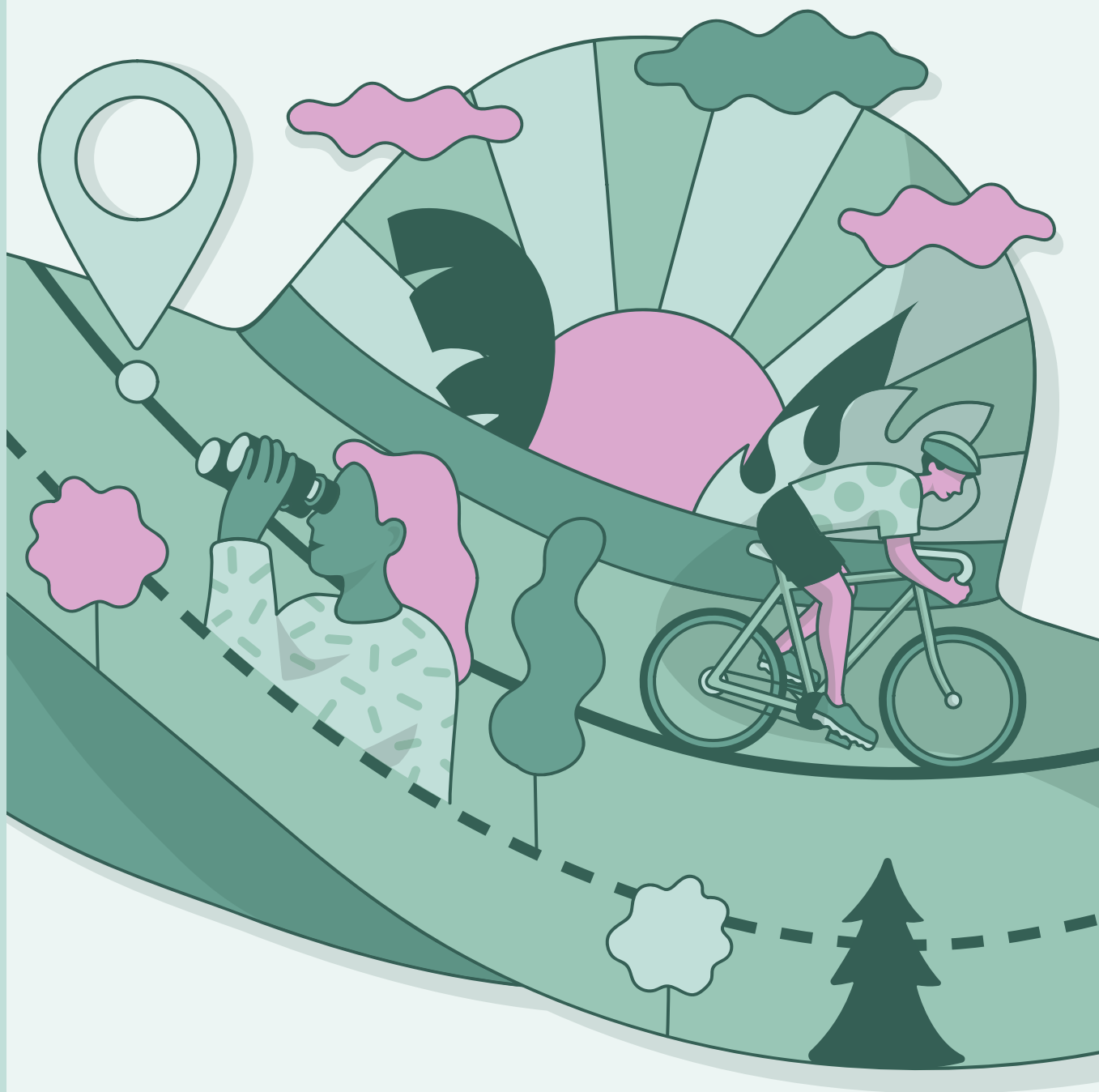


TREND BOOK #8

PARIS&CO



THE MAJOR TRENDS IN TOURISM, NOW AND IN THE FUTURE

ATOUT
FRANCE
Agence de développement
touristique de la France

PARIS

Métropole
du Grand Paris

TREND BOOK

TOURISM



THANK YOU

To Atout France for their direct support for the creation of this Trend Book.

To all of the contributors for writing this eighth edition of the trend book and to all the teams from Atout France for their precious advice.





Editorial

After a 7th edition under the banner of a review, there is a new dynamic behind this 8th edition of the trend book: a new team, new contributors with equally as perceptive views, and a new graphic style.

The trend book for innovation in tourism is having a makeover, whilst remaining true to its original aim. It is still the fruit of the analysis of the applications from start-ups for Paris&Co's incubation programme, but also more forward looking and specific monitoring work, in close coordination with the teams of Atout France, in France and abroad.

To overcome the challenges of our time, we need to change collectively, and the trends that you will discover reflect these developments. They are environmentally friendly, responsible and socially committed. Regenerative tourism, sports tourism or even micro-adventures, better mastering the impacts and in particular the waste, the future of innovation in tourism is all about the sustainable transition. But do we really have a choice? Are not many of these trends already becoming a reality? It is notable that it has become impossible to continue to travel without thinking about respecting the environment and the communities at the host destination.

As confirmation that there will be no ecological transition without respect for the social aspect, whether inside companies or in relations with others, other trends are appearing, creating new opportunities to enrich the experiences on offer and to meet the challenges of our societies.

In this new edition, you will discover new ideas and solutions that make it possible to transform the players in the sector and their businesses, to create new more sustainable solutions, and thereby to get innovation to work towards making tourism more responsible.

We would particularly like to offer thanks for the collective work of Anne Gousset, Emeline Guedes, Anna Veyrenc, Elise Akiki, Estelle Musellec and Max Bouteille from Paris&Co, and Bénédicte Mainbourg, Fatih Olcay and Jean-André Doeuvre from Atout France for this edition.

Our most sincere thanks also go to all the writers for their contributions and to Scarlett Ouziel for her illustrations, which bring a breath of fresh air to this 8th edition of the trend book.

We hope you enjoy your read!

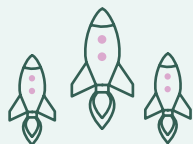
Anne Gousset,
Deputy Director General, Paris&Co

Caroline Leboucher,
CEO, Atout France

PARIS&CO

Paris&Co is an association acting for the general public interest that is driven by 5 values: goodwill, working together, a taste for entrepreneurship, responsibility and customer satisfaction. The association boosts projects with an impact, it identifies sustainable solutions and applies them to economic, ecological and social transitions through a range of systems. It also guides urban experimentation, detects and boosts social innovators, start-ups and stages major events.

Key figures :



500

startups and projects
supported in 2022



+ 100

public and private partners in
2022



+ 2000

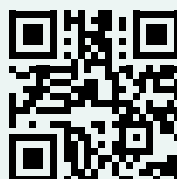
alumni

Our vision

Our society is faced with major transformation challenges that no stakeholder can overcome alone. Public and private players are under an obligation to rethink how they act, and their business and social models. Paris&Co works at the heart of the ecosystems with a disinterested approach to apply innovation to bring out the necessary solutions for a fairer, more resilient and happier society. Paris&Co believes that individuals and small structures have a role to play alongside big organisations to make these transformations.

Our CSR commitments

Paris&Co works for the general public interest alongside entrepreneurs, companies and institutions to make innovation a tool to transform society; for many years we have had a proactive CSR policy. Our aim is to set an example with the best CSR standards, to legitimately provide our clients a transversal offering that is in-line with these commitments.



PARIS&CO

Our Tourism programme

For more than 10 years, Paris&Co has federated players in the tourism ecosystem that are committed to transforming the sector by encouraging accessibility for all, by contributing to creating a more active and responsible society, and by guiding the ecological transition of the tourist industry. We work to this end through 3 major activities: as a start-up incubator, providing a trial area with Atout France, and observing trends.

We divide our role over 3 areas of innovation that contribute to the continuous improvement of the tourism value chain:

- Participating in the sustainable transformation of the sector and the continuous improvement of the visitor experience;
- Encouraging accessibility for all and fighting against social exclusion;
- Guiding the development of innovative solutions for visitors and professionals working in the sector.

Innovation challenges

- Visitor experience & hosting visitors
- Tourist mobility
- Hotels & Catering
- Discovering heritage
- Travel for all

Atout France, the Agency for the development of tourism in France, contributes to enhancing the appeal and the competitiveness of France as a destination, and is working to make France a global benchmark in terms of sustainable tourism by 2030.

The Agency therefore works with professionals in the French tourist industry to build an ever more high-quality, sustainable and innovative offering so that travellers from around the whole world can enjoy unforgettable stays in France.

It assists regions with new tourist projects or transforming and renovating sites. The Agency also oversees several systems to ensure the quality of the services provided, including ranking accommodation. It provides professionals with observation tools to allow them to foresee trends and to adapt their development strategy. Finally, Atout France assists them in their international development through communication actions offered by its network of 29 offices around the world.

ATOUT FRANCE, TOURISM ACTIVATOR

EVALUATE:

use data to enlighten,
steer, target, anticipate
and measure performance

TRANSFORM:

accompany the tourism
economy towards more
competitive, sustainable,
qualitative, innovative and
inclusive models

RELAUNCH:

[Re]Develop the appeal
of Destination France,
in particular through
the major international
sporting events to be held
in France in 2023 and 2024

PROMOTING THE EMERGENCE OF FRENCH TRAVEL TECH

Atout France works with its partners to help with the growth of tens of start-ups and innovative companies every year through a range of initiatives: promotion at events, networking with its members, experiments in the field and providing assessments to support them internationally.

This assistance will increase, until the end of 2024, with the implementation of field tests for innovative solutions in more than fifty areas all over France.



Innovation space at Rendez-vous en France

KEY FIGURES

- 435** communication campaigns
- 28** online events (Facebook Live, tasting, conferences, etc.)
- 2 323** professionals welcomed in France
- 268** professional events (canvassing, workshops)
- 124** professional training courses with **247** online
- 904** influencers and journalists welcomed in France
- 130** press and conferences events including **11** online
- 229** engineering projects assisted
- 99** webinars and training courses for professionals in France
- 40** start-ups in the network

Find out more: atout-france.fr or france.fr



Regenerative tourism: a necessity for environmentally friendly travel



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TREND

Regenerative tourism : a necessity for environmentally friendly travel

◆

Regeneration, noun:
**"the regrowth by an animal or plant of an organ, tissue,
or part that has been lost or destroyed"**

Collins Dictionary

The term 'regeneration' comes from the Latin regeneratio, which means "returning to life". Regeneration is then a synonym for renewal, a positive process that improves a dysfunctional situation.

The term regenerative tourism has appeared in the vocabulary of professionals in the tourist industry as society has changed: there is no longer a question of totally carbon-neutral tourism, but rather going beyond this neutrality to carry out positive actions for the planet, rebuilding the ecosystem, so that travelling has a positive environmental impact. This regenerative tourism must now address all travellers, whether they are partaking in local tourism or travelling further afield. New offerings are blooming in France and also abroad, ranging from offering environmentally friendly tourism to managing flows in tourist destinations.



Regenerative tourism, a buzzword or a revolution for the sector?

Guillaume Cromer ♦ Director - ID-TOURISME



Over the last 30 years, tourism has been embellished with many terms so that the sector or certain markets align with the challenges of sustainable development. After fair, community, responsible and sustainable tourism, here is a new addition to the range: "regenerative". Beyond adding a new buzzword to the world of environmentally friendly tourism, what is really hidden behind this term? A revolution in tourism and travelling? A wonderful utopia? Or simply marketing to make ways of travelling more "sexy"? We offer you an overview.

A review of 30 years of transition: from fair to regenerative tourism

Although we have been talking a great deal about sustainability in tourism in recent years, the challenges of sustainable development

have been applied to tourism for some time.

It was back in 1988 that UNWTO, the World Tourism Organization, officially defined sustainable tourism as "Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities".

Before that, we had already heard talk of other forms of responsible tourism such as ecotourism (in the 80s) or community tourism (in the 70s) that emphasised the specific issues of certain aspects, such as preserving nature or involving local people.

After the Rio Earth Summit in 1992, we began to see new initiatives and undertakings in France, particularly in the tour operating sector. The Ethical Charter for Travellers, the founding document of the association ATR – Agir pour un Tourisme Responsable [Acting for Responsible Tourism] – was created in 1995 whilst travelling in Tanzania with the tour operator Atalante.

Next on the scene was the association ATES – Association du Tourisme Equitable et Solidaire [Association for Fair and Responsible Tourism] – then ATD – Acteurs du Tourisme Durable [Players in Sustainable Tourism] – that aims to bring together all of the business lines and participants under an umbrella term.

Since then all of the sector and all the business lines have taken steps to integrate the issues of sustainable development into the process, governance and offerings of tourism.

Regenerative tourism: what are the promises?

Recently, there has been some talk of regenerative tourism. "Sustainable tourism" was not sufficiently pretty or promotional. This term is already outdated and overused. There was a need to think bigger and harder: regeneration, to say that tourism needed to *do more good than bad*.

But what is really hiding behind the term 'regenerative'? This word does not come from the world of tourism. You have to look to the so-called regenerative economy, which can be understood as a business model that aims to fight against using up, deteriorating and depleting resources. Initially, we think of natural resources, but we can also include people or the economy as part of the economic fabric to be rebuilt in an area.

The regenerative economy also echoes the works of the Ellen MacArthur Foundation on the circular economy or Isabelle Delannoy on the symbiotic economy with the sub-heading: *Regenerating the planet, the economy and society*.

In real terms, the regenerative economy is therefore an economy based on renewing the resources it requires or even more than that. Therefore, regenerative tourism is a form of tourism that makes it possible to renew the resources it requires, be it the environment (climate impact, biodiversity, air quality, etc.), society (local heritage and culture, local populations, quality of jobs, inclusion) and the local economy (balancing the local

benefits, etc.). It is a wonderful notion, but is it achievable?

Utopia or reality?

Yes, the idea of regenerative tourism is highly promising. But, it needs to be based on objective markers. It is an almost utopian vision that makes good sense and that aims to transform the tourism sector profoundly, to make it compatible with the planet's limits.

Nevertheless, some players (including myself) are afraid that this regenerative tourism is a means of rehabilitating tourism and travelling (particularly over long distances) without seriously attacking the foundations of *capitalist* tourism, which have been built over the last 30 years. Indeed, we can refer to the big debates about political ecology and its impact on tourism. Should we not call into question the growth in the sector and the accumulation of journeys, selfies and CO2 emissions in modern tourism?

Therefore, companies in the sector need to completely rethink their business model or even sometimes pull out of the tourist industry. As long as a company offering boat trips on the Seine defines its offering solely around tourist cruises, its room for manoeuvre will be very limited in terms of regenerative transformation. This type of company will be obliged to revise its business around another use for its boats, be it transporting residents or for a totally different optic (generating power, analysing water quality, etc.).

The role of data and monitoring in measuring the impact of regeneration

The text drafted by the *Convention des Entreprises pour le Climat* [Convention of Companies for the Climate] states: *"Regenerating means going beyond reducing the negative impacts or neutralising them to commit to having a net positive impact for the ecosystem and society."*

For example, the American company Guayaki, which sells yerba mate-based energy drinks, has implemented a business model of reforestation of the Atlantic forest canopy, regenerating biodiversity and trapping a far greater quantity of carbon than the company's emissions, whilst offering many social benefits to local populations.

To ensure the achievement of these kind of objectives, you need to track, supervise and monitor the targets that you set. You cannot regenerate without data and a dashboard!

Examples and counterexamples

Recently, Pierre & Vacances Center Parcs has started to take an interest in the concept of regeneration. This is the question about the group that was asked in a report by the CEC: *"How can Pierre et Vacances Center Parcs contribute to the ecological transition of the areas where its sites are installed, whilst offering*

its customers low-carbon stays to reconnect with nature and the natural and cultural wealth, and the life of each area?" There is now an intention to measure the development of the quality of the biodiversity from the start of the works up to the closure / restoration of the site for new Center Parcs projects. Developing this type of regenerative tourism requires expertise.

Alongside this, we can also see travel agents or other organisations specialised in regenerative tourism. We may query the pertinence and even the reality of the targeted regeneration. Websites boast of wonderful commitments to preserve the local environment and to involve local populations, but with no figures. ATES - the French association for fair and responsible tourism - has been promoting tourism with a sense of contact with local people whilst preserving the environment for 30 years, and they have never called it regenerative tourism. Care therefore needs to be taken to avoid trying to reinvent the wheel just for marketing purposes!



Crédit photo : image générée par Midjourney

Discovering our regions in a more authentic and responsible way



Pier Tognazzini ♦ Founder & CEO - MOOVERT



Looking online, It is hard to find tourist experiences to disconnect and return to a more authentic way of travelling... Getting away from it all, living with local people, taking an environmentally friendly perspective are popular new practices, particularly through the prism of regenerative tourism.

Where can we start? With a few figures and an observation, for example.

The observation: France is the world's leading destination in terms of number of visitors*

The figures:

- 50% of people asked said they wanted to favour accommodation that was better for the environment, but 87% of them do not know

where to find it**

- 42% of the 29,000 international travellers asked struggled to find less popular destinations in France***

* Atout France (May 2023)

** Study of 5,555 people carried out by And Tourisme (March 2022)

*** Wakefield Research for Booking and Expedia

Going beyond these figures, we can be more direct: how many times, at the end of the week, have you said to yourself: "I would like to spend a weekend in the great outdoors, eat well, do some sport, find out about local people and the authentic origins of the area I'm visiting"?

To take an example: what would you think of going hunting for truffles in Occitanie with a guide and their dog? And then, you could continue the experience with a cooking lesson based on truffles and eat the dishes you prepared. The host would then invite you to help them to create their products made from truffles and to sleep in their environmentally friendly gîte with a spot by the fireplace in winter or by the swimming pool with a seaweed filter in the summer. Does that sound tempting?

There are many, increasingly diverse forms of local, environmentally friendly tourism that are focussed on your well-being and protecting nature.

Once we have talked about local tourism, another issue arises: what about our foreign visitors? Particularly, those that have already

travelled in France?

They also want to get off the beaten track and experience this new more authentic kind of tourism in France with "slow tourism".

Taking your time, enjoying yourself, looking for a sense of achievement whilst discovering new cultures, new real and authentic adventures, close to home or the place where you drop your bags... Once again, there is a wide range of solutions!

Imagine someone from New York, Tokyo or even Berlin that comes to stay with a winemaker in Burgundy. A winemaker who gets a new understanding of what nature offers them every day and who is ready, in exchange, to take particular care of the environment and their vines as part of their accommodation offering. The programme includes: a winemaking activity, learning about local Burgundy cuisine, a bike ride in the vines, an environmentally friendly spa to relax, and dinner with the host to share a genuine moment.

MooVert was created to meet all these desires.

We often find it hard to talk about environmentally friendly tourism when speaking to a foreign audience, particularly because long distance travel is often called into question: no means of soft mobility, travelling by train... travelling by plane is often preferred...

Crédit photo : Moovert



Indeed, international travellers cause more pollution and, de facto, have a larger carbon footprint. Having acknowledged this, what can we do? The idea is not to set it aside, but to adapt their time in France to make it as environmentally friendly as possible, and to encourage them to look to local activities after their journey by plane.

We should remember the observation at the start of this article: France is the world's leading destination in terms of the number of visitors!

It is therefore important to address the subject of regenerative tourism from all angles to avoid making it exclusive to French travellers and to offer foreign visitors the possibility of having an authentic and environmentally friendly holiday in France. There are solutions to achieve this: MooVert is a key solution. With its 11 different languages, MooVert has decided not to target exclusively the general public (B2C) but also tourist sector professionals (B2B: travel agents, tour operators, private concierge services, etc.).

MooVert and other players from the private sector also have a role to play in guiding service providers in the ecological and digital transition.

Together, we have a mission to promote everything that has already been done in France, and to encourage and assist those who want things to change.

MooVert has created an algorithm to audit the potential for environmental protection, and promoting areas and French know-how. An assistance programme can then be implemented.

Then, tourism institutions (tourist offices, regional tourist boards, etc.) and Atout France have a role to play to in successfully marketing a more authentic vision of travelling.

It is important to work hand-in-hand with the institutions who work to promote our regions every day. All the more so as they have real expertise in local produce! A tab on MooVert therefore allows the regions of France to speak for themselves.

Atout France and its offices around the world promote and will always promote the invaluable and unmovable heritage that represents France.

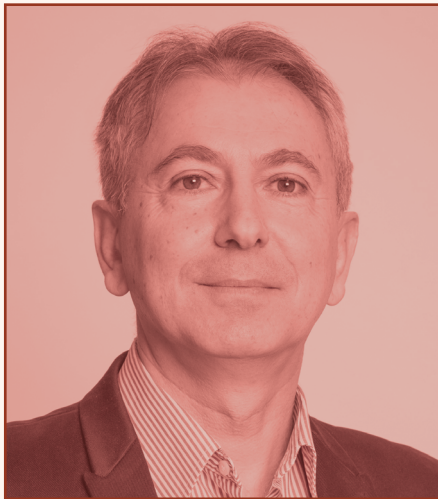
MooVert has great ambitions to become the ambassador for France's regenerative tourism offering around the world, and to offer a more authentic way to discover our regions.



Crédit photo : Moovert

The new world is late to emerge

Jean André Dœuvre ♦ Head of Strategy and Outlook Projects - ATOUT FRANCE



Tourism is by its very nature interdependent with its natural, economic and social environment. In this way, it follows its history for the better (prosperity...) and for the worse (natural disasters, terrorism, financial crises...).

From inevitable growth to existential doubts

Since the Second World War, international tourism has grown at an unprecedented rate, going from a few tens of millions of international tourists in the fifties to 1.5 billion in 2019, before the pandemic. The extraordinary growth in tourism was made up of three major phases:

1. Gradual take-off:

In the 1950s and '60s, tourism was centred around a small number of visitors from a small number of countries going to a small number

of countries - essentially, people travelling between western countries;

2. The increase in the field of opportunities:

In the 1970s, with the arrival of the Boeing 747, the famous "Jumbo Jet", and the accessibility of low-cost, long haul flights, the visitors were still from a small number of countries, but they now went to a large number of countries;

3. The global village:

Finally, at the start of the 2000s, the growth of the middle class in large emerging nations gave rise to tourism from a large number of countries to a large number of countries, globalisation had done its job.

Of course, several crises, generally localised in a country or a geographic area, reversed this upwards trend, sometimes impacting all of our economies (the 2008 Subprime mortgage crisis for example). But the strength of tourism and the global aspiration was stronger than anything else, and the advance quickly resumed after each major event, such as terrorism in Egypt, in Europe, the economic and financial crises in Asia, and many others.

With the Covid-19 crisis, for the first time, tourism was hit in one of its most basic aspects, freedom of movement, and at a global level above all! Before the start of the health crisis, we spoke of overtourism, the environment was "mishandled" by human activity... and in the wake of this unprecedented pause in our collective history, we saw the most radical predictions expounded. The world will never be the same! Tourism was said to be the sector

that would take the longest to recover from this extraordinary shutdown (if it would).

However, the desires to travel, to meet people and for cultural enrichment are not so easy to quash. As early as 2020, the firm Roland Berger published a study about "Tourism in the aftermath: is the crisis an accelerator of the pre-Covid trends?", which concluded that there was an increased environmental awareness and the impact of the crisis in boosting changes that had begun before the pandemic. Also, in Le Monde newspaper in 2021, there was an article entitled "After Covid, tourism will take off again. It is important that this recovery is not made on the same foundations".

A new cycle in human history was to emerge, better for nature and for mankind, which is inseparable from it. There were more articles on the same theme, and the public wanted to believe it, as it doubtlessly helped them to look towards a future that was slow to emerge.

Looking for nature...

To this end, all of the tourist destinations, through their public and private operators, increased the number of recovery plans for a business with a considerable economic contribution to their economies (the WTO estimated the exports generated by tourism in 2019 at \$1,700 billion, a sector that represents 10% of the global GDP). Some spoke of 'revenge travel' that would boost the return to better days, the sociologist Jean Viard described the possibility of a boom period, which he called the "10 glorious years". For example, low cost companies continued to foresee the

future a being like before, quickly releasing seating capacities on the market. We even see the A380 flying again as it is profitable with the occupancy rates observed. Economic observers constantly repeated that households had accumulated considerable savings, which could notably be spent on travelling.

And the inevitable happened, the recovery happened, in concentric circles, in domestic or local leisure tourism firstly, before expanding inexorably to the rest of the planet, or almost; Asia was the area that took the longest to recover. It is still at this time below the performances of 2019, which represents for all our observations the benchmark for an absolute recovery. Therefore, in terms of demand, the arrival of international tourists in the first quarter of 2023 represented 80% of the level during the same period in 2019, due to a downward influence from Asia, otherwise Europe was at 90% and the Middle East was back to its previous level. Overall, tourism after the pandemic looks a great deal like the world before, despite an increase in the pace of development of certain issues (awareness about the need to reduce the carbon footprint of the sector, a problem with the appeal of careers in the sector, etc.).

In terms of supply, with the dashboard of investments in tourism in France, we can see a 6.8% increase in investments in the trade sector between 2019 and 2022, amounting to approximately €13.7 billion, which demonstrates the operators' belief that demand will increase, based on the global population's lasting appetite for travel.

Zurab Pololikashvili, Secretary General of the WTO said: "The start of the year [2023] has shown again tourism's unique ability to bounce back."

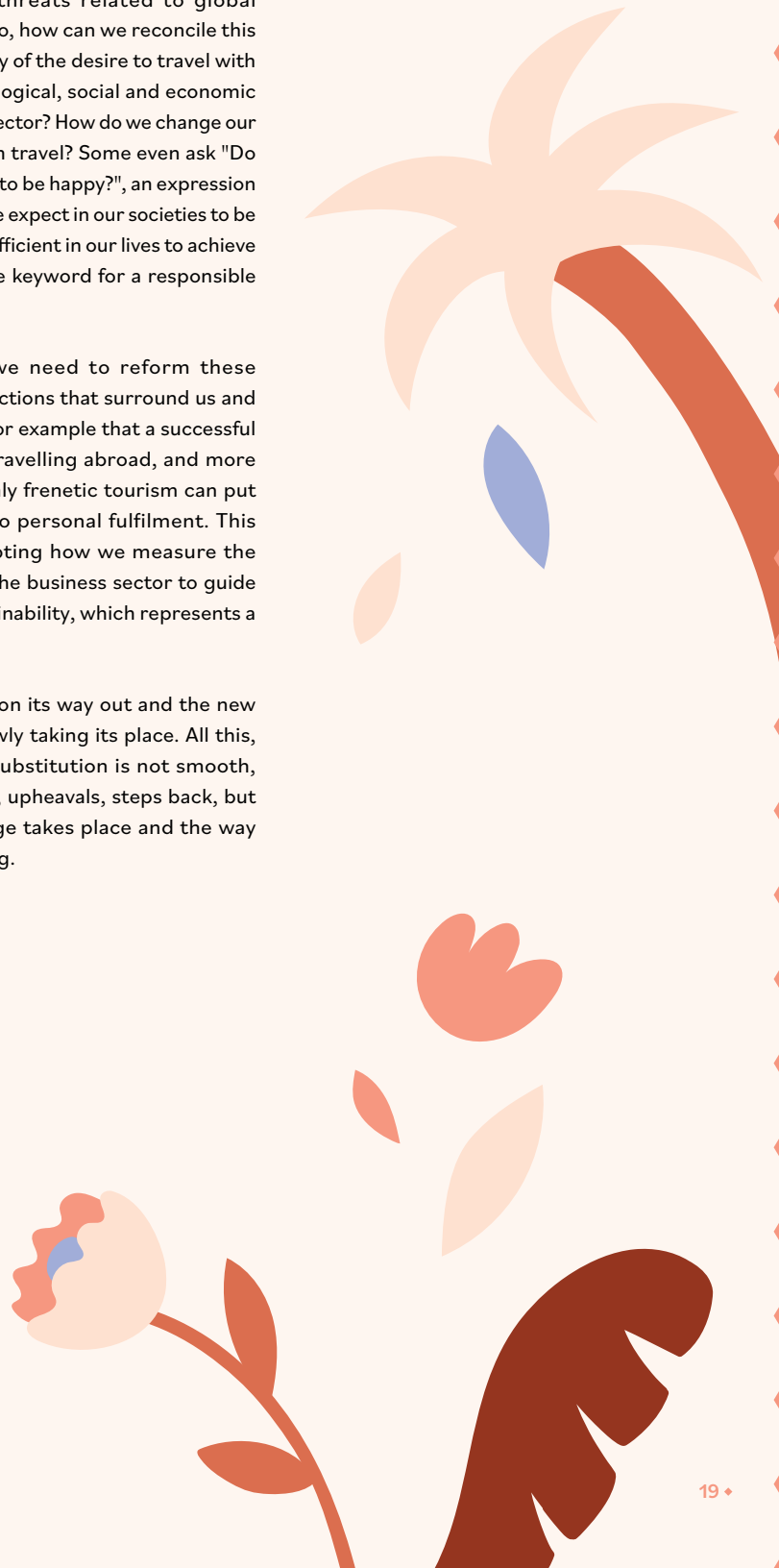
Is another future for tourism possible?

This recovery is certainly vigorous, but it comes with an endless inventory of the plagues that threaten us all, well beyond tourism alone

(increasing interest rates, inflation, the cost of energy and raw materials, shortages, the war in Ukraine and global rearmament, an amplification and intensification of the environmental threats related to global warming, etc.). So, how can we reconcile this "natural" recovery of the desire to travel with the essential ecological, social and economic transition of the sector? How do we change our relationships with travel? Some even ask "Do we need to travel to be happy?", an expression of the shift that we expect in our societies to be more frugal and efficient in our lives to achieve sustainability, the keyword for a responsible discourse.

To achieve it, we need to reform these paradoxical injunctions that surround us and lead us to think for example that a successful journey means travelling abroad, and more generally that only frenetic tourism can put us on the road to personal fulfilment. This also means adapting how we measure the performance of the business sector to guide this shift to sustainability, which represents a huge worksite.

The old world is on its way out and the new world is only slowly taking its place. All this, to say that the substitution is not smooth, there are shocks, upheavals, steps back, but inexorably change takes place and the way ahead is emerging.



Pathways towards regenerative Tourism; Amsterdam experiences

Dr. Ko Koens ♦ Professor, Inholland University of Applied Sciences, Breda University of Applied Sciences, University of Johannesburg

Roos Gerritsma ♦ Assistant Professor, Inholland University of Applied Sciences



The idea of regenerative tourism has garnered attention over the past years, as an innovative approach that goes beyond the traditional sustainability paradigm. Rather than finding a balance between economic, social and environmental issues, regenerative tourism seeks to regenerate and restore natural and cultural systems, create a positive impact on local communities and enhance the overall resilience of tourism destinations.

Regenerative tourism: a paradigm shift

The idea of regenerative tourism has garnered attention over the past years, as an innovative approach that goes beyond the traditional sustainability paradigm. Rather than finding a balance between economic, social and environmental issues, regenerative tourism seeks to regenerate and restore natural and cultural systems, create a positive impact on local communities and enhance the overall resilience of tourism destinations.

This means a radical departure from the way that tourism is currently

performed. Rather than fitting within current economic and social systems, regenerative tourism calls for a transition to a new system, in which the interconnectedness of natural and cultural systems is recognized, and where profit and economic gain are not the primary values of tourism. Regenerative tourism is place-based and built on the premise that tourism can be used as a tool unlock the historical, social and cultural potential of destinations, or parts thereof, which subsequently will allow destinations to thrive and flourish.

To put this into practice will require a significant change in mindset, among tourism practitioners, policymakers, and tourists themselves. It requires a willingness to challenge existing power structures and vested interests, and to embrace new forms of collaboration, dialogue and partnership.

However, this is not how the concept is always interpreted. Increasingly, within both industry and destinations, the term regenerative tourism appears to be used merely as a 'new term' for sustainable tourism practices. The concept of regenerative growth has even been coined despite the fact that growth should not be imperative for any kind of regenerative development. This lack of understanding may hinder the uptake of true regenerative tourism practices and could even lead to the term becoming yet another buzzword that means anything to anybody.

Regenerative tourism and urban environments: a difficult balancing act

Developing regenerative tourism in complex urban settings is challenging, even among stakeholders who seek a more holistic approach. The involvement of numerous stakeholders makes it difficult to align differing interests, and traditional top-down approaches struggle to engage and involve communities sufficiently to foster sufficient empathy



and understanding. A more collaborative, community-driven model may therefore have to be embraced to achieve alignment.

Finding common interests is easier in rural settings. Indeed, most successful regenerative tourism practices up until now have come from rural communities that are far less complex than cities. In addition, some of these practices (e.g. Playa Viva in Guerrero, Mexico) are aimed at the luxury tourist market. Such high-end regenerative tourism products have allowed economically impoverished rural areas to flourish again, but they may not fit within a complex urban context.

To better understand how regenerative urban tourism may be operationalized, it may be more useful to look at some new learning experiences from the city of Amsterdam where signs of regenerative tourism practices are becoming visible among (social) entrepreneurs, policymakers of the municipality and DMO, artist-activist groups and educational organizations. Some of their activities in particular touch upon one or several aspects of what the wide spectrum of the regenerative paradigm encompasses.

The Amsterdam's example, a city of many regenerative experiments

For example, “Plastic Whale” offers tourists the opportunity to go on a plastic fishing canal tour and collect rubbish out of the water. Likewise, Tours that Matter organizes similar positive impact tours where they invite visitors to give back to the places they visit. After a tour about Superdiversity, they'll cook dinner for the community to experience a harmonious society in practice. When talking about Urban Agriculture, they spend the afternoon weeding in a community garden. Their guests (both locals and visitors) all express a deep feeling of *doing* something for the greater good after their tour.

A group of artist-activists and social-entrepreneurs have been organizing (almost) annually a Reinventing Tourism Festival in Amsterdam since 2018. The festival aims to provoke a reframing of what tourism could add to the city, compared to consuming Amsterdam merely as a décor. During the festival, many out-of-the-box ideas, tourism (related) organizations and places were able to connect in an accessible way. The festival was attended and co-designed by all the other stakeholder

groups mentioned above. Currently, they are working on the launch of a Positive Impact Hub, through which visitors and the community are invited to co-create and experience new forms of tourism.

While this suggests that Amsterdam is underway to becoming a fertile soil for innovation and regenerative change, one of the main quests is: how to connect *all* tourism actors and adjacent sectors (i.e mobility, waste and energy management, agriculture) to create *significant* system change?

Promising leads in this sense are recent municipality policy vision document for 2035. It underlines the importance of designing tourism *with* the community as compared to designing *for* the community and creating a multi-core city, as opposed to a focus on the city centre only. The document includes many concrete actions and policies, like (extra) support for entrepreneurs that strive for a positive tourism impact (Gemeente Amsterdam, 2022).

At the same time the DMO amsterdam&partners puts much effort into co-creating new “stories of Amsterdam” explicitly with local ambassadors (residents, entrepreneurs, activists, researchers) who are rooted in the local community and working in a place-led manner. In doing so, space is given to needs and wishes on a city district level rather than those of visitors from outside of the city. Finally, our own Inholland Urban Leisure & Tourism Lab is co-developing small-scale interventions with local parties as well and in the meantime training students, the young tourism professionals of the future, to design tourism in a regenerative way.

The Amsterdam experiences indicate ways in which regenerative tourism can open a pathway towards a more resilient, equitable, and sustainable tourism ecosystem. However, it has to be said that the supply and demand of degenerative tourism offers remain omnipresent and are also increasing. For regenerative tourism to become the norm, it is necessary to do further experimentation, both with regards to new regenerative tourism products, as well as with policy processes to stimulate regeneration and connections between different stakeholders. While such experiments may be difficult, they are necessary to learn about and grow truly transformative regenerative tourism, rather than maintaining the status quo and simply ‘rebranding’ existing ‘sustainable’ tourism offers.

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TREND

Next generation hotels: a living place faced with job scarcity

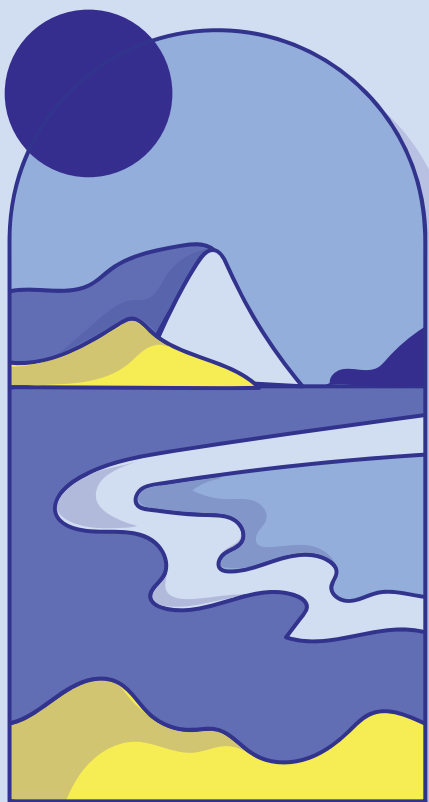
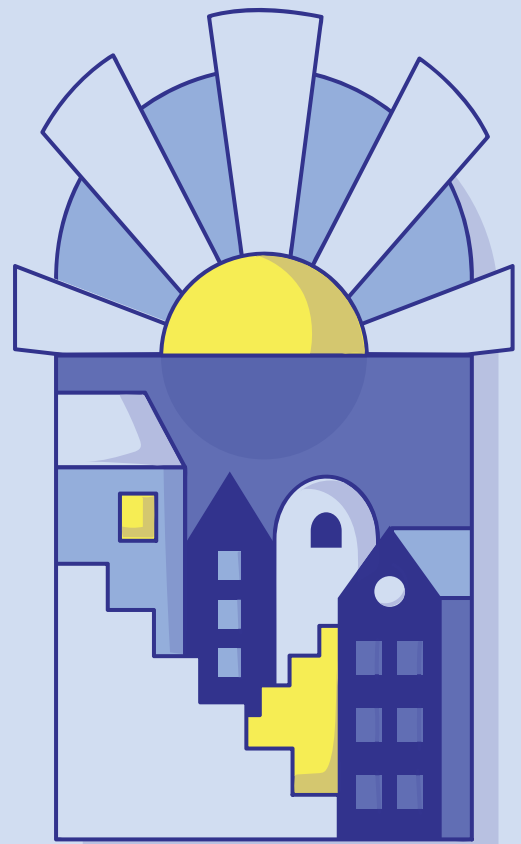
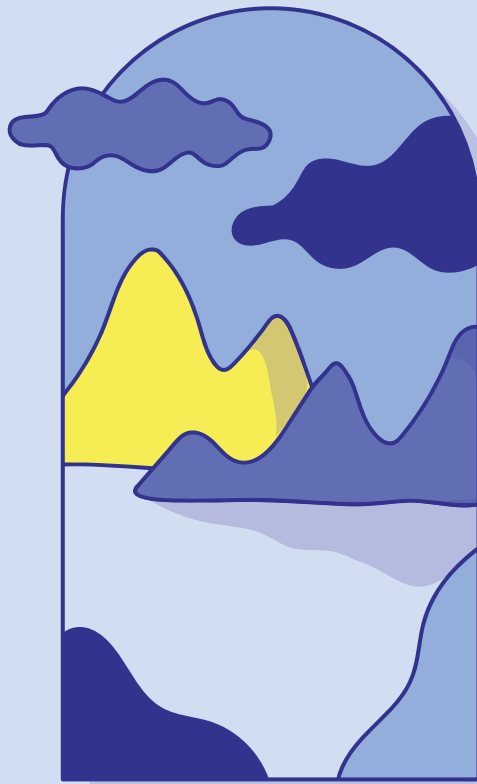
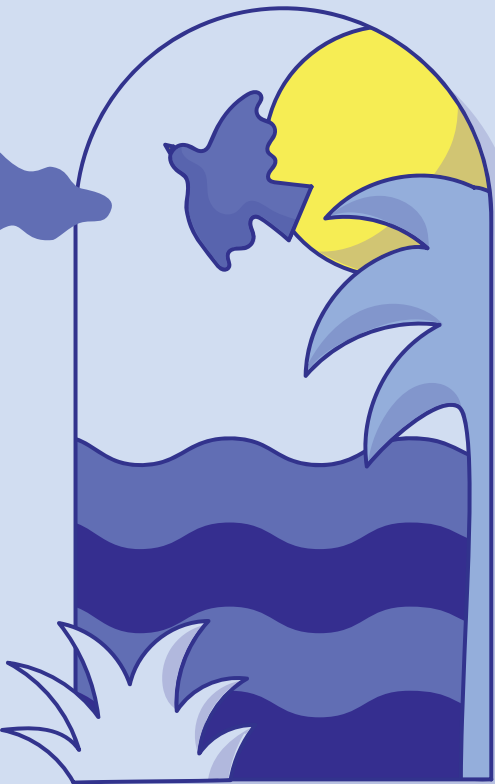


**"It appears to me that we depend on places for spirit, humour,
passion taste and feelings."**

La Bruyère

From the Latin hospitale meaning "room intended to host guests", hotels have traditionally been an essential part of our journeys and travelling. Hotels now have competition as the principal form of contemporary accommodation.

The industry is now obliged to recreate itself and increase the range of offerings. Hotels are no longer merely a room to rest when travelling, they propose a range of services: swimming pools, catering, relaxation areas, etc. They are no longer seen uniquely as a place to sleep, but rather as a living space, with many activities: art galleries, cinemas, leisure activities, coworking areas, etc. as a way to redefine themselves. New, evermore diverse offerings are emerging despite an important brake: recruitment difficulties in a sector that enchants employees less than travellers. Solutions are emerging to attempt to counter these difficulties, at least temporarily, and to make hotels into multi-activity living spaces.



Hotels are dead, long live hospitality!



Matthieu Chavanel ♦ Partner - OTIUM CAPITAL

From revolution to evolution, the hotel industry has gone through many changes. The highly segmented industry is now becoming a central part of areas, towns and villages.

01

**From one cycle to the next,
an industry that is more flexible
than we believe**

The hotel industry has gone through structural crises and revolutions that are changing it forever. But it has always been able to adapt, with its famous resilience.

In the 70s it saw the appearance of brands and franchises that brought expertise and standardisation.

In the 90s, the internet transformed how we consume and make bookings; hotel managers understood that their communication challenge was no longer in situ but online. From one cycle to the next, a revolution began in 2008 with AirBnB, which once again shook up the sector. In a few years, thousands, even millions of small hotels (individual hosts, independent players, etc.) appeared in towns and the countryside.

Hotels could not fight against that with their traditional arms. Individual hosts were less expensive, more flexible and more hi-tech.

Down but not out, the hotel industry proved the importance of its place in the ecosystem, and in the life of travellers and residents.

Therefore, hotels had to get back to basics to see what in fact makes a hotel, beyond its location and its ranking, i.e. hospitality, the art of hosting. Recovering its place as a key player.

Covid was also a historic moment for hotel operators and their teams. The results of the recovery, despite predictions that said the return would be slow, have shown that hotels are here to stay. And, above all, that ultimately, they are malleable, flexible and adaptable, although they may well be made from bricks and mortar.

02

The paradox of the place

The paradox of location and positioning is rarely mentioned. We are familiar with the maxim "*location, location, location*". We spend weeks looking for the best address and suddenly, when we find it, we create noticeably different worlds between the internal decoration and the identity of the place where we are.

Once over the threshold, a traveller is sometimes sent into a noticeably different world from the place where they were a few metres before, in the street.

There is a need to give power back to the surroundings by creating living spaces that are open to the neighbourhood.

One of the post-Covid trends with the greatest impact is giving a new life to local areas, with in the firing line this strong interconnection between residents and tourists.

The pitch is simple: create everyday places for residents and therefore local experiences for travellers.

03

Territorial anchoring, offering experiences that are also profitable

By its nature, a room is a perishable good, an unsold night in a room is lost forever.

Previously, profitability was measured by day and by room, today and in the future, it is becoming granular and is calculated per m² and per hour.

Places are transformed throughout the day, operators are seeking flexibility and modularity to go along with each moment in life.

The restaurant can become a conference room or waiting room, the bar can become a coworking space. Rooms, and particularly those with kitchens, are marketed under different forms.

Imagine a room that is sold in 4 formats: apartment hotel, single, double or family room, the quintessence of yield.

Hotel owners are competing with ingenuity to bring these spaces to life geographically (local impact and global visibility) but also in terms of time (optimise all of the 24 hours in a day).

Businesses are flourishing and some establishments host a bakery, a florist or even a hairdresser in their communal areas.

These annex activities are often outsourced but accounted for as gross rent in the operating accounts of the establishments. In addition to this purely financial contribution, the conceptual contribution is often measurable by how many local residents come to the premises.

04

The initiatives

In the context of the strong mix of uses in the hotel industry, establishments are increasingly integrating various activities in addition to their traditional accommodation offering.

There are many initiatives, the most striking of which in recent years are:

RockyPop

A multi-use, multi-experience venue. In Grenoble and other places tourists mix with residents in the communal areas. There is also a florist in the establishment.

Gogaille

A hotel broken down into lodges with an "Echoppes" restaurant as the centre point for the premises and the travellers.

Evihob

An original venue that recreates a village inn.

Plan B

A bowling club in the hotel.

MK2

A place to sleep and watch a film like at the cinema.

By integrating additional activities, the hotels offer their customers a more immersive and enriching experience. This allows travellers to enjoy a range of activities and services without leaving the establishment, which can be particularly appealing to customers who are looking to make the most of their time or to relax in a unique setting. This mix of activities offers added value and contributes to creating a memorable and complete experience.

Freedom and choice, two key factors for success when confronting the shortage of staff



Aurélie Notarianni ♦ Growth Marketing Manager - EXTRACADABRA



As the summer approaches, the recurring problem of the staff shortage in the hotel-catering sector reappears. According to Thierry Marx, President of the UMIH [French Hotel Industry Union], 200,000 jobs are currently vacant.

To meet this challenge, many employers are taking action, such as Charlotte Gomez de Orozco, the founder of Hotel Hoy for whom, *"it was important to open a place that inspires and motivates people, in which people like to work as much as the customers like to stay there"*. For example, she offers her employees yoga lessons, which are also given at the hotel. Developing

your employer brand and improving wages are certainly solutions to attract candidates, but job seekers have other aspirations.

Last year, 30% of the employees in the hotel and catering sector in Ile de France logged in to the **Extracadabra** application.

Extracadabra is part of a new generation of services that aims to smooth out employment in sectors with shortages. The application offers perfect matching between applicants and establishments for short-term assignments (Extra or Temping) or longer permanent contracts. We have recently launched a survey amongst our users to better understand their expectations.

Talents that want choice and better management of their time

In-line with the aspirations for greater liberty and accelerated by the health crisis that disrupted the catering sector, nearly 80% of our talents have been self-employed for less than 4 years. For the vast majority, **this choice was guided by better management of their time, to a far greater extent than a desire to earn more money** (74.5% compared to 58%). 87% of them have already been employees or still are, and have worked on average 8 years with a permanent contract.

We can clearly see a hybridisation between these employment statuses and a boundary that is being created between the different types of contract. Some will use their independent status to constitute an additional wage (25% of applicants say that their income as an Extra represents between 1% and 25% of their total income) and others will choose to favour this activity (23% of them get less than 75% of their income from their status as self-employed) and 38% consider that they earn more as employees (only 26% say that they earn less).

Nearly 22% of applicants say that they have no qualifications. The status of being self-employed is a real boost for these "self made" profiles as well as offering an opportunity to learn through the range of experiences that will be created on the platform. On average, a talent from the pool works with 15 establishments per year. It is therefore also in the hotels' best interest to encourage the best staff to learn in their establishments by offering a diverse range of experiences.

Support and an open ear to assist them every day

Whilst we see the status of being self-employed increasing in the sectors with staff shortages, the main concern is getting paid quickly (71% of respondents). Then comes the issue of paid leave, then for 60% having access to social

security, and housing for 55%.

With a service like Extracadabra, the Extras are guaranteed to be paid every 15 days and to have access to partners such as Cautionéo for a rental guarantee or Alan for prudential insurance in the event of an accident or even to cover Professional Third Party liability.

Simpler applications with better matching

Ultimately, 77% of the talents on the Extracadabra app¹ appreciate having the choice between permanent contracts, temping and seasonal contracts on the platform. They want their work to adapt to their lifestyle, and not the other way around.



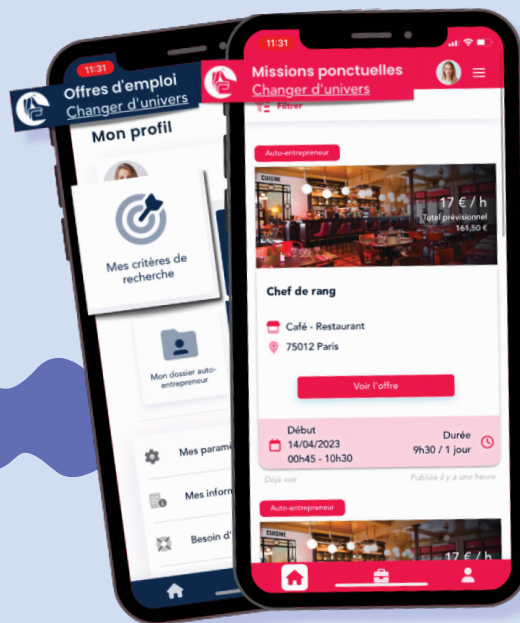
With these types of solutions, applicants can adapt their search criteria:

- location by town,
- different types of classifications when working in the dining room, kitchen or bar for example,
- permanent contract, seasonal or temporary assignments: everybody can adapt their research as they may want a permanent contract in Paris or a seasonal one in Nice!

"In a context of an ever greater shortage of staff since Extracadabra was created in 2015, we have always taken the applicants expectations into account. There were 100,000 vacant positions at that time and at least double that now. Their wishes are principally focussed on having a choice between different contracts at different times in their career, managing their time, and of course being paid on time and correctly for the time they have worked. That is why we offer compensation that is around 15% higher than market rates."

Rémi Boisson, co-founder, Extracadabra.

Methodology: A study carried out in April 2023 with our talent pool with qualifications in catering, event management, sales or logistics. We obtained 1,053 responses representing our talent pool.



About Extracadabra:

Whether you are a company or an applicant, Extracadabra guarantees you the perfect match! You do not need a magic wand to find the ideal job and the perfect applicant. Created in 2015 by Frédéric Nardon and Rémi Boisson, Extracadabra is an application that connects candidates and establishments anywhere in France using an extraordinary matching system. With Extracadabra, candidates can choose between a selection of offers of one-off assignments (Extra or Temp) or permanent contracts, and the establishments can choose the right candidate for them.

Dialogue and visiting companies: the keys to enhancing the appeal of professions in tourism

Clara Kervevan ♦ Former head of the *Espaces Ouvre-Boîtes* project for *Espaces* magazine
Currently head of Strategy and Monitoring at Atout France



Crédit photo : Alexandre Nestora

The three aims of the *Espaces* review when it launched its new service, *Espaces Ouvre-Boîtes*, at the start of January 2023 were: to recreate a dialogue, to better understand the expectations and values of young people, and to develop its employer brand.

The job market is undergoing a major transformation and the issue of recruiting young people is a major challenge for the tourism and hotel sector. With changes in expectations with regard to work, a generational difference and the emergence of new needs, such as

teleworking, etc., the job market is altering and recruiters are trying to find new methods and solutions to adapt to this transformation. In February 2023, the French National Open-Air Tourist Industry Federation (*Fédération Nationale de l'Hôtellerie de Plein Air*) launched its platform "My career camping.fr" with no less than 40,000 jobs on offer in nearly 32 different professions. The website had different tabs: "What is camping?", "Find a job", "The professions" and "Training". What was the aim? Educating people about the professions available, appealing to a new generation and convincing them to build a future in the sector. It is no longer about attracting young people

for a season or students for summer jobs, but offering long-term professional opportunities.

Openness as a key argument

Today, companies are getting better at addressing young people as customers and clearly identifying the most appropriate communication channels to reach them: firstly Instagram and now TikTok. They are innovating and offering new concepts, new services: modernising youth hostels, developing appropriate living spaces, coworking for their professional lives, and even cinemas and leisure spaces for their personal lives.

However, when it comes to speaking to young people as future employees, they find themselves in more difficulty. Human Resources Departments are being to realise that today's generation does not have the same expectations as their forebears and is not prepared to work under the same conditions. However, although they may be aware of the issue, they are encountering difficulties in how to respond. It is proving hard to change the traditional recruitment process and move to new, more innovative methods, where discussion and comprehension are a key aspect of recruitment.

Clichés versus Realities

Verbatims from the Espaces Ouvres-Boîtes event at the head office of the Accor Group on 29 March 2023,
15 students met with 10 Hotel Managers and Human Resources Directors.

“



Cliché: Money is the main motivation for young people...

Dorian Montier:

If my target was to earn more money, I wouldn't have chosen the hotel industry, which is for me a work of passion.

Cliché: The young are not committed...

Elizaveta Gorbatshevich:

It is essential for me to feel involved in the life of the team and the company.



”

“



Cliché: Young people do not accept authority...

Arthur Palmieri:

I need my manager to set me guidelines to advance in my work.

”



Cliché: The young are not motivated...

Bixente Dulau:

I know the hotel profession and its difficult working hours, my father was a receptionist. We adapted our family life to his timetable, and I'm prepared to do the same thing.

“

Cliché: Young people do not accept the specific working hours of the hotel industry...

Léa Gérard:

Working in the tourist industry means working at odd times, in the evening or the weekend. I am aware of the sacrifices that can mean.



The Espaces Ouvre-Boîtes Solution

In November 2022, the Espaces review began its first editor's lunches with professionals and experts from the sector. On that day, the theme was: recruiting young people. On one side, five school heads explained that young people found that they were put off by the slowness of the recruitment process, that they got very few replies from recruiters (even negative ones) and observed a real lack of responsiveness. On the other side, the companies are confronted by a shortage of employees and demanding applicants due to the number of companies, the benefits and the job offers available. The verdict was without appeal: there is an incomprehension between two generations.

A few weeks later, the teams from the Espaces review met and decided to launch a simple service to recreate a connection between students and companies: ten students were invited into the premises of a company by the manager for one hour in an informal context. They chose to involve a small number of students, so they could all express themselves easily at least once during the encounter. A relaxed ambiance made it possible for most of them to feel at ease to express what they were looking for professionally, to ask questions and even to give rise to some desire to work together.

Espaces Ouvre-Boîtes is...

... 42 events held between January and June 2023
 ... 150 companies and institutions involved
 ... 475 student participants
 ... more than 3,000 likes on LinkedIn
 ... companies and institutions like Barrière, VVF, Voyageurs du Monde, Atout France, Acteurs pour un tourisme responsable, Club Med, Gîtes de France, Comité Régionale du tourisme et des loisirs d'Occitanie.

Promoting your employer brand

From dialogue to teaching about the different professions in the sector, knowledge about corporate codes, etc. All the students very often leave with advice, a phrase, an anecdote or a marking experience from an employee... and sometimes an internship! A little something that will certainly give rise to an idea, an ambition or a project. For the companies, these encounters are an opportunity to speak with young people, to better understand them and to learn about how to recruit them better, but also how to develop their employer brand, their brand image, an image of well-being at work and openness. This is what today's youth say they want.

During an encounter at the head office of the Accor Group, the students said that they were willing to commit to a company, but that in return they expected acknowledgement, respect and to be listened to. For them, it was inconceivable to work in a company that does not respect their values, such as the environment and fighting against discrimination; values which were sometimes more important than remuneration. The students wanted opportunities to grow, varied tasks, guidance and a good working environment. The encounters also gave recruiters

strategies for improving their recruitment process: they want transparency, clarity with customised offers including the name of their future manager, information about life in the company, the benefits that it offers and the Corporate Social Responsibility (CSR) actions.

Companies cannot solely focus on the traditional recruitment channels, they must build and promote their employer brand with concrete and direct actions with young people, by welcoming them into their premises or by coming to see them directly in their schools and universities. Discussions and teaching about professions in the tourist and hotel sectors must be intensified in the training path involving players from the whole chain, from teachers to company managers.



Hotel management in Montreal; queen of versatility

Élisabeth Sirois ♦ Research support agent - Chair of tourism Transat - UQAM



After losing their dynamism in recent years, major urban centres are being reborn and returning to their former glory. The hotel sector is playing its part with audacity and creativity by diversifying its activities.

Hotels; a living space for the community

Hotels are increasingly opening up to their neighbourhoods and local residents. They wish to become an essential stopping off point for their daily lives.

To this end, some space is devoted to stores, cultural facilities or local businesses, as is the case for Humaniti Hotel Montreal, which hosts the grocery Avril on the ground floor. Along the same lines, the reception area is increasingly accessible and multifunctional; there is a space

for residents to socialise, work, relax, eat a snack, etc.

Hotels' restaurants are also gradually transforming into renowned addresses that appeal not just to visitors but also to local people. The Bivouac Restaurant at the Double Tree Hotel is a fine example of this kind of establishment that offers a local, boreal cuisine.

Several new hotel concepts devote part of the building to rental accommodation. This means that the tenants live alongside the guests, and use the same amenities and communal areas. For example, the Gare Viger apartments are located in the same complex as the Hyatt Centric Montreal Hotel. The tenants have access to the gym and even the pool. This option is interesting for hotel owners as it offers them financial stability.

Hotel; teleworking spaces



Crédit photo : Gilles Lauzon

Hotels have always been a key place for business travellers and are increasingly hosting teleworkers.

Many of them are now transforming unoccupied spaces into coworking spaces, which allows this clientele to network, meet with partners and get a change of air. These types of spaces are perfect for hosting workers who are on 'workation' business trips, during which free time

and days off are used as holiday time, or for the 'bleisure' clientele, who extend their business trip by a few days for leisure purposes. In all these cases, the apartments designed for long stays that include a kitchen, storage areas and a washing machine are optimal. The Homewood Suites by Hilton Montreal are a good example.

Hotels are also a good place for organising informal meetings – like team building activities or seminars — by favouring discussions between colleagues who rarely see each other in person since the arrival of teleworking.

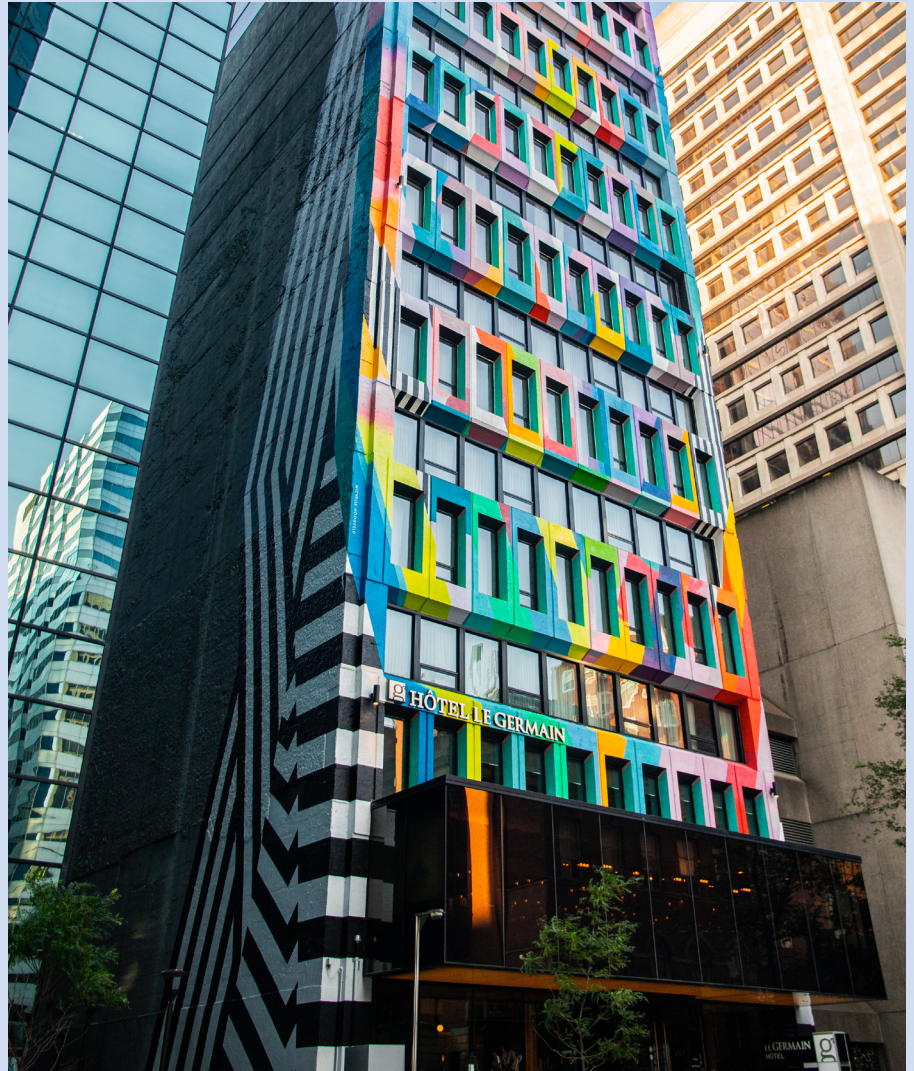
Hotels; loss leaders for leisure travellers

Hotels are trying to reinvent the experience they offer to get past the idea that they are just a place to spend the night.

For example, in 2022 the Éloïze Circus staged a series of shows at the Fairmont the Queen Elizabeth hotel in a cabaret format. The exclusive nature of these productions was an asset for this collaboration. For its part, Delta Montréal by Marriott recently partnered with AviaSim, a company that offers flight simulations. The facility on the ground floor of the hotel offers different packages that put guests at the controls of a plane or just introduces them to the inside of the cockpit.

Hotels can also become a tourist attraction when their unique design attracts the curious. Le Germain Montreal has understood this well by partnering with the Canadian artist Michelle Hoogveld to create a mural on the front of the establishment.

One thing is for certain, there is no shortage of ideas. The hotels of Montreal are adapting to the way cities are changing and are more versatile than ever!



Crédit photo : Hôtel Le Germain, Montréal

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TREND

New practices of players in tourism: from waste management to zero waste



"Nothing comes into being nor perishes, but is rather compounded or dissolved from things that are"

Anaxagore

The term "waste" refers to the unrecoverable part of an object, a foodstuff or any other good. Waste is therefore above all an unwanted product. However, in view of recent studies, optimising the management of waste and its losses seems to be essential.

Waste management policies affect every sector, including the players working in tourism. The latter are increasingly subject to evermore drastic regulations, which require a certain amount of adaptation. From waste reduction to evermore efficient recycling methods, to policies for reuse, those working in the tourist sector are adapting to give the waste they produce a second life. Many solutions including new technologies are therefore emerging, making people query if the players in the industry are as efficient as they need to be.



Managing waste: the 5Rs apply to tourism

Caroline Mignon ♦ President of Acteurs du Tourisme Durable
Founder of Echo Terra, eco-hosting venue in Anjou



For many years, waste has been an environmental and social scourge on more than one level.

And tourism has been a culprit, whilst it is also a victim.

Increasing awareness and evermore demanding regulations are making the tourist industry play its part in managing and above all preventing waste at every level in all the business lines.

What do we mean by waste?

According to the French Environmental Code, waste means "any residue from a process of production, transformation or use, any

substance, material, product or more generally any property, abandoned good or that its holder intends to abandon".

In France, households produce about 430 kg of waste per year and per person (of which 254 kg of residual household waste), to which must be added the waste produced by economic activities (including industry, agriculture, construction, healthcare, etc.). Overall in 2019, more than 5 tonnes of waste were produced for each French person . Of these, on average, 66% are recycled, 6% are transformed into energy and 28% must be disposed of (burial, incineration, etc.). Waste processing in France (recycling, incineration without energy recovery and landfills) account for roughly 4% of the country's greenhouse gas emissions. In this way, it represents a real issue for the National Low Carbon Strategy, which will enable France to adhere to the Paris Agreement.

The French AGECL Law (Anti-waste for a circular economy law of February 2020) transposes the objectives of the European directives of 2018 and 2019 into French law, and sets additional targets for reducing waste, reuse, food waste and energy recovery.

The volume of waste in tourism

Handling waste is one of the major issues addressed by the tourist sector, on the one

hand because it is a serious problem and on the other hand because the image of tourism depends on landscapes and sites that are clear of any waste or damage.

Whereas, tourists are vectors for waste: they take many objects that are destined to become waste with them into fragile natural spaces that may or may not be equipped with a waste management system (mountains, seaside, desert, forest, at sea, etc.). Moreover, by the mobility that it induces and its limited duration, tourism gives rise to the use of many single-use, practical, light-weight and inexpensive products (plastic water bottles, small containers for toiletries, cabin luggage, packaged food products, disposable plates, etc.).

In recent years, many studies have indicated the impacts of tourism on waste management :

ADEME, the French Agency for the Environment and Energy Management, estimates that tourist areas produce 27% more waste than the national average.

52% of the detritus in the Mediterranean Sea is related to seaside tourism according to a report by the WWF. 95% of the waste in the Mediterranean Sea is plastic. In the mountains, and particularly on the most popular routes, the flow of tourists leads to a considerable increase in the quantity of waste. The French

environmental publication Reporterre ran an article in January 2023 entitled *"In the Himalayas, tourism is transforming the mountains into a dustbin"* [translation], with striking photos as evidence, about a region (Ladakh) *"...which does not have the means to handle the waste generated (Ed. by tourism), which end up in massive open-air landfills"*, a scourge for the health of inhabitants...

Finally, the last negative point regarding waste in tourism: waste and the wasted food industry produce. This amounts to about 10 million tonnes per year in France, estimates Matthieu Brun, Head of studies at Club Demeter. Waste at the level of end consumers represents about a third of this total, i.e. 45 kg of food per year per person in France, including waste from meals away from home.

In addition to contributing to greenhouse gas emissions (production, distribution, transportation and decomposition), the food produce not consumed in France is also responsible for soil depletion, and excessive consumption of fresh water and drinking water.

So it is naturally one of the categories of waste that is most subject to reduction actions in tourism and the hotel industry, particularly with regard to open breakfast buffets (and the associated discounts), but also the quantities served in collective catering, etc.

Collecting organic waste: soon to be mandatory!

This waste that currently fills a third of French bins represents a precious source of compost for agriculture or for producing biogas through methanisation.

The regulatory threshold for mandatory organic waste recovery in catering, which has been in place since 2016, was lowered to 5 tonnes per year in 2023, and collection will be mandatory for everybody, professionals and private citizens, regardless of the volume generated from 1 January 2024.

Professionals in the tourist sector are therefore confronted by three major issues:

- Limiting and managing the increase in waste during tourist periods;
- Banning the littering and waste dumping caused by tourism, particularly in fragile natural areas;
- Eradicating food waste in catering.

What can be done?

Sorting and recycling is good, but the issue lies above all in reducing the amount of waste created.

Raising awareness about reducing waste is centred on the 5Rs:

- Refusing what you do not need
- Reducing what you do need (and that you cannot refuse)
- Reusing what you consume (and that you cannot refuse or reduce)
- Returning to the earth what is gives (composting)
- Recycling what you cannot use

In the hotel industry and catering sector, this rule could give rise to the following actions:

- Refusing: individually packaged products (jams, shower gels and shampoos, plastic water bottles, etc.), single-use objects (disposable plates, sheets and bedding)
- Reducing: food waste, disposable or non-recyclable packaging, the number of towels made available, paper flyers and brochures
- Reusing: using second-hand products (furniture, crockery, etc.), using reusable material (microfibre cloths, fabric tablecloths, etc.)
- Returning to the earth: composting organic waste, organising the collection of organic waste
- Recycling: favouring purchasing recyclable materials (glass, paper/cardboard, metals, etc.)

Did you know?

99% of the resources taken from nature (*Ed. to make objects*) are relegated to waste in less than 42 days!

Participants are committed

The tourist sector has adopted many initiatives in view of the necessity of acting to manage waste.

Firstly, most of the approaches to improvement and tourist labels now include criteria about recovering and especially reducing waste. For example, the environmental label includes the weight of non-recyclable waste per night as one of the 4 indicators for the environmental rating of hotels and campsites.

The European Green Key International and Ecolabel schemes impose measuring the change in the weight of waste generated and have several mandatory criteria regarding waste recovery from encouraging customers to sort waste in their rooms to composting, to zero single-use plastic (the subject of a report by the World Travel & Tourism Council and UNEP in 2021), or reuse, etc.

The following are some of the many initiatives that are blooming:

The Acteurs du Tourisme Durable (Participants in Sustainable Tourism) association awards one of its Horizons Trophies for "waste management and the circular economy". In 2023, this prize was awarded to the company Beesk, which organises 100% anti-waste food distribution for the French catering and event organising sector. The Acteurs du Tourisme Durable website also offers a directory of best practices including some relating to waste management, such as "Offering a zero waste breakfast in tourist accommodation".

The French national competition "*Design Zero Dechet*" (Zero Waste Design) organised by Syctom since 2012 devoted its 2023 edition to sustainable tourism. It involves most of the design schools in France.

In 2020, the Mountain Riders NGO launched a programme of actions for a "Zero waste mountain" to go even further in the issue of littering on mountains and in 2023 it drafted a National Zero Waste Mountain Charter in 2030, which commits voluntary private and public participants.

Several regions, especially the islands of the Gulf of Morbihan, are raising awareness amongst tourists about a zero waste approach and obliging them to take their waste with them to sort it on the mainland, which is better equipped to handle residual household waste.

Others are joining the movement: "*Gourde friendly*" to incite

establishments to open up to everybody to fill their water bottles!

For its part, the City of Paris has published a commitment plan for the tourism and travel sector aimed at giving professionals a methodological tool and offering a reference system for certification, and promoting responsible players in the tourist industry.

The Guide Zéro Déchet (Zero Waste Guide) devotes a whole file to zero waste when travelling with the aim of raising awareness and encouraging tourists to take action themselves.

Several associations are also emerging to prevent the production of waste and are organising sessions to clean up natural areas.

To conclude, there are now many best practices in the matter of waste management in the world of tourism; the challenge for us all, professionals and tourists alike, is now to think about how we can produce the least waste. The least polluting waste is waste that is never made!

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Ecological tourism management: Paris&Co has the solutions!



Arthur Dumoulin

Co-founder and Commercial Manager - LUNIWAVE

With behavioural sciences, positive ecology is possible!

Today environmental issues affect us to an ever greater extent and we are aware of the impact of certain sectors such as tourism or agriculture on ecology.

Did you know?

When people go to a hotel, they use twice as much water, approximately 105 litres in the bathroom.

In 2030 with the French Elan Law, the State will impose a 40% reduction in energy consumption. Luniwave therefore wants to guide hotels in their ecological transition, particularly by using behavioural sciences to reduce customers' water consumption. Customers will be challenged, informed and quantified.

Travellers are becoming aware of the environmental consequences of the tourist sector and are looking for more ecological options: 70% of customers say that ecology is one of their selection criteria when they choose tourist accommodation.

Luniwave offers a positive form of ecology that is profitable for hotels with its product: LuniOne.

How do you use LuniOne?

- **Before the shower:** the user selects a water consumption target on the screen near the shower
- **During the shower:** the user monitors their water use with 4 LEDs on the appliance on the tap, 1 LED lit represents 25% of the target has been reached.
- **After the shower:** the user's efforts are quantified on the control screen.

To avoid making the customer feel guilty, the water is not cut off and no aggressive light comes on; the reductions are natural and come about by modifying the user's behaviour.

More than 3,000 showers have been taken with the LuniOne prototype and 92% of the customers said that this method improved their stay in the hotels.

Consequently, after 2 years of research and development at the INSA in Lyon, our offering allows hotel owners to reduce their hot water consumption by 30%.

There are also financial savings! For example, over 1 year, a hotel with 100 rooms would save 1,500,000 litres of hot water and €15,000.





Marine Pescot

Founder & CEO - EQOLUX

Février 2023		0 paiements - 7 418,821 €	
	Delphine le Roanec pour Linge de lit et de bain pour les chambres 10 févr. 2023 • Nom de l'hôtel	488,465 €	
	Charlène Dalline pour Articles de nettoyage pour les chambres 10 févr. 2023 • Nom de l'hôtel	2 059,599 €	
	Charlène Dalline pour Articles de nettoyage pour les zones communes 09 févr. 2023 • Nom de l'hôtel	1 255,965 €	
	Jérémy Driot pour Meubles pour les chambres 08 févr. 2023 • Nom de l'hôtel	5 132,233 €	

Sustainable Procurement, kékako?

Procurement is all about managing the purchasing of goods and services for companies. How can it be used as the main tool to better coordinate their sustainable transition? This is the aim of Eqolux, the platform for the environmentally responsible leaders of the future.

Today, a 4-star Parisian hotel with 40 rooms will create on average more than 150,000 items of waste (in particular plastics) for the operation of the establishment and to galvanise the customer experience. Five years ago, the sustainable transition of the hotel sector (and tourism in general) was just a marketing advantage, a story to tell people; it has now become a legal obligation and a constraint if a hotel manager wants to maintain the classification of their establishment (Atout France).

Le développement durable au coeur de la réforme

À compter du 1er avril, le référentiel de classement verra le nombre total de critères inhérents au développement durable doubler (passant de 13 à 27). Les critères obligatoires vont quant à eux quadrupler (passant de 3 à 12). Il s'agit là de l'évolution la plus importante de la réforme.

Le nouveau référentiel vise ainsi à encourager les économies d'eau et d'énergie, une meilleure gestion des déchets, le recyclage, le recours aux circuits courts notamment dans la restauration, la sensibilisation de la clientèle ou encore la formation des personnels hôteliers...

L'intégration de ces nouveaux critères au dispositif de classement entérine des pratiques déjà répandues dans l'hôtellerie mais encourage aussi leur élargissement.

<https://www.atout-france.fr/actualites/etoiles-le-classement-des-hotels-evolue>

But what solutions are available to guide a whole sector to make better choices in terms of managing their purchasing, and therefore the waste generated? What is the impact, the life cycle of the products, the social and environmental commitment of the partner suppliers, the raw materials used, the manufacturing sites, the transport methods, etc. These are all criteria that the teams from Eqolux have used to build a Green Score for each product, and also for each order!

Eqolux is rather like an Amazon website for companies who want to find sustainable products. But to become tomorrow's purchasing platform, we also have to develop unique functional features to better guide hotel owners in the daily management of their establishments.

You can therefore get a consistent and reliable sustainability score for all the partners available on the platform. Above all, you get data in real time about all your purchasing and you can optimise your catalogue according to the commitments and recyclability of the products.

The instantaneous tracking of your purchases and the Green Score displayed for all of the products will then make it possible to recommend associated services to reduce your impact.

Eqolux is far more than just a traditional purchasing platform for the hotel and catering sector, it intends to reconnect local manufacturers and purchasers at a global level.



Geneviève Marais

Chairwoman - AQUATECH INNOVATION

From wastewater to sustainable water

Let's return the water we use to the planet and limit its consumption. Innovations for water make it possible to provide real solutions.

When imagining tomorrow's world and the solutions to preserve water, it is essential to concentrate on the issue of the sustainable treatment of wastewater, as sanitation is one of the principal ways to begin developing our areas. Indeed, less than 1% of wastewater is recirculated in France, whereas 14% and 8% are recirculated in Spain and Italy. There is an urgent need for action.

AquaTech Innovation, the Greentech start-up, offers solutions by deploying modular patented products to save water and protect the environment from the pollution caused by domestic wastewater:

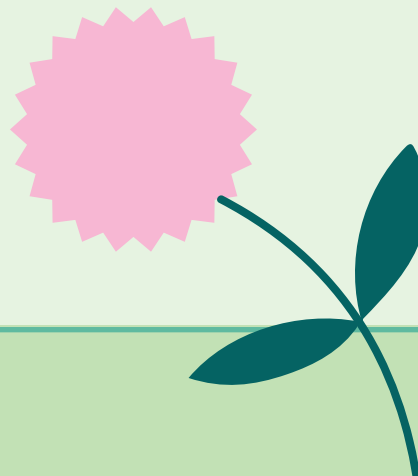
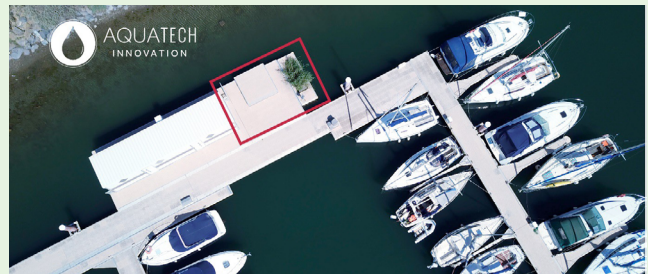
- A (removable) gravity powered collection network;
- 100% organic wastewater treatment, regardless of the geological constraints and variations in volumes;
- Water savings with our ReUse solutions;
- Using digital tech to monitor facilities.

Several solutions are then on offer:

- AquaCollect makes it possible to collect wastewater, regardless of the technical and geological constraints;
- AquaClear is a mini, 100% organic, water treatment plant, which can be deployed anywhere where traditional solutions do not apply, including floating;
- AquaPool regenerates wash water from sand filters in public swimming pools;
- AquaGreen and AquaFlush, ReUse solutions, recycle domestic greywater to be used again;
- AquaData permits the automated management of flows and a data checking process.

Each process can be used independently.

This allows professionals with activities that consume a lot of water to commit to a sustainable approach by protecting water resources, to comply with regulations and to continue their activity.



Efficiency, an essential issue for reducing digital waste in tourism

Alexandre Alary ♦ Founder of the Digital Green Tourisme collective

Milena Gatelier ♦ Member of the Digital Green Tourisme collective, manager of the responsible digital technology division



Tourist activity produces and processes a considerable amount of data every day. These data are stored, processed, used and, at a certain point, put to one side. All of these activities consume a great deal of energy, therefore creating a large amount of digital pollution. Moreover, the sector needs an ever greater number of digital tools. Digital and technological waste from the tourist sector is therefore an issue that needs to be considered at a time when we are seeking efficiency.

Firstly, we need to understand the negative externalities of digital consumption.

We are living in unprecedented times: human activity, our activity, is directly responsible for the threats to our existence on earth such as climate disruption, exhausting resources or even the loss of biodiversity. The reports from the IPCC leave us in no doubt. Tourism and digital technology are no exception and these sectors have many impacts, particularly in terms of waste management.

The digital life cycle: waste before, during and after



01

Extraction

A model with ever growing consumption naturally entails an acceleration in extraction to produce digital terminals.

The annual water consumption of an average gold mine is the same as for 80,000 inhabitants in France.

Exploiting minerals has disastrous consequences for the environment, as well as for local populations, like in China with neodymium or in the Democratic Republic of Congo with tantalum and cobalt.

02

Manufacturing



This accounts for on average 75% of the environmental impacts of digital technology. (ARCEP – French regulatory authority for electronic and postal communications)

The next logical step in the life cycle: production, in addition to requiring an enormous amount of water and energy, it produces waste that can contain heavy metals, hazardous chemical products and other toxic materials, which are harmful to the environment.

Taking the example of a smartphone: 70 kg of raw materials are needed to produce, use and eliminate one smartphone (i.e. roughly 500 times its weight). It contains 70 different materials. Only around twenty of the metals used are currently recyclable.

03

Disposal, Electrical and Electronic Equipment Waste

According to a study by the United Nations Environment Organization (UNEO), the world currently produces around 50 million tonnes of Electrical and Electronic Equipment Waste (EEEW) every year. This represents a 21% increase in just five years. If the current trends continue, this figure could reach 120 million tonnes by 2050. Electronic waste includes equipment such as computers, mobile phones, televisions, refrigerators and household appliances, and they often contain hazardous materials such as heavy metals, chemical products and plastics.

Each year, 170,000 tonnes of waste electronic items are produced. Between 40,000 and 50,000 tonnes, or about 5 times the weight of the Eiffel Tower, are tipped over 10 km in Agbogbloshie, in the suburbs of Accra, the capital of Ghana. With the combination of the water and soil pollution, and the toxicity of the air, adults and children try to survive by processing our electrical and electronic waste at the end of its life cycle.



The obsolescence of products is an essential factor to reduce as it contributes to excess consumption and therefore a growth in scrap. There are different types of obsolescence.

- **Technical obsolescence:** manufacturers design products so that they are quickly obsolete.
- **Aesthetic obsolescence:** products are designed to become obsolete in terms of style or fashion, to incite consumers to buy a new more fashionable model.
- **Functional obsolescence:** products are designed to be less durable than required, by using poor quality materials or by limiting their life span.
- **Psychological obsolescence:** products are designed to make consumers want to purchase them, even if they do not really need them.



Efficiency needs to be integrated into green innovation.

It needs to be defined simply to avoid falling into the stereotypical image of a return to the stone age, and to understand that it is a positive and essential lever. This means breaking away from the idea of always wanting more to the benefit of wanting less but better.

Efficiency can have a positive economic impact by reducing the costs associated with managing waste. The costs related to collecting, processing and disposing of waste are high, and they increase with the quantity of waste produced. By reducing our consumption and adopting practices to reduce waste, we can reduce these costs and optimise them.

Integrating efficiency into green innovation is a major issue. In this context, it means reducing the consumption of resources and energy. We are adopting an approach that is more aware of consumption, limiting the use of finite resources, and encouraging more efficient and more sustainable use of the available resources. Introducing efficiency makes it possible to avoid the rebound effect by promoting more responsible consumption.

We talk about the rebound effect as it is the essential danger of green innovation. It is the consequence of excess consumption and therefore an increase in production caused by a cost reduction for production and consumption. It is therefore important, even essential, to adopt a holistic approach to green innovation.

We have to take into account economic, social and environmental factors when implementing more practical and sustainable technologies.

The best type of waste is one that is never produced and efficiency offers us a way out.

By keeping our terminals for longer or by buying second-hand we avoid producing new ones, we limit pollution and we conserve limited resources.

Tourism must take into account the impact of digital technology and the waste related to excess consumption, and must integrate positive efficiency at every level to move towards greater sense, impact and greater savings.

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TREND

Sports tourism, learning expeditions... looking towards tourism that is closer to the local experience





"Make it so your painting is always a window to the world."

Léonard De Vinci



For many years, there was a trend to travel far away, to discover new horizons and new cultures. Although this "long haul" tourism will not stop, an ever greater number of travellers are turning to local tourism and discovering new experiences closer to home for ecological and financial reasons.

Responsible sports tourism, micro-adventures or even learning expeditions are emerging and winning over many people, who are looking for unusual experiences. This new way of travelling is growing inside France and also in many countries that put this activity at the heart of their tourist experience. It is converting travellers to a more local experience that is closer to the capacities of the planet and the specialities of each region; allowing people to get away from it all while travelling nearby.





Sports tourism, a key practice for sustainable sport that is accessible to everybody



An interview with Laure Batalla, Head of the Sustainable Sport Office and Marie Villeneuve, Natural Sports and sustainable sports tourism representative - Subdepartment for the coordination and development of public sports policies - Sports Division - French Ministry for Sports and the Olympic and Paralympic Games

1. How would you define sports tourism?

Very often, sports tourism is defined simply by fans travelling for a sports competitions abroad. In reality, the notion of sports tourism is far broader than that. We include different types of travel that can also include taking part or watching sports events, participating in sports activities or event discovering venues related to sport.

Sports tourism can be divided into four categories:

- **Participative tourism:** this means travel that is motivated by practising a sport itself, doing an activity or taking part in an event (competition, tournament, etc.);
- **Tourism related to sports heritage:** this includes visiting emblematic buildings (e.g. Stade de France) or even museums with a sporting theme (e.g. the French National Sport Museum in Nice, Roland

Garros Museum, etc.);

- **Event tourism:** by this I mean attending a sports events such as the 2024 Paris Olympic and Paralympic Games as a spectator. France is a great nation for organising major international sports events. These big sporting occasions are powerful levers for increasing tourism (in 2016, 536,500 foreign tourists came to France for the UEFA European Football Championship);

- **Business sports travel:** this refers to business travel based on events, conferences or even trade fairs for companies in the sports ecosystem, the federations, clubs or even athletes, such as running or body fitness fairs.

2. Why has the French Ministry for Sports and the Olympic and Paralympic Games decided to address this theme? How do you approach the subject?

There are an increasing number of tourists who take an interest in sports activities when they are travelling. The Union Sport & Cycle reveals that half of French people say they choose where they take their holiday according to the activities they can do. Sports tourism therefore has a potential to increase the practice of physical and sports activities by French people and can be a source of appeal for regions shared between economic players in sport and tourism.

The French Ministry for Sports and the Olympic and Paralympic Games has a long-term investment in sports tourism supported in particular by its National Sports and Nature Division (PRNSN). The role of this division is to provide information and guidance to participants, but also the regions as part of a strategy of the territorial development of

sports and natural leisure, and more broadly outdoor activities, whilst preserving the environment and the biodiversity of the host areas. Recently the Ministry has focussed its attention on three projects:

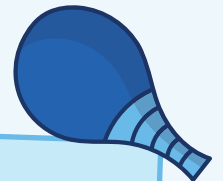
- A study of the national and international customers of sports tourism (supply and demand) launched by the Sports Division with the Direction Générale des Entreprises (DGE—Directorate General for Enterprise).
- Providing participants and public players with tools to regulate the activities: Outdoorvision and Suricate;
- The deployment of the "Vivez Sport" (Live Sport) digital platform launched in partnership with ADN Tourisme to promote and facilitate access to sports and physical activities in France.

All these actions, which relate to sports tourism, are part of a context of preserving biodiversity and reducing the carbon footprint, one of the key issues for the policies applied by the French Ministry for Sports and the Olympic and Paralympic Games.

3. Can you tell us about the Vivez Sport platform set up for sports tourism?

The Vivez Sport platform lists sports and physical activities for tourists. It helps to match supply and demand for French people in a reliable and secure space. The geolocation and the system of filters by categories (on land, on the water, in the water, mountains or in the air) can be used to refine users' searches. It is also possible to choose "reduced carbon" activities.

In all, the platform features over one hundred activities and more than 20,000 offerings are listed over the whole of France (mainland and overseas). The platform, which was launched in 2022 by the French Ministry for Sports and the Olympic and Paralympic Games on an open data system managed by ADN Tourisme, is fed by two different channels: data entered into DATAtourisme (ADN Tourisme) and by people with offerings who enter them directly into the tool. The offerings are verified by the platform administrator, the "Sport-innovations" national resource division – a support structure from the Ministry's sports division.



4. 4. In what way is sports tourism an opportunity for tourism as a whole and for local authorities in particular? What is at stake?

Sports tourism is currently one of the most rapidly expanding sectors and there are an increasing number of tourists who take an interest in sports activities when they are travelling. Once you have made this observation, you can see that sports tourism can only enhance and accentuate the development of tourist activity! For local authorities, sports tourism is a lever for increasing the appeal of an area. Hosting tourists contributes to maximising the value of local and human resources by increasing employment in these areas, whilst encouraging people to discover the heritage. But, sports tourism needs to benefit everybody and respect the environment. The French State is therefore seeking a balanced approach between expanding sports tourism and developing sustainable sports activity. In a context of climate change, which is leading us to adapt our behaviour, the sports tourism sector must reduce its impacts (national greenhouse gas emissions, pressure on natural resources, the production of waste, etc.) and base its appeal on a renewed, more local and sustainable offering.

5. If we get back to the public: does more local participative sports tourism help to remove the brakes for a certain type of tourist?

Providing a local offering allows people who do not have the means to travel to practice an activity or to take part in a sports event, or even people who do not want to travel by plane for example, to still be able to enjoy a sports experience, close to where they live, and adapted to any budget and any person. It's one less brake.

6. What is the connection for you between sports tourism and sustainable sport?

If we return to the example of more local, participative sports tourism, we can see that local participation is more environmentally friendly, as it reduces the carbon footprint, whilst also being really profitable for the local area and its population in terms of the economic returns, job creation and providing new services.

Sports tourism and sustainable sport therefore have a common goal: partaking in an activity whilst preserving the environment and

encouraging social development.

From an environmental perspective, sport has a role to play in its own ecological transition and, after implementing an energy efficiency plan, the ministry has drafted a national plan to adapt to climate change (PNACC Sport 2030) to make this transition effective. The ecological transition is also underway in tourism. Sport and tourism are two big economic sectors that will be closely observed, and that can send messages to incite and accelerate the ecological transition of society as a whole, by setting an example.

7. How can the tourist sector be made more sustainable via practising sports in particular?

There are several means, but the most obvious channel is by providing a more environmentally friendly offering, by favouring small circuit offerings and reduced carbon offerings in particular. Then, we can study the flows of participants to better distribute activities in different areas and reduce the pressures in terms of numbers of people, whilst favouring balanced regional development. Homogenising the occupancy of territories will avoid certain places becoming saturated and highlight some less popular areas.

In general, we are seeing the emergence of a "green trend" in younger generations, who combine practising sports with habits more focussed on well-being and environmental responsibility: more sustainable food, taking care of their health, the need to do sport and to eat a balanced diet, favouring small circuits to the benefit of the local area in which tourism is growing, and preserving the planet... The issue of sustainable sports tourism goes hand-in-hand with the value that young travellers place on their well-being and the environment. It is therefore essential to follow this trend towards more sustainable tourism and sport!



Adventure travel: more than a trend, a necessary return to the roots

Laurent Bussieras ♦ Co-founder - GALIUS

Quentin Lefauconnier ♦ Co-founder - GALIUS



The term adventure can cover many things! Forcibly, we think of great epics like Indiana Jones, or extreme journeys like those of Mike Horn. There is a bit of that, but much more. An adventure holiday could also be a week's trek in the Valley of Wonders, a biking tour of Luberon or even discovering the Allier Gorges in a kayak. Do you see? It begins first with travelling. Adventure travel is also, and above all, about connecting with the environment: enjoying what is around you whilst having the smallest possible impact to preserve it.

You do not need to go far to have a great adventure. You can get away from it all whilst staying close to home, this is what we call a micro-adventure. This is a relatively recent concept, brought to light by Alastair Humphreys who decided to make his country his playing field.

And we can say that COVID was a good ambassador for this new way of travelling.

Constraints in our movements, we had to say goodbye to our summer plans and make France our playing field. That reminds us of someone! The taste for France as a destination is illustrated by a record: 84% of people from mainland France went on holiday in France in 2021¹.

Adventure tourism means going outside your comfort zone.

The activities in question can be diverse and varied, going from hiking to biking, including discovering local fauna and flora. The trips can be adapted to everybody's needs and desires, be it for a weekend or for a longer stay, but are above all an opportunity to try out new things! For example, at Galius, we focus a great deal on travelling. For us, it is one of the best ways to discover an area and to return to the roots of what holidays are about. Going to sleep in a bivouac on the Vercors plains is sure to change you!

And that is where the magic happens. It may only be a few dozen or a few hundred kilometres away from home, the simple fact of getting off the beaten track, into a completely natural environment, is enough to get us out of our comfort zone, to create a sense of novelty and to create the most wonderful memories.

The experience above all!

By its very nature, when it comes to adventure travel, the activity is at least as important as the destination (if not more so) when it comes to preparing your journey. And one direct impact of that is a better distribution of the mass of tourists. We can all picture the crowded beaches of the Côte d'Azur in high season, where towels are fighting for space. Going on an adventure means discovering isolated places that are little known and less frequented! And that also means a better distribution of the economic benefits of tourism across the whole country. We promise you that the gorges of Allier are equally as stunning as those of Verdon!

A positive economic impact, but that is not all.

As in all sectors of consumption, we have become - or at least are becoming - aware of the challenges of changing our habits. Small circuits in the food industry is a good example. Today, an ever larger number of travellers are turning towards tourism that pays more attention to its impact. When they organise their holidays or getaways, around 2 out of 3 French people say that they take sustainable tourism criteria into account².

And we understand why! One of the statistics that we often find is a comparison between a return flight between Paris and New York (~1.8 tonnes of CO₂e per traveller) and a return train journey between Paris and Marseilles (3.6 kg of CO₂e per traveller)³. With a carbon quota of 2 tonnes per year and per person (which as a reminder is recommended by the Paris Agreements if we want to keep the temperature rise below 2°C before the end of the century) we quickly realise that the solution to the equation is not to take the plane. But, once you have said that, what can you do? Do we stop travelling and languish at home? Of course not, quite the opposite - we take risks (within reason of course) and we get out there. We seek adventure!

All of that whets your appetite, but the toughest part now is to find the adventure! And that is why Galius exists.

How does Galius fit into all that?

Galius is a booking site for adventure travel, 100% in France and built in close collaboration with local partners who are committed to offering authentic travel experiences that are accessible, without taking the plane.

Whether you are alone or in a group, by yourself or accompanied by a guide, you are sure to find the adventure you need: Hiking around the Chateaux of the Loire or in the Alps, a survival course in Fontainebleau Forest, snow shoeing in Vercors... There is something for everybody. No *all inclusive* offers or *fancy hotels* but memorable bivouacs, or nights moored under a sea of stars! To sum up, you are guaranteed to get away from it all, without taking the plane (though you may be a little sore).

Our role is to make you travel in a more active, more responsible way and to less frequented locations. The holidays that are offered on the website will allow you to experience all the outdoor activities possible and imaginable, as long as they have a low carbon footprint.

Finally, at Galius, we are nothing more than people who hunt for adventure holidays in France!

As we are convinced of the power of this kind of tourism and its positive impact, we wanted to build this platform to make a meeting place for committed professionals, the real players in this new form of tourism and a community that is committed to making tourism more environmentally friendly.

(1): Opodo opinion poll 2022, study carried out by Raffour Interactif

(2): Kantar x L'ADN study, September 2021

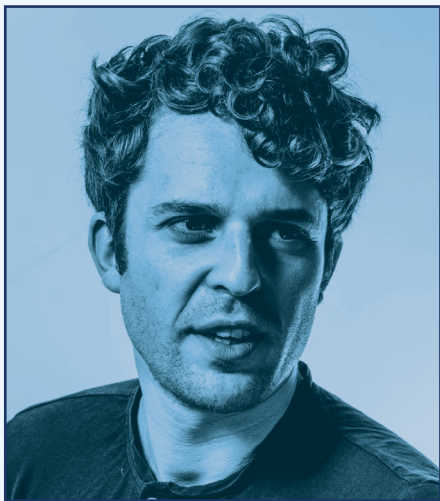
(3): Ademe



How can we get corporate travel to change?



Florian Guillaume ♦ Co-founder - IN:EXPEDITIONS



In 2019, business travel alone accounted for the equivalent to the annual emissions of Germany, the sixth biggest emitter on the planet. To solve this issue, corporate travel is slowly being replaced by low-carbon learning expeditions. Explanations.

Each year, thousands of companies send their teams on exotic business trips, remote seminars, learning expeditions, off-sites and other business trips to the other side of the world, which make a significant contribution to their carbon footprint. According to the Convention des entreprises pour le Climat (CEC), business travel can account for up to 90% of the emissions of a service company.

Business travel is old hat and creates division

Before a business trip, 79% of employees wonder if a journey is worth making? If we take the example of learning expeditions, which are often assimilated to technology safaris, these pilgrimages to the "Meccas of innovation" like San Francisco, Shanghai or Bangalore sometimes reveal a less glamorous reality: a visit to a high-tech Google cafeteria at Mountain View or an Instagram photo on the Facebook's rooftop at Menlo Park are not necessarily a fruitful or enriching experience.

Nor does organising a seminar in Tel Aviv or Shenzhen overcome all of a company's strategic or personnel issues. For the sociologist Christophe Dejourn, these events seem like "children's games", marked with a certain immaturity. In his eyes they are tools for regression that hinder serious and mature discussions in teams. Days spent solving puzzles, watching PowerPoint presentations or taking part in role-playing do not seem to improve the capacity for a team to work efficiently together.

On the contrary, these activities accentuate the group pressure on everybody. Finally, although the trip is intended to create confidence and cohesion, it often creates defiance and fear. Just ask this Airbus executive who wanted to force his employees to walk bare foot on broken glass during a seminar...

No need to travel far to get somewhere

Another more frugal and educational form

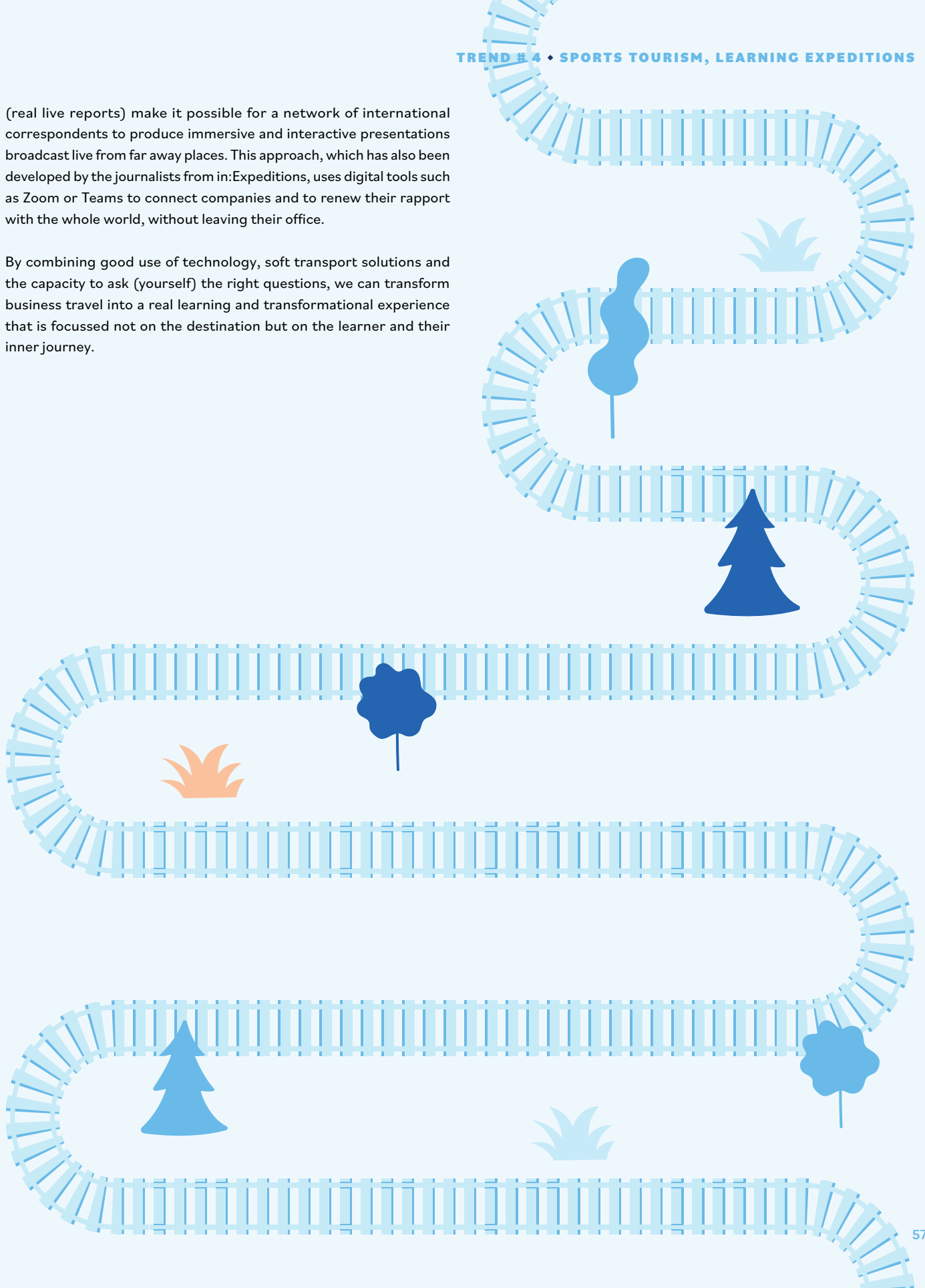
of business travel is possible. Since 2016 for example, the in:Expeditions studio has specialised in organising low carbon learning expeditions. With a map of more than 2,500 positive impact projects linking twenty-five towns across Europe, different types of exploration are organised by train. The aim is two-fold: to allow decision makers to stay one step ahead of the game, whilst polluting as little as possible during their journey.

And these low carbon expeditions have plenty of potential for learning: Europe is full of hubs for inspiration and innovation with a positive impact that the world's entrepreneurs are coming to envy. Niklas Zennström and Tom Wehmeier, Directors of Atomico remembered in a tribute in Le Monde newspaper on 13 June last year the following phrase: "Europe has the potential to create more value in the field of tech than any other region in the world". With 300 companies valued at more than one billion dollars founded in Europe, there is something to do and something to see. "Particularly in the field of social innovation and sustainable development where Europeans excel". Take a look for example at Amsterdam, a pioneer in the circular economy and the doughnut economy, Copenhagen, champion of transitions, London or Berlin, with the ground breakers in climate tech, the region of Brittany, a renowned low tech laboratory, or even Basel and Barcelona, international capitals of the regenerative economy.

And, whilst innovation does not stop at the boundaries of Europe, video expeditions

(real live reports) make it possible for a network of international correspondents to produce immersive and interactive presentations broadcast live from far away places. This approach, which has also been developed by the journalists from in:Expeditions, uses digital tools such as Zoom or Teams to connect companies and to renew their rapport with the whole world, without leaving their office.

By combining good use of technology, soft transport solutions and the capacity to ask (yourself) the right questions, we can transform business travel into a real learning and transformational experience that is focussed not on the destination but on the learner and their inner journey.



Sports tourism and adventures: the call of the Far North

Benoit Chollet (and Marc Vinet) ♦ Director Scandinavia, Finland and Baltic Countries - ATOUT FRANCE



Whilst Scandinavia and Nordic countries have always been mythical lands of adventure, the different crises of the past or those that can be foreseen are speeding the need for tourism in nature and with adventures. Although the roads to the north are becoming increasingly well known and the connection with nature less intimate, northern destinations and journeys are at the peak of this growing segment.

Scandinavia: the advantages of unique destinations

We should remember that the northern latitudes are made up of a diverse range of

natural landscapes that offer an invitation to adventure. Whether it is the majestic fjords and mountains of Norway or the endless forests of Sweden, not to mention Lapland in Finland, the resources and the holiday destinations involving nature are omnipresent in the cultures and the habits of the descendants of the Vikings, particularly where we find unique natural phenomena: the Aurora Borealis and the midnight sun or the famous geysers of Iceland, which can stimulate the imaginations of travellers from around the world who are seeking adventure.

These open spaces also of course favour all kinds of traditional and new outdoor activities (ski and kayak are both terms that come from the north). Whilst they are usually reserved for local participants, professionals from the north have been able to develop these features as unique tourist assets such as Jamtland County in the heart of Sweden, which was identified in 2018 by the European Commission in its *"Mapping smart specialisation strategies for sport"* as an important regional cluster assisted by research activities for the sport and outdoor segment. Development around sport can also be seen in Central Finland, with the recent formation of Visit Jyväskylä Region, as Jyväskylä is often identified as the Finnish sports capital.

To complete the picture, it is important to note that the growth in the Arctic region of Scandinavia, the ideal playing field for outdoor

and adventure concepts, with a totally different offering depending on the time of year. The disappearance of iconic species, such as polar bears or the irremediable melting of the glaciers, accentuate demands for stays in the Great North from Iceland to Lapland, as can be seen from all the new air and sea connections towards the extreme north.

Scandinavia can count on high quality, safe and well maintained infrastructures to host all these newcomers, even if the many challenges of increased tourism in zones that were until now hard to access, and were therefore protected, must be resolved on a day-to-day basis.

The Norwegians for their part are of course playing the sustainable travel card, from electric cars to trains not to mention new, hybrid ferries. Some of their railway lines are amongst the most spectacular in Europe and already transform a journey into a comfortable adventure through nature (for example, the train that take you to the village of fjords of Åndalsnes, a Mecca for climbing and the starting point for many adventures.



Why have the Scandinavians adopted this culture of well-being and outdoor activity?

There are many historic reasons for the active life style of Nordic countries. It is easy to imagine how the climate of the region with its long, cold winters has always required people to pay close attention to their physical and mental health. The protestant majority also exercised great influence by accentuating the sense of individual responsibility and self discipline, with a rigorous approach to personal hygiene and a holistic concern for well-being.

Physical activity is a daily part of life in Scandinavia. For example, nearly half of journeys to work in Copenhagen were made by bike in 2018. 7 out of 10 Danish people own bikes and 9 out of 10 in the capital. According to Eurostat, 75% of Danish people did aerobic sport in 2019, which was the highest level in the EU.

Northern countries are also renowned for their

unique culture regarding free time. Work-life balance is essential for Scandinavians. People are encouraged to indulge in activities that promote relaxation, well-being and personal development. Times of relaxation and conviviality are important and are often spent outdoors.

In Denmark, at Silkeborg, said to be the capital of outdoor activities, the municipality shows how nature, as a resource can enhance the well-being, prosperity and growth of any community. The ambitious model from Silkeborg involves all the stakeholders in a unique 360° model. Nature is integrated into every aspect of life and at every level with more than 175 local initiatives to improve the physical, mental and social well-being of its citizens.

Friluftsliv, a typical Scandinavian lifestyle

Scandinavians have a reputation for their love of nature, they call *friluftsliv* (pronounced *fri-leuft-live*). The expression translates literally

as "life outdoors" and was popularised in the 1850s by the Norwegian author Henrik Ibsen, who used the term to describe the value of spending time in remote places for spiritual and physical well-being, and who is also associated with the concept of *allmansrätten*, literally "the right to move". Scandinavian countries all have similar laws that allow everybody the right to walk or camp almost anywhere, as long as they respect the surrounding environment, the fauna and the inhabitants.

In 2019, Aron Emilsson (*Vice President of the Committee on Cultural Affairs for the Nordic Council*) explained in the *Nordic Outdoor Life Report*: "The natural and cultural environments of the Nordic region are facing new challenges. We must work together so that the environment and outdoor industry can handle more people and activities in the long term. An action plan must combine the ambitions of sustainability, the experiences and solutions for Nordic countries and offer greater outdoor opportunities to children and young people, and a helping hand to conservation and nature".

For Nordic people, the weather is still a determining factor. The long winter conditions play a significant role in the needs for serotonin, which are filled by sunny holidays or locally by sports activities. Sport is a good countermeasure against Seasonal Affective Disorder (SAD), which affects many people during the long winters with little sunlight. Doing outdoor sport therefore makes it possible to maximise exposure to natural light and to improve well-being. This triggers a phenomenon of heliotropism, which refers to the behaviour and preference for Scandinavians to look for sunny holidays in the winter months. This leads them to travel south to escape the darkness, to recharge, or simply to enjoy an environment that is more favourable to activities such as skiing in the Alps (sunnier than their mountains), cycling or even golf.

Sustainability and responsible tourism driving outdoor development

Scandinavia is at the forefront of sustainable innovations that have become an indissociable factor for its development. Climate issues are putting the durability of active and adventure tourism in Scandinavia at risk, particularly ski resorts or the Arctic. The seasonality and preserving natural spaces have been identified as the biggest issues for Nordic tourism. They are the main objectives for SkiStar, which operates the biggest Scandinavian mountain ski resorts in Sweden and Norway. For them, the all-year mountain has become the main challenge, diversifying sports activities and managing the recreational pressure on the environment has become an obligation. Durability is the key factor, as stressed in their latest annual report.

New initiatives supporting sustainability and activities are also worth noting. For example, in the summer of 2022, the Dalarna region in Sweden tested a new "Outdoor Qualified by Visit Dalarna" certification, with a focus on mountain biking. The accommodation that was awarded this certification includes for example maintenance infrastructures and parking for bikes, and has expertise in providing

information on routes, offering packed meals and other services for safe micro-adventures.



Certification Outdoor Qualified de Visit Dalarna

Finally, in Sweden, the Nature's Best label is awarded to ethical and high-quality holidays in the great outdoors. This label was developed by travel associations, the owners, nature protection associations, NGOs, companies and tourist institutions. The certification system labels the activities of eco-tourist entrepreneurs. It operates both as a tool for the sustainable business development of natural and cultural tourism companies and a quality label that makes sustainable experiences visible for responsible and active travellers.

Sources

- Nordic council Committee: prioritize outdoor life
<https://www.norden.org/en/news/committee-prioritise-outdoor-life>
- Le rapport Nordic Outdoor Life (svensktfriluftsliv.se)
<http://svensktfriluftsliv.se/wp-content/uploads/2018/04/2018-01-24-report-from-joint-nordic-project-recommendations.pdf>

ALLEMANSRÄTTEN –SÅ FUNKAR DEN!



Jag håller mig tillräckligt långt bort från någons hem.



Jag tältar bara så länge jag får och där jag får.



Jag eldar inte på klippor eller om det finns en brandrisk.



Jag tar med mig mitt skräp.



Jag vet hur jag gör mina behov i skogen.



Jag skadar inte skog och mark.



Jag stänger alltid grinden.



Jag plockar bara de blommor, svampar och bär som jag får plocka.



Jag håller koll på vad som gäller när jag är i ett skyddat område.



Jag har koll på min hund.



Jag visar alltid hänsyn mot djur och människor i naturen.



Jag badar där jag får och jag lägger min båt där det är okej.



Jag kör bara motorfordon där jag får.



TREND

Connected tourism & cybersecurity how to keep data secure



Security, noun: "the quality or state of being secure: such as (...) freedom from danger"

Merriam-Webster

From the Latin "*securitas*" meaning "freedom from care", security is a reassuring state, free from any problem and that offers peace of mind. A state that it is increasingly hard to maintain in view of the numerous data exchanges, particularly in tourist flows.

The cybersecurity of tourist data is a central factor for the state of mind in which tourists make their visits. Therefore the means for securing these data must be found to counter the many cyberattacks aimed at tourists who are considered to be vulnerable, either by using new technologies such as blockchain, or by certifications and training about managing personal data. From tickets desks for sports events to ticket offices for museums and other cultural venues, data protection is therefore essential for all the players in tourism.



Blockchain & data protection: where is the value for tourism?

Guillaume Cromer ♦ Director - ID-TOURISME



largely feeding on our data.

As a reminder, the growth in the volume of data shared in our society has been greatly increasing since 2010. We have gone from 2.2 zettabytes of data generated in 2010 to 47 zettabytes in 2020... A zettabyte is one sextillion bytes... The forecasts for 2035 are 2,142 zettabytes!

These data (our data) are the essential fuel for the GAFAMs, as shown by the following figures. Facebook depends for 98.5% on advertising, compared with 83.3% for Alphabet (Google).

What is blockchain?

A blockchain is a shared register that allows entities (people, companies, etc.) that do not necessarily trust each other to exchange data (in the form of transactions) without the intervention of any third party, solely via a secure, encrypted computer protocol.

Blockchain can be defined through the following properties:

- **transparency:** all of the participants can see all of the data inscribed;
- **sharing and decentralisation:** several copies of the blockchain exist simultaneously on different computers, nodes of the network;
- **irreversibility:** once data has been inscribed, it cannot be modified or deleted;
- **money market deregulation:** any decision is made by a consensus between the participants, with no centralised arbitrator.

In practice, there are several different types of blockchain, which implement different levels of permission for the different categories of participants. There are also different types of blockchain depending on these levels of permission: public blockchain and permissioned or private blockchain.

Our society is largely based on digital technology now with increasingly powerful players who are mainly fuelled by personal data. The Web3, based on blockchain technology promises to make our data secure, unchangeable and available without passing by a trusted third party.

Online centralisation and data society

Before entering the rabbit hole of blockchain, you need to remember certain elements that characterise the centralisation of the internet and the fact that current big companies are

Blockchain and data protection: how does it work?

A blockchain can hold different categories of personal data:

- **The identifier of the participants and miners (who verify transactions carried out by the**

network's users): each participant/miner/validator has a public key, which makes it possible to identify the issuer and recipient of a transaction;

• **Additional data**, inscribed "in" a transaction (e.g. a diploma, title deed). If these data relate to natural persons, who may not be the participants, who are directly or indirectly identifiable, they are personal data.

This definition makes it possible to integrate information and data from this "additional data" and therefore protect them thanks to the attributes of blockchain presented above in particular the security, integrity and availability. Therefore, based on this distinction, the usual GDPR analysis grid applies: identification of the data controller, implementation of rights, implementation of appropriate guarantees, security obligation, etc.

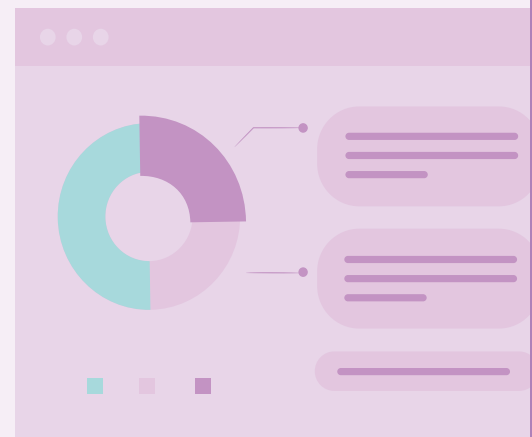
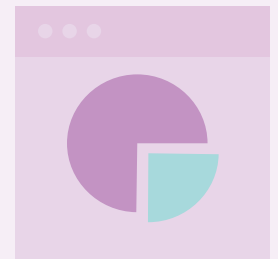
For example, in the health domain, in Estonia, people have the option of defining which professionals have access to their medical records. These access rights are inscribed in a secure manner that cannot be falsified in a blockchain that plays the role of a lock on these data.

What data for players in the tourist industry?

For players in the tourist industry, we can imagine various data that need to be protected:

- Customers' personal data (as intended by the GDPR);
- Statistical data in resorts related to observatories;
- Data about the flow of visitors;
- Data from tourist information systems about the tourist offering;
- Tourist accommodation registration data;
- Environmental data from tourism professionals (water / energy consumption, greenhouse gas emissions, waste, etc.) and resorts (data about the spatial impact of tourism, biodiversity in the regions, etc.);
- Etc.

These multiple cases of use show the importance and the necessity for players to take an interest in the subject of blockchain beyond the background noise around speculation about cryptocurrencies or other "scams" about certain NFT projects.



Mastering the GDPR fearlessly: discover how you can make the most of your visitors' data



Léo Bertrand ♦ Museum, Leisure and Tourism Account Manager - ARENAMETRIX



What exactly is the GDPR?

The GDPR (General Data Protection Regulation) entered into force in 2018, but its application is still a challenge for many players today.

Many DPO (Data Protection Officers) acknowledge that there is still a lot of work to be done to adopt the processes in relation to this regulation. Alongside this, consumers are increasingly aware of their rights with regard to their data and are using them more often (Solutions-Numérique, 2023 ; CNIL, 2022).

However, the GDPR is above all a matter of common sense and adhering to best practices

to use visitors' data intelligently and in a respectful manner. With the right tool, the advice from the French Data Protection Authority (CNIL) is the best ally for players in the tourist industry to offer their visitors an enhanced experience, without too much effort from their teams.

What data is useful for players in the tourist industry?

There are three types of essential data for professionals working in tourism:

- personal data (postal address, email address, name, etc.)
- consent data (opt-in, interests, etc.)
- behavioural and transactional data (purchasing history, marketing campaigns sent and the responses, etc.).

These data are collected on several occasions: during the purchase from a ticket office, browsing on the website, when completing a form, when signing up for a newsletter, a free event or downloading a brochure, etc.

How can you optimise the use of visitor data?

Visitor data are essential for optimising the experiences that are offered to them. However, they are still under used and applied to

operations (Les Echos, 2021).

These data have different uses:

- Assisting with decision making (*e.g. I note that many 18-25 year old visitors buy individual tickets for two sites that I operate, I deploy a double ticket for these two sites and target these profiles*)
- Measuring investments and optimising efforts made by your teams: analysing the performance of a campaign and the ROI generated, calculating the effect of a promotion, etc.
- Strengthening contact relationships: promoting your content and the offering of your destination at the right time, to the right person (*e.g. sending a new brochure "active tourism" to opt-in contacts from my base that have already made a purchase related to that theme*)
- Enriching the experience of visiting sites (*e.g. Sending a pre-visit email with recommendations of related products (reserving a car park, audio guide, etc.)*)
-

However, many institutions use the data from different tools (ticketing, stores, website, etc.). These data are siloed, split between the services and tools, without any tracking or harmonisation, which does not offer full knowledge of the contacts.

This fragmentation of data poses problems for GDPR compliance and limits the possibility of deploying these uses efficiently. Consequently, centralising data is an essential prerequisite.

An example of an intelligent application of the GDPR: offering your contacts a preferences section - The case of Chateau de Chantilly and its use of Arenamatrix

Issue: To continue to appeal to a local public whilst encouraging attendance by French and international tourists and business people, Chateau de Chantilly needed a simple but powerful central solution that would enable it to:

- Build and categorise its database
- Centralise the data from sales, contacts and satisfaction surveys to obtain better visibility of its types of visitors
- Customise and adapt its marketing communications
- Identify, segment and target its visitors using appropriate criteria

Solution: To meet this need, Chateau de Chantilly used the Arenamatrix solution to deploy the following actions:

Connecting to data sources automatically.

Arenamatrix recovered data from Chateau de Chantilly and connected to its website, its ticketing solution (Vivaticket), a marketplace (Patrivia) and its satisfaction surveys (Gece) to provide its teams with a full contact sheet, fed by the data from the different points of contact with visitors.

Creating a preferences section with 7 themes.

Contacts can choose exactly what type of communications they wish to receive. They can freely subscribe and unsubscribe from the different themes, which boosts their involvement with the site. The chateau therefore limits the number of people who unsubscribe and ensures a far greater level of response to its requests than when communications were standardised.

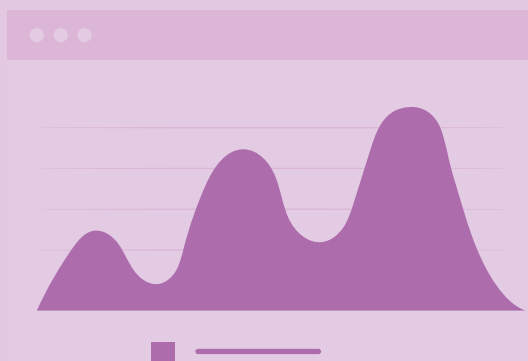
Automating the relationship with visitors.

Chateau de Chantilly can automate points of contact with many types of visitors according to their purchases, their visits and their satisfaction level. By automating its marketing, Chateau de Chantilly guides its customers throughout their visit (pre- and post-visit emails), asks about their level of satisfaction at the right time (including subscribers) and can prevent their deactivation on different channels.

What is Arenamatrix?

Arenamatrix was founded in 2013 with the intention of giving players in the tourist, culture and sports sectors control over their visitor data.

This idea was given form by the creation of a CRM data platform that centralises their contact data. The Arenamatrix platform analyses visitor behaviour and has an omnichannel campaign module for targeted communication. It meets the needs for visitor acquisition, commitment and loyalty building, but also data processing thanks to 360° monitoring of the life cycle of contacts in the data base.



Revolutionising the fan experience by simplifying it!



Fabien Selles ♦ Founder & CEO - FANSWAVES



As a big fan of football and music, I have always dreamed of experiencing the best atmospheres in France and abroad. These events are rarely enjoyed alone, but are more shared with the people that matter to us. However, organising these trips can be frustrating, particularly due to the time spent looking for information, the complexity of communicating and the advance payments required.

We have created a unique solution to help fans to overcome these challenges: Fanswaves. This platform simplifies the process of organising how you attend an event. Fanswaves is a social network that includes a market place for buying tickets to events and all the commodities you

need to get there. All of this, on the same website and with your preferred payment solutions to share the bill with your friends and pay in instalments.

But, beyond simplifying the organisation, we had a major concern: the security of our users' data. We realised that winning our users' trust depended on our capacity to protect their personal information. That is why we implemented robust security measures and we are committed to adhering to the strictest standards in terms of data protection.

A process that will evolve as the project grows. Our MVP will implement links to partners, in this way we ask for basic data to create a user profile and all the sensitive payment data will be entered on the websites of our partners, who the users already know.

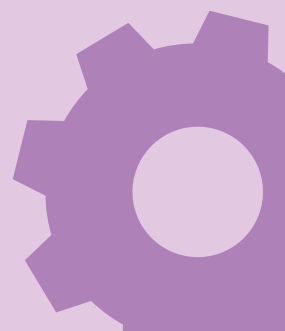
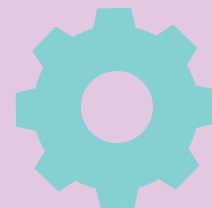
Ultimately, we will remove the link and we will work with ticketing and online payment partners to anonymise the data and secure it in a blockchain. These are precious assets as they will enable us to be responsive by giving us the possibility to manage ticketing and to make it paperless for the organiser, who wants to promote their event quickly on our map.

To discover how Fanswaves works look here! (ajout QR code niveau graphique ?)

We also realise that this is all a question of data.

We want to build our comparator to make it easy to identify the players who are ready to share their carbon footprint and accessibility for people with reduced mobility. We also have ideas for how to try and fight back against discrimination in stadiums.

By creating a tool that encourages human interaction by going to live events, we are going against traditional social media, which have a tendency towards creating isolation. Fanswaves creates a digital and physical connection between people by simplifying travelling.



Data bank

Data security

Get trained

MOOC :

- "L'Atelier RGPD" (GDPR Workshop), CNIL
- SecNumacadémie.gouv.fr: the ANSSI's MOOC for training about digital security

Guides and best practices:

- RGPD (GDPR: where to start), CNIL
- Règlement européen sur la protection des données personnelles : se préparer en 6 étapes (Preparing for the European Data Protection Regulation in 6 steps), CNIL
- Le guide de la sécurité des données personnelles (The personal data security guide), CNIL
- Guide pratique de sensibilisation au RGPD pour les petites et moyennes entreprises (Practical guide for raising awareness about the GDPR for small and medium-sized businesses)
- Getting CNIL certification for your product / solution
- The service-public.fr website: "Données personnelles et sécurité" (Personal data and security)
- La cybersécurité pour les TPE/PME en treize questions (Cybersecurity for small and medium-sized businesses), ANSSI
- Maîtriser la SSI pour les systèmes industriels (Mastering the ISS for industrial systems), ANSSI

Legislation in force:

- French Law No. 78-17 of 6 January 1978 as amended, the French Data Protection Act
- General Data Protection Regulation of 27 April 2016







LET'S INVENT TOMORROW'S TOURISM!



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