Le “nouveau voyageur”... Vraiment?

Conférence Contrat de Destination Provence - Novembre 2021

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TCI Research
Travel Competitive Intelligence

UNWTO
INNOVATION AWARD

FUELING DESTINATIONS' SUCCESS THROUGH DATA

- Agence de Travel Data Intelligence endossée par l'OMT
- La confiance de 150+ DMOs et acteurs du voyage
- Indicateurs standards et comparables pour les destinations
- Big Data + Etudes conventionnelles
- Temps réel / Analyse de long-terme

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- SATISFACTION VISITEURS
- REPUTATION DES DESTINATIONS
- SENTIMENT DES RESIDENTS
- DEPENSES VISITEURS (VISA)
- DEPLACEMENTS VISITEURS


DEFINIR AUJOURD'HUI LA DEMANDE DE DEMAIN
DANS UN MARCHÉ QUI RESTE DICTÉ PAR L'OFFRE
EST UN PARI TRÈS RISQUÉ…
LES VOYAGEURS S'ADAPTENT AU CONTEXTE COVID
ILS N'ONT PAS NÉCESSAIREMENT CHANGÉ

TCI Research
Travel Competitive Intelligence

MONITORER LES KPIs DE DESTINATIONS A L'ERE COVID

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Social Sentiment

- Lower sentiment to **travel**?
- Lower interest for **cities**?
- Less support from **residents**?

Social Data / Surveys

Visitation Heartbeat

- Share of domestic vs international?
- **New patterns** of visit?
- Do visitors stay **longer**?

Mobile Location Data

Visitor Experience

- Are new visitors **happy**?
- What (new) **expectations**?
- Do they feel **Covid-safe?**
- Is my reputation **competitive?**

Reviews Data
Visitor Exit Surveys

Visitor Spend

- Do new visitors **spend more** vs pre-covid?
- Spend categories **over / under invested?**

Visa Transactions
Spend surveys

Le Sentiment à l’égard du Voyage

De l’optimisme dans l’air

UNWTO

UNWTO TOURISM RECOVERY TRACKER

OVERVIEW | BY REGION | BY TOP 10 DESTINATIONS | BY TOP 10 SOURCE MARKETS | COMPARE INDICATORS | TRAVEL RESTRICTIONS MAP

OVERVIEW

To see how each region or subregion is performing throughout recovery, select a region below.

Current selection: Europe

Select a region or subregion

Return to global view

Region, Subregion
- Africa
- Americas
- Asia and the Pacific
- Europe
- Middle East

How does it work?

Methodological notes

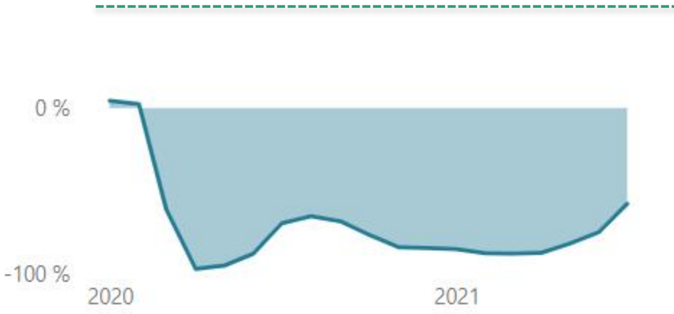
Tourism - General | Air Traffic | Accommodation | Covid-19

Int. Tourist Arrivals - UNWTO

juillet 2021

-58 %
Latest data

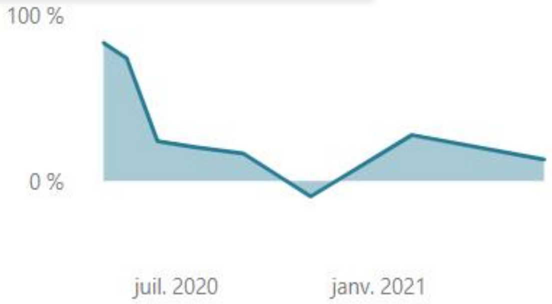
-77 %
YTD



Travel Restrictions - UNWTO

juin 2021

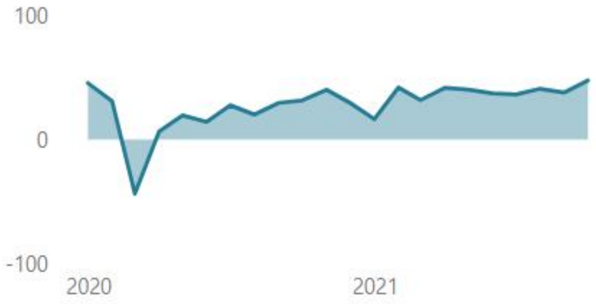
13 %
Latest data



Travel Sentiment - TCI RESEARCH

octobre 2021

47
Latest data



10/2021 = +47 points

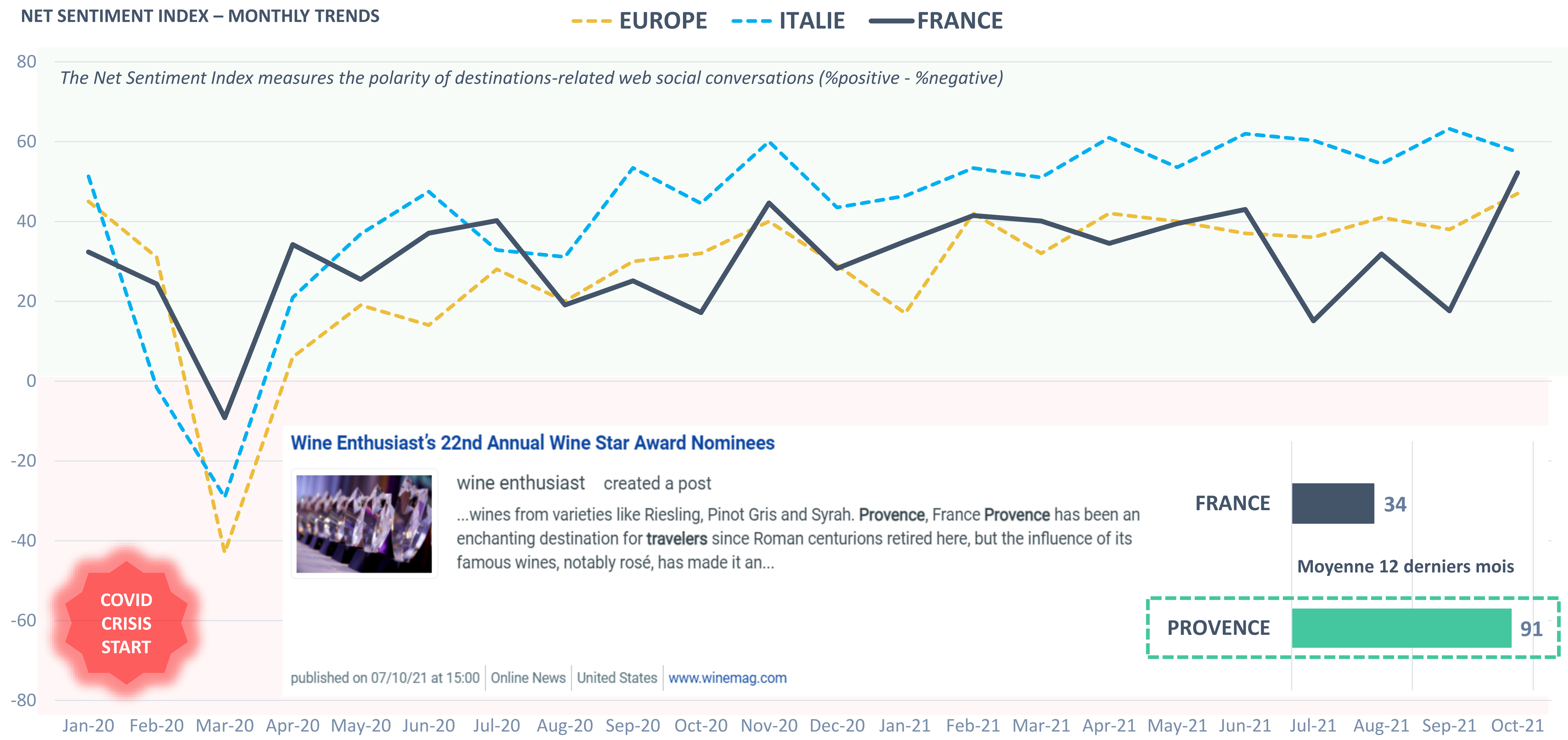
La tonalité des conversations sociales du voyage au plus haut depuis le début de la crise!

- *Réouvertures des frontières*
- *Rebond de l’économie touristique*
- *Promotions des offices du tourisme*
- *Communication organique des fans*
- *Tourisme thématique qui gagne du terrain la problématique Covid*

Net Sentiment Index (-100/100)

What Tonality in Web Social Conversations?

NET SENTIMENT INDEX – MONTHLY TRENDS



Wine Enthusiast's 22nd Annual Wine Star Award Nominees

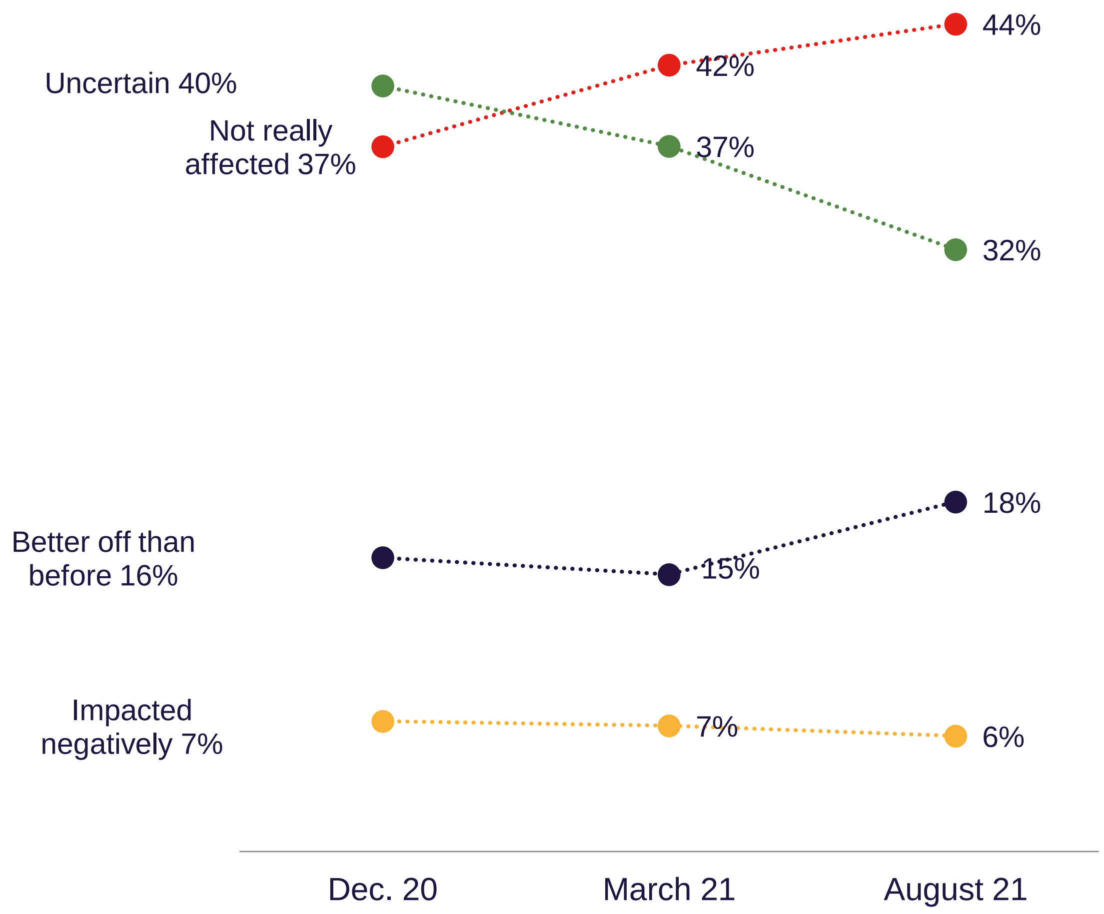
wine enthusiast created a post

...wines from varieties like Riesling, Pinot Gris and Syrah. **Provence**, France **Provence** has been an enchanting destination for **travelers** since Roman centurions retired here, but the influence of its famous wines, notably rosé, has made it an...

published on 07/10/21 at 15:00 | Online News | United States | www.winemag.com

Respondents' financial situation (Trends)

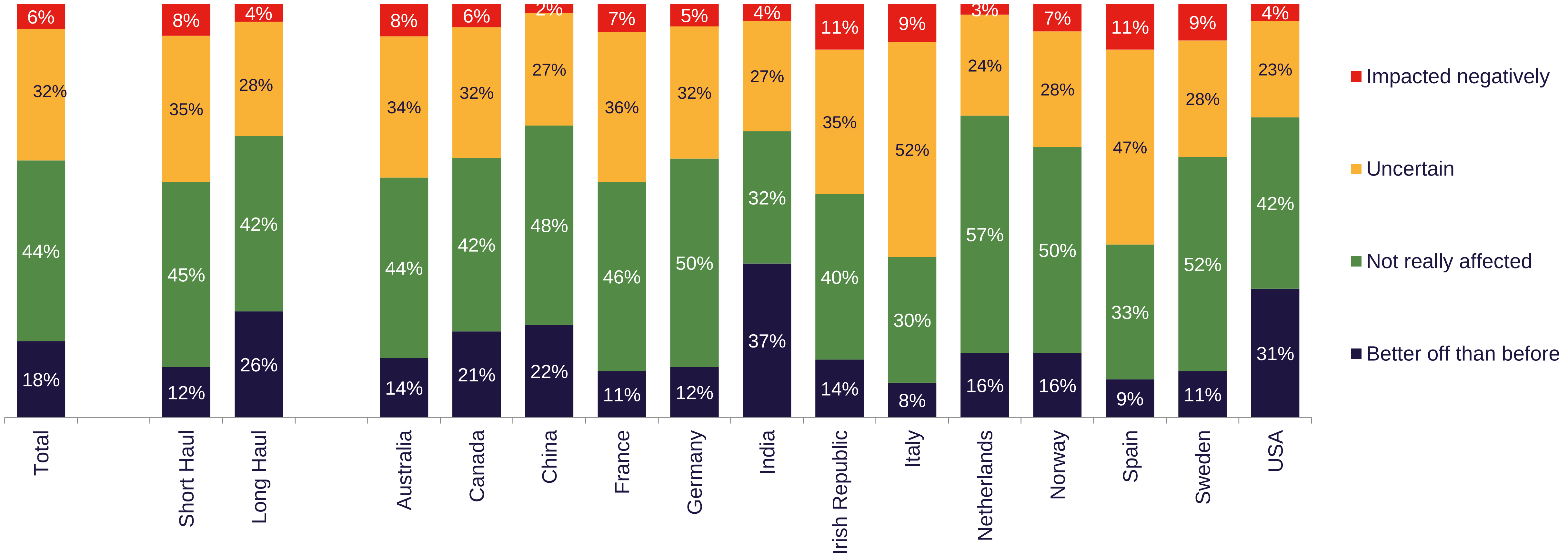
Trended data **confirms a movement from "Cautious to Alright" attitudes** in relation to consumers' spending power.



Q25. How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Trend calculated at constant perimeter (13 markets consolidated)

Respondents' financial situation

While many markets start an economic rebound, **nearly 2 in 3 respondents** on average report their financial situation has not really been affected or is even better than before. Uncertainties remain however for a third of them, particularly for Southern European markets surveyed. **LH markets** –notably the USA- show a **growing optimism** about their financial situation.

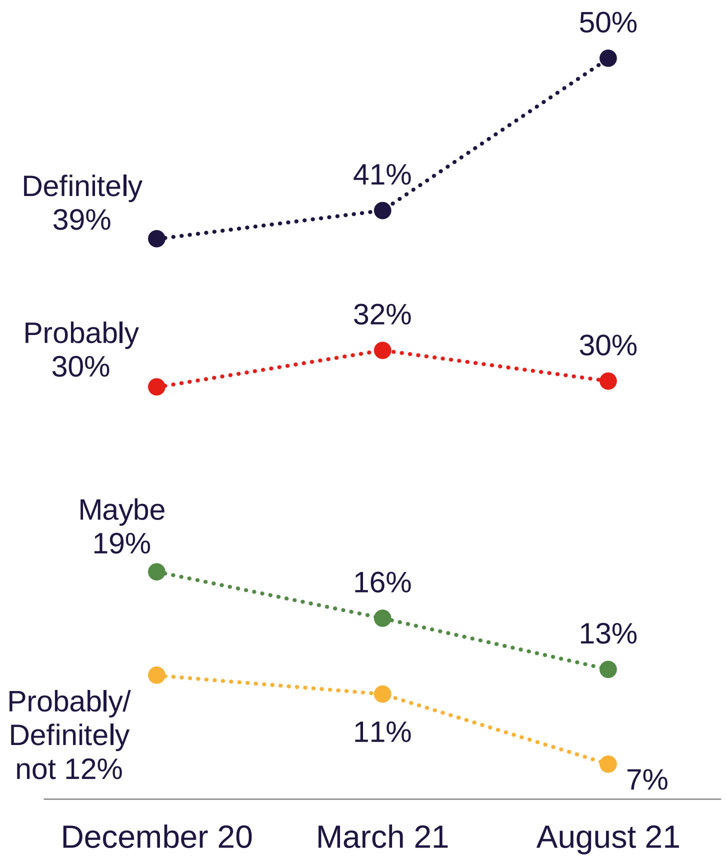


Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: All respondents (n = 7,500)

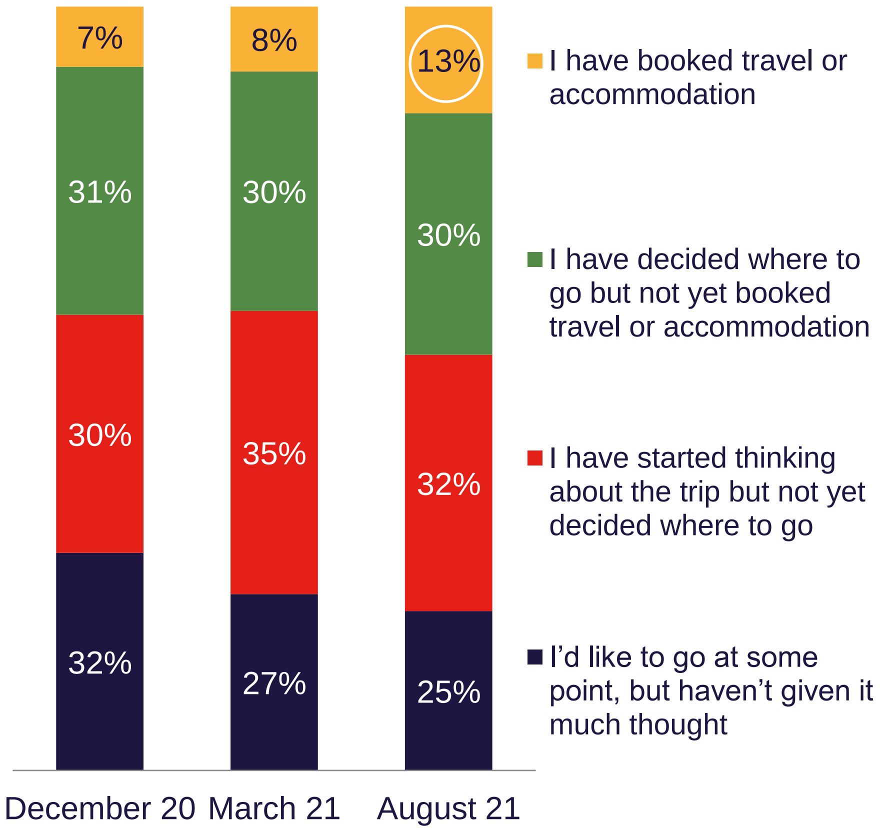
Trended data – Overall Travel Intentions

Previously hesitant consumers now express firm desires for travelling: today, half of respondents definitely plan a trip abroad in the coming 12 months. While bookings have increased, the choice of the destination remains open among other planners.

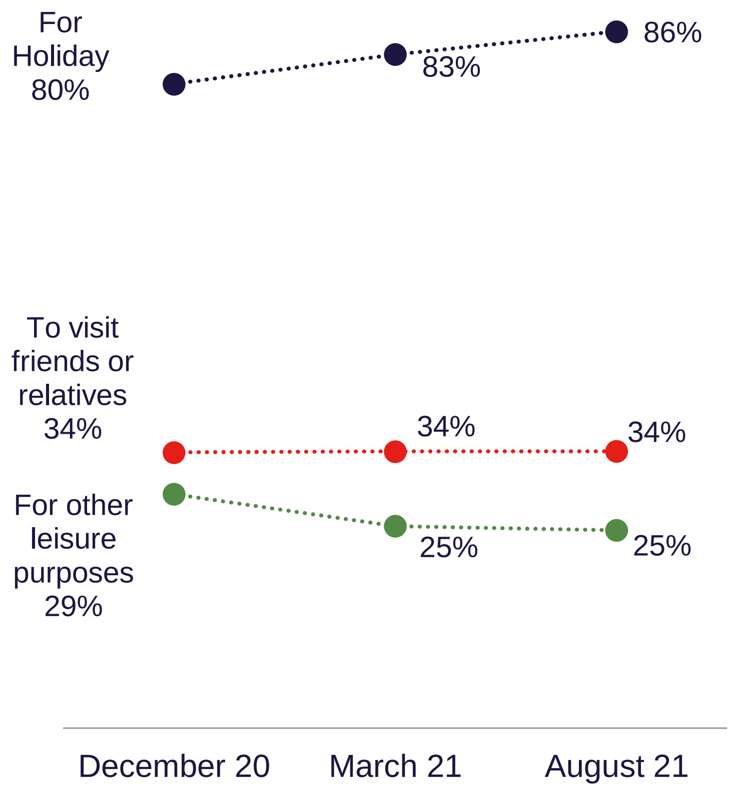
Travel consideration



Trip planning stage



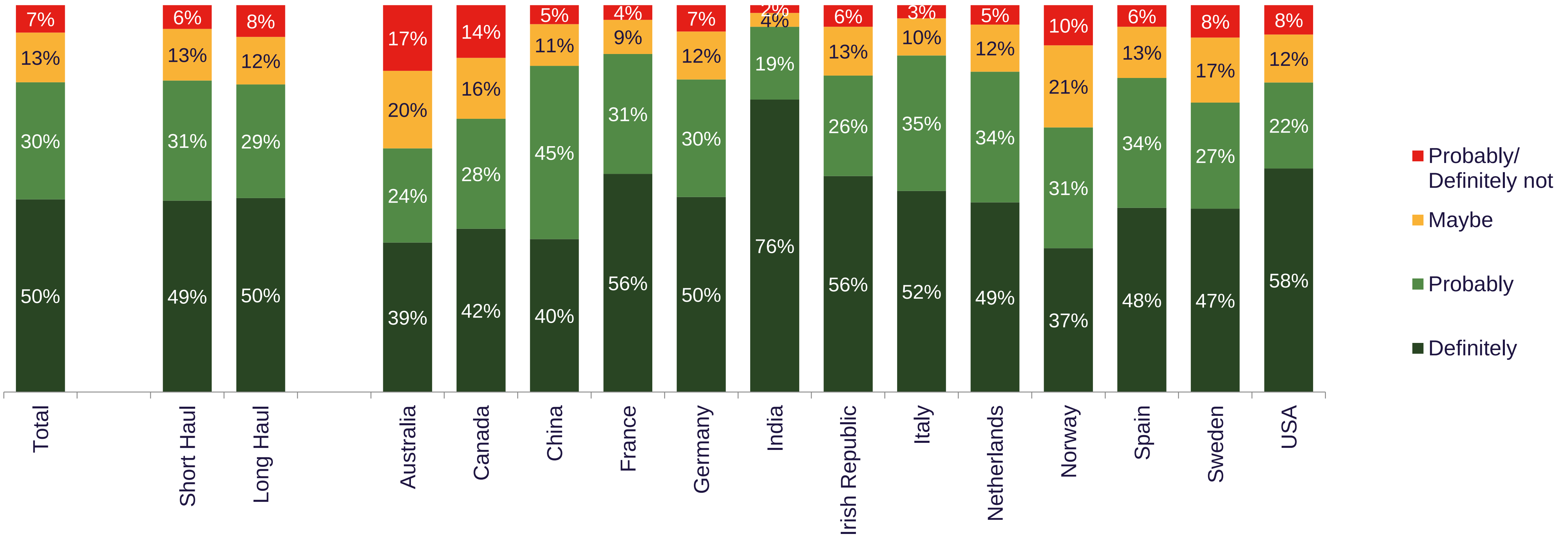
Purpose of leisure travel



Trend calculated at constant perimeter (13 markets consolidated)

Travel consideration for an international leisure trip

Despite pandemic prolonged uncertainties, a steady and more established desire to travel is confirmed across many markets. While the Nordics still show a more reserved attitude, France, Italy and the Republic of Ireland show the most positive sentiment towards travelling abroad. In LH markets, the US and India are the most advanced in their intentions.



Q5: How likely would you consider an international leisure trip for more than one night in the next 12 months?
Base: All respondents (n = 7,500)

Travel horizon for next international leisure trip

4 in 10 respondents in SH markets envisage a trip by the end of the year, including in the shoulder or summer season and the festive season. 2022 spring and summer are also already in mind. LH markets' travel intentions for 2021 focus on festive period (and China Gold Week) then span over the first semester in 2022. The horizon is not yet defined for a significant part of consumers in the Nordics and Australia, reflecting a more cautious travel attitude in these countries.

	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
Aug-21	2%	2%	2%	1%	1%	1%	1%	3%	5%	3%	1%	6%	1%	1%	1%	3%
Sept-21	9%	13%	4%	2%	3%	1%	11%	19%	7%	12%	15%	15%	10%	12%	8%	7%
Oct-21	8%	9%	7%	2%	5%	11%	9%	11%	5%	10%	7%	12%	7%	8%	7%	8%
Nov-21	6%	6%	6%	2%	5%	7%	7%	4%	9%	7%	5%	6%	4%	7%	5%	6%
Dec-21	10%	10%	10%	7%	8%	8%	10%	6%	22%	10%	16%	9%	8%	15%	8%	10%
Jan-22	5%	3%	7%	4%	7%	5%	3%	2%	14%	3%	2%	3%	6%	3%	4%	7%
Feb-22	4%	3%	6%	4%	7%	6%	5%	4%	7%	3%	2%	3%	5%	3%	3%	4%
Mar-022	5%	4%	5%	4%	8%	3%	4%	4%	7%	6%	4%	2%	3%	3%	5%	5%
Apr-22	4%	5%	4%	4%	4%	4%	5%	4%	4%	6%	6%	3%	4%	3%	5%	5%
May-22	6%	6%	7%	4%	7%	9%	7%	7%	5%	7%	5%	8%	4%	6%	5%	7%
Jun-22	6%	6%	5%	6%	5%	6%	6%	7%	3%	8%	7%	5%	7%	4%	7%	6%
Jul-22	7%	8%	5%	8%	6%	6%	9%	7%	1%	7%	7%	9%	9%	9%	10%	5%
Aug-22	5%	6%	4%	4%	4%	4%	7%	6%	3%	4%	8%	5%	4%	8%	4%	4%
Sept-22	3%	3%	4%	7%	4%	3%	2%	4%	2%	2%	4%	2%	3%	4%	4%	3%
Oct-22	2%	1%	3%	4%	2%	5%	2%	1%	1%	1%	1%	2%	1%	1%	2%	2%
Nov-22	1%	1%	2%	3%	1%	2%	0%	1%	2%	1%	0%	0%	1%	1%	1%	1%
Dec-22	2%	1%	2%	4%	2%	2%	0%	1%	2%	1%	1%	1%	0%	0%	3%	2%
2023/beyond	4%	2%	6%	11%	8%	7%	2%	1%	1%	4%	2%	1%	4%	3%	2%	3%
Don't know	10%	10%	10%	19%	11%	10%	9%	10%	1%	6%	6%	7%	20%	8%	16%	9%

Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7,450)

Activators for an international leisure trip

While vaccination and other health and hygiene factors in the destination country (low cases, safety protocols, vaccinated population…) still act as key activators for a trip planning, the shift from *health-centric* to *money-centric* attitude is tangible: money-back guarantee is now mentioned as #1 activator in 10 out of 13 markets surveyed, and attention paid to attractive deals grows. Insurance for COVID-19 travel is also often mentioned.

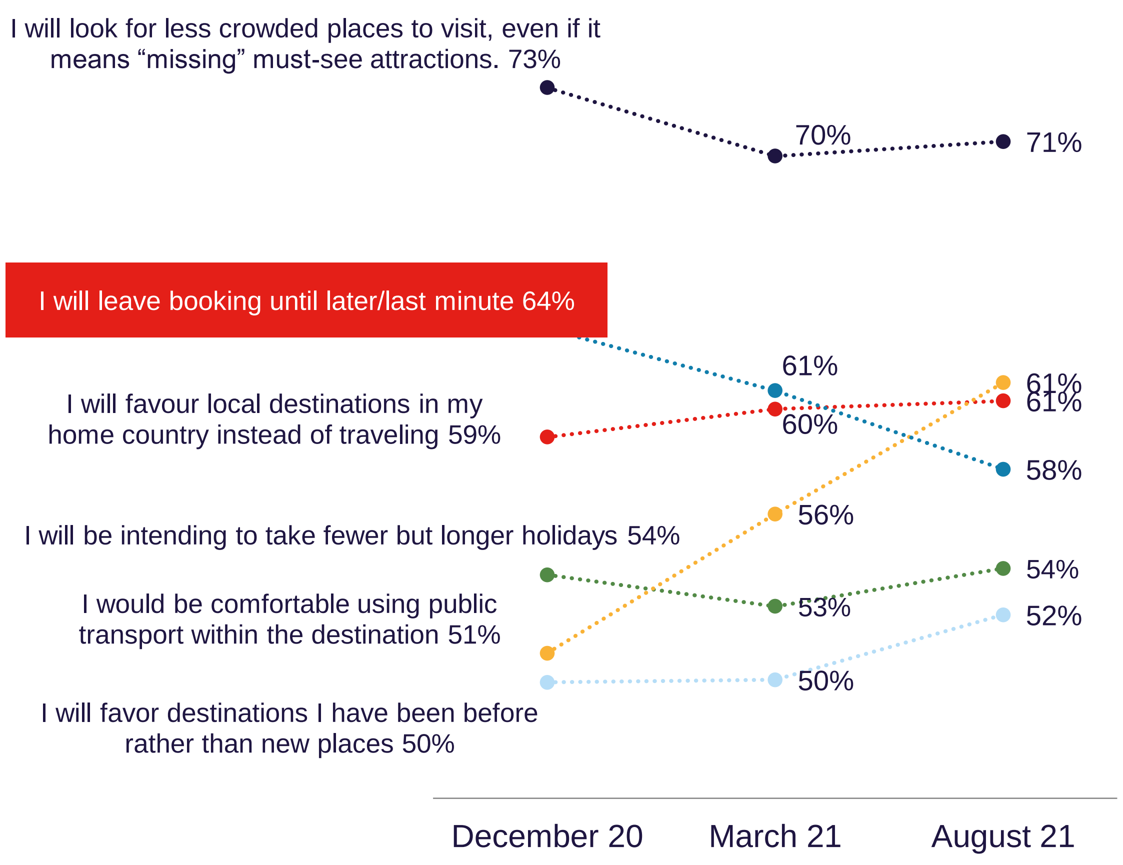
	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Rep.	Italy	Neths.	Norway	Spain	Sweden	USA
Money-back guarantee should I wish to cancel my trip	35%	39%	30%	44%	41%	13%	42%	38%	26%	41%	39%	39%	31%	40%	43%	35%
A significant decrease in coronavirus cases at destination	31%	30%	31%	30%	35%	25%	23%	32%	31%	36%	32%	26%	28%	31%	35%	35%
Removal of quarantine policies in destination country	28%	30%	26%	34%	32%	19%	31%	34%	27%	27%	24%	32%	34%	32%	27%	24%
Hygiene & safety protocols in place at destination	26%	24%	29%	25%	29%	26%	20%	23%	40%	33%	34%	18%	17%	37%	10%	31%
A high proportion of the population being vaccinated in the destination country	25%	24%	27%	27%	31%	21%	17%	20%	28%	30%	27%	18%	26%	25%	28%	32%
An attractive offer e.g. discounts	25%	27%	23%	17%	26%	21%	28%	20%	29%	30%	28%	23%	25%	30%	27%	25%
Insurance for COVID-19 related travel changes/changes to regulations	25%	23%	27%	39%	33%	19%	27%	14%	30%	22%	27%	22%	20%	26%	29%	24%
Receiving a Covid-19 vaccination	23%	18%	29%	32%	19%	30%	11%	18%	38%	26%	22%	12%	14%	17%	25%	26%
The introduction of a vaccine passport	22%	23%	21%	31%	33%	12%	22%	12%	19%	28%	30%	17%	26%	19%	34%	21%
Removal of quarantine policies in home country	22%	23%	20%	36%	25%	15%	25%	27%	21%	25%	18%	21%	33%	23%	15%	16%
Your Government's advice on international travel	19%	19%	20%	30%	20%	16%	11%	11%	25%	31%	11%	19%	32%	13%	23%	18%
Stable political environment in destination country	19%	20%	19%	11%	17%	26%	22%	26%	18%	13%	19%	16%	17%	22%	21%	17%
Welcoming locals	16%	16%	16%	10%	11%	20%	21%	19%	20%	11%	13%	15%	22%	15%	12%	16%
Assurance that there will be a range of/enough things to do	15%	14%	16%	7%	13%	19%	22%	22%	18%	12%	9%	16%	7%	16%	10%	17%
Voucher-back guarantee should I wish to cancel my trip	14%	16%	12%	10%	13%	9%	13%	14%	14%	14%	22%	18%	8%	26%	11%	15%
Mandatory coronavirus testing at some point during the trip	13%	10%	16%	14%	13%	14%	9%	8%	22%	11%	13%	10%	9%	15%	6%	16%
Official national hygiene label in accommodation and attractions in destination	12%	9%	15%	8%	9%	22%	9%	9%	23%	9%	11%	9%	6%	10%	6%	12%
Relaxation of visa requirements	4%	N/A	8%	N/A	N/A	16%	N/A	N/A	23%	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Q20: What would make you more likely to travel internationally for leisure in the next 12 months? (Multiple Answers)
Base: All respondents (n = 7,500)

Trended data - Attitudes

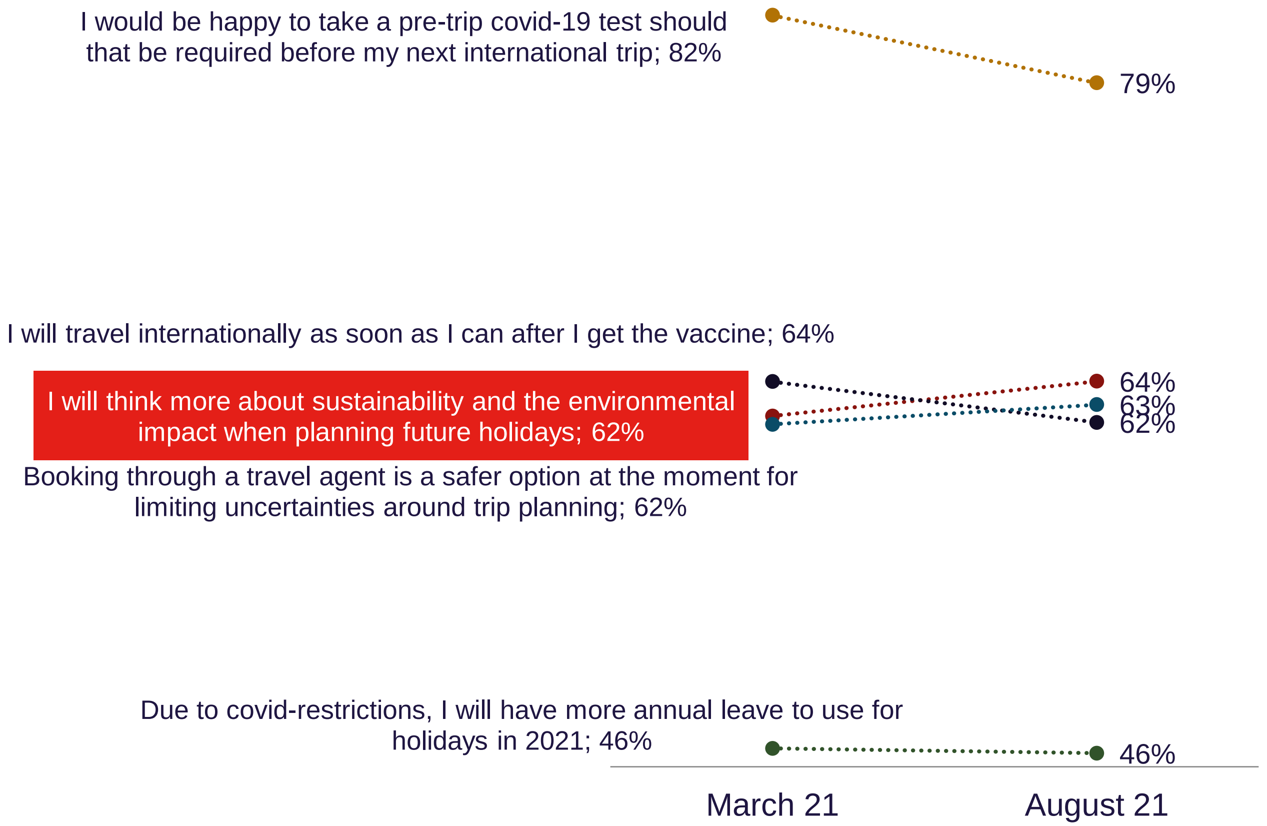
Booking last-minute remains a popular attitude yet declines while consumers are offered more flexible cancellation guarantees. Trust in using public transport has increased, suggesting a continued slight shift to pre-pandemic attitudes. The overall consumer mind is still fueled by a sense of responsibility in relation to health and environment.

Travel attitudes (Completely+Somewhat agree)

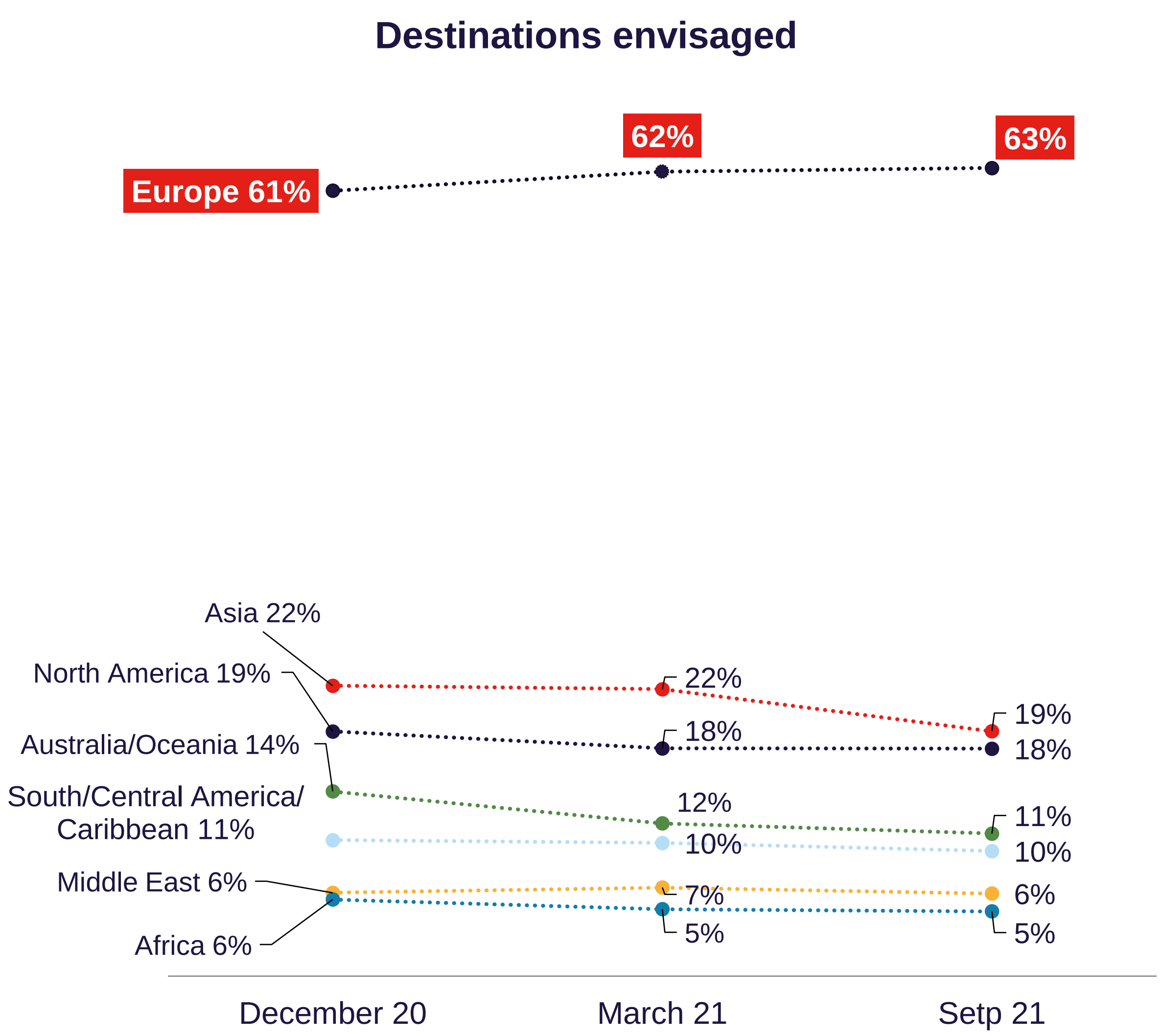


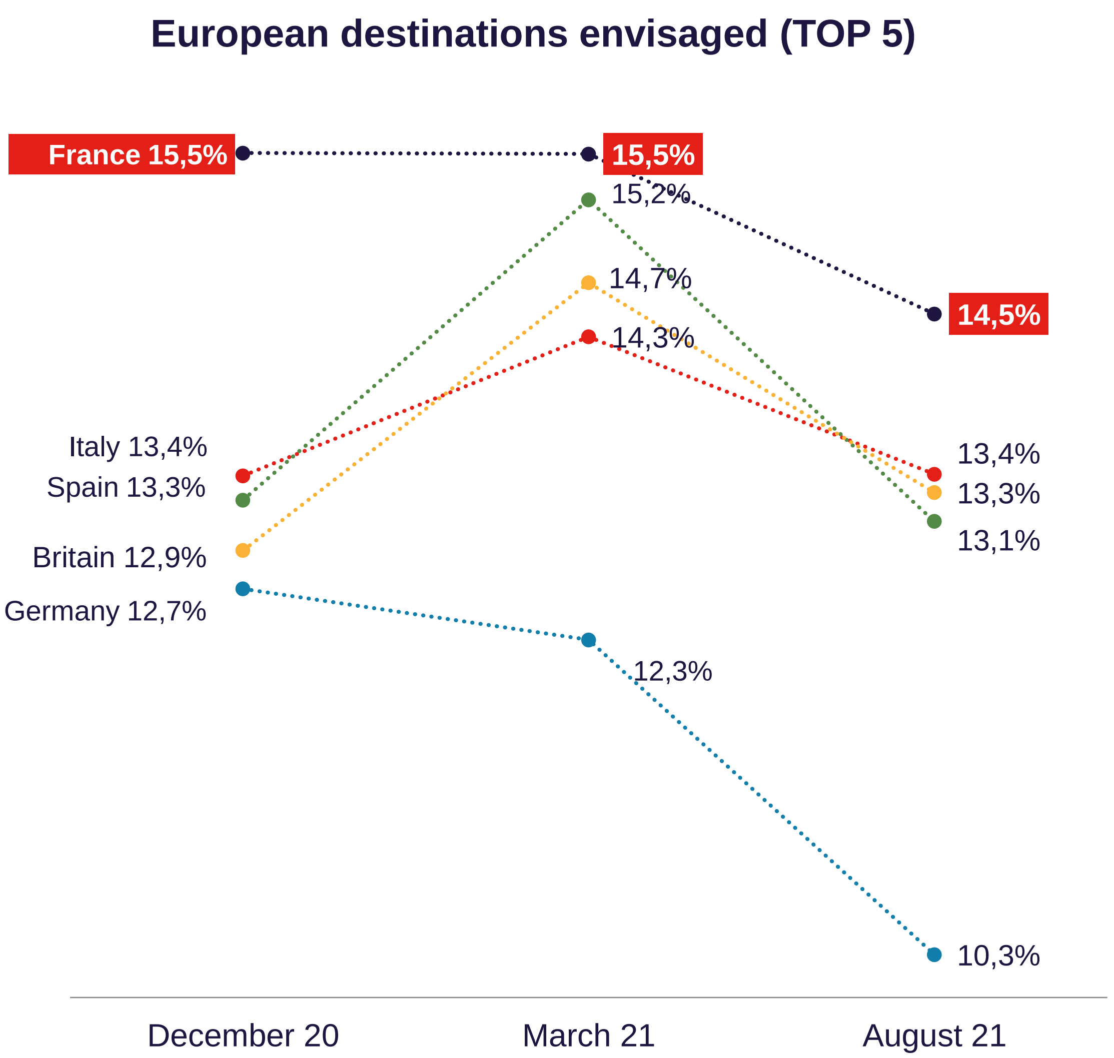
Trend calculated at constant perimeter (13 markets consolidated)

Travel attitudes (Completely+Somewhat agree)



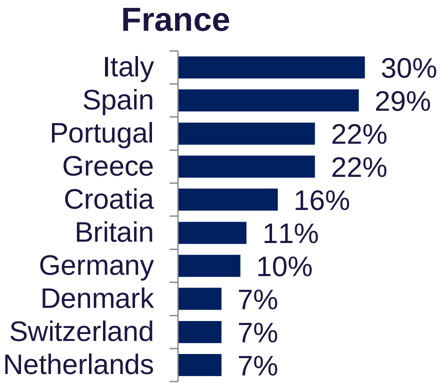
Trended data - Destinations



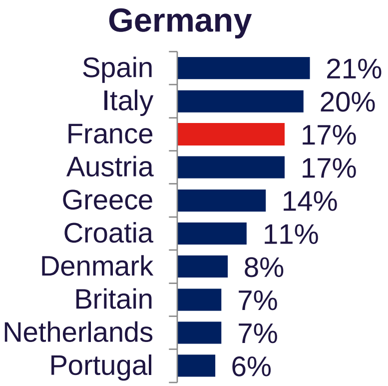


Trend calculated at constant perimeter (13 markets consolidated)

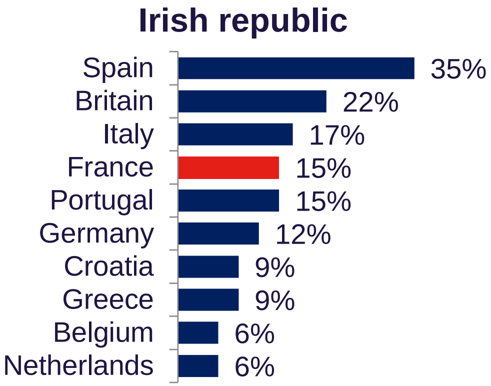
Top European destinations for travelers in SH markets



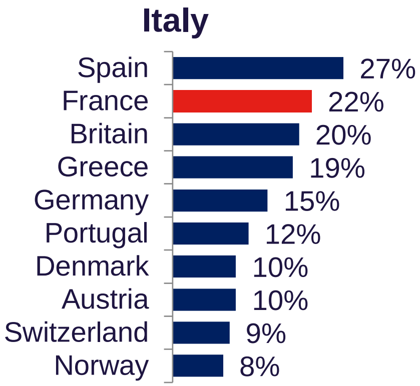
2.6 dest. mentioned on average



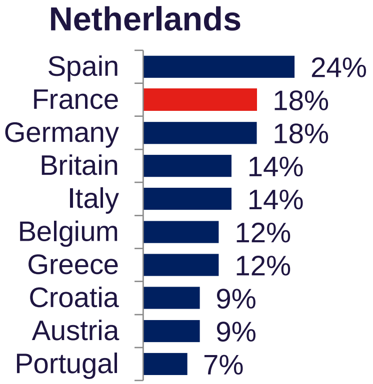
1.9 dest. mentioned on average



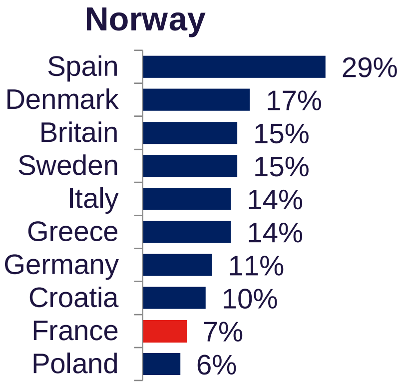
2.2 dest. mentioned on average



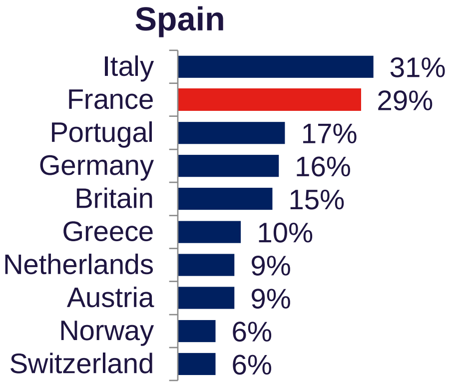
2.5 dest. mentioned on average



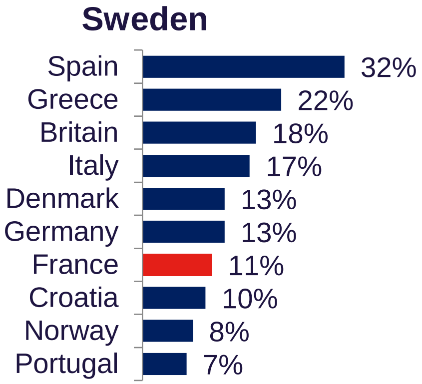
1.9 dest. mentioned on average



2 dest. mentioned on average



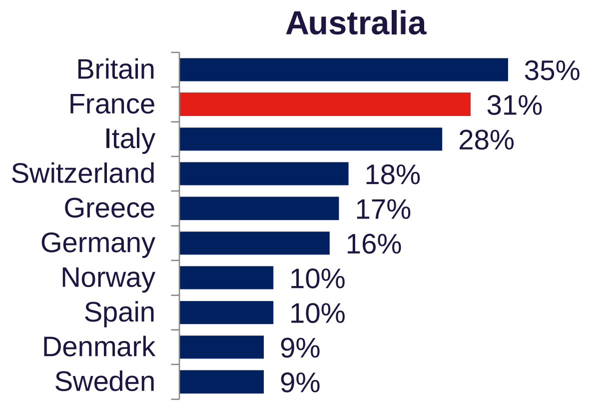
2.3 dest. mentioned on average



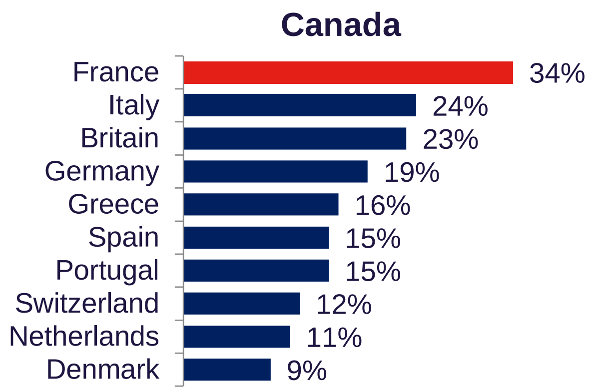
2.2 dest. mentioned on average

Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking an European leisure trip in the next 12 months (n=4,664)

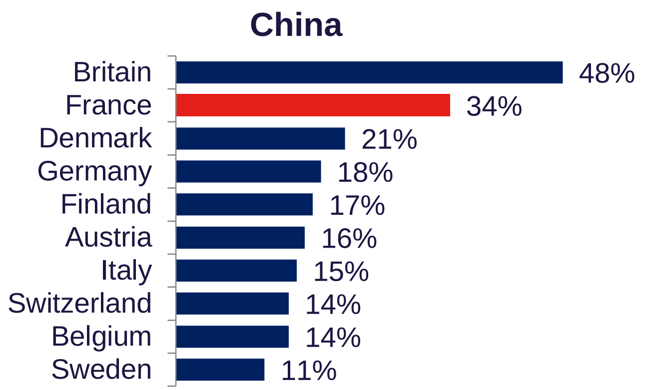
Top European destinations for travelers in LH markets



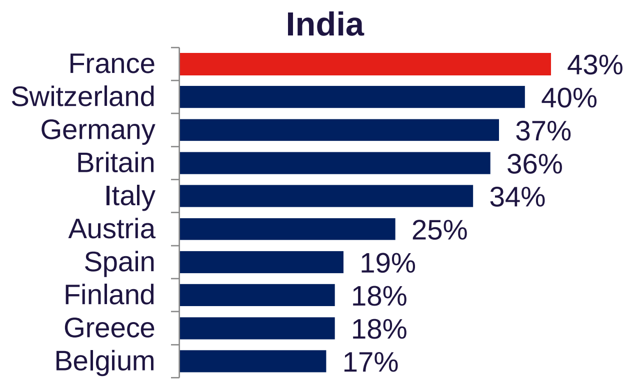
2.8 dest. mentioned on average



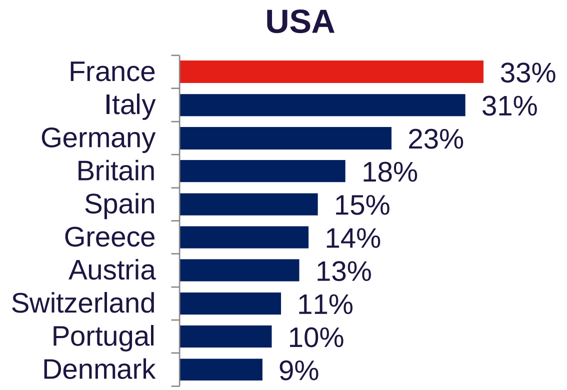
2.7 dest. mentioned on average



3.5 dest. mentioned on average



5.1 dest. mentioned on average



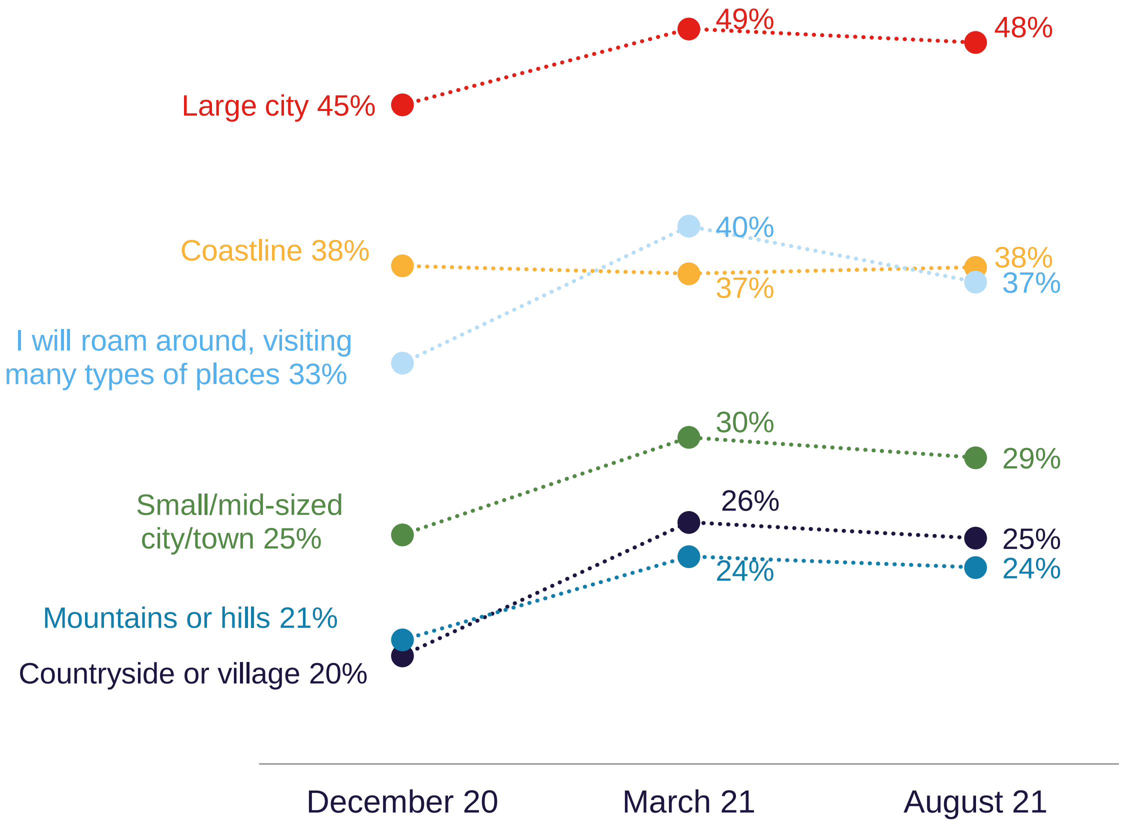
2.9 dest. mentioned on average

Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking an European leisure trip in the next 12 months (n=4,664)

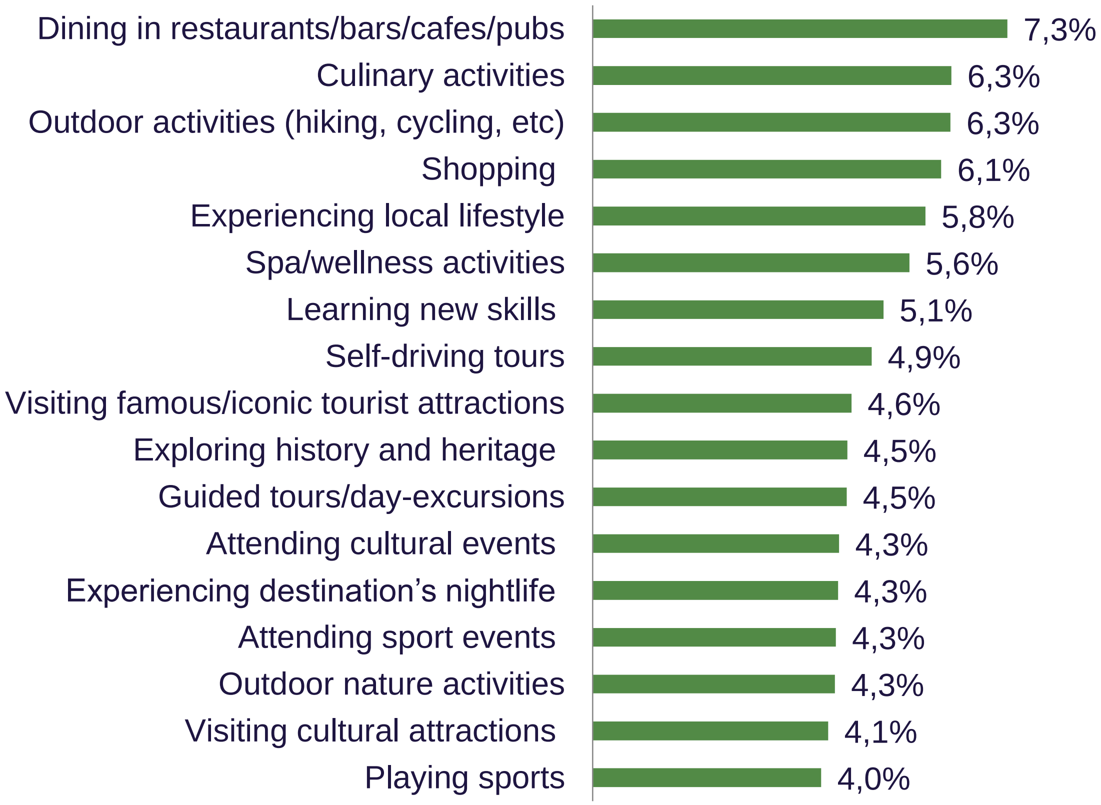
Trended data

While desire for exploring and roaming around in the destination mitigates as summer ends, the “return to normal” in destination experience is tangible though the increase of interest expressed for all types of activities, including socialising and lively experiences. A growing demand for food-related experiences is also visible.

Main types of destinations envisaged



Interest level in activities (W3/W2 Evol. - gap of %)

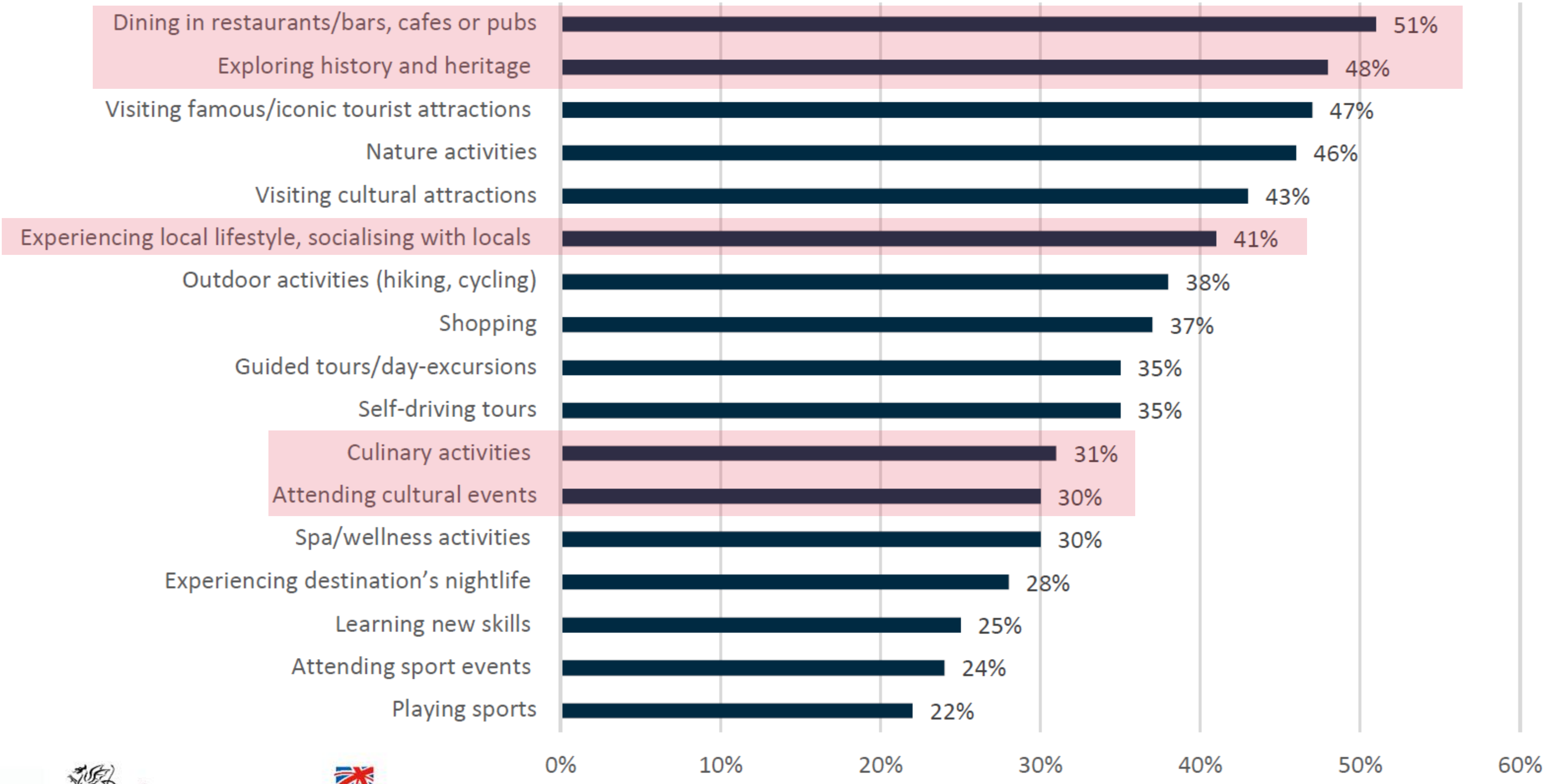


Trend calculated at constant perimeter (13 markets consolidated)

TCI Research Travel Competitive Intelligence | LONDON & PARTNERS | Llywodraeth Cymru Welsh Government | Visit Scotland Alba | VisitBritain

Des désirs d’expériences favorables pour la Provence

Quelles activités envisagées pour un prochain séjour à l’étranger?



Le sentiment des residents a-t-il changé?

travelsat Resident Sentiment Index

Le support à l'égard du tourisme est intact en moyenne

MAIS LES ANTAGONISMES SE DEVELOPPENT AU SEIN DES CITOYENS

… ET 6 VOYAGEURS SUR 10 ONT DES INQUIETUDES SUR L'ACCUEIL DES LOCAUX

REDEFINIR LA CROISSANCE, RASSEMBLER ET AJUSTER LE CONCEPT DE TOURISME IMMERSIF

PRE-COVID

Tourism-phobia Index

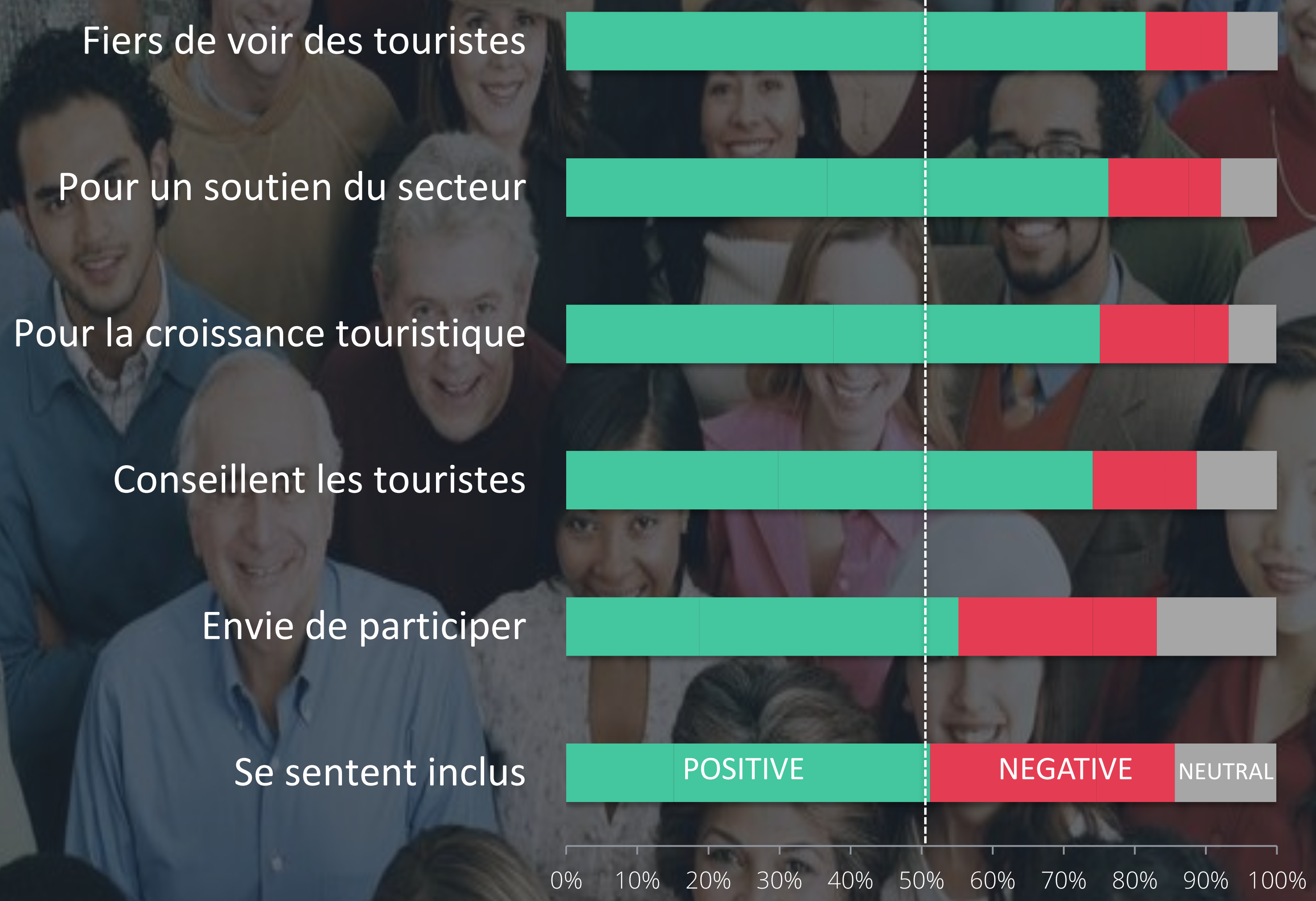
POST-COVID

Consolidated Insights based on 8000+ interviews among residents in 20 all-size European cities, surveyed during Covid (2020/21) in *Amsterdam, Barcelona, Berlin, Bern, Bordeaux, Bruges, Brussels, Florence, Geneva, Lausanne, Lille, Marseille, Lisbon, London, Lyon, Munich, Paris, Porto, Rome, Seville, Stockholm, Zurich*

TCI Research Travel Competitive Intelligence

LE SENTIMENT DES HABITANTS

Polarité du sentiment



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travelsat
Resident Sentiment Index

Des ressorts du sentiment inchangés mais amplifiés

- Impact perçu très positif sur **l'économie locale**
- Souhaitent voir le secteur **soutenu**
- **Fiers de (re)voir** des visiteurs étrangers
- Désireux de **partager et contribuer**
- **Sentiment mixte** sur l'inclusion des résidents
- **Surfréquentation, environnement** et **qualité de vie alimentent encore les inquiétudes**, mais avec un niveau de tolérance plus bas…

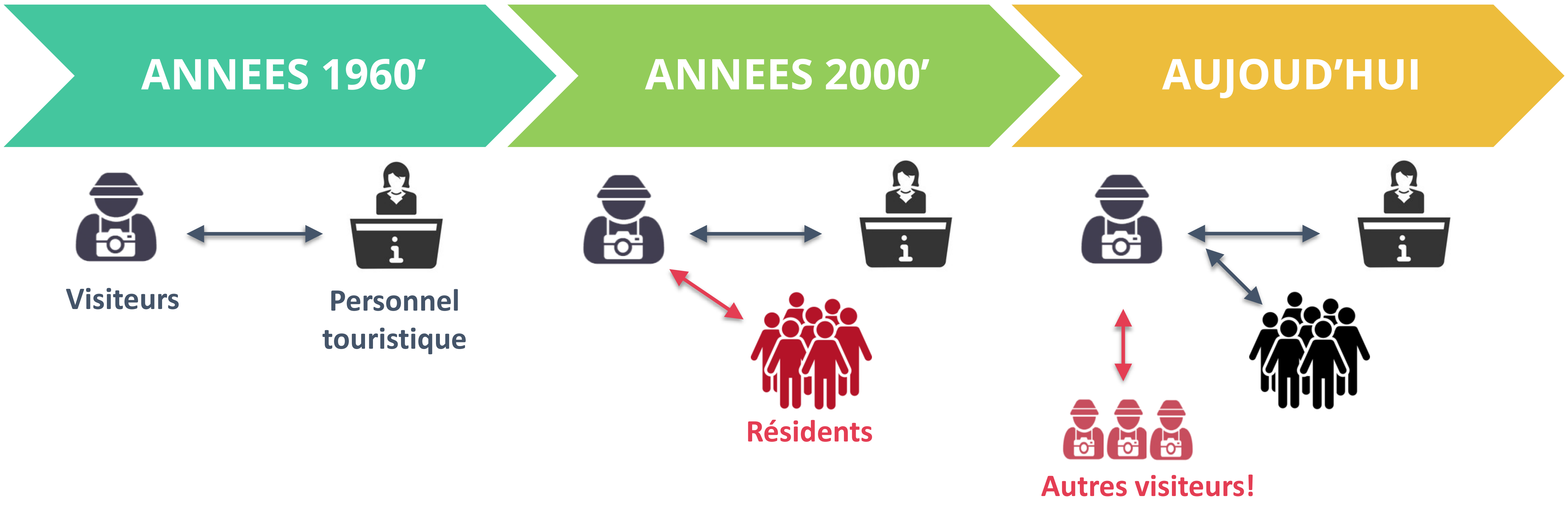
Le Sentiment des Visiteurs

En quête d'une expérience **sûre <u>mais totale</u>**

Au lieu d’imaginer ce que pourraient être les besoins des visiteurs de demain…

…offrez-leurs ce qu’ils attendent aujourd’hui!

Le “nouveau” paradigme de l’accueil



Guests' Comments
From 30+ Review Websites

Recently heard ...

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Welcome,
TCI Research

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  - ECONOMIC IMPACT
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  - MARKETS INSIGHTS
  - TRAVEL SENTIMENT
- AVIATION
  - BOOKINGS
- ACCOMMODATION
  - HOTEL PERFORMANCE
- E-REPUTATION
  - TRAVELSAT© Pulse
  - Net Sentiment Score
- DATA SOURCES
- SEND FEEDBACK

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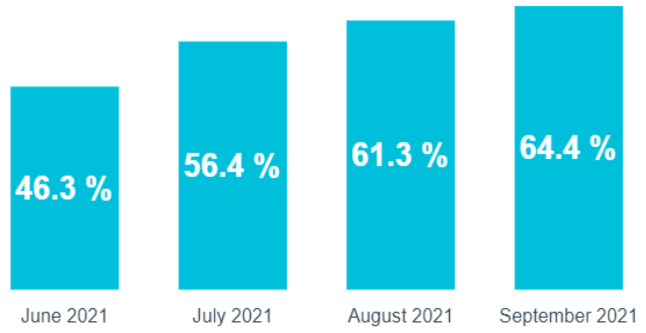
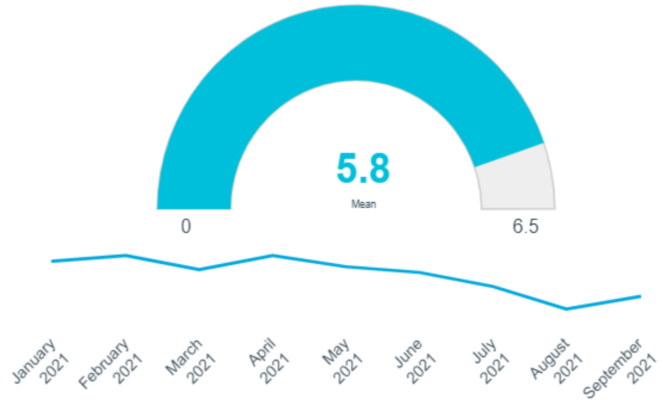
Visitor Sentiment

EUROPEAN TRAVEL COMMISSION

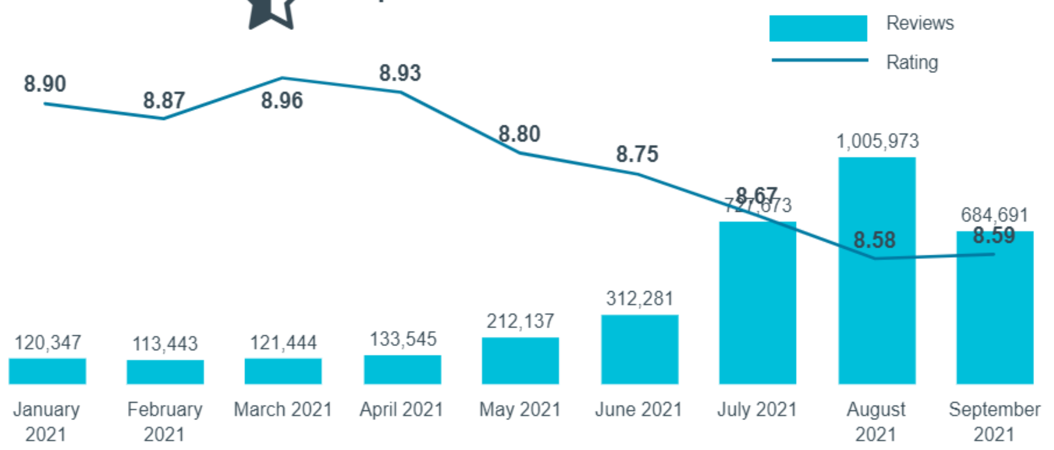
Share of International Reviewers



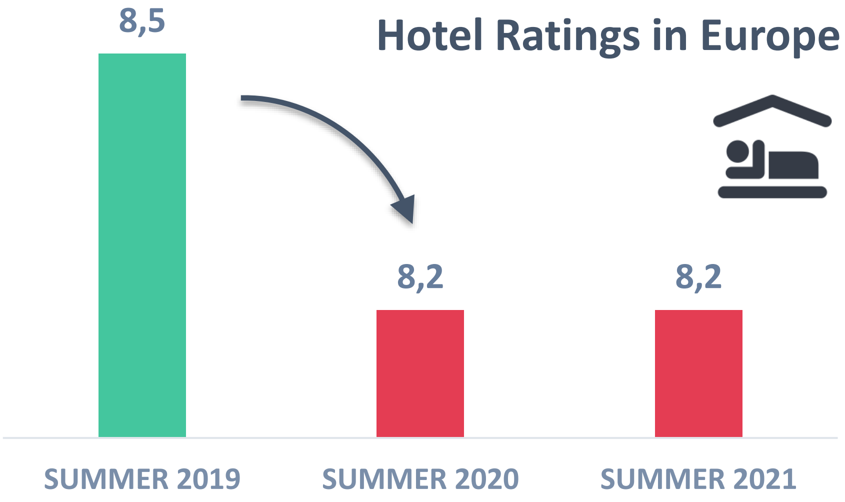
Sanitary Safety Score (YTD)

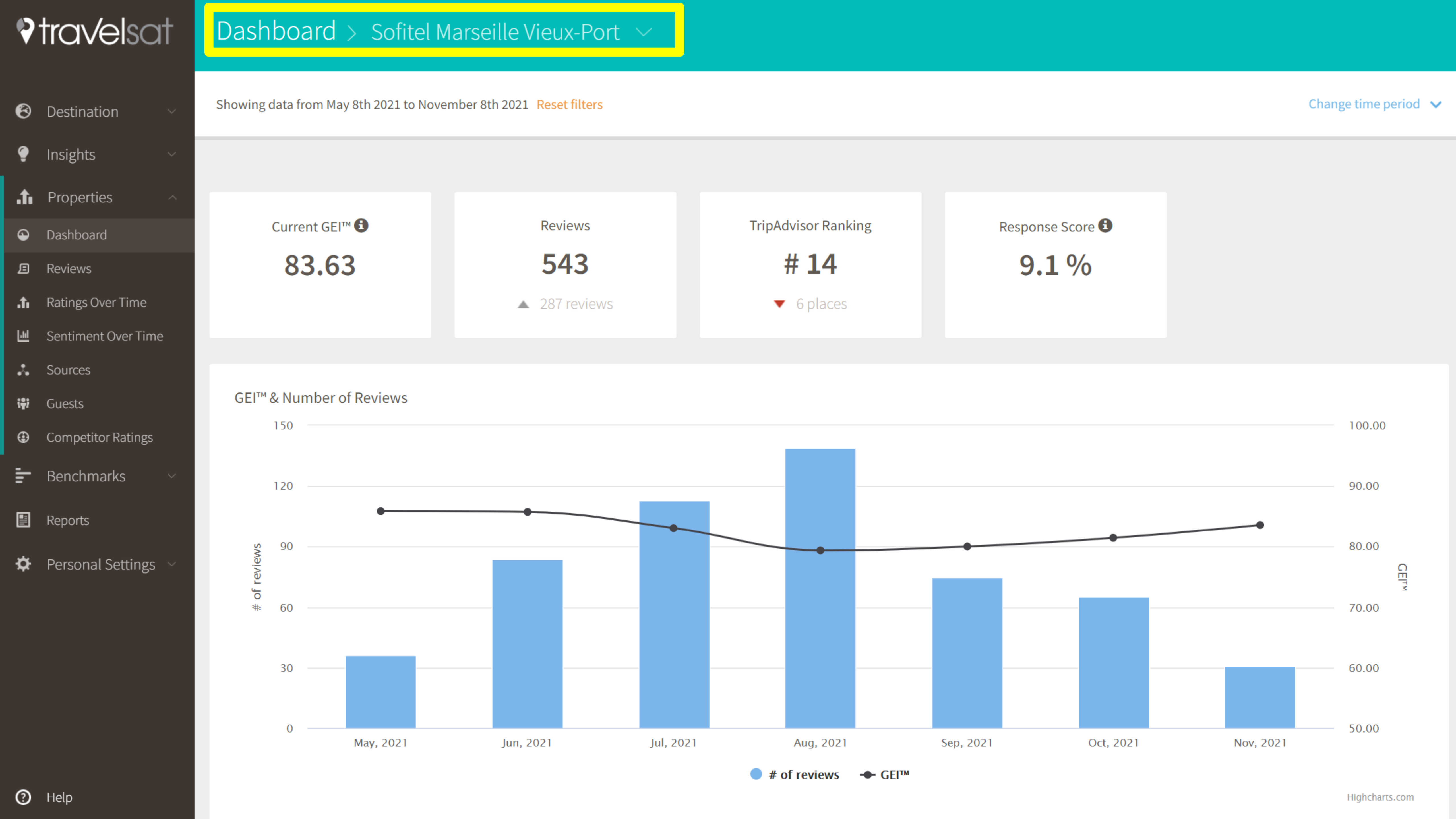


Europe Visitor Sentiment



Hotel Ratings in Europe




travelsat
Dashboard > Sofitel Marseille Vieux-Port
Destination
Insights
Properties
Dashboard
Reviews
Ratings Over Time
Sentiment Over Time
Sources
Guests
Competitor Ratings
Benchmarks
Reports
Personal Settings
Help
Showing data from May 8th 2021 to November 8th 2021 Reset filters
Change time period
Current GEI™
83.63
Reviews
543
287 reviews
TripAdvisor Ranking
14
6 places
Response Score
9.1 %
GEI™ & Number of Reviews
150
120
90
60
30
0
100.00
90.00
80.00
70.00
60.00
50.00
# of reviews
GEI™
May, 2021
Jun, 2021
Jul, 2021
Aug, 2021
Sep, 2021
Oct, 2021
Nov, 2021
# of reviews
GEI™
Highcharts.com

Destination
Insights
Properties
Dashboard
Reviews
Ratings Over Time
Sentiment Over Time
Sources
Guests
Competitor Ratings
Benchmarks
Reports
Personal Settings
Help

Showing 33 from May 8th 2021 to November 8th 2021 Reset filters

Export Choose a filter set Filter on ratings, topics & more Options

Thursday, August 5th 2021

B.

masque

By Hervé on August 5, 2021

Replied

10

Good

bonjour la chambre est super et agréable

Bad

les gens ne respecter pas le port du masque c'était desolant pour un hôtel de votre standing

Un moment de détente absolu

By gaelguibert123 on November 2, 2021

8.0

General

Très bon hôtel

Le surclassement a été très bien apprécié

Le seul bémol pas des moindres

Est le service spa qui n'était pas en libre service à cause de Covid chose que la réception a oublié de nous dire de réserver et pour une durée d'une heure maximum par jour vraiment dommage en vue du tarif de la chambre

Translate

Details Notes Forward Reply

Please click on a review to see its details and to check the internal notes.

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Reviews > Le Vieux Port

- Destination
- Insights
- Properties
  - Dashboard
  - Reviews
  - Ratings Over Time
  - Sentiment Over Time
  - Sources
  - Guests
  - Competitor Ratings
- Benchmarks
- Reports
- Personal Settings
- Help
- Sign out TCI EU

Showing 11 from May 14th 2021 to November 14th 2021 Reset filters

Export | Choose a filter set | Filter on ratings, topics & more | Options

Sunday, August 1st 2021

There is life

By Erwin S on August 1, 2021

10

General

The central square of Marseille, there is always something going on, even in Corona times. You should take a stroll around the harbor and maybe choose a restaurant / bar or go a little further to Places des Huiles.

Translated from German Revert to original

Details | Notes | Forward | Reply

By Richard Leblanc on March 29, 2021

2.0

General

port du masque non respecté, domage site magnifique

Translate

Details | Notes

There is life

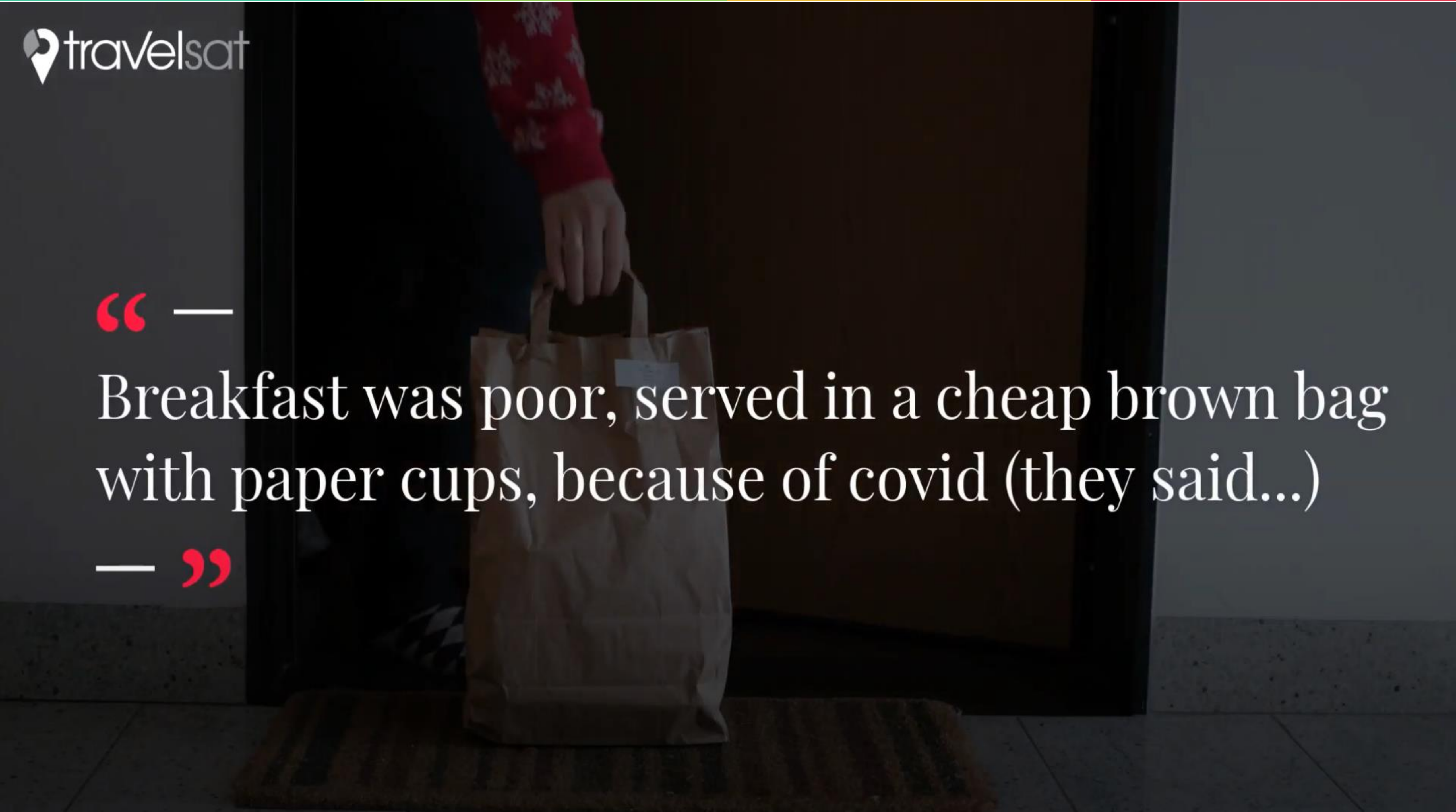
10

Name	Erwin S
Date	Sunday, August 1st 2021
Origin	Saarbrücken, Germany
Country	Germany
Language	German
Source	TripAdvisor

Copy review-link

Ratings

Overall - General 10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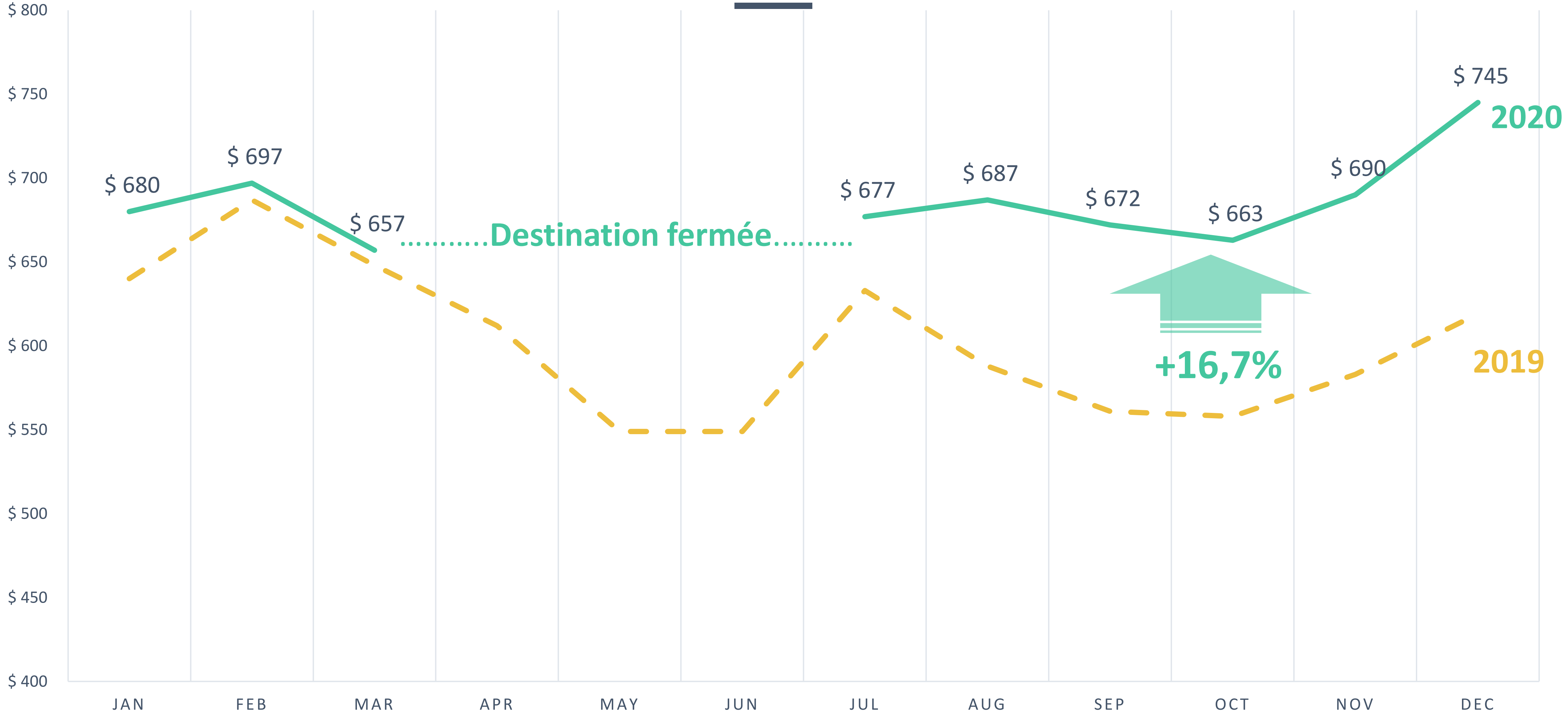
"Breakfast was poor, served in a cheap brown bag with paper cups, because of covid (they said...)"

Les dépenses visiteurs

Quel impact du Covid?

Les dépenses Visa Pre/Post Covid

Dépenses par visiteurs – Exemple d'une destination hors-Europe



Data include consumers and commercial cards (sales transactions only, withdrawal excluded)

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In association with VisaVue® Travel

Dépenses Visa Pre/Post Covid

Q2/2021 vs Q2/2019

Exemple d'une destination hors-Europe

Moins de visiteurs…

-15,7%

qui dépensent plus chacun…

+23,1%

Une dépense totale retrouvée!

+3,8%

Pre/Post Covid par catégories

GROCERY, FOOD STORES, SUPERMARKETS	$4 524 025	36,4%
ACCESSORIES	$2 320 071	12,3%
GIFT, CARD, NOVELTY STORES	$1 655 573	18,3%
GOLF COURSES	$177 653	11,9%
ART DEALERS / GALLERIES	$18 156	3454%

Data include consumers and commercial cards (sales transactions only, withdrawal excluded)

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Travel Competitive Intelligence

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Dépenses Visa Pre/Post Covid

Q2 2021 Y/Y Evolution vs 2019

Exemple d'une destination positionnée luxe en Europe

Beaucoup moins de visiteurs…

-68,3%

… Mais bien dépensent bien plus chacun !

+76,6%

Facteurs combinés

- **Les visiteurs qui reviennent** sont plus riches / moins affectés par la crise
- **Augmentation des prix** des produits et services touristiques
- **Sentiment de rattrapage des consommateurs** après une longue période de frustration
- **Plus d'activités engagées** pendant le séjour
- **Séjours plus longs** – Attitude « road-trip » et de découvertes

Data include consumers and commercial cards (sales transactions only, withdrawal excluded)

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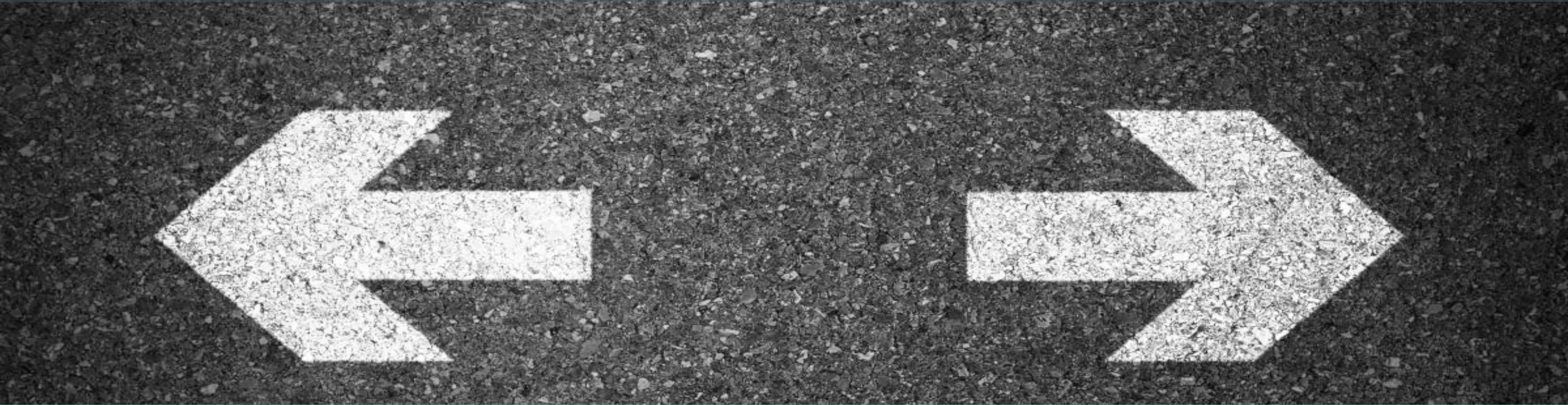
Travel Competitive Intelligence

REINVENTER LE TOURISME DE DEMAIN EST EXCITANT MAIS…



… CERTAINES ACTIONS SONT PLUS RENTABLES A COURT-TERME

1. Nourrir le **capital de réputation de la marque** de destination (attractivité territoriale / expérientielle)
2. Trouver le bon équilibre dans **l'expérience visiteurs <u>"full & safe"</u>** pour **<u>libérer la dépense</u>**
3. **Réimpliquer les habitants** dans la politique touristique (vision partagée, produits immersifs)
4. **Flexibilité des réservations** + **Durabilité** + renforcer la **gestion partenaires** basée sur la data