkers have been infected – April 2020, [Le Monde](#)
  - Covid-19: With more than 22,000 deaths, the United States remains the most bereaved country – April 2020, [France 24](#)
  - Coronavirus: deceptive figures in the United States – June 2020, [Le Huffington Post](#)
  - United States: new cases of Covid-19 multiply in 20 states – June 2020, [Le JDD](#)
  - Coronavirus: America has not yet reached its peak, says WHO – June 2020, [Le Huffington Post](#)
  - United States: the fear of a third wave – October 2020, [France Info](#)

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

- And the closed borders and entry conditions:
  - Coronavirus: Donald Trump bans Europeans from entering the United States – February 2020, [L'Echo Touristique](#)
  - United States: an update on new airline programs – March 2020, [L'Echo Touristique](#)
  - United States: American Airlines has resumed its flights from Paris – June 2020, [TourMag](#)
  - United States: when can we travel there again? – July 2020, [Business Travel](#)
  - United States: soon a lifting of the ban on entry to Europeans? – November 2020, [L'Echo Touristique](#)
  - Entry into the United States and Ireland: PCR tests soon to be mandatory – January 2021, [Déplacements Pros](#)
- Altogether, in the context of the presidential election with, in June, the official announcement that Biden will run for presidency:
  - Coronavirus: Donald Trump announces that he will “suspend” all immigration to the United States – April 2020, [Le Monde](#)
  - Coronavirus: Donald Trump prepares the United States for “two very difficult weeks – April 2020, [Le Monde](#)
  - Coronavirus: Trump assures U.S. is “winning the battle”, possible deconfinement in May – April 2020, [Le Huffington Post](#)
  - Coronavirus: in the United States, the GDP falls by 4.8% at an annual rate – April 2020, [Le Monde](#)
  - United States: Joe Biden will officially be the Democratic presidential candidate – June 2020, [Le Monde](#)
  - United States: with his handling of the health crisis, “Donald Trump is now in trouble among the over-65s” – July 2020, [Le Monde](#)

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

- And with the resurgence of social tensions and mobilization starting with Georges Floyd's death, the Black Lives Matter has a very strong repercussion in the French media and social media:
  - United States: Atlanta police chief resigns after officer kills African-American man during arrest – June 2020, [Le Monde](#)
  - Police reform initiatives multiply in the United States – June 2020, [Le Monde](#)
  - Is the United States at a turning point in the fight against racism? – June 2020, [Sud Ouest](#)
  - United States: a police officer shoots a black man in the back at close range in Wisconsin – August 2020, [France Info](#)
  - USA: “It hurts when I breathe,” says Jacob Blake from his hospital bed – September 2020, [L'Express](#)

## Presidential Elections: the main focus in the media in the second semester

- Campaigning Trump and Biden are determined to win this election:
  - Presidential - USA: Trump barks, Biden runs – July 2020, [Libération](#)
  - United States: a Trump-Biden debate less chaotic than the first – October 2020, [Sud Ouest](#)
  - United States: the labor market is Biden's economic priority – November 2020, [Les Echos](#)
  - United States: Joe Biden's victory in the key state of Arizona officially certified – November 2020, [France Info](#)
  - United States: Trump still does not admit defeat, Republicans encourage him to do so – November 2020, [Sud Ouest](#)
- Some media used the electoral campaign and the candidates' travel schedule to offer long societal reports on the states in which the candidates were visiting:
  - *5 minutes* report on Georgia – U.S. Presidential election: even the very conservative Georgia is gradually moving to the left – October 2020, [France TV Info / France 2](#)

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

**Between the end of the year 2020 and today, the focus of the media, mechanically turns to the President-elect and his first steps at the head of the country**

- The French media, mostly in favor of democrats, are highlighting Biden's positive actions towards good diplomatic relations, social diversity and so on:
  - United States: Joe Biden wants to return to a diplomacy based on “alliances” and “values” – February 2021, [Le Monde](#)
  - The United States wants to return to the UN Human Rights Council – February 2021, [Le Monde](#)
  - The first hundred days of Joe Biden: the great return of the protective state – March 2021, [Le Monde](#)
  - United States: Joe Biden appoints an all-female communications team – November 2021, [La Croix](#)
- With a major focus on the Capitol assault
  - United States: what the Capitol insurgents tell us about Donald Trump's electorate – February 2021, [Le JDD](#)

## **The easing of the restrictions and the borders' reopening perspectives**

- As 2021 is starting, the media discourse evolves and gives way to the prospects of a return to normal life:
  - USA: Towards an exemption from quarantine for fully vaccinated people? – February 2021, [TourMag](#)
  - United States: Disneyland plans to reopen its doors “by the end of April” – March 2021, [Le Figaro](#)
  - In the United States, airlines on track for a relaunch – March 2021, [Quest France](#)
  - New York, open city one year after the start of the Covid-19 pandemic – March 2021, [Le Monde](#)
- Covid: The United States on the fast track to reopening – March 2021, [Le Monde](#)
- However, the latest results remain difficult from a touristic point of view:
  - United States - \$900 billion in aid is a “huge relief” to the tourism sector – December 2020, [Veille Info Tourisme](#)
  - Covid-19: in New Orleans, Louisiana, the tourists have disappeared – February 2021, [RFI](#)

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

**“Travel” sections, in lifestyle media, specialized tourism media or even in daily national press, have been focusing on France and close accessible destinations - mostly European destinations – in the last year or so, so that readers can find usable content.**

- Lately, there has been a return of extremely limited media coverage of tourism in lifestyle and general media because the access to the country was not possible and thus information not relevant to readers. These are generally rankings, inspirational content or, as *Le Monde* did, a new section called “*Voyage immobile*”, allowing readers to travel a little further despite the closing of borders:
  - National parks in the American West: our practical advice to prepare your trip – February 2021, [Le Figaro](#)
  - Internet users elect “the most beautiful beaches in the United States in 2021” – March 2021, [Geo.fr](#)
  - From Yellowstone to the Grand Canyon: top 10 most visited U.S. national parks in 2020 – March 2021, [Le Figaro](#)
  - An immobile journey to Palm Springs - November 2020, [Le Monde](#)
  - An immobile journey in Chicago, the arch-modern – February 2021, [Le Monde](#)
  - An immobile journey to Philadelphia, the soul of the East Coast of the United States - March 2021, [Le Monde](#)
- In trade and professional media, the central topics were the webinars:
  - 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](#)

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

## Journalists analysis

**Jean-Michel de Alberti – Editor-In-Chief *Désirs de Voyages***

*“The United States is one of the recurring topics, the French love to discover the lesser-known states, the cultural angle is important but also the history, the traditions of the South. For the time being, we treat long-haul destinations from the perspective of the dream of discovery, but we have significantly reduced the number of pages outside Europe.”*

**Céline Baussay – Editor-In-Chief *Hôtel & Lodge***

*“Before the crisis, in Hotel & Lodge as in all the other media I work with, I treated the United States like any other destination - except for the fact that it is a huge country with multiple tourist possibilities. Since the crisis, long-haul destinations have received very little coverage, but they still receive some attention, so as to continue to make people dream.”*

**Florian De Paola – Journalist *L’ECHO Touristique***

*“Before the crisis, we treated the US as a classic long-haul destination. I don’t remember a recent report from us on the south of the USA, but I imagine that if we had done it, we would have tried to show the images of the south such as the wide open spaces, deserts or swamps, the plantations, the big cities, the culture (jazz, gastronomy, ...), the “USA” side of the lands (rodeos, ...), the roads, the horses, the country atmosphere, ...”*

# CHANGES IN PUBLICATIONS, DIGITAL AND PRINT, POST-COVID

## What changed due to the pandemic

### ■ What changed in 2020, since the health crisis:

- Increased in-home media consumption across all channels.
- 64% increase in internet research.
- 54% increase in online video.
- Media groups continue to diversify and evolve their linear television platforms to other broadcasting formats.
- 78% of consumers use user generated media as a source of information and news. With social networks, they therefore benefit from a unique space to better inform themselves, interact and express their opinions in a radical way.
- In 2021, actions will play a major role and this applies to both brands and media groups; 41% of marketers are convinced that many online platforms do not offer the right balance between the right to freedom of expression and the need to protect the safety of their users and advertisers.

§ Source: *Étude Kantar - Tendances et prédictions media 2021*

### ■ Varying levels of trust in journalists - they are criticized for:

- Information overload
- The non-hierarchization of information
- The gentrification of the profession (it lacks social diversity and therefore impartiality concerning certain subjects, especially political ones)

§ Source: *Culture-RP.com*

- 57% of journalists feel that the public has less confidence in them.

§ Source: *Cision.fr*

- Confidence in information in France is among the lowest in Europe (23%), 39th out of 40...

§ Source: *Compta-online.com & Reuters Institute*

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

## ■ The French connection to the media:

- The French are now more likely to access news from a smartphone than from a computer. They were 24% to use it in 2014, and 59% in 2020. The trend in news access from the computer has been reversed, with 50% using it in 2014 compared to 41% in 2020.

§ *Source: Compta-online.com & Reuters Institute*

- In 2020, radio newspapers in general have lost listeners, due to the changing habits of the French and to teleworking. In 2021, they could bounce back.
- In digital, newsletters are becoming a journalistic format in their own right.
- With a few exceptions, the decline in print circulation affects all titles. But, as we see with major events - elections, trials, deaths, sports competitions - history needs to be printed. And the regional dailies remain for many real must-read events.
- Digital sales of historical brands are growing (Le Monde, for example, is targeting one million subscribers by 2023). This should be seen as an endorsement for the content of websites, certainly, but also an interest in reading PDFs or electronic versions, the best way to benefit on screen from the advantages of a paper layout.

§ *Source: Observatoire des médias.com #Prédictions2021*

## ■ The main concerns of journalists and advice for communicators

- Find experts available for video interviews and local news.
- Keep sending information other than COVID19 because journalists are aware that the subject will weary their readership, even though they will continue to demand positive local news on the subject.
- See local stories that are NOT about the virus. Only one a day would be refreshing.
- Prefer email as a point of contact and avoid reminders.
- 72% of journalists say that the press release is the content they prefer to receive from media relations professionals and organizations.

§ *Source: Cision.fr*

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

## ■ In 2020-21, in tourism press relations it is considered that :

- It is important to keep picking up the phone, taking news from reporters and giving them news about clients, even though borders are closed.
- We must continue to inform in order to better project ourselves into the future.
- It is necessary to propose new formats such as podcast
- And don't forget the digital communication

§ *Source: Culture-RP.com*

## ■ The paper press in decline, what solutions?

- The many changes in the French media landscape are symptomatic of an era in which digital is taking the ascendancy and in which traditional media are forced to constantly reinvent themselves in order to stay ahead. This year Glamour magazine closed its paper version in 2020 due to insufficient results. The takeover of the Mondadori group by Reworld Media has created a huge upheaval in the various titles, with departures and new assignments for the chief editorial positions. This is the case at Grazia and Biba, which are both renewing their teams and completely rethinking their print and web versions. Grazia went from a weekly to a quarterly format in the course of 2020 with a change in editorial line. Biba has strengthened its digital presence with stronger and more focused newsletters, including the Audacieuses, a brand new newsletter format.

§ *Source: OffreMedia.com*

- A deep redesign is in progress. The law of October 18, 2019 on the modernization of press distribution is intended to ensure the system's durability in a context of significant market evolution towards digital reading. For publishers, the printed format is destined to occupy an increasingly marginal place in their business model. However, it cannot disappear overnight and its distribution remains strategic. It remains to find the right balance in a shrinking market.

§ *Source: Le Nouvel Economiste.fr*

- On the other hand, some new formats are emerging. The most recent example is the magazine version of Le Routard. Despite a complicated context in the travel sector, new players are appearing.

§ *Source: Cmimedia.fr*

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

## French media: audiences and circulations

### ■ Daily press

- In January 2021, among the seven title of the daily press (Le Parisien, La Croix, Le Monde, Le Figaro, L'Equipe, Les Echos, Libération), most of them increased their circulation. On average, titles increased their circulation by 6%.
- For these 7 titles, their websites frequentation increase on almost all of them, except for Le Monde and Le Parisien.
- The use of their applications is still increasing for all media (see charts hereafter).

§ Source : OffreMedia.com

### Circulation and websites traffic of daily press media – January 2021

#### Déclarations Déposées ACPM/OJD Janvier 2021

| DDM                          | DIFFUSION OJD           |                              | FREQUENTATION OJD                  |                             |                                      |                             |
|------------------------------|-------------------------|------------------------------|------------------------------------|-----------------------------|--------------------------------------|-----------------------------|
|                              | Diffusion France Payée* | Evo Diffusion France Payée % | Visites Sites Unifiés Janvier 2021 | Evo vs mois normé 2020 en % | Visites Apples Unifiées Janvier 2021 | Evo vs mois normé 2020 en % |
|                              | 74 172                  | - 16,02%                     | Voir les chiffres de "Le Parisien" |                             |                                      |                             |
|                              | 84 586                  | - 7,49%                      | 6 959 543                          | - 19,42%                    | NC                                   | -                           |
|                              | 134 008                 | + 4,84%                      | NC**                               | -                           | 4 598 801                            | + 3,99%                     |
|                              | 197 627                 | - 11,55%                     | 78 028 112                         | + 8,44%                     | 99 951 605                           | + 17,21%                    |
|                              | 341 638                 | + 6,42%                      | 183 119 758                        | + 14,04%                    | 36 348 382                           | + 8,83%                     |
|                              | 86 655                  | + 21,02%                     | 31 493 944                         | + 16,14%                    | 2 575 601                            | + 20,34%                    |
|                              | 430 242                 | + 23,98%                     | 142 937 389                        | - 4,90%                     | 57 075 897                           | + 11,55%                    |
| Total 7 quotidiens nationaux | 1 348 928               | + 6,16%                      | 442 538 746                        | + 5,72%                     | 200 550 286                          | + 13,69%                    |
|                              | 634 072                 | - 0,78%                      | 165 776 295                        | + 10,58%                    | 15 904 472                           | + 22,29%                    |
|                              | 194 167                 | + 1,80%                      | 97 601 961                         | - 9,31%                     | 13 608 644                           | + 11,57%                    |

Diffusion OJD : Evolution vs janvier 2020

Frequentation OJD : Evolution en pourcentage vs mois normé 2020

\* Moyenne de diffusion

\*\* : les sites de ce support n'ont pu être contrôlés ce mois-ci suite à des problèmes techniques. L'évolution vs mois normé 2020 des 7 quotidiens nationaux a neutralisé ces périmètres.

Mois normé : mois normé 2020 : moyenne des visites mensuelles sur les 12 mois 2020

NC : Non Contrôlé

Source : ACPM / OJD - 02.03.2021



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

## Top 15 daily news websites – January 2021

| Top 15 des sites d'actualités et d'Info généraliste en Janvier 2021 |  |                      |                              |
|---|--|----------------------|------------------------------|
| Rang  | Sites  | Visites Janvier 2021 | Évolution vs mois normé 2020 |
| 1   | franceinfo.fr     | 195 577 254          | + 31%                        |
| 2   | lefigaro.fr       | 183 119 758          | + 14%                        |
| 3   | bfmtv.com         | 180 894 186          | + 29%                        |
| 4   | ouest-france.fr   | 165 776 295          | + 11%                        |
| 5   | lemonde.fr        | 142 937 389          | -5%                          |
| 6   | leparisien.fr     | 97 601 961           | - 9%                         |
| 7   | 20minutes.fr      | 97 425 278           | -16%                         |
| 8   | actu.fr           | 84 244 493           | + 11%                        |
| 9   | ladepeche.fr      | 74 083 070           | + 56%                        |
| 10  | lci.fr           | 53 447 230           | + 7%                         |
| 11  | sudouest.fr     | 53 172 107           | + 11%                        |
| 12  | Boursorama.com  | 48 241 145           | + 2%                         |
| 13  | francebleu.fr   | 45 875 275           | + 16%                        |
| 14  | lepoint.fr      | 45 483 879           | + 23%                        |
| 15  | midilibre.fr    | 42 550 217           | 63%                          |

† Sites unifiés : site fixe, site mobile & AMP  
 ‡ Mois normé : moyenne de l'ensemble des mois sur l'année 2020

Source : ACPM - Janvier 2021

### ■ Television

- The global daily TV viewing time is close to 4 hours in 2020 with 3h58mn. This is 18 minutes more than in 2019. The year peaked at 4:40 in April, while the second confinement reached 4:23 in November before falling back to 4:11 in December.
- In 2020, TV viewing time is increasing for all the targets communicated by Médiamétrie, except for children aged 4-14, for whom it is stable (1h28).
- In February 2021, the TV audience remains stronger than last year with 4h03 overall viewing time vs. 3h50 last year but this time has been decreasing since November 2020 (4h23) according to Mediamat figures from Médiamétrie.

§ Source : *OffreMedia.com*

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

## TV audiences 2020 vs. 2019 and in February 2021

### AUDIENCE TV 2020

PART D'AUDIENCE EN JOUR DE VISION

CIBLE : 4 ANS ET +

| Chaines    | ANNEE 2020<br>(%) | EVOLUTION VS 2019<br>(pts) |
|------------|-------------------|----------------------------|
| TF1        | 19,2              | -0,3                       |
| -2         | 14,1              | 0,2                        |
| -3         | 9,4               | 0,1                        |
| 6          | 9                 | 0,1                        |
| -5         | 3,5               | -0,1                       |
| W9         | 3,0               | -0,1                       |
| arte       | 2,9               | 0,3                        |
| S          | 2,9               | 0,6                        |
| C8         | 2,6               | -0,3                       |
| W9         | 2,6               | 0,1                        |
| AMC        | 2,3               | 0                          |
| TFX        | 1,8               | 0                          |
| Star       | 1,7               | 0                          |
| TFX        | 1,6               | -0,2                       |
| RMC        | 1,5               | 0,2                        |
| C NEWS     | 1,4               | 0,6                        |
| MD         | 1,3               | -0,2                       |
| 13         | 1,3               | -0,1                       |
| chaîne TF1 | 1,3               | -0,1                       |
| GAMMA      | 1,2               | -0,1                       |
| +4         | 1,2               | -0,4                       |
| LCI        | 1,2               | 0,2                        |
| STAR       | 1,1               | -0,1                       |
| 13         | 1,1               | 0                          |
| franceinfo | 0,7               | 0,2                        |

Source données : Médiamat - Médiamétrie  
Traitement : Offremedia

### AUDIENCE TV FEVRIER 2021

PART D'AUDIENCE EN JOUR DE VISION

| Chaines    | FEVRIER 2021<br>(%) | FEVRIER 2021 vs<br>JANVIER 2021<br>(pts) | FEVRIER 2021 vs<br>FEVRIER 2020<br>(pts) |
|------------|---------------------|--|--|
| TF1        | 19,6                | -0,3                                     | 0,5                                      |
| -2         | 14,6                | 0,4                                      | 0,4                                      |
| 6          | 9,6                 | 0,7                                      | 0,8                                      |
| -3         | 9,1                 | -0,1                                     | -0,2                                     |
| -5         | 3,3                 | -0,3                                     | -0,5                                     |
| arte       | 3,1                 | -0,1                                     | 0,4                                      |
| W9         | 2,9                 | -0,1                                     | 0  |
| C8         | 2,7                 | 0  | -0,1                                     |
| W9         | 2,7                 | 0,1                                      | 0  |
| S          | 2,7                 | -0,5                                     | 0,5                                      |
| RMC        | 2,2                 | 0,2                                      | 0  |
| C NEWS     | 1,8                 | -0,1                                     | 1  |
| chaîne TF1 | 1,8                 | 0,2                                      | 0,2                                      |
| TFX        | 1,6                 | -0,1                                     | -0,1                                     |
| TFX        | 1,5                 | 0  | -0,3                                     |
| Star       | 1,5                 | 0  | -0,3                                     |
| RMC        | 1,5                 | 0,1                                      | 0  |
| GAMMA      | 1,2                 | 0  | -0,3                                     |
| 13         | 1,2                 | 0,1                                      | 0  |
| MD         | 1,1                 | -0,1                                     | -0,1                                     |
| 13         | 1,1                 | 0,1                                      | 0  |
| +4         | 1,0                 | 0,1                                      | -0,4                                     |
| STAR       | 1,0                 | -0,1                                     | -0,1                                     |
| 13         | 1,0                 | -0,3                                     | 0  |
| franceinfo | 0,7                 | -0,1                                     | 0,2                                      |

Source données : Médiamat - Médiamétrie  
Traitement : Offremedia

### ■ Regional Press Audience 2020

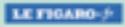
- Ouest-France, Le Parisien and actu.fr topped the list of most visited regional news and generalist information sites in November 2020 according to the ACPM.

§ Source : OffreMedia.com

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

## Regional media websites ranking in November 2020 vs. November 2019

Top 15 des sites d'actualités et d'Info généraliste en Janvier 2021 

| Rang | Sites  | Visites Janvier 2021 | Évolution vs mois normé 2020 |
|------|--|----------------------|------------------------------|
| 1    | franceinfo.fr     | 195 577 254          | + 31%                        |
| 2    | lefigaro.fr       | 183 119 758          | + 14%                        |
| 3    | bfmtv.com         | 180 894 186          | + 29%                        |
| 4    | ouest-france.fr   | 165 776 295          | + 11%                        |
| 5    | lemonde.fr        | 142 937 389          | -5%                          |
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| 7    | 20minutes.fr      | 97 425 278           | -16%                         |
| 8    | actu.fr          | 84 244 493           | + 11%                        |
| 9    | ladepeche.fr    | 74 083 070           | + 56%                        |
| 10   | lci.fr          | 53 447 230           | + 7%                         |
| 11   | sudouest.fr     | 53 172 107           | + 11%                        |
| 12   | Boursorama.com  | 48 241 145           | + 2%                         |
| 13   | francebleu.fr   | 45 875 275           | + 16%                        |
| 14   | lepoint.fr      | 45 483 879           | + 23%                        |
| 15   | midilibre.fr    | 42 560 217           | 63%                          |

► Sites unifiés : site fixe, site mobile & AMP

► Mois normé : moyenne de l'ensemble des mois sur l'année 2020

Source : ACPM - Janvier 2021

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

## Media editorial perspectives

Jean-Michel de Alberti – Editor-In-Chief *Désirs de Voyages*

*“We expect to resume during the summer or at the beginning of the school year, not before.”*

Céline Baussay – Editor-In-Chief *Hôtel & Lodge*

*“As soon as the borders reopen, we will probably return to a similar rhythm as before. The desire to travel far away still exists.”*

Florian De Paola – Journalist *L’Echo Touristique*

*“Our ambition is still to report on long-haul destinations when we take over. As soon as it is possible. We hope for the summer. For the USA, I’m afraid it will take a bit longer... we can write as soon as the destination is reopened. For the moment, the feasibility of reports is complicated, but we will always give space to long-haul in our Destinations pages. On the other hand, there will be many more pages on nearby destinations (France, Europe) than before the crisis. In the short term, we will continue to cover the daily news of our sector. In the long term, we want to talk much more about France, without forgetting our usual interlocutors.”*

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

The latest trends that emerge in various studies about travel at the end of 2020 led us to some opportunities to be developed in 2021. All these latest trends in tourism are valid from a trade, consumer and media relations perspective.

## Trends in tourism for 2021

### ■ Surf the tourism trends to propose up-to-date content

- All end-of-year studies are on the same wavelength. Many big trends are emerging for 2021. Offering content in line with the major tourism trends for 2021 is a way to infiltrate topics that readers will want to read, that fit their needs. It is likely that media will be aligned and seek to meet the expectations expressed by the French people in the evolution of their way of traveling.

### ■ Top tourism angles identified for 2021:

- Health safety as a priority: travelers will now pay attention to the proposals of airlines, accommodations, restaurants, for an impeccable sanitary hygiene. It will be a criterion for decision. It will be judicious to communicate on any initiative in this sense, particularly with the professional press.
- Immersion in nature: several studies show that French tourists are less and less attracted to urban destinations. The call of nature is becoming more and more pressing, especially since the world has lived in isolation for many months. Wide open spaces and fresh air are now part of the new travel desires.
- Nomadic work: the pandemic has accelerated the growth of remote working. In this context, it is to be expected that journalists will be looking for long-term rentals for “workcation” articles.
- Responsible tourism: travel less but better and longer, multiplication of articles proposing eco-responsible stays. It is possible that journalists will ask more and more for responsible propositions to add to their features.

§ Sources: *L’Echo Touristique*, *Tour Hebdo*, *Tourismexpress*, *etourisme.info*.

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

## New is always working

- Journalists are always on the lookout for novelties. Whether it's about accommodations, tours or restaurants. Whether they can test them or not, new products are always an attraction for the media in the race for novelty. It is therefore necessary to share openings, renovations, new concepts on a regular basis. This allows us to feed different types of media (trade, specialized tourism, lifestyle...), and it can also be a trigger or a pretext for individual press trips.

## Work on your pillars to infiltrate specialized media

- Gastronomy, great outdoors, culture, history and small towns and road-trips are a perfect fit. On all these topics, it will be necessary to gather information and keep getting in touch with specialized media to value these pillars.
- Valuing your pillars is the best way to pass your key messages and transcribe your DNA. This is your added value, and as a matter of fact, the southern states offer an extremely diverse culture which allow us to target a large variety of media: Chefs portraits, bike tours, hikes in national parks, cooking recipes, human rights, Cajun music, native wildlife and many others, are as many subjects that we can exploit with media specialized in specific sectors. This allows us to reach a qualified audience, especially interested in the angle and the story developed.

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

## What trends journalists identified

**Jean-Michel de Alberti – Editor-In-Chief *Désirs de Voyages***

*“The American dream is still a popular destination. We can feel the readers’ impatience to travel again. What is rising in their needs is a greater demand on hygiene, services etc. Travelers in France expect the tourism sector to make things easier, basically future tourists want to travel again but expect the rules to be clear (for the plane, visas etc) because we are facing a rather confusing period. For example, in the United States, the rules change from one state to another, or even from one city to another: it will be necessary to communicate well on what is possible or not.”*

**Florian De Paola – Journalist *L’Echo Touristique***

*“We think that tourism will be very local, at least for the year 2021, even 2022. The French will rediscover their country, or neighboring countries, and will be able to enjoy many of the experiences they used to have on the other side of the world. This is why we will try to give more space to local tourism than in the past. Nevertheless, once the pandemic situation is better controlled on a global scale and travel is possible again, I think that the usual motivations of tourists (exoticism, sun in winter, cultural discovery, sports, meetings with local populations, ...) will allow the return of long-haul travel “as before”. On the condition that leisure air fares are not prohibitive because of the drop in business travel.”*

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

## The emergence of the podcast

- The so-called “native” podcast now attracts more than 4.8 million listeners per month - an increase of 48% compared to 2019 (according to Médiamétrie).
- The format, which is free most of the time, works mostly with urban youth, but is progressing with all social categories and age groups.
- At Binge Audio, the leading production company in France, there are nearly 500,000 listenings per month, more than 80% of which are by people under 35.
- While they are seduced by its format, which is compatible with the bustle of modern life-a telephone and a pair of headphones are all that is needed for the experience-the public is in favor of original podcasts that offer a new way of handling information, for which testimony and empathy are the keys.
- This emancipation is nourished by the absence of constraints, “specific to emerging media”.
- An experience that has the challenge of being immersive.  
§ *Source: La-Croix.com*
- Even traditionnal media now highlight travel podcast as cultural and entertainment contents.  
§ *Le Monde*
- Nearly 15% of French people listen to the radio every day on a digital medium according to Médiamétrie (i.e. 7.8M people in France).  
§ *Source: OffreMedia.com*

# FUTURE OF PRESS TRIPS

## What journalists are wishing for

Journalists are raising two concerns regarding press trips: sanitary measures and the will to be alone to be able to have a tailor-made journey and thus perfectly adapted content.

## What would be best to capitalize on journalists press trips

- During the press trips, journalists may want to see specific things, but they might be willing to be guided. Thus, the press trips are the perfect occasion to highlight what needs to be. This is the opportunity to showcase novelties, to offer to discover some hidden gems that only locals know about.
- What is interesting to develop for 2021 press trips:
  - Cross state press trips to make journalists discover several states in a single trip
  - Individual trips to have features that are more researched and documented
  - Eco-tours to highlight what sustainable proposition the Southern states have to offer
  - Thematic tours to value one of Travel South pillars

## **FUTURE OF PRESS TRIPS** cont...

### **What journalists imagine for the press trips after COVID**

**Jean-Michel de Alberti – Editor-In-Chief *Désirs de Voyages***

*“I would like to do press trips as soon as possible, I have participated in many press trips, in groups or individually. The health crisis didn’t change my approach on the press trips, except of course, that the organizers of press trips must respect a certain number of rules.”*

**Céline Baussay – Editor-In-Chief *Hôtel & Lodge***

*“For my part, the approach to press trips has not changed. I have continued to do a few and will do more as soon as it is possible and simple, without any particular precautions; in short, status quo!”*

**Florian De Paola – Journalist *L’Echo Touristique***

*“My approach to press travel is no different than before the crisis. I just think that we will have to respect certain rules (social distancing, wearing masks, ...) in many destinations and for some time, and I don’t see any problem to comply with these rules in order to travel. On the other hand, I think that we would refuse a trip to a destination where there is an epidemic peak.”*

### **Key Media Events**

- **Les rencontres de la presse de l’ADONET : 01 june 2021 (not confirmed yet)**
- **IMM France 2021 : 22 june 2021**



# **Social Media**

# SOCIAL MEDIA

The year 2020 has turned our social media habits upside down. The first wave of Covid-19 means 3.9 billion people confined to their homes and an exponential increase in the use of social networks.

## Key figures:

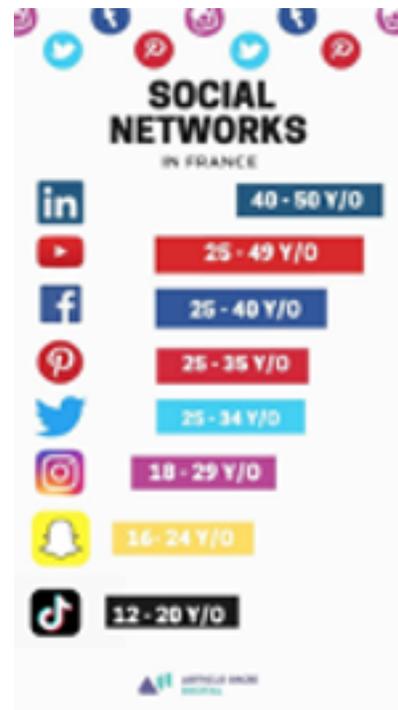


Facebook persists as a major Social media :

- 1 out of 2 French has an account.
- Instagram is now trending compared to Snapchat, the gap between the two social networks will remain the same or will widen in favour of Instagram.

Source: Mediametrie, Facebook, Instagram 2020

Penetration rate of social networks by age in France in 2020



## **SOCIAL MEDIA** cont...

- Unsurprisingly, in the evolution of social networks, we always find that the young audience is the largest and most active.
- To summarize, social network figures show that social network users are 90.4% of Millennials (or Generation Y), 77.5% of Generation X and 48.2% of Baby Boomers (E-marketer 2019).
- The Millennials therefore remain the generation with the highest use of social networks, as well as the largest access to smartphones. They are at the forefront of usage, they were the first to use Instagram, and today TikTok.
- Generation X will be more likely to use tablets.
- Finally, Baby Boomers are gradually catching up with technology and are becoming more and more familiar with social media notably Facebook, Youtube and LinkedIn.

# 2021 SOCIAL MEDIA TRENDS

## Responsible commitment and humanization of networks

The first confinement saw the trend of “salon militancy” accelerate. Internet users are becoming more and more committed (for the planet, against racism...) through petitions, publications on the networks, dedicated hashtags. To follow this trend, social networks are also finding ways to humanise digital interactions: Facebook and its emoji “care” for solidarity; lives on Twitch and Instagram for a more intimate connection and audio formats to communicate with more nuances.

## Nostalgia marketing and back to basics

2021 marks the return of the “good old days”, happier memories to make people forget the current crisis. This reassuring past is accompanied by an over-valuation of the simplicity of everyday life: on TikTok and Instagram, we notice a clear increase in the “Gardening” communities and the “cottagecore” movement. Internet users are increasingly turning to local communities via digital (Whatsapp groups, etc...); they are escaping and seeking comfort in simplified virtual realities (Animal Crossing...); they follow influencers who advocate a simple lifestyle...

## Social gaming

Video game platforms such as Twitch have seen their audiences skyrocket. More and more brands have chosen to support the world of gaming by partnering with streamers or Youtubers. Some brands are also using video games as a method of communication by associating themselves with in-game events to promote their content to the gaming community.

### Social Media: the practices of 50 French travel and lifestyle influencers during 2020

In summary, what should we remember?

- 60% of influencers surveyed continued to work with brands in 2020.
- In detail, 60% inspired internet users from their sofa via paid partnerships.
- 56% were able to travel in 2020 to mostly French and European destinations.
- Instagram remains the preferred platform for tourism and lifestyle influencers (90%).
- In parallel, new social networks (TikTok, Twitch) and new formats (podcasts) have become popular during the confinement.
- 100% of influencers surveyed declare that they are ready to change their habits to consume and promote responsible tourism.

## 2021 SOCIAL MEDIA TRENDS cont...

### Influence marketing and social media: impacted by the health crisis?

A drop in cooperation with brands

In its new report, the Socialbakers platform has highlighted the effects of the current pandemic on the influencer industry with a 41% drop in influencing operations compared to last year. Indeed, it appears that the sector has been particularly affected by the crisis and tighter budgets.

These effects are visible through several factors:

- the decrease in sponsored content on the accounts of influencers associated with brands
- the shift of sponsored content towards small and micro-influencers (reduced audience)
- and therefore, increased visibility for small brands that can more easily move towards these niche strategies

On Instagram, the reference network for influencers, this trend is confirmed. With #ad, used by influencers in their sponsored content, we can have visibility on their evolution.

Source: Socialbakers State of influencer marketing study

At the same time as the use of influence marketing has decreased (impossibility to travel, difficulty sending parcels, events...), French brands and Internet users have turned to social networks and online campaigns.

During containment, social networks saw their traffic increase considerably (notably Whatsapp with a rise of more than 46%).

### Trends: influence marketing: niche and nano influencers

In recent years, brands in France have turned to micro-influencers, i.e. people with accounts on social networks with between 1,000 and 100,000 followers.

Although they do not have as many fans as big stars, who can sometimes exceed one million subscribers, this type of influencer generally enjoys great credibility and a very committed audience.