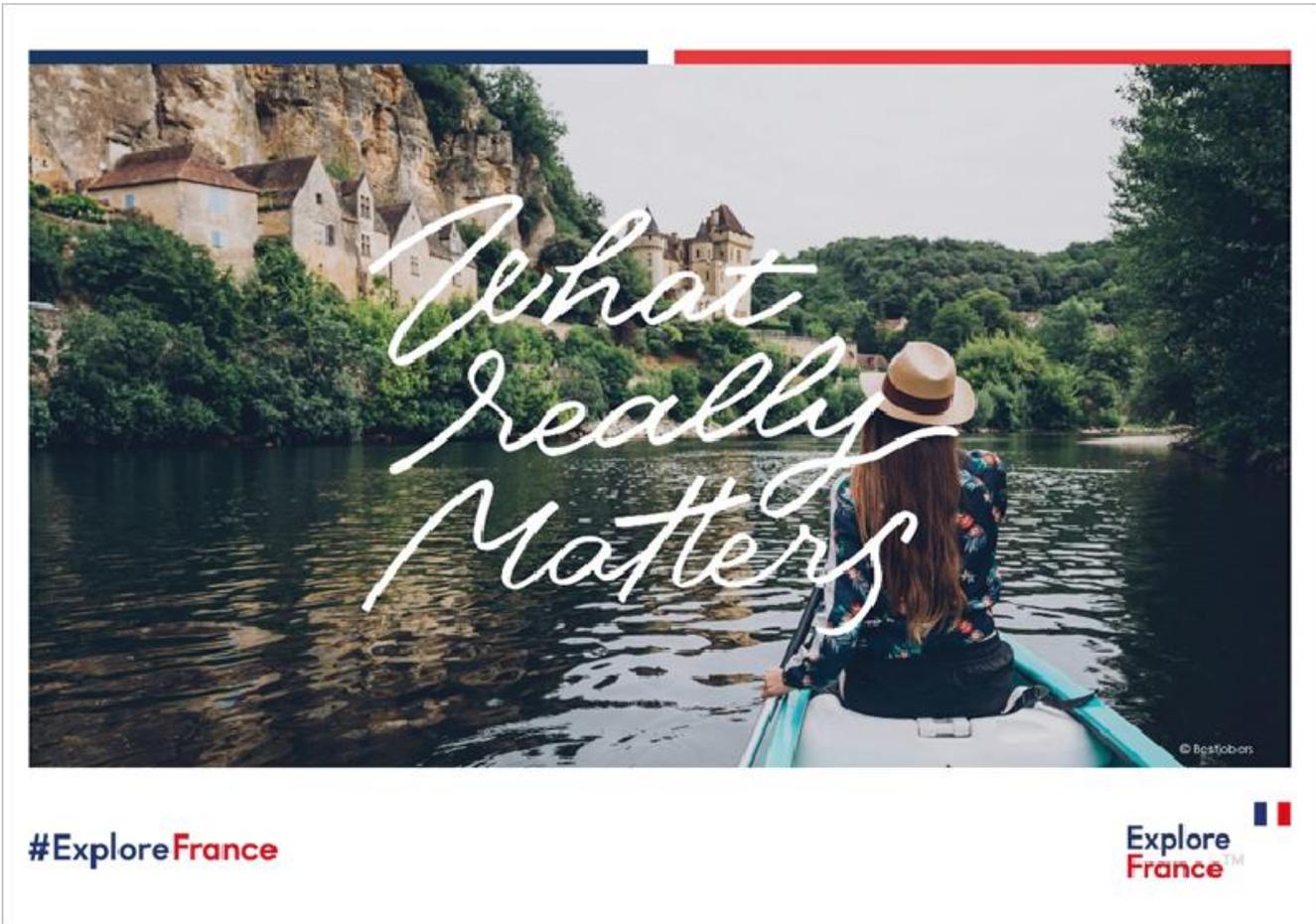


EUROPEAN RELAUNCH CAMPAIGN 2021

Atout France, the 13 regional tourist boards and agencies, and private partners are all involved in a new tourism push for destination France



For over a year, the steps implemented to contain the global Covid-19 pandemic have taken a significant toll on the international economy, with the tourism sector being one of the hardest hit. According to the UNWTO, international arrivals (business and leisure sectors) dropped by 74%, or 1 billion, last year in comparison with 2019. In France, the Bank of France estimates a drop in international tourism revenue of -49.6% in 2020, compared with 2019.

However, the predicted improvement of the health situation in France and Europe has now allowed the French government to relax restrictions on visits to the French mainland. As of the 3rd of May, tourists from the European area can once again visit France, as long as they can show proof of a negative PCR test. According to European Commissioner Thierry Breton, 70% of the adult population of Europe could be vaccinated between now and mid-July. This development, and a proposal to introduce a Digital Green Certificate within the European area from mid-June, potentially signals a gradual return to tourist activity this summer.

After spending the past year rediscovering their own countries, Europeans seem ready and eager to travel beyond their borders, subject to conditions.

It's clear that **a new kind of tourism is emerging**. The Covid-19 situation aside, there are growing concerns regarding sales flexibility and the environmental impact of travel. The traveller of 2021 is keen to embrace a more sustainable and responsible form of tourism - focusing on short-haul destinations (to lower their carbon footprint) - and tends to seek out unspoiled areas and authentic experiences. The desire to socialise and enjoy meeting up with others in restaurants and bars once again (with social distancing measures in place) is also a major factor.

► ATTRACTING EUROPEAN VISITORS BACK

French tourism professionals have been following these developments very closely and understand that **French destinations have everything required to meet these new aspirations**.

For several months, they've been working on a joint strategy to kickstart travel from Europe, which made up a little over 75% of international tourism before the crisis; a number that's predicted to **exceed 85% in 2021**. They are now preparing to launch a marketing campaign of unprecedented scale.

► AN UNPRECEDENTED CAMPAIGN

For the very first time, Atout France, the 13 regional tourism committees, promotions agencies, tourism agencies in mainland France and several private tourism companies have come together to promote France as THE ultimate travel destination.

Under the **#ExploreFrance** brand, the relaunch campaign will encourage tourists from 10 European¹ markets to return to France and discover **What really matters**.

The campaign will set out a different way to travel, much more in tune with visitors' new aspirations and their growing need to take a step back and embrace a slower pace of life. The What really matters #ExploreFrance campaign will centre around the key themes of **sustainability and environmentally-friendly travel**, showcasing the latest and most exciting developments in **slow tourism** and taking prospective visitors on a whistle-stop tour of France's **natural spaces, culture, heritage and art de vivre**.

Slated for a summer and autumn/late-autumn launch, **the largely digital campaign was designed to be rolled out gradually and with enough flexibility** to keep up with developments in the health crisis

¹ Germany, Belgium, United Kingdom, Switzerland, Netherlands, Italy, Spain, Denmark, Sweden and Austria.

in France and international markets. **The May launch will vary by market and will be subject to travel restrictions and social distancing measures in each of the targeted countries.**

In addition to the campaign which aims to spark a desire to rediscover France, Atout France and its partners will run press and industry events in the various European markets to reassure tourists, update them on the latest safety measures in France and promote the country's wealth of new attractions and unique travel opportunities.

BACKGROUND CONTEXT

► 2019, A RECORD YEAR FOR INTERNATIONAL TOURISM IN FRANCE

- 1st international tourist destination with 90 million arrivals
- 3rd destination in terms of international revenue: 57 billion Euros
- Almost 170 billion in internal tourism consumption (spending by French and international visitors with French economic agents)
- 442 million overnight stays in tourist accommodation including 215 million in the hotel trade
- Almost 7.5% of the gross domestic product connected to tourism, including almost 40% connected to international visitors

► 2020: A CHALLENGING OUTCOME FOR INTERNATIONAL TOURISM

Despite a generally decent summer season, sustained by buoyant domestic travel and a boost in tourism from select Northern European markets, 2020 was a challenging year for French tourism.

The Bank of France estimates a **-28.3 billion Euro drop in international tourism revenue** (-49,6%): 28.7 billion euros in revenue versus 56.9 billion in 2019.

However, France has fared better than other European destinations: Spain (-77,8 %), United Kingdom (-64,2 %) and Italy (-60,6 %).

WHAT REALLY MATTERS #EXPLOREFRANCE CAMPAIGN GOALS

Tourism is a vital part of the French economy and represents 2.87 million jobs, or 10.1% of total² jobs. The *What really matters #ExploreFrance* campaign aims above all to **support industry professionals who have been hit hard by the Covid-19 crisis.**

The first phase of the campaign is designed to inspire **European tourists** by showcasing new destinations and suggesting new experiences in line with their revised priorities. Its second phase includes targeted campaigns designed **to generate holiday bookings.**

² Source: WTC / Oxford Economics

ATTRACTING EUROPEAN VISITORS BACK

As tourism kickstarts again across Europe, all destinations will be rolling out major relaunch campaigns to appeal to potential tourists. Fierce competition is on its way and will require a substantial pooling of energy and resources from key French tourism stakeholders.

► AN UNPRECEDENTED JOINT CAMPAIGN BUILT AROUND A SHARED GOAL AND STRATEGY

For the past several months, the teams at **Atout France** and **13 regional tourism committees, promotions agencies and partnering tourism agencies** in mainland France have joined forces to devise and finance a relaunch plan to suit every stakeholder's needs and wishes.

This meant developing a brand-new work approach to ensure that the final campaign met everybody's objectives. Under the supervision of steering committee, teams from the various participating organisations set up 5 trade commissions: a Legal and Financial Commission, a Data, Performance and Reporting Commission, a Marketing Commission, a Press/Influencer Commission and a Private Partnerships Commission.

Several private transport and distribution stakeholders lent their expertise to the campaign.

► TO POSITION FRANCE AS THE ULTIMATE TRAVEL DESTINATION

France has all the assets required to meet the aspirations of the 2021 traveller:

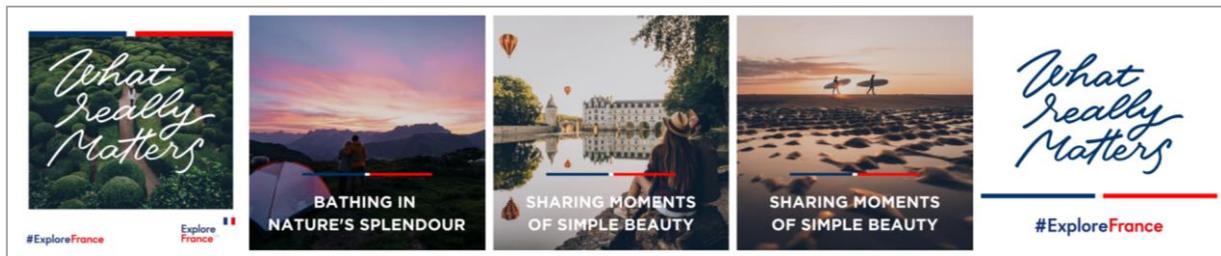
- Reliable healthcare services,
- Sales flexibility from tourism professionals,
- Proximity and ease of access,
- Large unspoiled areas and a range of landscapes,
- Rich cultural heritage
- Art de vivre and dependable places to socialise,
- An updated and innovative approach to tourism to meet travellers' new expectations,
- Low food miles, local suppliers, a range of local produce
- Cultural affinity and a friendly image
- A safe bet = "what really matters"!

► TO INVITE EUROPEAN TOURISTS TO DISCOVER WHAT REALLY MATTERS

Emerging from a year of enforced isolation, everybody is now looking to get back to what they have really missed over the past months, and their priorities have changed to reflect this. That is the concept at the heart of the **What really matters #ExploreFrance** campaign.

The experiences highlighted will promote the return to a simpler life, centred around sharing, conviviality, and eco-responsibility.

European tourists will be invited to take the time to discover the many treasures French destinations have to offer, and to enjoy uplifting experiences, using a more sustainable and responsible approach.



The following will also be highlighted:

- Invigorating experiences **in the heart of nature** (slow tourism, wide open spaces, sustainable and low-impact travel, experiences off the beaten track),
- **Cultural/heritage** and discovering local savoir-faire,
- Opportunities to **sample French art de vivre** (gastronomy, wine tourism, discovering local produce in fun, sociable settings).

New and enticing holiday packages featuring third-party venues combining multiple activities, cosy hotel experiences, unusual accommodation in harmony with nature and the use of technology to enhance the tourist experience, will also be promoted.

A new kind of travel is emerging, and European tourists are invited to be the key players in this revolution.

► **TO PROMOTE FRANCE'S SUSTAINABLE TOURISM CREDENTIALS**

For over a century, France has operated an environmental protection policy. Since the opening of its first park in 1913 (Parc de la Bérarde in Isère), the country has strived to combine economic development with the preservation of its natural spaces. Today, it boasts **11 national parks** covering a 60,000 km² area, or 5% of the country overall, **54 regional parks** and **9 natural marine parks**. In addition, **30% of French land** holds ZNIEFF protected status, which is awarded to areas recognised for their remarkable natural assets. These parks offer tourists ample opportunity to recharge their batteries in natural settings that France has always aimed to keep free of charge and accessible to as many people as possible, while in other countries access to such areas can prove very costly.

In a bid to support sustainable and **low-impact travel**, France has also developed a vast network of hiking trails, cycling routes and riverways, allowing visitors to discover areas of outstanding beauty while keeping them protected.

In terms of **accommodation**, 191 establishments across the country have been awarded the EU's Ecolabel for environmental excellence to date. A further 644 are members of the Clef Verte (Green Key), the very first international network of environmentally-friendly tourism facilities. Additionally, 40 establishments have been recognised for their sustainable credentials by the Green Globe association. No fewer than 280 rentals hold Gîtes Panda status while 320 holiday lets across the country are Ecogîte-certified.

Finally, foodies visiting France will find a whole range of restaurants offering **authentic cuisine and championing locally-sourced and responsibly-grown ingredients**. The Michelin Guide recently launched a new label recognising restaurants embracing sustainable gastronomy. Around fifty establishments have received this accolade to date. Last but not least, the "Maître Restaurateur" label is a guarantee of quality awarded to industry professionals serving exclusively homemade cuisine. 3,800 people in France currently hold this title.

TOURISTS TARGETED

Before the pandemic, European markets made up a little over 75% of international visitors, and in 2021 that number is predicted to exceed 85%.

That is why the campaign is targeting 10 nearby markets: **Germany, Belgium, the United Kingdom, Switzerland, Netherlands, Italy, Spain, Denmark, Sweden and Austria.**

Norway, the Czech Republic and Romania may also be included in the relaunch plan depending on the changing situation in these markets and travel restrictions from these countries into France.



To identify the markets most receptive to its messages and create a campaign catering to their varying needs, Atout France developed and piloted a **targeted monitoring tool**. Taking into consideration the constantly evolving Covid-19 situation, each market is evaluated daily based on its current travel restrictions (PCR tests, quarantine, essential travel only...) and its access to/likelihood of travel (available air travel capacity, internet searches...).

The campaign will be aimed at 3 specific cross-sections of the public in each of the target markets:

- **Families** and **"DINKS"** (double income with no kids)
- **Repeaters**, loyal clients.
- **Millennials** (25-34-year-olds), likely to travel at any time.

The teams at the Atout France headquarters and its 9 European offices will work tirelessly over the next few months to ensure the success of the campaign.

They will also run an accompanying awareness campaign intended to reassure **key stakeholders** (tour operators, travel agencies) and European **media** outlets and keep them informed about ongoing health and travel measures and new tourism opportunities.

CAMPAIGN ROLLOUT

The *What really matters* #ExploreFrance campaign was originally intended for a **late spring/summer**, and an **autumn/late-autumn** rollout, and was **designed to be adaptable** in the face of ongoing pandemic developments and predictions in France and the international markets.

A campaign divided into three phases:

The first phase of the campaign aims to increase France's visibility as an overall destination. It should be launched between now and late May in markets where circumstances allow.

The second phase will allow regional tourism committees, promotions agencies and tourism agencies wishing to capitalise on phase one to supplement it via additional marketing that specifically promotes their destination to the identified markets.

Finally, the third phase, carried out in partnership with private companies, including key players in transport and distribution, will aim to generate holiday bookings. This conversion campaign will promote ready-to-buy packages ("flight + accommodation" or other combinations).

The #Explore France campaign will be almost entirely digital. A range of initiatives (ad space buys, influencer marketing on social networks, PR events and media calls) will allow for more granular targeting of the various identified groups.

The joint approach to this relaunch campaign has allowed for a collective pooling of human and financial resources.

A total of 10 million euros will be co-invested by the French state (via Atout France), the regional tourism committees, promotions agencies, tourism agencies and their regional partners as well as by industry businesses in 2021.

A CAMPAIGN PROMOTING THE 13 REGIONS OF MAINLAND FRANCE

WHAT REALLY MATTERS #EXPLOREFRANCE

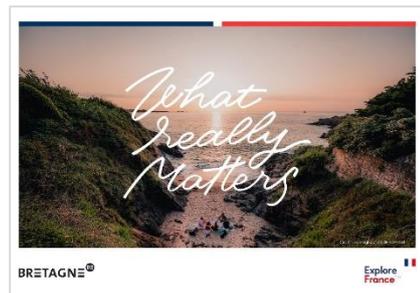
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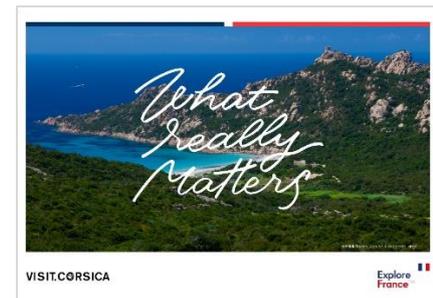
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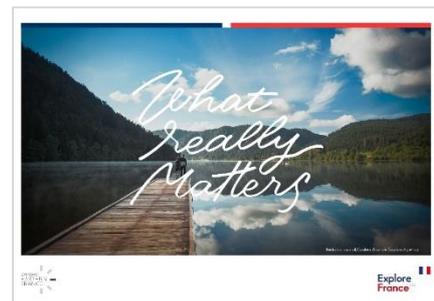
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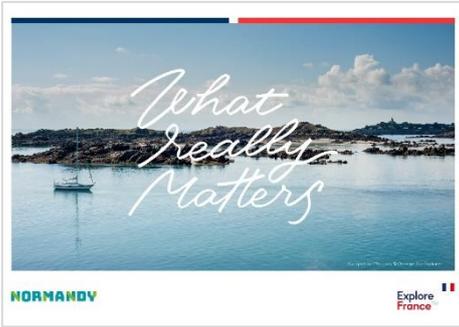
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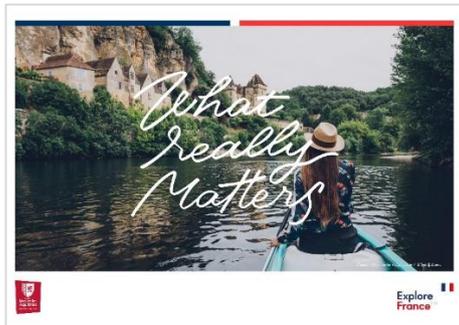
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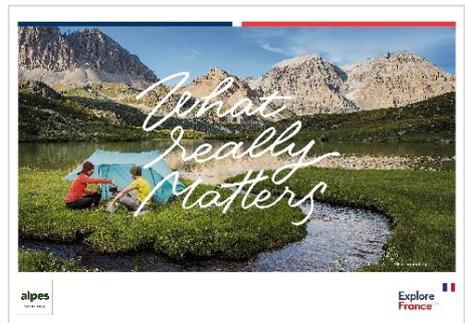
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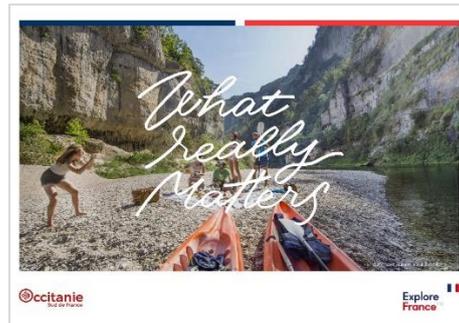
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Provence-Alpes-Côte d'Azur



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WHAT REALLY MATTERS #EXPLOREFRANCE



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