R&D surveys

Deciphering Societal Core Trends and their impact on Tourism





Mission Attractivité Hauts-de-France Comité Régional du Tourisme et des Congrès HAUT & FORT

February 2021

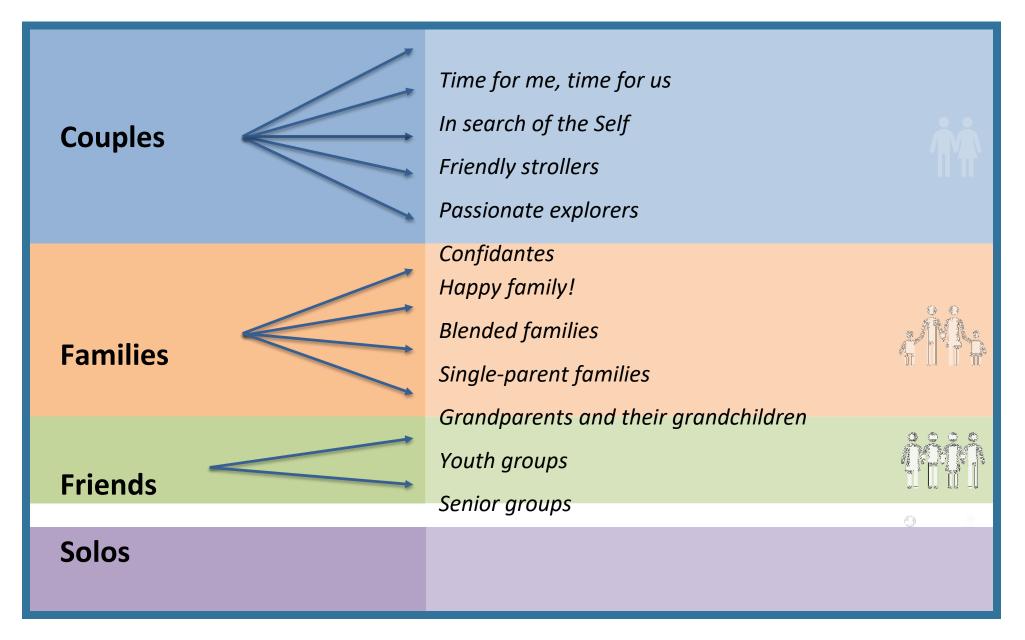


Summary from the CSA and Think out research



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CUSTOMER SEGMENTATION IN HAUTS-DE-FRANCE



Mission Attractivité _____Hauts-de-France_____ Comité Régional du Tourisme et des Congrès

COUPLES / A TIME FOR ME AND FOR US

Slow down, take a break

Context

30 years and older, active, high-income, often very busy with work. The daily rhythm is fast-paced, they are in the middle of building their relationship and their career path. They are **passive** and want to relax individually and as a couple.

They need to get away from it all in order to be able to disconnect both through the setting and the pace. They like to be surprised, especially on a culinary level

NEEDS PRIORITY need: SLOW DOWN from the fast pace of the week. SUPPLEMENTARY NEEDS: FINDING ONESELF, strengthening the bonds of the couple RELAX: contemplation of vistas, wellness treatments	ENJOYMEN 25% 50% 100% 75%	DISCOVERY 25% 50% 100% 75%
++ Accessibility (no time lost in travel)		
 ++ Peace and comfort: view from the room, modern and soothing decoration, high-tech / high-level, quality services, calm ++ A warm welcome + The central location of the accommodation in relation to wellness activities (spa, pool, massages) + Freedom: adjustable breakfast times, room service, no schedule or constraints + Quiet restaurants, intimate setting, refined decoration (flowers, candles, etc.), discreet service, refined and even gastronomic cuisine, quality and local products. E.g.: Relais & Châteaux, gourmet restaurant, high-end 	100% SAVOUR	100% 75%
COVID 19: To be reassured on the sanitary measures taken by all those involved in the stay, and in particular for the spas, hammams, massages	CONTEMPLA	GET

11 – Slowness / Pace of life "A desire to slow down, for a less intense pace of life, for contemplation. To get back control of my time, fight stress and anxiety".

Context/Origin/Root causes of this underlying trend:

- In our modern society, urgency has become a way of life. There is a real pressure to be overactive, to be perfect and efficient in all areas.
- In reaction to the sudden acceleration of the pace of life, there is a strong need to reclaim space-time and the ease of living: we allow ourselves not to see everything or to see it differently, to take the time to discover.
- ✓ We rediscover the luxury of relaxation, of strolling, of slow natural paces (the seasons, etc.)
- ✓ The values are light-heartedness, letting go, simplicity. We feel better when we slow down, when we empty our minds.

Concrete translations / illustrations:

- Travel down the Baie de Somme at the pace of the steam train
- "Silent" stay at Lizières Castle
- Visits to gardens
- Gentle roaming routes

Quotes from Philosophers, Sociologists, Anthropologists, Historians, Experts, etc.:

• "The age of machines has plunged us into a noisy, intense world, dictated by the race against time. Suspending time allows us to free ourselves from Chronos and to regain calm, silence, a form of rest."

BVA, well-being and personal development trend book

- *"We are cyclical beings, but our modern lifestyle tends to forget that! To be healthy, we must learn to recognize and respect our cycles."* **Huria Benyaha**, researcher at the Stem Cell and Brain Institute
- "Resting does not only mean sleeping. To rest is also to go on a stroll, to look at the trees or the windows, to indulge in a useless, futile, simple, light, unscheduled activity, without any precise goal or objective, in the free moment when we completely relax - body and mind." Frédéric Lenoir

3 – Beauty of Nature

"The contemplation of nature is a source of positive emotions...

Disconnection, reconnection, return to oneself"

Context/Origin/Root causes of this underlying trend:

- ✓ Since the beginning of the 20th century, the world has experienced a very strong acceleration of urbanisation, resulting in an increase in the size and activities of cities.
- The polluted and noisy urban environment affects the health and quality of life of growing populations.
- Need to compensate for urbanisation and the metropolisation of life by seeking out non-populated, non-toxic and little or no anthropised environments to look (again) at
- ✓ Need to reconnect with nature (water, earth, plants, etc.) to regain your equilibrium.

Concrete translations / illustrations:

- Landscapes, wide open spaces, panoramas: the Baie de Somme, the Côte d'Opale, the forest massifs
- Large urban parks, green lungs in the heart of cities

- "Sophisticated brain imaging techniques have shown that when we view nature scenes with lush vegetation, the brain regions associated with emotional stability, empathy and love are more active." Dr. Alan C.
 Logan graduate of the Canadian College of Naturopathic Medicine
- *"We think we are looking at nature, but it is nature that is looking at us and permeating us."* **Christian Charrière**, journalist and author
- *"Happiness in looking and comprehending is nature's most beautiful gift." Albert Einstein* (The world as I see it, 1934)
- *"Beauty heals our doubts. The aesthetic emotion is a re-learning of self-esteem"* **Charles Pépin**
- "We have not yet done anything better than nature (and the art that tries to imitate it), to let ourselves be driven by something greater than ourselves, to nourish our spirit. **Anne Cazaubon**- Let yourself be touched by beauty

7 – Harmony with Life / Reliance

"Awareness of the deep link between humanity and the living (animal, plant and mineral kingdoms) and the universe; abandonment of the prevalence of man over

Context/Origin/Root causes of this underlying trend:

- ✓ Faced with the frenetic pace of contemporary society, which generates imbalance and stress, we are discovering that resynchronising with the pace of life is symbiotic and repairs us,
- ✓ It is the end of a cycle: we realise that Man is not "above" Nature, but that he is only a part of this Nature, composed of the same elementary bricks and traversed by the same energy fields. Man and Nature are part of the same great universal whole and their destinies are linked.
- "There is no such thing as infinite growth in a finite world": the idea emerges of the necessary transition from an unsustainable society that destroys natural resources to a resilient, sustainable and supportive society that respects life and the planet's limits.

Concrete translations / illustrations:

- Forest therapy
- Visits to energetic places: megalithic sites, springs, fountains,
- Sit spotting
- Experiments in permaculture and urban farms,

- "Move smoothly to the rhythm of nature, in tune with it, for its rhythms are perfect. There is a place for everything and everything has its place" Anonymous
- *"We thought that freeing ourselves from nature was proof of our intelligence and power. But the more we free ourselves from nature, the more vulnerable we become."* **Nicolas Hulot**
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- *"Reliance is essentially a matter of inner experience, a quest for the Unity of life that defines our relationship to the world"* **Marcel Bolle de Bal**
- "I speak to the world and it answers me" Harmut Rosa
- *"All our movements, whether they be thoughts, emotions, feelings, gestures or words, generate vibrations that carry information within us and all around us." Vibrations, Clélia Félix*

Self-diagnosis and inspiration questionnaire for those involved in tourism



How can we meet the needs of "a time for me and us" couples?

• What activities/sites should they be recommended to slow down and break away from the daily grind? And in particular in terms of wellness offers in or around my home? What are the places that are conducive to rejuvenation, the panoramas, the parks, the gardens, the works of art to be contemplated in the museums, etc.?

• Which restaurants offer refined, even gastronomic cuisine, based on local products, where the atmosphere is calm and intimate? Terraces with a nice view?

• How do I participate in territorial anchoring from my home (e.g. at breakfast, offer of a basket of products or meal basket)?

• What are the soft sports activities or tours/walks by bike, on foot, on horseback... that allow me to immerse myself in natural spaces?

COUPLES / IN SEARCH OF THE SELF

Rejuvenate yourself

Context

They are **over 50 years of age**, in the high-income bracket, very active and have a good financial situation.

Or They are under 50 years of age and have acquired maturity on the topic of well-being, and are looking for in-depth wellness experiences that go
 beyond discovery practices. They like to indulge in self-care. They are demanding and attentive to themselves, they watch their diet, engage in regular sports activity, use body care and personal development techniques. They are <u>active.</u>

NEEDS	ENJOYMEN	DISCOVERY
PRIORITY need: UNWIND physically and mentally through IN-DEPTH care, well-being techniques and sports practices. SUPPLEMENTARY Needs: ESCAPE through the contemplation of landscapes.	25% 50%	50%
KEY FACTORS OF SUCCESS		
 +++ Quality and high added value of wellness services +++ Comfort, high-end accommodation +++ The absence of irritants in each of the components of the stay + The central location of the accommodation in relation to wellness activities, sports and restaurants (for older people: the on-site restaurant is an asset) + Quiet, uncrowded restaurants, aesthetic setting, warm welcome, healthy food, light meals, quality and local products, organic products. E.g.: restaurant offering gluten-free and vegetarian dishes, as well as local products 	100% SAVOUR CONTEMPLA	100% 75% GET

8 – Well-being

"Search for serenity, re-harmonization of the body and mind in response to stress, anxiety, anguish".

Context/Origin/Root causes of this underlying trend:

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- \checkmark ... that the health crisis is further amplifying.
- ✓ The notion of well-being has become a crucial issue in our society and is now inseparable from the notion of health.
- Already present in the motivations for vacations, the need for well-being has been reinforced and is reflected in a search for time for oneself, for lightness (putting down the burdens of the mental load), for letting go, for deep relaxation.

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- Guided meditation session: meditation in immersive landscapes (before a sunset, in the forest, etc.)
- Massages and spas, sound siestas at the Valloire Gardens, sophrology walks, forest therapy, yoga
- Wu Tao at the Saint Quentin Museum, art therapy at the Louvre Lens
- Healthy food

- "Learning to live begins with learning to know and take care of one's body, psyche and mind, and to promote the harmony of these three dimensions of our being." **Frédéric Lenoir**
- "Serenity refers to those unspeakable moments when we feel calm inside and in quiet connection with our environment. In these moments, which are often very simple, we feel a peaceful communion between our inner and outer worlds. It can be at dusk when you watch the sun go down; in the forest, when you listen to the birds, the sounds of the wind..." Christophe André, psychiatrist
- "True satisfaction with life comes not from becoming rich or thin but from the profound sentiment of feeling good about yourself." Mihaly Csikszentmihalyi, Hungarian psychologist
- "We are so used to hearing the perpetual din of the mind that we are no longer aware that in the background there is an infinite world of tranquillity." **Thoughts on happiness and harmony**

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Self-diagnosis and inspiration questionnaire for those involved in tourism



How can we meet the needs of couples who are "In search of the self"?

- What in-depth wellness activities / services should they be recommended? Services with high added value.
- What are the places that are conducive to rejuvenation, the panoramas, the parks, the gardens, the works of art to be contemplated in the museums, etc.?
- Which restaurants offer a healthy cuisine, with vegetarian or vegan options, based on local products, and where the atmosphere is calm?
- How do I participate in territorial anchoring from my home (e.g. at breakfast, offer of a basket of products or meal basket)?
- What are the gentle or more intense sports activities that allow you to recharge your batteries?

COUPLES / FRIENDLY STROLLERS

Escape together, make a maximum of discoveries while being free

Context

All age groups. Being active, they like to wander around, see the must-sees/essentials of a region and make various discoveries (without spending too much time on them): short visits to museums, unusual towns and villages, landscapes.

They are organised but **relaxed**, **cool** during their stay: the visits are prepared but they want to develop the programme **at their own pace**, keeping their **freedom**, their **autonomy**. Their accommodation should be **calm and comfortable**, in a welcoming (charming) setting.

NEEDS	ENJOYMENT	DISCOVERY
PRIORITY need: DISCOVERY through SEVERAL walks, without in-depth exploration SUPPLEMENTARY Needs: Having FUN AT THE TABLE: local gastronomy, sharing moments of conviviality "like a local"	25% 50%	
KEY FACTORS OF SUCCESS	100% 75%	100%
++ The wide variety of sites to visit and their ease of access +++ typical local restaurants, frequented by locals (a guarantee of quality), rooted in the area, emblematic, friendly reception and service, regional cuisine and local products. E.g.: country bistros, estaminets ++ The central location of the accommodation, the view (priority for young couples) ++ The comfort of the accommodation (priority for older couples) ++ Cool/relaxed organisation: the stay must be prepared so that the programme can be carried out at one's own pace, freely, savouring each moment, without constraints. ++ The quality/price ratio	100% 75% SAVOUR CONTEMPLATION	50% 100% 75% GET AWAY

4 – Authentic and multi-faceted immersions

"Immersion in nature but also in the city, culture, art, people...

Energizing immersion, in authentic spaces and in contact with the inhabitants".

Context/Origin/Root causes of this underlying trend:

- ✓ There is an emerging need for a change of scenery, without necessarily going very far, and for in-depth discovery: we no longer just want to GO to a destination, but to LIVE IT,
- ✓ Visitors in the 21st century are therefore tending towards immersive tourism, where they are no longer just spectators who admire (the heritage) and observe (the inhabitants): they become active participants in their stay.
- Immersive stays make it possible to understand and appreciate other ways of life (meet), to enrich oneself intellectually (learn), to practice an activity concretely (do), to soak up the energy of the place (feel)
- ✓ By appealing to the 5 senses (see, taste, touch, smell, hear), an immersive stay provides moments rich in mixed emotions that help memories to be made

Quotes from Philosophers, Sociologists, Anthropologists, Historians, Experts, etc.:

- *"We live in a vision-centred society. But our relationship with the environment involves our five senses. If a visit gives us well-being, it is the result of multiple sensory stimuli which, by blending together, define the same experience, anchor it in our memories and transform us"* **Minh-Xuan Truong**
- *"There are places that awaken the soul from its lethargy, places shrouded in mystery, chosen from all eternity to be the seat of emotion"* **Maurice Barrès La colline inspirée**
- *"Fighting stress and depression, facilitating sleep, stimulating the immune system, oxygenation, musicality (...). With all your senses alert, the immersive forest walk allows you to be totally in the present moment. In the words of <i>Éric Brisbare*

Concrete translations / illustrations:

Visit the park of the Château de Chantilly on horseback to feel the energy of the place, walk in the forest of Mormal at the site of the arboretum, the multi-sensory ascent of the slag heap (Lens-Liévin), the sensory immersions of the PBA in Lille and La Piscine in Roubaix, the Glass Workshop in Trélon...

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5 – Legacy and transmission of cultural and natural heritage "The heritage that we have a duty to pass on to future generations because it is an element of their identity as well as ours"

Context/Origin/Root causes of this underlying trend:

- ✓ The dilution of markers in times of crisis creates a need for a secure reference system. There is a return to traditional values and a renewed interest in history and heritage
- Reconnecting with "what has stood the test of time" (monuments, religious buildings, museums, know-how, etc.) is experienced as a return to the sources of our identity, balancing and refounding,
- At the same time, there is a feeling of responsibility to pass on to future generations, just as every parent must pass on their origin to their child. However, this origin should not be understood as a testament but as a resource, as "something that builds",
- ✓ A classic guided tour is no longer enough to satisfy today's visitors. Whether tourist or resident, they want to discover heritage in an immersive, participatory and personalised way. Cultural mediation must facilitate the understanding and transfer of knowledge, while remaining faithful to the spirit of the place.

Quotes from Philosophers, Sociologists, Anthropologists, Historians, Experts, etc.:

 "Everything has become heritage: architecture, cities, landscape, industrial buildings, ecological balances, the genetic code."

Marc Guillaume

- *"We should be proud to have inherited the best and noblest of the past. One should not sully one's heritage by repeating the mistakes of the past."* **Gandhi**
- *"Places are also bonds. And they are our memory." Philippe Besson*

Concrete translations / illustrations:

- Forests, slag heaps, marshes, protected coastlines...
 The development of the Somme valley, developments that enhance the natural heritage
- Monuments, blockhouses, places of remembrance
- The glass workshop in Trélon, the Manufacture in Roubaix,
- New staging and intermediation: The Forest Festival, video mapping, Chroma show in Amiens, theatrical visits, Louvre-Lens visits

8 – Well-being

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Self-diagnosis and inspiration questionnaire for those involved in tourism



How can we meet the needs of friendly strollers?

- What are the top 10 must-sees to recommend to your clients to freely discover near your organisation (natural and cultural heritage, museum, architecture, etc.)?
- What are the typical restaurants in the area, frequented by the locals, offering local specialities, where you can talk to the staff and the inhabitants?
- What are the cycling or walking routes that allow you to discover the area and its highlights?
- What are the places where you can recharge your batteries, the panoramas, the parks and gardens?
- What is the calendar of markets, events and food fairs?
- Which local producers can be found nearby? How do I participate in territorial anchoring from my home (e.g. at breakfast, offer of a basket of products or meal basket)?

COUPLES / PASSIONATE EXPLORERS

Deepen their knowledge of a topic they are passionate about through contact with experts

Context

Between the ages of 50 and 65, they are at the end of their career, in the high-income bracket or are beginning to retire. They are still dynamic and active. Their children are adults and have left home. They have a perpetual need to learn and grow. They are rigorous, demanding, enjoy making discoveries and getting to the bottom of things on subjects they are passionate about, and want to awaken their minds.

NEEDS

PRIORITY need:

TO ENRICH themselves with new knowledge related to an area of interest, to immerse themselves totally in a subject in order to discover it in DEPTH

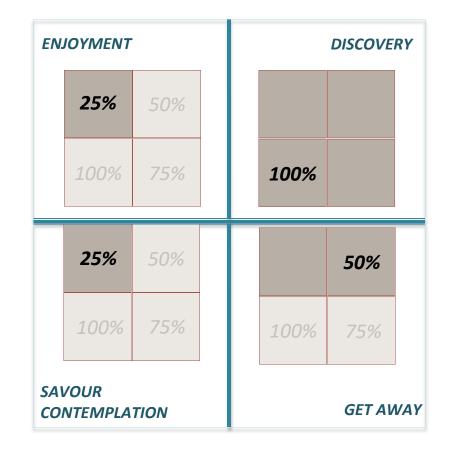
KEY FACTORS OF SUCCESS

++ Be accompanied by advisors to prepare your stay, and then on site by dynamic, sharp, professional guides who are experts in their subject

- ++ Have access to unique / VIP tours for individuals
- + An organised stay to optimise the time of the stay as much as possible
- + Authenticity (accommodation, restaurant)

+ Restaurants offering **local delicacies**, allowing to discover the regional culture, rooted in the territory, frequented by the locals, where they can talk about the delicacies, the origin of the products, with special attention on the view of the landscape, reception and friendly service. E.g.: country bistros, estaminets...

COVID 19: To be reassured on the sanitary measures taken by all those involved in the stay, to be at a distance from others (including the possibility of a personal guide)



2 - (Re)discovering the local factor

"A change of perspective, such that known space reveals itself in a different light and surprises us

<u>adain</u>

Context/Origin/Root causes of this underlying trend:

- ✓ Local roots (trend 1) and ecological awareness (trend 17) are combined: the 20th century of total openness to the world, resulting from the progressive ideology of the Enlightenment, is over.
 - This is no longer a time for accumulating exotic experiences off the beaten track, but for gaining a deeper understanding of destinations chosen because they make sense.
- ✓ A change of scenery and distance are dissociated: we are now coming to terms with the idea that what we have in front of us every day can surprise us. Changing one's perspective of the "known" makes it possible to experience a change of scenery close to home.

Concrete translations / illustrations:

- A trip on a gyro-pod in the heart of the Audomarois forest to the edge of the Audomarois marsh
- The unexpected climbing of a slag heap
- Discover Lille differently, by paddle boats on the canals

- "Many tourists today question the need to fly to the end of the world to find the same globalized world. In this context of renewal of the idea of travel, the short stay "close to home" is regaining its credibility. An alternative offer is developing, which adapts to a demanding, increasingly "green" clientele, in search of an accessible change of scenery." Franck Michel, anthropologist specialising in travel - Revue Espace, 2010
- *"Both for economic and security reasons, but also because the time is ripe for territorial re-anchoring, we are rediscovering the local area and its heritage." BVA, trend book*
- *"The end of the world and the edge of the garden contain the same amount of wonder".* **Christian Bobin**, writer
- *"It is because of a lack of attention that we are not surprised more often."* **André Gide**
- "The extraordinary lies deep in the ordinary. It's all in the keenness of the eye" Karl W Dürckheim

5 – Legacy and transmission of cultural and natural heritage "The heritage that we have a duty to pass on to future generations because it is an element of their identity as well as ours"

Context/Origin/Root causes of this underlying trend:

- ✓ The dilution of markers in times of crisis creates a need for a secure reference system. There is a return to traditional values and a renewed interest in history and heritage
- Reconnecting with "what has stood the test of time" (monuments, religious buildings, museums, know-how, etc.) is experienced as a return to the sources of our identity, balancing and refounding,
- At the same time, there is a feeling of responsibility to pass on to future generations, just as every parent must pass on their origin to their child. However, this origin should not be understood as a testament but as a resource, as "something that builds",
- ✓ A classic guided tour is no longer enough to satisfy today's visitors. Whether tourist or resident, they want to discover heritage in an immersive, participatory and personalised way. Cultural mediation must facilitate the understanding and transfer of knowledge, while remaining faithful to the spirit of the place.

Quotes from Philosophers, Sociologists, Anthropologists, Historians, Experts, etc.:

 "Everything has become heritage: architecture, cities, landscape, industrial buildings, ecological balances, the genetic code."

Marc Guillaume

- *"We should be proud to have inherited the best and noblest of the past. One should not sully one's heritage by repeating the mistakes of the past."* **Gandhi**
- *"Places are also bonds. And they are our memory." Philippe Besson*

Concrete translations / illustrations:

- Forests, slag heaps, marshes, protected coastlines...
 The development of the Somme valley, developments that enhance the natural heritage
- Monuments, blockhouses, places of remembrance
- The glass workshop in Trélon, the Manufacture in Roubaix,
- New staging and intermediation: The Forest Festival, video mapping, Chroma show in Amiens, theatrical visits, Louvre-Lens visits

3 – Beauty of Nature

"The contemplation of nature is a source of positive emotions...

Disconnection, reconnection, return to oneself"

Context/Origin/Root causes of this underlying trend:

- ✓ Since the beginning of the 20th century, the world has experienced a very strong acceleration of urbanisation, resulting in an increase in the size and activities of cities.
- The polluted and noisy urban environment affects the health and quality of life of growing populations.
- Need to compensate for urbanisation and the metropolisation of life by seeking out non-populated, non-toxic and little or no anthropised environments to look (again) at
- ✓ Need to reconnect with nature (water, earth, plants, etc.) to regain your equilibrium.

Concrete translations / illustrations:

- Landscapes, wide open spaces, panoramas: the Baie de Somme, the Côte d'Opale, the forest massifs
- Large urban parks, green lungs in the heart of cities
- Regional Nature Parks,

- "Sophisticated brain imaging techniques have shown that when we view nature scenes with lush vegetation, the brain regions associated with emotional stability, empathy and love are more active." Dr. Alan C. Logan graduate of the Canadian College of Naturopathic Medicine
- *"We think we are looking at nature, but it is nature that is looking at us and permeating us."* **Christian Charrière**, journalist and author
- "Happiness in looking and comprehending is nature's most beautiful gift."
 Albert Einstein (The world as I see it, 1934)
- *"Beauty heals our doubts. The aesthetic emotion is a re-learning of self-esteem"* **Charles Pépin**
- "We have not yet done anything better than nature (and the art that tries to imitate it), to let ourselves be driven by something greater than ourselves, to nourish our spirit. **Anne Cazaubon**- Let yourself be touched by beauty

6 – Local gastronomy

"The gustatory heritage is an integral part of the overall discovery of the territory... Sensoriality, revelation of local traditions, change of scenery".

Context/Origin/Root causes of this underlying trend:

- ✓ Faced with the standardisation and globalisation of food, the territory embodies the local specificity, the *human made*, and trust
- ✓ The table becomes a means of discovering a territory in an original, immersive and intense way and occupies a central place among the benefits expected from a stay. It combines a change of scenery with a moment of reunion and richer exchanges
- ✓ A taste for being rooted in tradition, but also for the values of the imagination and spirituality. The territory is revisited: the product is local, fresh and in season, the dish is iconic, but the recipe has evolved (bistronomy, street food, healthy food, picking, a visionary and accessible passionate chef...),

Quotes from Philosophers, Sociologists, Anthropologists, Historians, Experts, etc.:

- "Gastronomy is now an important component of tourist appeal. From simply important, it has become essential for some tourists who make the discovery of the culinary and wine heritage, or even a restaurant, the main reason for their trip" 2014, Olivier Etcheverria, geographer and author (Hors-série Revue Espace, Dec. 2020)
- "Cooking is a perfection of food; gastronomy is a perfection of cooking itself." Jean-François Revel, of the Académie française in Festin en paroles (1979)



Concrete translations / illustrations:

- Sébastien Porquet, Le Saltimbanque (picking, wild plants...)
 Florent Ladeyn, Auberge du Vert Mont (local products, promotion of local identity) The Sensory Route in Maroilles
- Culture/food associations: tasting in a museum, treasure hunt in town (l'Echappée Bière)
- The "green stars" in the Michelin Guide, Emergence of the "micro-breweries"

15 – True and sincere meeting / connection "Symmetry of attention between the service provider and the client: spontaneous, empathetic and warm meetings and exchanges, "

Context/Origin/Root causes of this underlying trend:

- Digitalisation and the standardisation of offers and behaviour have dehumanised and depersonalised relationships.
- Overtourism has led to the trivialisation of relationships to the point where they are disappointing or non-existent,
- ✓ Generalized commodification makes selfless attention rare,
- ✓ Social distancing and barrier gestures have only amplified the phenomenon, and hence the ever-increasing need for a true and sincere encounter,

Concrete translations / illustrations:

- In response to the standardisation of the offer, the symmetry of intentions forms the basis for a personalised offer.
- In the context of new constraints, visitors will be even more attentive to the reception, the considerate, human and attentive attitudes that show a sincere desire to take care, to contribute to well-being.
- The notion of hospitality of the service provider replaces the notion of accommodation provider: the accommodation provider becomes a host. Visitors should feel expected, recognised and welcomed as guests.

- "There are instincts for every encounter in life."
 Victor Hugo, "Les Misérables"
- "The individual has always flourished through these successive encounters with the outside world." François Cheng
- "There are some encounters in life where truth and simplicity are the best ride in the world." Jean de la Bruyère "Caractères"
- "The interpersonal quality of the Jo&Joe teams is an essential element of our offer. The receptionist or the bartender, for example, do not just do their job: they embody the function. As a result, they have a genuine relationship that puts our customers at ease." **Matthieu Perrin**, former brand manager of Jo&Joe, Accorhotels group

Self-diagnosis and inspiration questionnaire for those involved in tourism



How can we meet the needs of passionate explorers?

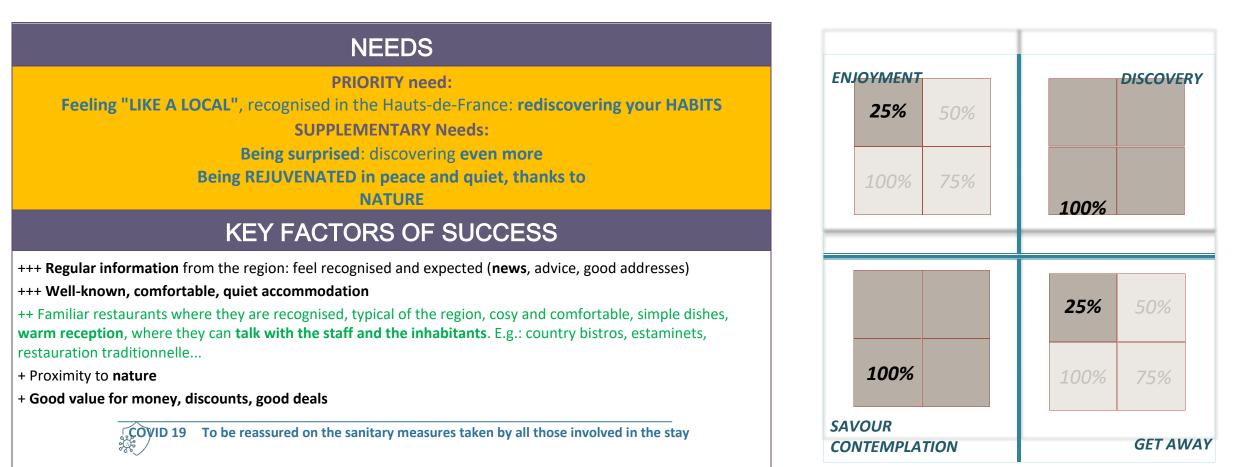
- What guides and experts should they be recommended to accompany them on site and satisfy their thirst for knowledge (culture, heritage, nature, gastronomy, craftsmen, etc.)?
- How can we help them to optimise their stay so that they make the most of their visits/activities?
- What unique or VIP visits should you suggest?
- What restaurants can they be recommended where they can talk to the staff or the chef about the delicacies, the origin of the products... What local producers can they meet nearby?
- How do I participate in territorial anchoring from my home (e.g. at breakfast, offer of a basket of products or meal basket)?

COUPLES / CONFIDANTES

(*Re*)*discovering and finding familiar territory*

Context

Over 50 years old, they are very attached to the Hauts-de-France region, which they consider to be their refuge, they have rituals and habits. Middle-income category, and tend to live nearby in an urban environment. They need to keep in touch with the territory (emails, SMS, etc.)



1 – Local roots

"To find what I am geographically and emotionally close to, the place that has a bond (collective memory): attachment to ways of life, to local customs"

Context/Origin/Root causes of this underlying trend:

- ✓ It is a trend that has appeared as a reaction to globalisation: globalisation creates the need for roots, particularism, territory, cultural markers,
- ✓ The desire for elsewhere and far away is replaced by a desire to rediscover what is close and more like us, what is authentic and therefore more reassuring,
- The journey that makes sense today responds to the desire to (re)discover the territory, the traditions, the values of its inhabitants,
- ✓ Local anchoring is a reconnection to a way of life/knowhow shared by a group and considered all the more safe because it has stood the test of time



Quotes from Philosophers, Sociologists, Anthropologists, Historians, Experts, etc.:

- "The challenge of local anchoring is threefold. It aims first of all to make the inhabitants proud of their territory... It then allows visitors to live like a local, to meet the ambassadors of their way of life. Finally, it promotes short (local) supply chains." Revue Espace 2020
- *"What is close always ends up being more important than what is far away", Michel Maffesoli*
- "[...] Everyone knows that discovering and meeting the local populations [at the end of the world] is often an illusion." **Franck Michel**, anthropologist specialising in travel - Revue Espace, 2010

Concrete translations / illustrations:

What can only be experienced "here".

- Local festivals (Sainte Barbe, May 1st at the Familistère de Guise...)
- Climbing a slag heap with a guide
- The fish market of Boulogne-sur-mer

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4 – Authentic and multi-faceted immersions

"Immersion in nature but also in the city, culture, art, people...

Energizing immersion, in authentic spaces and in contact with the inhabitants".

Context/Origin/Root causes of this underlying trend:

- ✓ There is an emerging need for a change of scenery, without necessarily going very far, and for in-depth discovery: we no longer just want to GO to a destination, but to LIVE IT,
- ✓ Visitors in the 21st century are therefore tending towards immersive tourism, where they are no longer just spectators who admire (the heritage) and observe (the inhabitants): they become active participants in their stay.
- Immersive stays make it possible to understand and appreciate other ways of life (meet), to enrich oneself intellectually (learn), to practice an activity concretely (do), to soak up the energy of the place (feel)
- By appealing to the 5 senses (see, taste, touch, smell, hear), an immersive stay provides moments rich in mixed emotions that help memories to be made

Quotes from Philosophers, Sociologists, Anthropologists, Historians, Experts, etc.:

- *"We live in a vision-centred society. But our relationship with the environment involves our five senses. If a visit gives us well-being, it is the result of multiple sensory stimuli which, by blending together, define the same experience, anchor it in our memories and transform us"* **Minh-Xuan Truong**
- "There are places that awaken the soul from its lethargy, places shrouded in mystery, chosen from all eternity to be the seat of emotion" Maurice Barrès - La colline inspirée
- *"Fighting stress and depression, facilitating sleep, stimulating the immune system, oxygenation, musicality (...).*

With all your senses alert, the immersive forest walk allows you to be totally in the present moment. In the words of **Éric Brisbare**

Concrete translations / illustrations:

Visit the park of the Château de Chantilly on horseback to feel the energy of the place, walk in the forest of Mormal at the site of the arboretum, the multi-sensory ascent of the slag heap (Lens-Liévin), the sensory immersions of the PBA in Lille and La Piscine in Roubaix, the Glass Workshop in Trélon... Self-diagnosis and inspiration questionnaire for those involved in tourism



How can we meet the needs of confidantes?

- What news, advice and good addresses should they be given so that they feel "like a local"?
- What are the typical restaurants in the area, frequented by the locals, offering local specialities, where you can talk to the staff and the inhabitants and where the reception is particularly warm?
- What are the calm places where you can recharge your batteries, the natural spaces, the parks and gardens, the latest exhibition?
- What is the calendar of markets, events and food fairs?
- Which local producers can be found? How do I participate in territorial anchoring from my home (e.g. at breakfast, offer of a basket of products or meal basket)?

HAPPY FAMILY

Entertaining the kids

Context

Parents in traditional families are between **30 and 50 years old**. They are in the process of consolidating their professional careers. They have to reconcile professional and private life, sometimes with difficulty (with still young children).

They have little time available on a daily basis, and feel guilty for not spending enough time with the children. The stress factor is important, especially for women.

Holidays and weekends are therefore times to get together with the kids, to experience joy with them and also to destress.

NEEDS PRIORITY need: Spending time TOGETHER, making it FUN FOR THE CHILDREN: having fun together according to the children's preferences SUPPLEMENTARY Needs: REST, recharge one's batteries if possible (especially for mothers). Sleep, recuperate, relax. Minor plus: discovering new horizons, new activities	ENJOYMENT 100%	DISCOVERY 25% 50% 100% 75%
 KEY FACTORS OF SUCCESS ++ Proximity and diversity of leisure offers in relation to the accommodation ++ Accommodation with a dedicated children's area and a parents' area (for resting). + Quiet accommodation, comfortable bedding + Kids-friendly reception. + No constraints, a lot of flexibility + Leisure activities to share time together + Spacious family restaurant nearby, varied menu, simple dishes and children's menus, friendly and cheerful atmosphere. Benefits: activities or playground, outdoor space. E.g.: traditional restaurants / bistros / brasseries with terrace, garden and with sufficient space between the tables and large tables or a private room 	SAVOUR CONTEMPLATION	GET AWAY

+ Consistent prices with no surprises

COVID 19 To be reassured on the sanitary measures taken by all those involved in

13 – Strengthening family ties

"Comforting the family, loved ones, strengthening natural ties"

(All families: traditional, blended, single-parent, families with LGBT parents...)

Context/Origin/Root causes of this underlying trend:

- ✓ In the current climate of uncertainty, family cohesion is more important than ever. A close-knit family will be more protective against daily difficulties and stress. The tribe becomes a refuge, a sanctuary.
- ✓ The strengthening of family ties is a response to the fragmentation of society, the superficiality of relationships and the geographical fragmentation.
- ✓ The family is once again becoming a structuring element of life, challenging the priority position that work has held for the last thirty years.
- ✓ The phenomenon of individualisation taken to extremes leads at the same time to a need for community belonging,

Concrete translations / illustrations:

- Family weekends on the farm, in nature, family visits to museums, shared activities (tree climbing, etc.)
- A range of activities to meet the specific needs of each member of the family or to meet the needs of the whole family, in particular through a range of family-friendly facilities and services
- Facilities that can be shared: swimming pool, barbecue, games available...

- "With the lockdown, family has (once again) become synonymous with comfort. **Geneviève Reynaud- BVA**
- *"Holidays are often a time for families to withdraw into themselves.* In the coming years, family tourism will continue to grow, as it is reassuring. The family target will be all the more strategic as the face of families has changed a great deal: in addition to "traditional" families, there are now blended families, single-parent families, etc., where the ties are all the more precious" **Rémy Oudghiri**
- "A family holiday away from home has a positive impact on the parent-child relationship, communication and listening to the child, married life, and the exercise of discipline by the parents. Thus, this period of relaxation and entertainment that tourism implies makes it possible to accept each other, to listen to each other, to communicate, to share activities, and even to consolidate the family bond" National Tourism Council, 1998
- *"For the younger generation, the family appears to be the foundation, the base that guarantees emotional security. It is the major ingredient of personal fulfilment, of happiness"* **Isabelle Gerber**

14 – Being together and doing things together *"To be together, with each other, in a harmonious, balanced and reassuring climate. A time-space that we choose, where we feel good, where we are happy."*

Context/Origin/Root causes Context/Origin/Root causes

of this underlying trend:

- ✓ If loneliness and isolation can be considered as the diseases of the 21st century, reinforced by the pandemic, the way out is to be able to feel good with others,
- ✓ With the acceleration of the pace of life, shared time is becoming rarer and therefore more precious. With the significant psychological investment in them, they must absolutely be successful
- Sharing an activity/discovery strengthens or even repairs the bonds within the tribe, eases tensions, reinforces complicity and creates common memories



Quotes from Philosophers, Sociologists, Anthropologists, Historians, Experts, etc.:

- "A sandcastle built with four or six hands: the sea can destroy it, but it remains forever present in the family history".
- "This need to rediscover the link and to rediscover the Other in order to find meaning and to find oneself is only growing. Accelerated by the search for comfort due to the pandemic, we are seeing a renewed investment in family, friends, "loved ones" and, more generally, a return to the human element, to ties, to mutual aid and new forms of solidarity, often in proximity. [...] Exchanging in order to exist, sharing". Geneviève Reynaud- BVA
- "Complicity: it is the key to a shared moment that anchors memory. It's not the price or the setting that counts, it's the quality and intensity of the moments experienced."

Concrete translations / illustrations:

- Awareness of the precious nature of shared moments leads consumers to better prepare their stay and even to raise their standards.
- The conditions for a successful stay include preparation, services, concierge services, the availability of the host and their intention to contribute to the enrichment of visitors' relationships.

16 – Fostering happiness

"Happiness is an emotion that resembles pleasure and can become an embodiment of happiness. Search for what will make my "guests", visitors, clients happy"

Context/Origin/Root causes of this underlying trend:

- Modern everyday life (urbanisation, productivist logic, digitalisation of communication, uncertainty, insecurity, terrorism, fear of the future...) generates sadness and fatigue,
- Crises (pandemics, lockdowns, etc.) amplify this sense of gloom and unease,
- ✓ The current context "sorely lacks optimism, colour, beauty, freedom, harmony and play". Ingrid Fettell, psychologist in neurosciences
- ✓ ... Fostering happiness is a counterpoint

Concrete translations / illustrations:

- "Fostering happiness" will never be as powerful as when this happiness is embodied by the provider (which presupposes that the provider has become aware of what makes them happy).
- Look for what will bring happiness: a landscape, a sunset, a masterpiece, a good meal... Without forgetting that atmospheres, individual postures (the smile, the attention, the quality of the welcome, the recommendation of people who are passionate about their job and therefore happy...) allow a form of expression of happiness.

- "Happiness is a power, cultivate it." Dalai Lama
- "Happiness cannot be decreed, but we can createlimate favourable state of mind to allow this feeling to emerge. We can, for example, be attentive to all the small pleasures that life provides, be present in what we do. Develop qualities of presence to others, savour the good moments of life". Frédéric Lenoir
- "When we look at something beautiful, we are happy. This is bafflingly simple."
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- "Happiness is the fundamental emotion that accompanies our power to act". Baruch Spinoza

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Specificities based on the child's age

0 to 5 vears

An age where children follow their parents in their activities: antiquing, walks, strolls. The pace of the stay is more peaceful and the activities are dictated by the child's pace. The entertainment and fun dimension is particularly important: water games, activities with animals, learning farm, petting zoo

6 to 10 years

A pace based on **sharing in the family**: moments shared for the child's enjoyment: gardens, cycling, pony rides, activities with animals, theme parks, amusement parks, science parks, boat rides, museum visits.

A pace combining **relaxation** (strolling, walks) and **diversified activities** in order to benefit the most from the stay.

SPECIFIC KEY FACTORS OF SUCCESS

+++ Safe, functional and well-equipped accommodation so that there's no need to bring additional equipment (high chair, baby bed, children's games), thus making logistics easier; search for ease of use

++ Search for closeness to the home is more significant.

+++ **Safe** accommodation, **separate bedrooms** with actual beds for children.

- ++ **Games** for children, cycles available and safe cycling tracks
- ++ Search for closeness to the home is more significant.

Specificities based on the child's age

11 years and up

An age where **children share their parents' activities**: city tours, heritage discovery, food discovery, treks... including activities designed for them and shared with the family: treetop adventure course, land sailing, paddle boats, canoeing, museums, memory tourism, nature treks and during bad weather: escape games, bowling. An adult's pace including activities designed for adolescents.

A place for solo or duo activities for parents based on wellness: Spa, yoga, jogging, leisure, reading.

A **cool or active pace** decided on the spur of the moment

SPECIFIC NEEDS

To get away from things, a change of pace, to breathe. Predilection for large natural spaces but also **the city** with older children

SPECIFIC KEY FACTORS OF SUCCESS

Wifi ++ Vélos à disposition Une cuisine plus raffinée pourra être appréciée Self-diagnosis and inspiration questionnaire for those involved in tourism



How can we meet the needs of the Happy family?

- What shared activities can we recommend to these clients? Near your organisation, suited to the age of the children, to have fun, to please the children and to create memories: leisure activities, nature outings, fun workshops, etc.
- What activities do you recommend to keep children entertained while parents relax?
- What activities do you suggest in case of bad weather?
- What are the safe walking and cycling routes that allow you to get some fresh air nearby?
- With which local restaurateurs or producers are there partnerships to offer meals at the place of accommodation? How do I participate in territorial anchoring from my home (e.g. at breakfast, offer of a basket of products or meal basket)?
- Which restaurants are kid-friendly, with a friendly atmosphere, are spacious, with a varied menu, have entertainment/activities for children, with a garden, a terrace?

GRANDPARENTS WITH THEIR GRANDCHILDREN

To enjoy, pass on and create memories in complete safety

Context

Opportunities for grandparents to spend time alone with their grandchildren are rare. Grandparents see themselves as the possible stress release valve for both parents and children.

They have a great responsibility towards their grandchildren. Grandparents seek above all to strengthen their relationship. They want to ensure that the grandchildren have fun and share great moments or simply make them happy and want to come back. They want to ensure maximum safety during their stay.

NEEDS		
PRIORITY need:	ENJOYMENT	DISCOVER
Making the GRANDCHILDREN happy of complicity, strengthening ties. SUPPLEMENTARY Needs: TRANSMITTING and awakening grandchildren: passing on interests, a state of mind rather than knowledge	100%	100% 75%
KEY FACTORS OF SUCCESS		
+++ A wide range of activities ++ Comfort and features of the accommodation: child-friendly, quiet, safe. Centrally located accommodation. ++ Kids-friendly reception.	50%	50%
+ at the place of accommodation: well-equipped kitchen and proposals for catering services or partnerships	100% 75%	100% 75%
On-site catering , children's menus, local products , discovery of regional delicacies . E.g.: Country bistros, estaminets, traditional restaurants		
- Parking facility	SAVOUR	
Games, equipment to keep children occupied in case of rain or during meals	CONTEMPLATION	GET AWA
cOVID 19: To be reassured by choosing a known accommodation, to be reassured about the health measures taken by all those involved in the stay.		

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Concrete translations / illustrations:

- Landscapes, wide open spaces, panoramas: the Baie de Somme, the Côte d'Opale, the forest massifs
- Large urban parks, green lungs in the heart of cities
- Regional Nature Parks,

- "Sophisticated brain imaging techniques have shown that when we view nature scenes with lush vegetation, the brain regions associated with emotional stability, empathy and love are more active." Dr. Alan C.
 Logan graduate of the Canadian College of Naturopathic Medicine
- *"We think we are looking at nature, but it is nature that is looking at us and permeating us."* **Christian Charrière**, journalist and author
- *"Happiness in looking and comprehending is nature's most beautiful gift." Albert Einstein* (The world as I see it, 1934)
- *"Beauty heals our doubts. The aesthetic emotion is a re-learning of self-esteem"* **Charles Pépin**
- "We have not yet done anything better than nature (and the art that tries to imitate it), to let ourselves be driven by something greater than ourselves, to nourish our spirit. **Anne Cazaubon**- Let yourself be touched by beauty

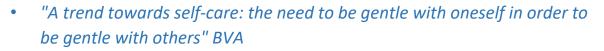
12 – Care

"Care: taking care of yourself and others"

Context/Origin/Root causes of this underlying trend:

- ✓ Awareness that you have to take care of yourself in order to take good care of others...
- ✓ ... that taking care of others does us good (altruistic selfishness)...
- ✓ And that taking care of others also means taking care of future generations, and therefore taking care of the planet, our "common home".
- ✓ Care thus expresses the transversality and universality of benevolence

Quotes from Philosophers, Sociologists, Anthropologists, Historians, Experts, etc.:



- "Think of a relationship with the other in terms of trust and concern for the other rather than in terms of mistrust" **Fabienne de Brugère**
- Meaning of Care: "Everything we do in order to maintain, continue and repair our world." Joan Tronto, political scientist

- "The morality of care has become a universal ethical issue that has taken its place in modern humanism" **Nicolas Journet**,
- "It is no longer a secret that happiness is no longer to be found in having but in a form of being that oscillates between selfcare and openness to others: our own tribe and future generations." Psychologie.com
- "Care is as much about caring for oneself as it is about caring for others or the world, once we recognise that we are all vulnerable because we depend on our fellow human beings to survive. Practising care means finding the right gesture, the right look, the right word to respond to the needs of others; it means being able to express compassion, solicitude and respect." Psychologie.com

Concrete translations / illustrations:

- The quality and personalization of the reception, the quality of the relationship that will be established during the stay, the care of the guest's well-being
 - The values of conviviality, solidarity, openness
 - Sincere attention, thoughtfulness

Self-diagnosis and inspiration questionnaire for those involved in tourism



How can we meet the needs of grandparents with their grandchildren?

- What shared activities can we recommend to these clients? Near your organisation, suited to the age of the children, to have fun, to please the children and to create memories: leisure activities, nature outings, fun workshops, etc.
- What activities can be suggested to encourage the transmission between grandparents and grandchildren of heritage, culture, art, gastronomy...?
- What are the safe walking, cycling and boating routes in the vicinity?
- With which local restaurateurs or producers are there partnerships to offer meals at the place of accommodation? How do I participate in territorial anchoring from my home (e.g. at breakfast, offer of a basket of products or meal basket)?
- Which restaurants are kid-friendly, allowing you to discover local delicacies, with a secure garden and terrace?



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