



Respire

TOMORROW TOURISM

TOMORROW TOURISM
IS BEING BUILT TODAY

WHITE PAPER 2020

Analysis & Recommendations

www.respire.travel

Foreword

Tourism has always been one of the activities which fascinates and stretches the imagination of everyone. In 2019, the number of international tourists reached 1,4 billion.

Europe is by far the first tourist destination: it represents more than 50% of international arrivals.

Historically, tourism is a sector that is continuously changing:

In the 19th century, the sector experienced its very first revolution when the idea of leisure travel was born.

In the 20th century, between the two world wars, the advent of paid vacations gave further impetus to the second great revolution of our sector, which was structured and organized around this new situation. Everything changed between the 1950s and 1970s when the first vacation clubs appeared. There was a democratization of the idea of family vacations.

Tourism does not evolve for a very long time. Tourism is a rather traditional sector, often resistant to novelties and innovations.

In 1980, the American magazine "TIME" awarded the title of Man of the Year to the PC (personal computer). The arrival of the computer in houses represents a major change and a new era that significantly influences the consumption of goods and services. It is the starting point for the third revolution in tourism.

At the beginning of the 1990s, the third revolution arrived: the liberalization of the sale of travel outside of agencies with the appearance on the market of gift boxes, and then of the Internet, which definitively and changed the way travel is sold and consumed with the pure players, these online-only agencies, and the low-cost airline companies.

As we can see, the sectoral cycles having major changes are repeated on average every 25/30 years, which brings us finally to 2020.

Nowadays, with the arrival of new technologies, tourism is regularly targeted as disrespectful of the environment, ignorant of the travelers' demands, and producer of fully standardized products.

We know that these methods are not the best ways to work or do tourism.

Foreword

Almost nobody has taken the time to try to change the situation and come back to practices that respect the desires of the customer travelers, and also respect the populations and the places. This kind of tourism is perceived as destined for a wealthy elite.

The price of a more artisanal service is higher than the one practiced by the big industrial groups, but do we have the choice to ask ourselves this kind of question while ignoring these practices?

While everyone is asking this question without really finding an answer, the planet decides otherwise : At the beginning of 2020, the Covid-19 pandemic hit the world like a tsunami, with terrible consequences for the global economy, and especially for our sector: 90% of planes are grounded, all travel canceled or postponed, thousands of hotels are closed around the world or used as emergency hospitals.

In March, by noticing this complicated and uncertain situation, the idea of thinking about these subjects came to my mind: what if we take advantage of this imposed pause to define how to start again?

With this in mind, on the first Sunday of the lockdown, I contacted four friends, all renowned professionals, to propose that we imagine together what tourism would look like after this crisis.

It was obvious to me that, if tourism was to continue to exist after this pandemic, it would have to be very different from what we had known.

From 4 people the first day, we were up to 70 after a week, 500 after a month: Respire was born.

If this pandemic has hurt us, it has also given us a wonderful gift: time.

Today, Respire is a reality:

- The Think Tank has more than 8,000 members around the world (Respire has delegations in around 10 countries).
- Our reflections have received greater attention from the professional and general public press, institutions, and politicians.
- Nowadays, Respire is also an association that has nearly 200 members.

Foreword

From the 17 think tanks, 8 of them decided to focus on tomorrow's tourism, for 6 months. How should it evolve? How this major change could allow tourism to continue to exist?

This White Paper is the first result: a manifesto of the profession which analyzes the consequences of this pandemic on our sector, an assessment of the situation with suggestions of recommendations and solutions, so that tomorrow's tourism is better than yesterday's and today's.

Respire is not intended to state a truth or impose a unique thought or a new model, but nothing will be the same again.

I don't know if this is the right method if our resolutions and recommendations will be read or adopted.

We don't pretend to impose our ideas, but we strongly hope that our thoughts and could be a way to write tomorrow's tourism again, a white page by which we can begin to imagine and write the way to do tourism for future generations.

Fabio CASILLI

Chairman-Founder of RESPIRE, LE TOURISME DE DEMAIN

Many thanks to all the members of the Executive Board who helped to create this report and more specifically to the group of the White Paper around Maika FRIDI which was able to synthesize all the thoughts of our active members.

This White Paper was translated from French to English by Cindy Flament.

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Tourismophobia

(By Corinne DOULAN, with Jennifer WEBER,
Corinne PENARANDA, David MOTHE, Luc TROMME,
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« The diversity of the participants, who come from all walks of life, ensures the wealth of the thoughts » Corinne DOULAN

MIGRATION HISTORY AND TOURIST PRACTICES

- **18th century** : The quaint travel tends to lead to non-European lands. Wealthy travelers position themselves as former explorers in expeditions. Elsewhere is attractive, enchants crowds and becomes an inspiration.
- **19th century** : Birth of modern tourism in the motion of the construction of European colonial empires. Mediterranean, North Africa, French Indochina succeed to America and India epics. The Orient fascinates. Tourism facilities are built, hotels are flourishing, traffic becomes intense. These destinations become hotspots to cure during the winter but also the other seasons (seaside or mountain destinations). Resorts are being built, occupied by these new residents. Places all promise enchanting stays : exotic advertisements, travel guides, translators, indigenous distinctiveness, palaces, new transportation companies (ships - Suez canal in 1869, trains - Orient Express in 1883). Books and other handbooks for travelers spread since the end of the 19th century, abounding explanations, descriptions of the places of the maps, and illustrations. All is made to attract tourists from all walks of life.

In this way, tourism is developing in a very multifaceted way. The discovery of the faraway thanks to the imagination of the first vacations and the growth of the means of transportation, enjoyment of the new conquered spaces, population migration (revolutions, diaspora), armies (more military type of tourism because of the expansion of the colonization, and thus of the colonized territories), scholars and other scientists (studies of the far and fascination for indigenous and local people).

- **20th century** : Obtaining the paid vacations in 1936 (15 days), and then in 1956 (3rd week), in 1968 (4th week), in 1982 (5th week), as well as the development of the roadways and means of transportation are great progress in the world of tourism. The second part of the century sees the advent of tourism in the form of a shared seasonal migration due to a flourishing industry.

Tourism has deeply changed the lifestyles and the economy of the territories. The world wants to be contemporary, it changes, it opens the doors to this process of a link between the people where the circulation is reigning : people, communication, media fluxes. All these elements allow making the faraway more closer, to consume it in a better way.

- **21st century** : The current analysis of the tourism market allows us to highlight notorious inequalities between territories but also underlying issues linked to this elsewhere overconsumption. Capital cities are overflowing because of the exponential flow of tourists. Local people begin to saturate and they claim to have their empty city back. Tourism professionals come to lose their ethics: the same tourism products are offered and sold. Price negotiations are pulling the prices back, travelers are more and more numerous in the same places. Behaviors are changing, under the influence of one on each other, in an endless circle.

All these practices gave birth to new sociocultural concepts in the world of tourism : **tourismophobia** and **touristophobia**. Not really defined on the paper, they have in common the fear and the rejection : fear of invasion and loss of the private space, fear of the other one, fear of the travel in itself, fear of the consequences of this consumption pattern of tourism. This new vocabulary results from the saturation of a global phenomenon linked to the exponential development of tourist activities. The idea is bringing a start of solutions to, and not reverse, but only to end this tendency to the excessive (over)consumption of the territories.

« Tourism industry disfigures local cultures, their economy and their environment for the benefit of customers in search of immediacy, formatted or wrongly authentic products. » (Usbek & Rica, Tourism destroys the world's diversity, relearn to travel !)

RE-DEFINITION OF THE TERMS

- **Tourismophobia** : Fear, rejection, contempt, or hate for the whole sector of tourism. Feelings experienced by inhabitants, citizens who are sensitive to the preservation of the heritage, some travelers, some tourism professionals, and by any person who be able to perceive the negative effects of tourism.
- **Touristophobia** : Fear, rejection, contempt, or hate for tourists. Feelings experienced by inhabitants, citizens who are sensitive to the preservation of the heritage, some travelers, some tourism professionals, and by any person who is confronted to disrespectful or/and overnumbered tourists.

DOUBLE STANDARDS : ISSUES AND EFFECTS

- **Rejection of tourism institutions** : travel agencies and tour operators lose their credibility in the eyes of customer travelers. They don't find the interest to go through those professionals anymore.
 - The bankruptcy of some huge actors of tourism. The corporate identity and the stability of agencies are shattered. Customer travelers don't trust the tourism industry anymore.
 - Rejection of the travel production chain because unable to guarantee the trip/the destination. From the crash of some production, chains arose a cascade of cancellations.
 - Rejection of the hotel chains which are considered too intrusive and degrading the sceneries, especially big hotel resorts which concrete some coastlines.
 - Rejection of the cruise lines which are considered as polluters and pouring out their stream of tourists. (Example : Barcelona, Venice, and Marseille).
 - The standardization of a flourishing industry no longer meets the requirements of the customers. There is a weariness about the offered products. Efficient productivism drains too many tourism flows in the same places. Over-tourism is born.

• **Rejection of the destinations, of the faraway, of the travel:** some geopolitical, economic, or health-care contexts do not help with travel. Far away from the No Man's lands or the risk zones, some territories might seem hostile, and those places do not foster confidence for the travelers. By distributing some burning topics over and over, a fearful atmosphere could set. So that, some destinations are sometimes shunned by travelers who are becoming tourism phobic. Various events contributed to this negative image :

- Terrorist attacks: Paris, Egypt, Sri Lanka, Tunisia
- Health crisis: virus Zika, chikungunya, Covid19
- Natural disasters: tsunami in South-East Asia, earthquakes of the islands Gili Meno and Haiti, volcanic eruption of Eyjafjallajökull
- The political unstable or debated destinations: Cuba (with the embargo), Colombia, Turkey, Middle-East, Mongolia, or again, political instability in Ecuador and Venezuela.

The fear (phobia) of traveling is experienced during the first encounter in a travel agency. The potential customer travelers list the destinations where they do not want to go, often misguided by news, media, third parties. Some countries may suffer from this negative image when there are still possible alternatives.

- **The over-tourism or the rejection of tourists:** « Tourist go Home » or the dissatisfaction of over-tourism leading to the tourismophobia. Tourists are considered as intrusives and they are confronted with anti tourists speeches (San Sebastian in Northern Spain and Catalogna, Biarritz and the Basque Country, Corsica, Venice (30 million visitors every year), the island of Boracay in the Philippines). Tourism is becoming persona non grata. Inhabitants and local communities feel invaded and dispossessed from their identity and their territories. A large number of travelers to the same places and sites provokes anger and rejection, besides inappropriate behaviors which are seen abroad :

- Degradation of the properties and cultural places: the Machu Picchu and the damage of the Sun Temple by 6 tourists in January 2020 (broken block stone, traces of fecal matter). The Great Wall of China or Angkor Wat has been damaged by graffiti.
- Environmental degradation: the beach of Maya Bay and the islands of Koh Khai in Thailand have been closed to allow coral reefs to regenerate. The Kilimandjaro is eroding because of the tourist flows. The ecosystem of the Galapagos islands is becoming weak, threatened by tourists, who come to see centennial turtles, and iguanas.
- Pollution/waste management: the city of Jaisalmer (India) has seen tourism development, but its sewers are not suitable for this mass of people. Now, the city is under threat of leakages. The Everest nickname is "World's tallest waste dump" because so many visitors leave their garbages (tents, all kinds of types of equipment), and even the Mediterranean sea is full of garbages, of which 52% are from seaside tourism.

- Overexploitation of the natural resources: overconsumption of water in India and Africa (filling hotel swimming pools and other infrastructures, watering golf courses and green spaces). In the Cyclades (Greece), water consumption in the summer period (tourism) is 5 to 10 times higher than the rest of the year, which leads to overexploitation of groundwater and continuous salinization of freshwater. In the Philippines, drinking water is becoming scarce, and power outages are increasing. The modernization of the distribution networks to meet the requirements of a growing clientele, the leaks, and the increasing needs lead to a significant waste of water.
- Difficult cohabitation/noise pollution: in all capital cities and touristy cities. Example of Paris in the districts of Montmartre and du Marais. Amsterdam, district of the Barceloneta (Barcelona).
- Travelers' behaviors: disrespect from tourists in cult places (India), wearing inappropriate clothing (Maldives), mocked habits and customs, complaints (food, lifestyle).
- Traffic congestion: massification of air, land, and river transports linked to the increasing flow of travelers. Overcrowded streets and transport (e.g. the roads on the Isle of Skye in Scotland). Increased transportation in India, Thailand. Road networks for inhabitants are invaded by tourist transport (buses, cars).
- **Selfie time: Instagram/Facebook, behind the scenes:** *According to a study conducted in 2018, 23% of surveyed find their future travel destination through social networks and posted content, especially on Instagram, which influences 42% of the French people, and it is the favorite social network of 18/34-year-old people. These networks have been flourishing for a few years now, and they are getting an increasingly important role in the promotion of tourist destinations and the sale of travels: beautiful pictures highlighting the places, some hashtags to find the contents. If in some cases, this strategy is efficient, it is not efficient in some other places: some destinations, enjoying sudden popularity, are not prepared and structured to cope with all those new tourists with the following consequences :*
 - The Icelandic government decided to close the canyon Fjaðrárgljúfur from February to May 2019 due to too much important tourist flow, which has come to cause environmental damage. Hit by sudden popularity after a clip from the Canadian singer Justin Bieber, the canyon became a must-see for the visitors, who rated it as "perfect for Instagram".
 - Some visitors fly in the face of the closing prohibition of the *Collines aux coquelicots* from Lake Elsinore (California): they break the rules of respect and preservation of the place (necessary to ensure the balance of this fragile ecosystem) and pick flowers to post pictures on Instagram.

- The street Crémieux (12th arr. of Paris) falsely looking like Burano (island of Venice) with its colorful little houses is a key place for all *Instagrammers*. More than 31000 posts are dedicated to #ruecremieux, a phenomenon! The Haussmannian façades are contrasting with the colorful little houses from this street that are enjoyed by the amateur photographs but this passion is rejected by the inhabitants. The tourist flow, which is more or less supported during the weekdays, is finally becoming a nightmare during the evenings and weekends: mass of tourists, bachelorette parties, shooting of music video, etc. Inhabitants can no longer stand this invasion and ask the City Hall to close the street at some hours to find their quality of life back.
- If social networks can have a clear influence on travel trends and destinations by significantly increasing sales, some people accuse these new broadcast channels of having ruined territories by overexposing them. Ultra visibility can have harmful consequences in the long term.

« Tourists hate to look. The camera looks for them. When they have clicked, they are appeased, they have amortized their trip. The piles of pictures they keep are like diplomas certifying that they have moved » (Jean Dutourd)

- **Economic and social effects:** rental increase, the disappearance of local shops in favor of the localization of tourism accommodation, housing shortage which leads to the imbalance of the rental market, the gentrification of the city centers with the departure of the working classes to the benefit of the more affluent classes: new lifestyles and consumption patterns are settling. Some city centers have been dispossessed of their housing in favor of hotels and tourist rentals. Amsterdam has just banned, since July 1, 2019, short-term tourist rentals from its city center (especially the famous red-light district). The city follows in the footsteps of Madrid and Palma de Mallorca. In Scotland, the Isle of Skye and Edinburgh are experiencing a high incidence of tourist accommodation offers. Some people buy accommodation with the sole aim of renting it out, a practice that is not to the liking of the inhabitants.



(Photos libres de droits – montage J. Weber)

RECOMMENDATIONS

- **New Technologies:** *Virtual Reality (VR) where the trip is from your home: discover the wonders by experiencing unusual things from your living room. A different and original approach is a promotional tool for a destination while preserving the same site from the over-mass of travelers, and also a way for the consumer to go beyond his fears of travel or his budgetary limits, by experiencing in an immersive way. Numerous applications are virtual assets that seduce the public while protecting heritage and certain fragile places. Immaterial travel is not a ready-made solution but a multi-sensory tourist experience, sometimes impossible to achieve in real life.*
- **Tourism flow management/Quotas:** The development of tourist activities and destinations leads to an increasing number of visitors to places/sites, and therefore a saturation effect occurs. To facilitate the flow of travelers, upstream, it is necessary to mobilize the inhabitants of the targeted territory and consult with public policies. Measures may appear with alternatives. Imposing visitor quotas on a place/site, mandatory reservation of time slots to smooth out the number of visitors, observation of population flows are all examples of current tourist management :
 - Venice: from the Carnival 2020 (canceled), installation of ultra-sophisticated sensor gates at strategic locations of the historic center (34 in total) which record the people's moves and transmit them to the municipal authorities, which allows to calculate the density of people and to anticipate a limitation of the traffic by the police. Diversion to other areas of the city to discover unknown areas.
 - Dubrovnik: installation of a counter at the entrance of the city limiting access to 8000 daily visitors.
 - Machu Picchu (Peru): restriction of the number of one-site entrance tickets, distribution of visitors over the whole day, restricted to 600 persons per hour from 6 a.m. to 2 p.m., on-site duration of the visit is limited to 4 hours.
 - Barcelona : programme de *décroissance touristique* passant par le gel des licences hôtelières pour éviter la saturation touristique (zone d'exclusion hôtelière), restriction to 400 visitors per day in the Güell Park (now paid service and booking is mandatory).
 - London: the creation of a playful and free application in 2017, *Play London with Mr. Bean*, which allowed to spread visitors through the city, with an immersive visit (400.000 downloads in 2018).
 - Copenhagen: promotional campaign to sensibilise visitors about the attractivity of the sites, outside the city. An alternative mixing Danish legend and discovery "outside of the box" (« Telling the alternative stories outside the city center »).

- **Encourage slow tourism:** To deviate massive tourist flows to low-touristic territories, we have to take the time: The time to develop offers, to show travelers what you can't discover in a few hours/days, to convince local politicians that this new traffic, even if it is small and fluid, still contributes to the economy of their territory. Think about promoting a whole territory and not just the most popular destination/city of the moment. Putting forward and affirm the identity and specificities of the territory as a whole. Responsible or participative tourism puts forward the quality of the trip rather than the quantity, and the discovery in-depth opposed to the superficiality. Alternative and more ecological modes of transportation, scattered activities, experiential accommodations, a kind of personal pilgrimage, a stay based on immersion. Territories must invest in this trend by proposing rural river escapes but also urban ones, to discover differently. A way to enhance the value of certain places and gain visibility.
- **Training/awareness of the future tourism professionals:** The environmental issue is becoming a recurrent theme in tourism study programs. Some specialized training programs offer a separate course in the field of ecotourism, solidarity tourism, environmental tourism. However, for generalist initial training courses, these issues are overlooked. Tomorrow's tourism requires a current understanding of what exists on certain sites/territories. Behavior can only be changed by the awareness of future tourism professionals, who will transmit these values to their clients-travelers. It is necessary to develop an ethic that goes against selling everything, to raise awareness through debates on current issues. These questions could be integrated with the form of modules in the course programs:
 - Mass tourism
 - Management of travelers' harmful/disrespectful behaviors
 - Understanding of the cultures to avoid unawareness and give better advice to travelers about a destination
 - Individual pollution abroad
 - Means of travel
- **The « tourism traceability »:** In parallel with carbon footprint (these two traceabilities are interlinked because the carbon footprint is part of the tourism traceability), it now exists a technological possibility to calculate the trace of the durability (by satellite, progression of the modification of the environment, of the level of pollution. of a precise area). Another possibility with the GPS is to calculate the carbon footprint of a traveler who rents a car and crosses a zone. These two solutions will eventually make it possible to refine the trace of a tourist. Unfortunately, what can never be measured is the trace linked to the degradation caused by human behavior (taking pictures without the person's consent, degrading a historical site, bad behavior in a sacred place, etc.). However, these behavioral degradations account for a good half of the tourist trace of a traveler. The interest of the subject for Respire is to be the think tank that introduces in the popular opinion a new concept that will make long reference. The subject is promising: let us imagine products (stays, circuits) annotated with a touristic pollution rating, that incites the traveler to consume better and make his own choices during a trip (inspired on mass consumption). Moreover, tourism professionals would be graded, according to the pertinence of their offer regarding traceability.

•**The Ethical Code, a new travel contract?** Tourismophobia is a consequence of the traveler's inappropriate behavior during his stay, the over-tourism amplifying the issue. Writing an Ethical Code, included in the sales contract between agencies and travelers would make it possible to integrate the values of the latter when booking the trip. By signing this new type of contract, the traveler customer commits to respect the various stated points. This approach does not grant them a penalty in case of non-compliance, but it does begin to make them aware of their possible risky behaviors in a destination. That is one more step in making the traveler more responsible, and the recommendations can be written in the travel booklet, given to the traveler before departure. This initiative could come in a sort of travel practice framework.

•**IATA and the airline companies:** Besides the written support of the contract and the travel booklet for the customer travelers, it is clear that visual supports are a strategy to get a message across. It is, therefore, necessary to think in terms of visual campaigns to raise awareness and provoke a concrete impact on the customer: it would be useful, in coordination with IATA and the airlines, to have short videos made according to the destinations served by the companies.

- Programming short videos, ambassadors of the destinations, and dispensing recommendations about how to react in the right way (e.g.: no bringing of food/plants on Australian soil, behavior in sacred places or with a local population, preservation of the fauna/flora, the problem of begging).
- Broadcasting on board at the time of take-off and/or landing to capture the attention of the customer travelers who leave/arrive at these destinations. Unconsciously, the message gets through.
- Considering a QR Code at the end of the video so that the traveler can find these recommendations on his smartphone. Multimedia is a major communication asset.

A NEW TOURISM OR NEW WAYS TO TRAVEL.

Imagining a new form of tourism gets through the will of the professionals of the sector. Driven by convictions, the professionals suggest and engage solutions that put forward respect, transparency, and exchange. Sometimes, it is still complicated to combine the economic reality of a professional, with righteous tourism based on good intentions. For example, the question is not whether to ban some sites considered too touristy, but how we can have a significant impact on destinations. Therefore, we must think about combining good practices with the consequences that would follow, knowing that some may not have the desired effect. Deconstructing the myth of mass tourism that is not necessarily irresponsible (and in parallel niche tourism that is necessarily righteous) by considering there are territories where one traveler per year is already too many and destinations where 10,000 tourists per day can be welcomed in a full responsible way.

We are each professional of tourism and each traveler, we have only one special way to be apprehensive about the first move and the faraway. We bring with us, not only our luggage but also our culture, our experiences, our fears. We can think that we are open-minded, ready to live new experiences, to be immersed but we all have our limits. There are as many forms of travel as there are travelers; it is therefore not possible to generalize a standardized way of traveling. The common vision of tourism, the expectations, the needs, or even the urgency of the destination, make that we must bring multifaceted solutions to whoever wishes to travel. So that the tourist, who has simply come to consume his purchase, becomes a traveler in search of knowledge of himself and the Other.

However, it is impossible to generalize the solutions and think of applying them systematically to each destination. The involvement of the local population is essential and its support is not automatically acquired. Everyone is free to make their own choices and a country will not necessarily see the benefit of limiting its tourist flows (which contribute to the country's economy) to the detriment of the stability of the territories.

The levels of education and information are not the same, the economic, ecological, and social issues are specific to each destination. Each country/region has its approach to tourism. We share the responsibilities: tourist offices, tourism professionals promoting a destination (with a lot of communication), without taking into account the structural limits of the places. At the same time, local populations work to increase the accommodation capacity and infrastructure because tourism represents a significant source of income for them.

The future of travel is based on fundamental values: respect, interaction, listening, exchange. Tourism wants to be sustainable, and also more responsible in its ways. On the one hand, thanks to professionals more sensitive and implicated in the process. On the other hand, placing the traveler at the very heart of his or her travel project, allowing him/her to understand the issues and to act in return. To make each traveler an ambassador of tomorrow.

« Leaving is leaving your cocoon, opening your wings and flying away. It is to realize that we are not the only ones on the earth, that we do not know everything as we thought. We become more humble, more tolerant, a little more intelligent » (Pierre Fillit)



Training for tourism professionals

(By Nathalie DAVERIO with Florence ARIAS, Christèle CATTIER, Karine KAMLI, Lysiane LE MENTEC, Stephane MICHAUT and Victoria MORIN).

« *We sell well what we know well. Training is the essence of every success.* ». Nathalie DAVERIO

In a fast-changing world, training is a crucial issue for all sectors of activity, and tourism is no exception. To create tomorrow's tourism, current and future tourism, professionals must be trained to the new social and technological issues of our century. It is also worth mentioning jobs in the sector, which are currently at risk, and that retraining is essential to bring out and develop the skills of some tourism professionals. The objective of the working group Formation is to overview the situation from the identified jobs and existing pieces of training to highlight the training needs of the current tourism professionals and the obstacles that can appear, especially for the current employees.

The group wanted to identify the new requirements of skills with the transformation of tourism. The group also wanted to determine why and how to use the training to improve the work-life, to make tourism professionals indispensable for the consumer.

Above all, let us define what training is: training is a learning path allowing **to get knowledge and skills**, to meet a career goal, and maintain employability.

We notice that the training offer is quite broad and touches several publics. Through the different possibilities of education and training, we present here the possible axes of new training, and the means of funding. This approach allows us to highlight the evolution of our profession and the possible accesses thanks to the training.

What is the existing training to learn the job of travel consultant ?

To learn this job, the future tourism professional has the following accesses:

- **The initial training**, which is part of the continuity of schooling, accessible after the A-Levels/High School Diploma and recognized by the Ministry of Higher Education:
 - **Higher National Diploma / 12th Grade**. This diploma is very oriented for jobs in travel agencies, tour operators, incoming agencies and tourist offices, but also in customer relationship management. There are 2 years of studies after the A-Levels/High School Diploma.
 - After, the student can choose to specialize with a **professional license degree** in public schooling. This diploma allows choosing a key theme: promotion and preservation of the territories, travel guide, guide speaker, sports tourism... There are 3 years of studies after the A-Levels/High School Diploma.
 - **Master**, in public schooling, gives more access to jobs like hotel manager, tourist office manager, tourism product manager... There are 5 years of studies after the A-Levels/High School Diploma.

- **Bachelor's Degree**, after the A-Levels/High School Diploma, is a 3-year course but it is also an unrecognized course by the Ministry of Higher Education. The obtained diploma is a school certificate.
- When the employee wants to change or develop his/her skills, he/she has access to **continuing professional training**. The professional training can be a **resumption of studies** to learn new skills, but also participate in training **within the framework of his/her current job**. The professional training is intended for people who aim to gain new skills necessary for **evolution** to their current activity or **learn a new job**. These training courses can deliver **a training certificate or a diploma**. Learners must complete an internship in a company. These courses are available on block-release training. Internships of less than 2 months don't give the right to a bonus.

Does today's initial training face tomorrow's challenges?

Thanks to an analysis of the daily life of travel and tourism professionals, and also thanks to a study of the challenges of tomorrow's tourism, it is useful to respond to the identified gaps. Most of them will be in the following areas and will not have a prominent place in the HND/12th Grade course:

- **Cultural**: the lack of knowledge about the destinations accentuated by the absence of representation of some countries in our territory (tourist offices), lack of follow-up by different infrastructures (tour operators – tourist offices – incoming agencies) to follow up on information mainly transmitted by e-learning.
- **Sales techniques**: commercial and sales techniques, computerized research tools that are more "professional" than those used by private individuals, which would allow for greater reactivity to the requests of customer travelers, techniques for referencing selected suppliers as real partners, allowing for added value to the questions of customer travelers.
- **More specialized fields**: a real awareness of tourism for people with disabilities, ecotourism, voluntourism, consumer rights, how to build a network.

We can also notice that two fields are not enough highlighted in the Higher National Diploma/12th Grade whereas they are indissociable from our daily life **to meet consumers' new requirements**:

- **Digital**: Tourism professionals cannot be obsolete, they have to be as well productive as their customer traveler to the use of digital : method of searching information, use of image, of storytelling. E-tourism and M-tourism are just overlooked whereas they represent the future, an important part of tomorrow's tourism.
- **Environment, climate**: these major axes of the consumption's evolution and the respect of our planet are primordial. The awareness of these two subjects is also part of the development of a more eco-friendly company.

Thanks to this study of the initial training, we can notice the need to go deeper into the learning. Some fields need to be actualized, so that tourism professionals can be more productive and at ease.

The continuous professional training

The law of September 5, 2018, "law for freedom to choose our professional future" facilitates the funding, regulation and improvement of the professional training and learning system.

We can notice that France offers several possibilities of support to enable the improvement of professional skills and employability. Several financial solutions are possible and are aimed at both the individual, depending on his/her status as a job seeker, employee, and for companies. All companies contribute to an OPCO, which provides funding.

The funding will allow access to professional titles, diplomas or certificates of training if the training followed is neither diploma nor certification. The issue is more about a lack of information to understand and know "what kind of funding for what kind of training?". The training organizations know how to support and help their customer travelers.

The Professional continuous training is there to react to skills updating, professional evolutions within or outside the company, the new needs of a company, the various economic situations :

- Every two years, employees have a mandatory professional interview to discuss their evolution and needs. This interview must be followed by a skills development plan and must be finalized after 6 years.
- Employees are not made to inform their company of their training if it is financed by the Training Personal Account (CPF) or by their own money.
- France's Validation of Professional Experience (VAE) and skills assessments can be financed by the company.
- The company can contribute to the employee's Training Personal Account (CPF).

The on-the-job training

« *We say well what you understand well* » says the adage. In the world of travel, we rather say « *we sell well what we know well* ».

The on-the-job training, which is the daily life of tourism and travel professionals, mostly reveals the importance of the good management of the company.

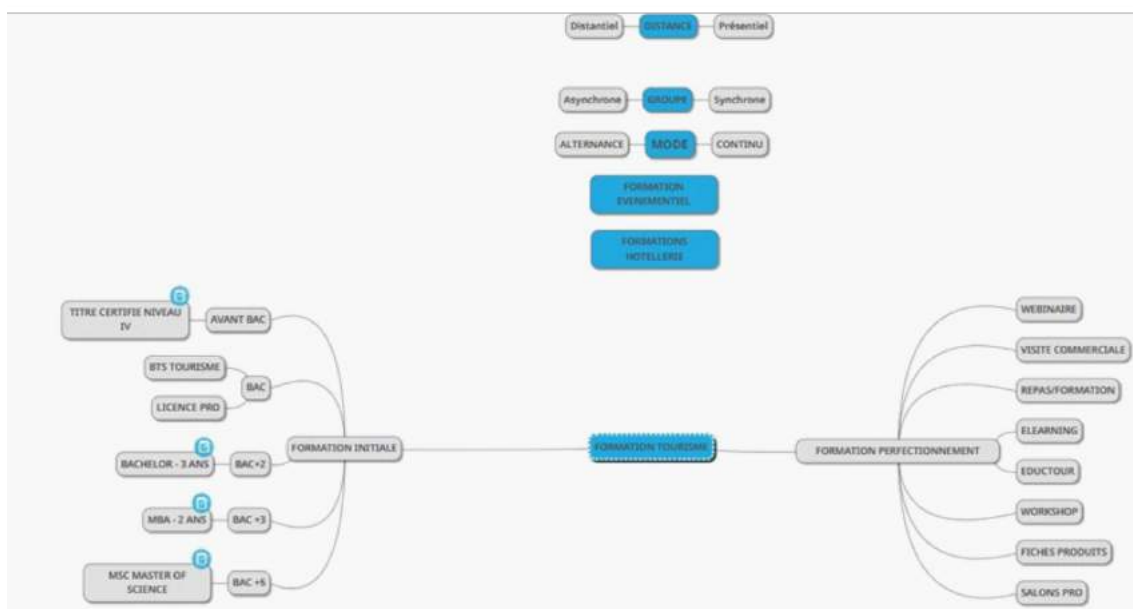
Current employees' training is often dedicated to product presentations by commercials from different suppliers, e-learning about destinations and products, news of the sector, how to adapt to the evolution of the jobs, new technologies and ways to act in a crisis. All those types of presentations can be organized during the day or evening.

Training for tourism professionals

Study tours (most of the time, costs are covered by the companies' suppliers, and not by companies by themselves) are very unequally distributed in the profession. They represent a real and great place to get practical and technical knowledge. It is important to reinvent the rules so that everyone gets access to these study tours, and that also the company can get the right to benefit thanks to relevant reports.

We can notice that training for current employees is mostly done without any delivery of the certificate.

Daily, travel and tourism employees, despite a real personal investment and passion for their job, may be lost and have a lack of motivation. If the company and its employees want to take action to complement their knowledge, an internal organization is strongly recommended to create space and time to be trained in the workplace, by being free from other tasks.



Synthèse des formations

The tourism worker is waiting for a new valorization of his/her profession/passion to give meaning to his/her commitment, to the usefulness of his/her profession. With the current health crisis, the situation changes regularly, which means that everyone has to reinvent himself/herself regularly.

The training has a real impact to give some legitimacy to the polyvalence that is already required. Employees from the travel sector have many skills. To remain unavoidable and to keep a recognized existence in front of the customer travelers, they must develop real know-how and expertise, by validating their knowledge with training, certifications about the numerous facets of our common job (facets would be identified by sharp diagnostics that would be able to shift the lines). This is a key make the job better, while at the same time gaining credibility.

Employment

(By Carole MARI-CHAUVET, with Frédéric BABU, Pauline CARANONI, Emilyne CHAUMONT, Patrick GAUDIN, Frédéric d'HAUTHUILLE and Caroline MURTAS)

« *Confidence is a key element. Without it, there is no successful project.* ». Carole CHAUVET

Representing more than 10% of jobs all around the world, tourism is a key sector, and an indispensable economic, growth and income lever. The development of the sector is now brutally stopped by the unprecedented crisis that we are currently living (56% decrease in international arrivals during the 5 first months of 2020).

For years, all sectors of our ecosystem have been facing concrete difficulties in their recruitment process.

The constraints and employment conditions specific to the sector make the relationship between companies and employees particularly unstable.

In this context, how can tourism attract and keep its talents, while adapting to new trends and employees' aspirations ?

Identified issues

In 2013, The study conducted for the Ministry of Crafts, Trade, and Tourism shows the great attractiveness of tourism, since 83% of young students and parents find this sector attractive. Above all, this study highlights the discrepancy between the representation they have of tourism (travel, vacations, exoticism...) and the numerous constraints of the sector. Moreover, when we go deeper into the questions about jobs, several obstacles to the desire to join the sector are mentioned. Among the most important: working conditions, career development, remuneration, and work-life balance.

- Instability and seasonality

In the *outgoing* sector, employment contracts generally are permanent. The use of fixed-term contracts is essentially limited to temporary replacements (maternity leave, medical leave...). This staff shortage involves a power relationship between employees/applicants.

In the *incoming* sector (event/congress tourism, business tourism, land transport), the seasonal nature of the activities incites employers to fall back on short-term employment contracts (fixed-term contracts, seasonal contracts, even interim).

In France, if the urban tourism is less impacted by the seasonality, we have to highlight that mountain season is very short (3 to 4 months), the seaside season is from 4 to 5 months (but only 2 of them are in really peak season).

About MICE, besides the seasonality of the destinations, there is the punctual side of the events and thus, there is also a punctual side of the needs. Hence, companies of the sector drastically call upon very short-term contracts (limited to the duration of the event), interim or freelance.

- Work schedules and workdays constraints

As in several service companies, employees in the tourism sector are often required to work on a wide range of working hours, which requires a great disponibility and flexibility: working hours on the weekend, holiday, embargo on vacation periods, day off, and/or imposed vacation periods, late or divided working hours, long days... All these constraints bring a work-life imbalance.

If the employees seem to adjust well at the beginning of their career, it is no longer the same when they build a family and then, some organizational constraints appear. The personal life rhythm of the employees rarely suits the requirements of disponibility from the sector. In addition, there are often low salaries and high responsibilities. The disengagement of talent from the sector in favor of other sectors seems inexorable.

- Low salary level vs. high responsibility

The strong development of the tourism sector should have promised a bright future for our professions.

The example of air transport : Since the deregulation of this activity (1992), the activity of the sector has quadrupled. This growth should be beneficial for employment: low-cost airlines such as the Persian Gulf airlines have massively recruited young Europeans. However, the trade war between low-cost and premium airlines has forced all airlines to cut costs to offer the lowest prices, which has had a strong impact on employment conditions (salaries, flexibility, offshore contracts). The other side of the coin is bitter for employees.

The trade war for quality vacations at ever lower prices (and their impact on employment) has been spread to all tourism activities:

- Growing development of online agencies (Do It Yourself replaces the assistance of professionals whose positions are eliminated).
- Almost permanent pressure on employees from customer travelers and employers who impose a high level of availability and flexibility.
- Constantly growing obligations and responsibilities whereas salaries remain low.

Low remuneration of tourism jobs brings two feelings : little recognition and lack of personal development (considered as primordial by the employees).

- The difference between the image and the reality

There is a significant difference between the expectations of the young graduates and the reality of the market. It is often due to the inordinate hopes of young people, induced by the promises of some training organizations that all too often make it seem as if, after long years of study, students will easily get a well-paid position of responsibility as soon as they enter the job market. But the reality is quite different.

Moreover, training is not always adapted to employers' expectations.

Recruiters meet young graduated people, who are not prepared enough for the reality of a sector whose work included many constraints, with experienced employees who are often disappointed about their working conditions and remuneration.

It, therefore, seems essential to us to make future employees aware of these working conditions and personal commitments so that everyone can decide to work in the tourism sector in full awareness of the constraints.

The uberization of tourism

Definition :

The uberization, named after the company Uber, is a recent phenomenon in the economic field consisting in the use of services that allow professionals and customer travelers to get directly in touch with (often quasi-instantly thanks to the use of new technologies). The use of freelancing allows reducing the cost price of this kind of service as well as the weight of formalities for users. The uberization finds a wider place in the field of the collaborative economy. Indeed, this concept is opposed to the one we know for years, and especially since the thirty glorious years, that is the wage-earners fixed and regimented world.

Many companies of the tourism sector have been focused on a very precise part of their core business and fell back on subcontracting and automatization for various closely related jobs (but indispensable), causing the way of jobs tip to service societies.

For example, many airlines fell back on freelance aircrews (non-employees). They subcontract with service societies for airport jobs and they also develop automatic systems for check-in and boarding.

The dazzling emergence of customer relationship platforms (accommodation, urban and interurban transport), hustled *random* professionals. Their financial power and their commercial aggressiveness, helped by an unclear legislative, allows them to expand their network quickly around the world, using millions of non-employees who do the work of former employees whose jobs have been eliminated, especially in the (key) function of customer service.

Beyond the evolution of the tourism sector (externalization, digitalization, *responsibilization* of the customer traveler who does the former tasks of employees), the world of work (globally) sees the birth of new aspirations and needs from employees and companies: France has seen the development of freelancers in an almost exponential way. In 2019, our country has more than 930 000 freelancers, which means 145% increase in just 10 years. This trend should speed up again, in 2020 and 2021, to follow through the health crisis where workers and companies review their priorities and expectations.

In tourism, because of the seasonal nature of the industry, which results in precarious contracts, the trend towards uberization is particularly strong. At the beginning of the 2000s, only the guiding or event professions seemed to be possible to be carried out on a freelance basis, for missions ranging from a few hours to several days. Since a turning point has been reached when major companies of the sector have also developed the use of this system for other functions.

Today, only a few companies still pay their guides and escorts as employees to ensure their exclusivity by counting on their loyalty and expertise. The trend towards the independent contract is particularly important.

Following the example of travel agency networks which are massively developing the use of freelancers, tourism professionals seem to find here a concrete solution to the lack of sharp expertise of their staff. The use of freelancers allows them to count on specialized skills for a very short mission and adapt the workforce to the workload while freeing themselves from the inherent social rules of the employment contract. The activity and income of freelancers are very variable, which makes the situation of these workers* very precarious. For employers who become principals, the real danger is to lose talents who leave tourism for other professions in the trade, which offer better job security, a preserved private-work balance, and a higher salary level.

The evolution of wage-earning employment to fees is a new challenge for the sector of tourism: if freelancing meets the expectations and aspirations of (some) workers and companies, how can our sector make its professions more attractive and establish durable relationships between companies and workers?

* we use the term “workers” to include employees (having an employment contract) and freelancers.

How to make our jobs more attractive?

In the current situation, restarting the activities and hiring people became unpredictable: the exodus of talents and experimented people in favor of other sectors is a major risk to which tourism companies must find a solution, to avoid endangering their existence.

We recommend the creation of the following actions to keep profiles and talents :

Immediate effect :

- **Transparency and information about the reality of the sector since the career guidance**

To avoid dissatisfactions and deceptions at the beginning of a career, it is important to future workers to know the constraints of the sector, precendently written, as soon as they are thinking about career guidance :

- Working in the sector of tourism involves being at the service of customer travelers. They have to be available to customer travelers when they are waiting for them.
 - Margins are low: companies cannot lose their payroll. Wage levels are lower than in most of the other service sectors.
 - A matrix of the wages in the sector (according to position, experience, and type of company) has to be implemented, so that young graduates are informed of the conditions for recruits, as well as career development.
- **Transfer of skills between companies:** development of partnership system (availability of employees between companies) according to the defined rules between each company and the entire transparency with the candidates, to fight against short-term contracts. (See below, *the networking* by the study group *new jobs in tourism*).

The following ideas can be studied :

- Seasonal workers in mountain or seaside resorts could see each from a season to another one (this would allow a real training plan for employees throughout several seasons).
- Mountain seasons (winter) and seaside seasons (summer) are particularly complementary, we could imagine a kind of twinning between winter and summer resorts by organizing recruiting sessions to summer resorts in march in winter resorts, and mountain resorts in September in summer resorts, either in the hotel industry, catering or institutional.
- Transversality on different positions in the same company/institution for employees (sales, communication, marketing, customer service, production, accounting...). An employee of a tourist office could thus work successively each year as a promotion officer during the off-season and as a holiday advisor during the peak season. In the open-air hotel industry, he/she could work as a sales representative from October to March, as a reservation agent from March to May, and as a receptionist and host from May to October.

These examples show the interest in developing this policy of monitoring and encouraging versatility, which is an effective way of fighting against short-term contracts since it makes recourse to a permanent contract possible. In addition, this is part of a staff training plan and therefore, the development of employees.

Long-term analysis

Extending the seasons to extend short-term contracts (for example, the thalassotherapy center of Quiberon was open from April to the beginning of November in the '90s, and its season was extended: now, the center is open from February to December).

For tourist guides, the extension of the duration of some tours or services thanks to the development of their versatility, would allow them to extend their duration of service.

All these actions would a vicious circle that would improve the employment prospects in the sector, and also get a perennial relationship between employers and employees.

The potential extension of the duration of the touristic seasons would distribute the number of tourists and struggle against over-tourism and touristophobia.

- **Setting up a “good behavior” charter for employers**

Employers have to be transparent concerning their social and economic policy, and this long before the job interview. They promise to be transparent and precise about working hours, mobility, flexibility, versatility, employees' availability and they have to spotlight evening, night, and weekend working hours...

Furthermore, managers need to be better informed, prepared, and open to new aspirations due to a generational shock. The proof is the growing importance given to CSR policies, of which one of the three pillars is social commitment. Today more than ever, the strength and sustainability of a company depend on benevolent, inclusive, and close management.

To help employers and managers, tools can be put in place (simulation exercises, audits, etc.). A real dialogue should be set up to promote understanding of expectations and problems and to encourage openness to new possibilities in the working relationship (teleworking, fixed annual hours, mobility, multi-skilling, etc.).

Finally, employees' participation in the company's capital is an important focus of reflection.

Will the decade 2020-2030 be the death of wage-earning?

After the emergence and surge of freelancing, of DIY, of slashing (a new form of work which seems to take root today, since 29% of French employees would like to carry out two salaried employment, and even more so for young people) and zapping (younger easily switch from one employment contract to another). Many economists dare to develop this idea: when everyone is waiting for immediacy and flexibility when workers want to make sense to their employment(s) and have work-life balance, the future of professionals (and more especially in the sector of tourism) is maybe linked to these new forms of work organizations.

For more workers in the tourism sector, these new forms would allow them to take charge of their destiny and give real meaning to their work.



New jobs in tourism

(By Elsa BRINDAZUR, with Cécile ARTHUS, Maxime BESNIER, Carole DEMOLIS, Sandrine FRANÇOIS, Frédéric d'HAUTHUILLE, Lysiane LE MENTEC and Jennifer WEBER)

« The power of intention: it's better to choose to see what we believe, instead of believing what we see ». Elsa BRINDAZUR

After the closure of borders and various health measures taken by each government in the entire world, at the time of the nearly complete stop of the travels, RESPIRE wishes to take advantage of the time-lapse which suddenly appeared to step back and understand where the tourism sector is.

What are the lessons of this systemic crisis? How to identify and emerge the new jobs of tomorrow's tourism, without making traditional jobs disappear? How new jobs in tourism can bring a new life to the profession to take it on the path of righteous tourism?

General difficulties and issues of the tourism sector

Difficulties of the sector are not only linked to the conjuncture: the advent of the pandemic highlighted old-established structural issues.

- Competition culture (image war, offers war),
- Partitioning of the jobs of the sector (little dialogue and solidarity between jobs),
- Complicated link with the institutions (systemic failure of guarantee facilities and lack of state aids to contain the crisis),
- The sector is very exposed to the negative impact of the news (Thomas Cook, Covid 19, bad news about destinations: wars, natural disasters...)
- Strategic turn of the new technologies (essential for the continuity of economic professionals).

From this deep unrest, it is necessary to learn lessons to get out from the vicious circle of individualism and competition, by using the assets of the profession and the common intelligence to reach transversal solutions and average supports to take up the challenge of this cataclysm.

Assets and potentials of the sector

On the contrary, the sector can also capitalize on its strengths to rebuild the future, independently :

- A great diversity of jobs: receptionist, tour operators, distribution agencies, technical and support service jobs,
- Strong links with other sectors of the economy as transports, culture, media, accommodation. All these possibilities give strategic importance to the sector, with a diversity of skills, resources, and connexions,

- A marketplace of innovation to create new services, as well with the use of new technologies (geolocalization, virtual reality, transport on demand, artificial intelligence, robotics...) as with innovative concepts that put humanity and nature at the top of the priorities (immersions, partnerships, challenges, artistic collaborations, civic engagements...).

By being well-organized, the tourism sector could rapidly become again the jewel and the driving force, that it is: dynamic job market, development of a social and righteous economy, technologic innovations at the service of mankind. Finally, travel is a modern vehicle of transmission of ideas, allowing exchanges, melting-pot, and learning beyond borders. Tourism is still and always meant to push forward a balanced world between progress and regressions. The seduction power of tourism will not collapse in a context where everyone needs, more than ever before, to remove from this chaos to keep on dreaming, affirming his/her humanity through perspectives of exchange, discoveries, and openness to the world.

Recommendations

The initial work of the think tank *New Jobs in Tourism*, based on this observation, has produced the following ideas to bring out innovative solutions adapted to the problems facing the sector.

Developing a new approach, through collective intelligence

Why?

- « *Insanity is doing the same thing over and over and expecting different results* » (quote from Albert Einstein). The ultra-competitive model has shown its limits in a complex and breathless world. We recommend taking the opposite direction of what led to the disaster: to create a righteous and socially responsible spiral, to bet on collective intelligence in a sector with a strong individual culture, and to demonstrate its effectiveness by the strategy of "small steps" by setting up progressive actions with achievable objectives,
- Public and customer travelers wait for innovative solutions and meaningful content to push tourism forward,
- Cooperation is moving into stability and responsibility. It reassures disoriented and hesitating customer travelers in a sinistral situation,
- This new approach is bearing environmental and societal responsibilities, by prioritizing due respect to values before short-term financial benefit.

How?

- Organizing the sector to make possible, but also indispensable, the cooperation between professionals who share values,
- Showing the example by embarking into the transformation: jump from fatalism to action by grouping within a collaborative network of engaged professionals and volunteers to shift the lines and rebuild a clear and harmonious ecosystem,
- Creating security and quality conditions that would instill confidence in our customer travelers and partners about our products, and thus, persevere in the ambition of building a model of society, by betting on humans (not on financial), together.

A new way of working: the collaborative network

The establishment of a collaborative network built on agile structures, with a diversity of skills, shared resources, and visibility that gives weight to its action, will allow new opportunities to emerge.

How?

- By basing on the lessons learned from the crisis and the feedback of 80 years of the profession to anticipate the forthcoming changes,
- By identifying the meaningful trends, those to be favored and those to be fought,
- By organizing the sector with flexible and helpful structures, to create a resilient and driving system, as economically autonomous as possible,
- By proposing the necessary changes of the regulatory framework to allow the coexistence of all professionals within an ecosystem where everyone completes each other, thanks to value propositions, and allow to cover all the final customer traveler's expectations,
- By thinking about every profession with the concerned professionals, about a relevant network architecture, which allows every profession, traditional or recent, to find a balanced, intelligent positioning within the network, in line with its added value and its DNA, thus promoting positive synergies with the other professions in its branch.

Within a qualified collaborative network, an engaged professional, regardless of his/her investment and initial assets, will be able to :

- Surpassing the culture of competition and every man for himself to get access to other levels of performances and quality of service, by using the services and the shared expertise available to support him/her, help him/her grow and make his/her choices,

- Being part of a qualified network also allows each professional to focus on the strategic elements of his/her business development, and more specifically :

-
- Le diagramme illustre la stratégie touristique d'un territoire, structurée autour d'un noyau central : le **METIER** (représenté par un cercle vert). Ce noyau est connecté à cinq grands domaines stratégiques, chacun représenté par un cercle blanc :
- CHAMP D'ACTION** :
 - Adaptation du territoire
 - Concertation de l'ensemble des acteurs
 - Valorisation des ressources touristiques
 - Vente de prestations annexes
 - Offre d'affaires, meetings, séminaires
 - Dispositifs
 - B2C grand public
 - B2C Publics : Réservation des prestations spécifiques
 - CIBLE PRESTATIONS TOURISTIQUES** :
 - Productions labellisées / typiques
 - Offre de prestations
 - Qualité d'accueil
 - Produits d'accompagnement
 - Services annexes
 - EXPERTISE** :
 - Conseils
 - Formations et accompagnement
 - Accueil touristique
 - Gestion responsable de plans d'accueil
 - Gestion des risques & destination
 - Spécialités touristiques
 - Psychologie / relation client
 - LIENS PARTENAIRES** :
 - Agences agréées ventes
 - Tour opérateurs
 - Réceptifs
 - Prestataires touristiques
 - CIBLE CLIENTÈLE** : (Ce cercle est connecté à tous les autres domaines stratégiques)
 - Offre d'affaires, meetings, séminaires
 - Dispositifs
 - B2C grand public
 - B2C Publics : Réservation des prestations spécifiques
- Le diagramme est superposé sur une image de fond montrant une forêt verdoyante avec des rayons de soleil filtrant à travers les arbres.

How to develop an innovating ecosystem within a cooperative network: an idea RESPIRE

In concrete terms, it should be insured to spread out this collaborative network on a model that allows :

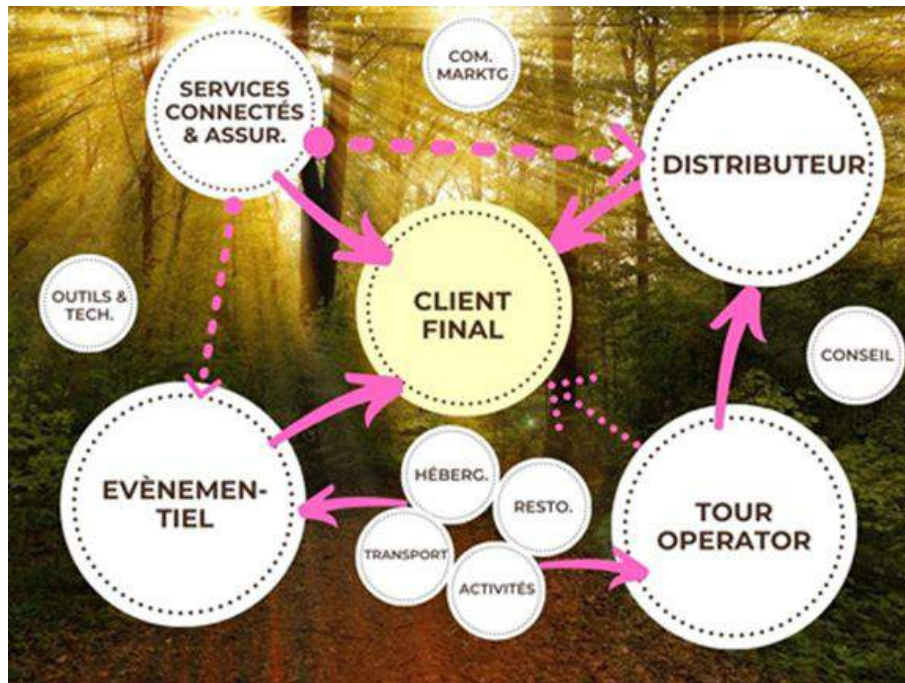
- Each profession should have its structure at its level, independent of the decisions that affect its perimeter, and included in a larger structure that guarantees overall coherence.
- All the professions should have a transversal structure that is charged to :
 - Guaranteeing the respect of the ethic charter and commitments borne by the label,
 - Offering the resources for solving cross-cutting issues that would be specified in its scope of responsibility from its founding,
- To the interface, sectors to develop collaborative projects with tourism professionals, who carry innovating solutions with them.

Transversality and diversity of the professions represented in this network would help to create an **integrated ecosystem** allowing to :

- Strengthen exchanges at the interfaces, where they were almost non-existent until now,
- Create a dynamic of continuous progress allowing :
 - To the collective, to pool skills, to bring together talents and ideas to create innovating and multidisciplinary solutions, and to implement continuous improvement processes with the emulation of the network,
 - Everyone can discover new facets of the sector, new opportunities, and identify new solutions to the ever-changing needs of customer travelers,
- To give each professional in the network the opportunity to take his/her place at the heart of a qualitative and complete environment.

It will be necessary to equip this network with a **custom-made label** allowing :

- To validate the integration of each professional candidate into the network, particularly regarding the authenticity of his/her commitment to righteous tourism, evaluated using a criteria grid provided on request by a multidisciplinary panel of specialists,
- After the validation step, to integrate the new entrant by allowing him/her to position himself/herself according to his/her target clientele, range of offers, level of eco-responsible commitment and solidarity,
- To guarantee and continuously monitor the quality and diversity of the offer produced by each of the network's participants,
- To create protective and engaging statutes, adapted to each profession, and even to propose regulatory changes to institutions if necessary.



It is by guaranteeing the uniqueness and authenticity of the action carried by the collective of professionals that this network brings a pioneering and trusted answer to the question « What is tomorrow's tourism ? ». The network also bears the need for overall coherence in the sector, which is crucial to finally have the means to anticipate, secure, and stabilize the evolutionary perspectives for the entire sector of activity.

Declination of the networked operation to the job: Distribution of travels

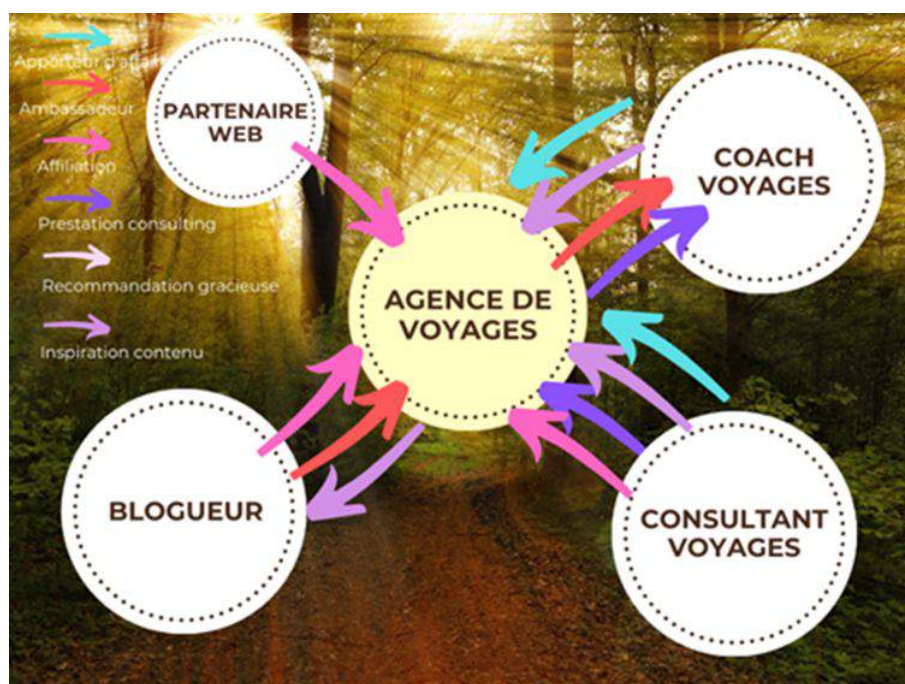
To support this reflection, the think tank conducted a complete study to declinate this approach, and deploy it in the travel distribution business in France, affected by the conflict between the new entrants and the traditional professionals, mainly about what is authorized by the regulatory (French Tourism Code and strict liability applied to the sale of tourism packages).

This declination proposes a network model, allowing to integrate the 4 identified jobs within the design and distribution branch, by positioning them at their right place according to their target clientele and customer needs they choose to meet with their services. By doing this exercise, it was possible to clarify :

- The status of each professional, and the necessary evolution of the regulatory of the profession,
- The assets and expertise of each profession generating possible interactions and collaborations between jobs.

In concrete terms, the exercise also demonstrated :

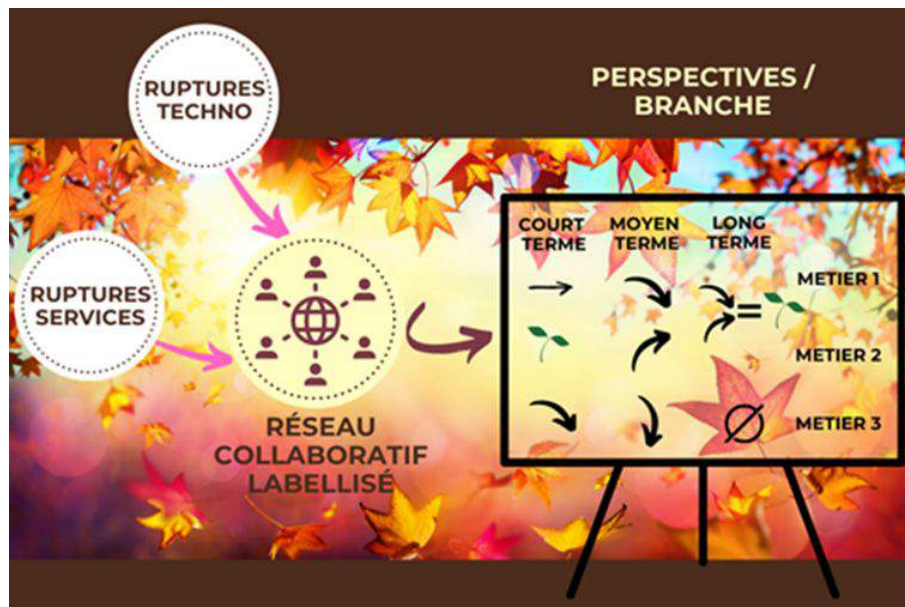
- The implementation practicability of such structure, including the impacted sectors by the big issue of illegal trade,
- The interest in integrating a collaborative network for every professional,
- The traversal solutions that can bring the labeled structure as a network (shared skills and support services, regulatory and sector agreement, partnerships)



Building on the strengths of the sector to imagine the future jobs and reinvent ourselves

The deployed approach to suggest an answer for the question of the evolution of jobs in tomorrow's tourism is carried by the following scheme:

- Identifying the technological, organizational, and conceptual breaks associated with the new tools and services, that all have the power to revolutionize the way to do exercise the future jobs in tourism,
- Rationalizing the integration process of these breaks within the network, in order to declinate their implementation at the level of each business line and each profession,
- Deducing the development, by sector and by profession: stabilization, declination, growth, a fusion between two existing jobs, a fusion between one traditional and one recent job,
- Imagining what the future jobs in tourism could be, the most promising ones in 5, 10, 20, or 30 years, always as part of the ethical background carried by the network.



Among these development perspectives imagined in a short, mid and long term for each profession within the different sectors of the network, we will have to identify the range of tomorrow's tools on which the various businesses can rely :

- The tools favoring the agility in practice,
- The strategic tools for anticipating the trends.

All these studies will be shared with the other think tanks of Respire (New technologies, Training, Employment, Toolbox) to put them into a common perspective. The goal is to emphasize the most meant and strategic solutions to bring a major contribution to the rebirth of the sector.

Future is embedded in the intentions of the present: stay positive, use our strengths to accept having lost yesterday, learn and grow today to reinvent ourselves tomorrow, all together.

New technologies and innovation

(By Tristan DAUBE, with Alexandre ALARY, Charles FORISSIER, Virginie GENTIL, Cyrielle NAU, Marie TESSON and Nathalie TRICHARD)

« **Systematic innovation needs the willingness to see change as an opportunity** ». Peter DRUCKER

The changes of the 21st century, the technological changes, the new expectations and the behaviors of the consumers deeply disturb the traditional ways of working. Tourism is one of the first impacted sectors. However, the innovation is a useful step to :



The new technologies appear like a tool, a way allowing an improvement of the existing things. If any innovation is not necessarily technological (we have to remember that the most plebiscite innovation is the suitcase with wheels), the possibilities offered by the numerical mutation are numerous opportunities for the tourism sector.

Those tools redefine our relation to tourism, by modifying our behaviors at each step of the trip: before, during and after.



New technologies modify the motivations of the travelers before their trip

The new technologies transform the way consumers prepare their trips. The new ways to inform and communicate, especially by social networks, disintermediation, and the generalization of online booking platforms are all devices that have become part of tourists' daily lives. However, innovation and new technologies are incompatible with traditional travel jobs.

Our recommendations :

- Fostering the adoption of new technologies by travel agencies to help the customer traveler in his/her decision making, especially Virtual Reality (VR) that can be the subject of an investment to facilitate the immersion of the customer traveler. It is also augmented reality, virtualized souvenirs, etc.
- Systematizing the digital transformation of customer relationship (agency 3.0) to limit paper printouts (without eliminating the human link that remains essential)
- Pursuing the development of videoconferencing and screen sharing to limit unnecessary physical trips.

New technologies allow tourism professionals to adapt themselves to (new) needs of the customer travelers during their trip.

Consumer needs have changed as technology has permeated everyday life. 59% of travelers say they want to be surprised by technology. It is also an information tool for 59% of them, and a way to keep in touch with their loved ones (55%). Numerous applications are a way for hyper-connected tourists to personalize their travel experience.

Our recommendations:

- Using Big Data and Open Data to collect, sort and analyze information allowing tourism professionals to adapt to the expectations of customer travelers.
- Encouraging the development of digital services (city-guides, check-in and check-out...) by service providers
- Promoting the hyper-personalization of the customer experience

New technologies allow to better follow the feeling of travelers, after their trip

The new technologies also bring new opportunities after the trip, and especially in customer relationship management and customer loyalty.

Our recommendations:

- Mobilizing new technologies, improving the after-sales service, especially in improving communication with the customer traveler
- Managing data collection and measuring customer satisfaction in order to improve continuously (satisfaction questionnaire via push notifications, Net Promoter Score monitoring, e-reputation...)
- Using digital communication channels to gain visibility
- Using new technologies to build customer loyalty and create user profiles.

The new technologies are opportunities for all service and tourism products providers, and they should not be perceived as obstacles. The new technologies can be used to improve the customer traveler experience before his trip (help to decision-making), during (hyper-personalization, adaptation to needs), and after (follow-up of the satisfaction of the visitor, after-sales service).



Une Nouvelle Vision du Tourisme

Tomorrow's travel agency

(By Alexandre ALARY and Sabrina ARNOULD, with Eric BAETENS, Emmanuelle CHAN YOU FEE, Jöelle CONREUR, Karine KAMLI, Isabelle PECHEUX and Nathalie TRICHARD)

« Happiness is not a destination to reach, but it is a way to travel ». Alexandre ALARY

Today, whether they are part of a network or independent, travel agencies are suffering the consequences of the health crisis. This extraordinary event has highlighted the paradoxes of the profession. It has also raised the importance, and even the urgency, of wondering about the fundamental values that drive the travel agency. It is now time to think of a future anchored in this new reality, to be professional and creative in this epic that is tomorrow's agency, and become collaborators rather than mere collaborators.

The situation is all the more urgent as we are witnessing a clear deterioration in the image of the travel agency, as it remains unclear to consumers. The qualities and added value of the agency are not or hardly perceived. This lack of identification is even more marked among the younger generations.

In this way, the travel agency is often perceived as:

- **Too expensive,**
- **Not meeting the demand,** the agency only sells products from brochures, and/or only suggest non-personalized stays and circuits,
- **Obsolete,** and mainly intended for senior people.

The travel agency is too expensive

Our observation:

The other day, a client of the agency asked me *"If I go through your agency, how much will it cost me compared to buying the travel services directly?"*. My answer: *"Nothing"*. And for the same price, this traveler-customer benefits from many services and guarantees¹.

The majority of French people consider that using a travel agency is more expensive than buying each service oneself. This is the only characteristic of a travel agency for which, in a study by Future Thinking², more than 20% of them said they completely agree. In detail, two categories of populations, the 18-24-year-olds (60%) and the CSP+ (56%) identify travel agencies and higher costs.

Why do we have to charge fees when the client-traveler validates his contract? At the moment when he gives us his trust to finalize his trip, to thank him, we charge him agency fees... Besides, this term is devaluing!

Today's agency works far too often for free! How many quotes, programs, and finally no response, we tell him that his proposal does not interest him or that thanks to the advice of the agency, the candidate has bought everything directly from the providers?

During the health crisis, it is also necessary to repatriate the travelers to their destination, to manage the files in progress, to postpone them, to rework or even to cancel everything without any remuneration, and to face the indifference or ignorance of the travelers who do not imagine that, by asking for the total reimbursement of their trip, the agency's remuneration disappears completely, which puts its very existence in danger.

The travel agency, in addition to being perceived as too expensive, charges fees that the traveler considers unjustified.

Our recommendations:

Transparency and customer traveler oriented pedagogy

- To be renowned as a real services agency: the cost of the service is not as high as the traveler-client imagines because (even for customized travel), travel agencies benefit from commissions, retro-commissions, and negotiated prices from their suppliers and providers.
- Tomorrow's agency, as a service and consulting agency, must propose in all transparency, a fee schedule according to the complexity and time spent on the program proposal. The customer traveler would then have the choice to be satisfied with the only elements provided by the agency to book the services by himself/herself (the responsibility of the latter is not engaged) or to entrust the travel agency with the total or partial booking of his/her itinerary. The contract would take into account the study fees received as a deposit on the contractual travel service.
- For the customer traveler, it is more flexibility and freedom. For the travel agent, it is a recognition of his/her expertise.

A little reminder of the security of the customer itinerary

- The protection: the travel agency is automatically responsible for the performance of the service provided in the contract, without prejudice to its right of recourse against the service provider (Tourism Code). The traveler, therefore, has recourse in the event of poor performance, non-performance or default.
- The guarantee and security of funds: the guarantee of a protected trip whatever the events via the financial guarantee of the agency (except dry ticketing). Since the decree n° 2015-1111 of September 2, 2015, *the financial guarantee is allocated to the refund of all funds received by the travel and tourism operator in respect of commitments that he has contracted with the final consumer for services in progress or to be provided and makes it possible to ensure, in particular in the event of cessation of payments having led to a bankruptcy filing, the repatriation of travelers and the assumption of responsibility for additional accommodation costs that would result directly from the organization of the repatriation.*

Services to valorize before, during and after :

Availability, time gain and comfort: The travel agent is available for the customer traveler from the moment he/she enters the agency until his/her return from the trip, and even after. He can answer most of the traveler's requests. He will be able to manage any modification, even on the spot, all contingencies, exceptional situations, and all requests for assistance or repatriation.

- The travel agent saves time in the organization of the trip, effective time and time in case of a problem. Delegating the organization of your trip is to allow an organization from A to Z (visas, insurance, money/budget advice, etc.), and to be able to rely on the skills of the travel professional. Entrusting the organization of your trip to a professional also means saving time in the face of the illusion of the ease of booking your trip/airplane ticket on the internet (many comparators), final price different from the call price/options, difficulty in contacting customer service, insurance/security of the purchase, etc.).
- Every service has a cost, the challenge is to make people recognize the added value of going through the travel agency, in a transparently and educationally way.

Travel agency only sells products from brochures, non-personalized stays and circuits

Our observation:

The democratization of travel, the development of transportation networks and accommodation, the right to paid vacations, increased purchasing power: all these professionals have contributed to the creation of a leisure consciousness and the birth of what we call "mass tourism".

Today, the traveler has all the tools at his/her disposal to meet his/her needs. More informed, he/she is also more sensitive to the commitment and more critical in the choices that are proposed to him/her. Faced with hundreds of standardized offers, his/her desire for personalization is more than ever essential.

In the traditional model, the travel agency sells and distributes what a supplier has produced. Today, the borders and responsibilities are much more blurred because everyone does everything.

Travel agencies can produce a trip bypassing a tour operator, or even a Destination Management Company. Those two often have a double B to B and B to C activity (in very variable proportions) as customer travelers often book directly a part of the services (e.g. air transport) and address themselves at the same time to agencies, tour operators, and Destination Management Companies for the remaining part.

Our recommendations:

- More liberty: some networks have a dedicated production department, some travel agencies are forced to work only with referenced tour operators/Destination Management Companies and do not necessarily have the choice of their suppliers. The buying groups think about the business instead of thinking about the customer.

- There is also another question: air transport should continue to be part of the travel agency's offer in the future (risk of low satisfaction, low profitability, risk of failure)? Whether it should be left to the customer-traveler, or even directly to the service (tour operator if necessary).
- To the question « To sell what the agency produces or to sell what it buys from a third party », there is no single answer or model. There is a need to evaluate, according to the environment and the geographical location of the agency, the profile of the customer traveler, his/her need for reassurance, the level of service expected, his/her level of autonomy and his/her budget.
- Like some tour operators which choose their distribution model, tomorrow's agency must be free to choose the offer that best corresponds to the traveler's request, whether it is for a simple stay or a unique experience. It must be able to set up commercial relationships with partners that it has chosen to be more agile, more reactive and more qualitative. One of the agency's partners levers will be the Destination Management Company, a dedicated partner, providing security and linking logistics to quality. The context of the health crisis perfectly illustrates the importance of this partner.

Always customer-oriented, tomorrow's agency must be able to tailor its choice of partners and decide to sell or produce according to the case, to respond to requests, and provide satisfaction and quality of service.

In a perfect world, the customer traveler who wishes to contact a professional to organize his/her travel project would have a single "one-stop-shop" capable of managing everything directly: customer relations, the technical production of the trip, local expertise, and follow-up "during the trip" devolved to the Destination Management Company.

This counter would also have cross-cutting, related, or ancillary subjects and services such as transport, particularly air transport, regulations, insurance, formalities, and even services (luggage, bookshop, etc.).

The travel agency is obsolete

Our observation:

- It is mainly intended for seniors. Younger generations, who are adept at new technologies, are missing out.
- It has missed out on the digital revolution: B to B sites of tour operators, sites of tailor-made travel experts, sites of central hotels. All different, they do not facilitate the task of the travel agent who must also know the tools of each supplier. This is a considerable waste of time in the era of zapping and instantaneous information.

- In terms of communication, travel agencies do not have sufficient notoriety to be able to renew their image. The applicants to the trip only know a few strong brands. Some travel agency networks have a strong local network but less so nationally. Moreover, travel shows are the only ones that can promote the travel agency, but they are few.

Our recommendations:

- Choosing professional tools that improve the daily life of travel agents: There are tools for managing the agency with complete back and middle office solutions: production, Customer Relationship Management (CRM), Electronic Document Management (EDM), Archiving, and Decision Support Analysis (DSA). There are also tools for easy website creation without developers.
- Engaging in omnichannel: Communication in 2020 is crucial for any company that wants to have notoriety, a recognized brand, traffic in its agency and on its website, but also to convert and retain an audience corresponding to its travel agency. Notoriety and e-reputation are essential. Tomorrow's agency must be accessible/responsive on all media and applications (website, mobile, tablet) to attract, convert and engage its community, which will become the ambassador of tomorrow's agency. The necessary levers are the following:
 - Ergonomic and easy-to-use website, optimized for SEO
 - Blog / Top 10 lists
 - Social networks and applications
 - Collaborations with influencers
 - Multimedia (webinars, podcasts)
 - Data / Customer Relationship Management (CRM)
- Being an expert and innovate: tomorrow's agency must **reinforce the jobs skills by continuous training** about the following themes:
 - Digital Transformation
 - Management
 - Marketing / customer experience / customer universe
 - Corporate Social Responsibility (CSR), sustainable and responsible development.

As a conclusion, our recommendations are in line with the changes to be made, as we are at a crossroads in the history of tourism. With these recommendations, we prove and act that the travel agency is agile, innovative and sure of its strengths, with deep convictions.

Our recommendations:

- Creating the travel agency brand
- Creating a logo and a graphic charter
- Giving back to the travel agency its true value.
- Mobilizing institutions and professionals of the sector for a global campaign (national and international) that indicates that the brand "travel agency" advocates renewal, expertise, reassurance, creativity, in a modern, human and visionary vision

Re-imposing the professional aptitude

- To reinforce our image of seriousness and professionalism
- To easily put forward this important asset
- To guarantee that each agency creator or takeover has a recognized track record.

Reinventing the travel agency which becomes the place where travel is lived

- Demonstrating innovation and creativity by offering travelers a wider range of services. The traveler customer must enter a place (or marketplace) dedicated to travel and possibly gather other services: luggage shop, bookstore, bar, viewing of travel films, virtual immersion
- Transforming the travel agency into a place where travelers spend time (an afternoon or an evening)
- Make sure that the visitor enters this space and comes out a customer or even an ambassador
- Leaving the agency walls to go to ephemeral places to create a targeted buzz with an adapted offer in partnership with tourist offices and/or partners from other sectors.
- Adapting customer service hours (24/7 continuous service is possible in digital)

- Creating a *Respire label* for travel agencies that :
 - Apply the validated recommendations by the working groups (righteous tourism, new technologies, awareness of tourismophobia)
 - Take training courses on various subjects: destinations, legal, Corporate Social Responsibility
 - Have an eco-responsible website
 - Eliminate paper brochures
 - Promote slow tourism offers
 - Systematically propose an alternative eco-friendly offer to the chosen trip
 - Fund and form a targeted association (sustainable, solidarity, or in favor of biodiversity) according to the chosen destination
 - Integrate a Corporate Social Responsibility policy into their company project
 - Designate a trained person in charge of Corporate Social Responsibility and its implementation, both internally and externally. -> Corporate Social Responsibility, sustainable and responsible tourism will be an integral part of the agency's strategy in the future.

Sources:

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(By Véronique NARAYANA SWANY, with Emmanuel HUGOT,
Audrey LAMPS, Victoria MORIN
and Mélanie ROSSETTI)

"Be the change you want to see." **Gandhi**

The evolution of tourism is not only a matter of means of transport but also a key prerogative to consider. The different mobilities have allowed its expansion to the world's ends, and to reach 1.4 billion tourists in 2019 all around the world, but also 8% of greenhouse gas emissions (GHG). These new climatic challenges and the Covid-19 crisis are turning tourism mobility upside down.

This chapter on New Mobilities aims to present and decrypt what the new mobilities are, and how the tourism sector can seize them to respond to these new challenges.

The modern individual of the 21st century is a permanently connected Homo Mobilis. Today, the smartphone is an integral part of new mobility because it can provide customized solutions for people's travel. Nowadays, it is no longer a question of choosing a single mode of transport to get to a destination, but rather of visualizing the entire journey, starting at point A and ending at point B by combining different means of transport.

New Mobilities are therefore the addition of traditional (train, car, plane, boat) and alternative (scooter, bike, shared mobility) means of transport with the new prerogative of the 21st-century challenges: to have the lowest possible carbon impact.

What does this mean for tourism? How can we participate in reducing the carbon footprint of travel?

How can tourism professionals integrate these new mobilities into their offer?

We will draw up here the major findings and challenges for tourism professionals and provide some ideas and solutions to help our profession to be engaged in the transition, transformation, and adaptation of tomorrow's tourism.

The new issue of the 21st century: the carbon footprint of the travel

Understanding the carbon footprint of different modes of transport

Globally, tourism accounts for 8% of GHG emissions, 75% of which are due to transport and 21% to hotels and restaurants.

Not all modes of transport are comparable, and they have different uses depending on the time available to travelers, the place where they use them, and the circumstances in which they use them.

The readability of the carbon footprints of the different means of transport is not always clear to tourism professionals or travelers, even though different calculators allow to calculate the carbon footprint of a means of transport.

The point here is not to promote one calculator rather than another but to affirm the importance for the profession to take ownership of the challenges of the carbon footprint.

Our recommendations:

• **Displaying the carbon footprint of each trip**

Article L.1431-3 of the Transport Code states that any person who sells or organizes a transport service [...] must provide the beneficiary of the service with information on the number of greenhouse gases [...] used to carry out this service.

We recommend that each tourism professional is committed to:

- Specify the total carbon footprint and broken down (plane, hotels, activities...) on its offers, brochures, websites of each trip to inform the client-traveler.
- Adopt a carbon logo created in this sense, so that each trip has a visual identity with carbon consumption levels (12345 or ABCDE) with a clear color code as is the case in food or energy consumption. The idea is to encourage travelers to choose the combination of transport that has the lowest impact in terms of carbon consumption. This classification would also allow initiating discussions with customer travelers who would ask questions about the reason for the level of carbon compensation between one trip and another, the criteria of carbon expenditure that tip the balance in favor or against a more or less important carbon compensation.
- Join a tourism-specific calculator to harmonize the carbon footprints of trips, and to allow for a comparison of the footprint of each trip, we recommend that the profession adopt a unique calculator created with the specificities of tourism that would take into account the entire chain of creation of a trip.

• **Awareness, acculturation and training of tourism professionals**

This new prerogative that many companies are implementing is a major challenge for tourism professionals. Traveling customers are more and more aware and want to be informed about the carbon footprint of their consumption.

Therefore, tourism professionals must be trained and informed on these subjects to be able to inform and advise their customer travelers.

- Train all tourism professionals on climate issues with the climate fresco
- Explain and develop a factual and realistic argumentation on the real issues of air transport
- Integrate specialists, independent consultants in the fields of ecology in the production of travel and marketing to accompany tourism professionals.

- Develop simple tools (apps, fact sheets) to allow tourism professionals to answer questions from customer travelers.

• **Changing the internal practices of the profession**

Go to see partners on site is important for the profession, but it is also part of the credibility and responsibility of the profession to reduce its carbon footprint and to redefine practices and needs in terms of business travel:

- Limit fam trips and conventions to the other side of the world for short times (less than a week).
- If the plane is necessary to go on a fam trip, extend your stay to maximize efficiency and meet all the partners and hoteliers.
- Give preference to local conventions.
- Limit special travel agent offers for short stays on the other side of the world, and develop online professional training.
- Optimize the transportation used and encourage their combination.
- Compensate for all mandatory travel for professionals.

• **Developing low-carbon mobility travel offers**

- Make a concrete commitment to reducing the ecological footprint of each trip by deliberately integrating the professional carbon footprint referent into the design and cost of the trip.
- Offer to combine trips: for example, offer the train (for a trip where train transportation is possible) and if the customer traveler prefers to fly, evaluate the carbon footprint with an approved calculator and directly offer carbon compensation as an additional cost.
- Do the same thing at destination by the Destination Management Company (DMC) : the latter must be made aware, informed and trained to do so. The idea is not to penalize a DMC but to accompany it on a righteous path.

Observation: The particularity of the plane

Air travel remains key mobility for tourism but, with the movement of shame to take the plane and the recent health crisis, air transport is experiencing an unprecedented loss of legitimacy. Air transport accounts for between 3 and 6% of GHGs worldwide, depending on the calculation (whether or not contrails are taken into account). In France, domestic traffic represented 2.8% of the transport sector's GHG emissions in 2017 and 1.4% of France's total emissions.

It is important here to mention some key figures to understand why air travel is so decried.

Although air travel accounts for only 3% of global GHG emissions, it should be remembered that 90% of the world's population has never flown.

75% of flights are for leisure purposes.

The carbon footprint of a French person is currently 12 tons of CO₂ per year. To respect the Paris agreements, we should not exceed 2 tons of CO₂ per year. However, a return flight from Paris to New York represents 2 tons.

Nevertheless, there is no carbon-free technological alternative to air travel in the short or medium term. This is why we have drawn up a list of ideas for tourism professionals when there is no other choice than flying.

Our recommendations:

- Favoring direct flights
- Favoring airlines that have a strong sustainable development policy
- Offering compensation to its customer travelers.
- Optimize long-distance travel, offer travelers the opportunity to get involved in the development of the destinations they visit.
- Avoid the use of domestic flights at destination: give preference to trains (night trains for example for long journeys).
- Avoid offering low-cost airlines that generate opportunity travel through price.

Observations: Carbon compensation mechanisms

Carbon compensation makes it possible to finance carbon sink projects, such as planting trees to cancel footprint. It is appropriate here to make a quick point about compensation:

It is impossible today to cancel carbon footprint through compensation: rather, compensation allows us to contribute to the zero-carbon objective. Compensating is by no means the solution, but it is one of the solutions. In the case of a long-haul trip where the plane can hardly be replaced by another option, but also when using the train, bus and all other modes of transport using carbon energy, it is the responsibility of the profession to propose and/or participate in a carbon offset project.

Our recommendations:

- Raising awareness of carbon compensation mechanisms and projects within the profession.
- Offsetting all mandatory employees' trips.
- Developing a sales pitch and simple solutions to engage customer travelers in this direction.
- Developing a partnership for the profession with specialized professionals to indicate to customer-travelers where they can compensate for their trips.
- Maintaining an up-to-date list of compensation professionals to give to customer travelers.
- Having environmental consultants or a dedicated person intervene in companies to help employees decipher and implement low-carbon travel and find projects and professionals certified to compensate.

Low carbon transport: the new mobility for tomorrow's travel

Observation: The commitment of the States in the decarbonization of economy : what are the consequences for the mobility of tourism?

As a follow-up to the Paris Agreements, a majority of countries (including France) have adopted low-carbon strategies for 2050, which for France implies an 80% reduction in GHG emissions compared to today. Achieving such a reduction within 30 years implies in-depth changes in all sectors, including tourism. These changes are underway, and the aim here is to interpret the risks and opportunities for tourism professionals that these political and industrial issues represent, on which the profession has no room for manoeuvre, and no other choice than to adapt. The list below highlights only a few of the laws, projects and ideas discussed to enable tourism professionals to understand the changes to come. These include:

- Technological advances for a carbon-neutral aircraft (hydrogen)
- The discussion on floor prices to avoid social and environmental dumping and to invest in research and development and the renewal of the air fleet.
- The renewal of the coach and cab fleets (which will reduce the carbon footprint of airport/hotel or station/hotel journeys).
- The development of new fuels.
- The vote on the end of domestic flights when there is a solution by train (2.5-hour journey).
- New measures to fight against the advertising of some goods/services (end of video advertising screens, limitation of advertising for the most polluting products).
- Bans on cars in city centers.

- Rationalization of water use in some countries.
- Incentives for the use of sustainable transport within the framework of the LOM law (400 euro package for employees) for home/work trips.

Moreover, it is important to highlight that the largest companies also have important objectives to reduce CO2 emissions and that consequently, one of the first areas of reduction is the mobility of employees, air travel. This change is important for the entire business travel profession, but also MICE travel because it seems little responsible for a company to take its employees to the other end of the world for 3 days.

It should also be noted that old and new mobility will also be impacted by climate change (flooding of certain cities, airport runways and train tracks impassable due to heat, power cuts in certain countries).

What are the new mobilities?

The fast urbanization of the last few years and the new challenges of air pollution and global warming have led to a surge in new forms of mobility, mainly in the most urbanized cities, which are transforming behavior. Today, we speak of sustainable mobility or eco-mobility, which makes it possible to meet the daily travel needs of the greatest number of people. We can mention the development of public transport (electric bus, tramway), all the new forms of bicycles (folding, electric, with cart for children), scooters, wheels, but also the whole new economy of transport (bicycle and car) in free access and shared mobility (carpooling).

In a few years, users will use their vehicles but also autonomous vehicles, trains, subways, bicycles. Mobility will be multimodal, greener, and adapted to demand. This is what we call: MaaS.

MaaS - Mobility as a Service - is a very specific approach to mobility. It aims to make passengers' lives easier by providing them with a single platform (usually a mobile application) to search for multimodal and door-to-door routes and book them in real-time without difficulty.

MaaS is still in its infancy, but it will allow mapping all mobility offers: daily, local, country, continent, integrating also the offers of the collaborative economy. It will also allow managing the demand in real-time to optimize the filling rates to avoid empty trips and thus optimize the carbon footprint of each trip.

Data allows a very fine-tuned and optimized approach to offer users and travelers a simple and flexible mobility experience, but this mobility service implies many material transformations, especially technological and infrastructure ones.

For longer distances, there is no mobility system today that can meet these challenges.

How to settle the new mobilities and optimize carbon consumption in the tourism offer?

The new mobility of travel seems to be more and more complex for tourism professionals who must face both issues that were previously unknown to the profession (carbon footprint) and the rapid development of new modes of transport that are currently difficult to identify and book by the profession.

Our recommendations for these 3 observations:

- Promoting shared mobility (carpooling and public transport) using sharing platforms to integrate them into pre-trip or destination offers.
- Promoting alternative and low-carbon modes of transportation to and from destinations.
- Encouraging local destination professionals to map and develop alternative modes of transportation in their offerings.
- Encouraging tourist offices to provide training on new mobilities, developed or being developed in the country.

To reinvent tomorrow's tourism, it is crucial that tourism professionals take hold of, train and advise their customer travelers on the subjects of mobility, carbon footprint and carbon contribution to participate in raising the awareness of customer travelers, and to develop a decarbonized tourism, thus participating in the transition and the achievement of the objectives of the Paris Agreements. It is the responsibility of the entire profession to develop its activity following these new challenges and the new impacts that are imposed on it. Of course, this transformation cannot be done in stages, but it is important to lay the foundations without delay so that it becomes an integral part of our daily lives, as soon as possible.

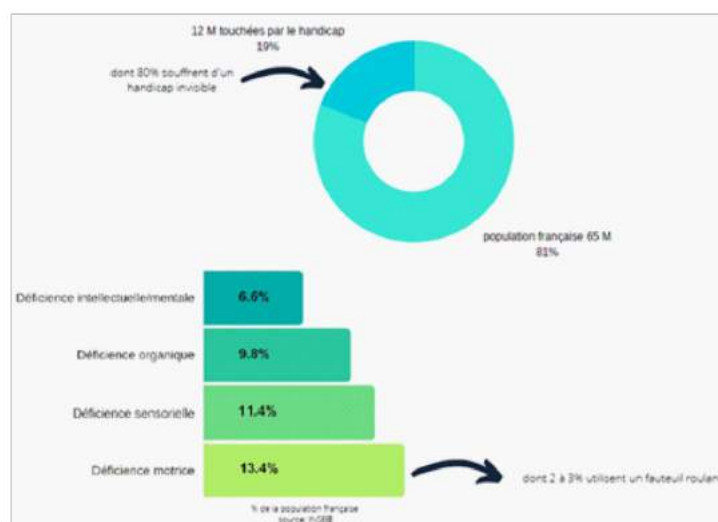
Disability-friendly tourism

(By Jennifer WEBER with Caroline MURTAS, Emeline FONT, Véronique NARAYANA SWAMY, Emmanuel HUGOT and Stéphane MICHAUT)

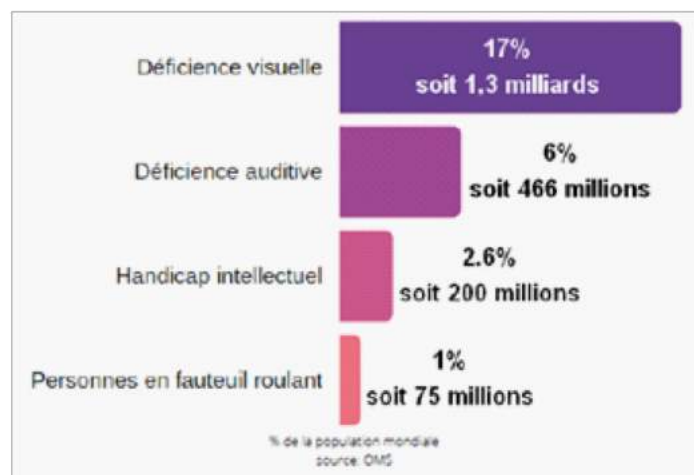
« *The impossible is the only worthy enemy of man.* » Andrée CHEDID

Our observation:

- In Europe, disability affects about 1 in 6 people, i.e more than 80 million citizens, including about 12 million in France (source: INSEE).
- Worldwide, more than one billion people are disabled, i.e. 15% of the population (source: Ministry of Ecological Transition and WHO).
- Currently, 80% of these people do not travel. However, travel or tourist activities in the broad sense of the word are a right but also the participation of people with disabilities in social life.
- The accompaniment of the disability is only thought of and organized according to a "medicalized and/or psychologizing vision of the disability" (J.-J. Detraux, president of CEFES).
- However, disability is not only a health problem but also a socio-cultural problem. People with disabilities are quickly reduced to their physical, psychological, or mental disadvantage.
- The current health crisis Covid-19 reinforces the gap in accessibility to travel for people with disabilities, not only by reducing the possibility of international travel but also by sidelining a so-called fragile population, which is, itself, relegated to the background in terms of travel and tourist activities.



Les chiffres du handicap en France



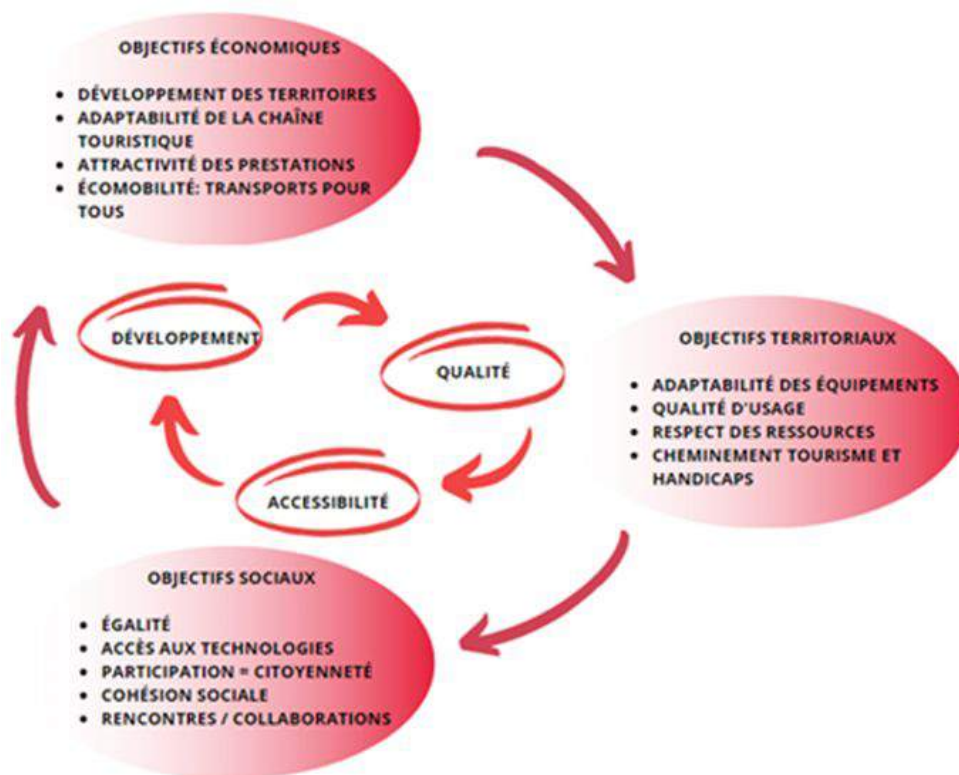
Le handicap au niveau mondial

ISSUES AND DIFFICULTIES OF THE COALITION TOURISM/DISABILITY

- **Segregation:** people with disabilities are ineligible for vacations. Tourism is therefore not accessible to this type of traveler. In the omnipresent imagination, there is a conceptual barrier that shows the incapacity of these people. An able-bodied-centric vision that considers disability only in terms of a lack or medical failure. Geographical and logistical constraints are blockages to the physical experience of travel.
- **Compartmentalization:** the existing products offered are often intended only for this specific clientele of travelers. People with disabilities go on their own, with a companion, or in a group. Some service providers offer mixed trips (in groups of able-bodied and disabled people). These recognized professionals in the field of disability travel in France sometimes have limited access, because there are not always physical agencies to meet them. Most of the time, people book their trips remotely (internet, email, telephone) and do not have direct contact. There are only a few agencies specialized in disability travel in France.
- **Financing the trip:** a long obstacle course that often leads to the abandonment of applications along the way. The abundance of information and the various French departmental or associative aids dedicated to the disabled overlap (ANCV, MDPH, AFM, UNAPEI etc.). There is no harmonization or grouping of possibilities and applications.
- **Travel insurance:** After an inquiry by the disability-friendly tourism group with ten recognized travel insurers, none of them covers travelers with disabilities. Some of them are ready to review their position by composing tailor-made insurance policies on a case-by-case basis. Disabled people are considered as special situations outside the basic contracts, mentioning that a person with a recognized medical problem before a trip will not be covered in case of worries related to it during his stay.

ASSETS AND POTENTIAL OF THE DISABILITY-FRIENDLY TOURISM

- **Niche business:** it can be considered and exploited by the whole chain of tourism professionals. Commercial development through a diversification of the tourist products and services offered. Additional asset because it allows reaching a potential clientele not considered until now. The tourist innovations allow them to distinguish themselves in the context of economic competition. The evolution of this tourist niche depends on the capacity of the organizers to carry out stays adapted to this specific clientele, whose needs and expectations are in constant evolution.
- **Territorial dynamics:** by including in a local and territorial approach a part of the population that did not have access to tourism products and services until now, the transit of another flow of travelers is allowed (business travel, tourism). People with disabilities will be able to travel to take advantage of tourist services in the surrounding area, thus leading to the mobility of resources and people, and even to the development of a residential economy (movement of people from outside the territory who generate income locally) in addition to the current economy (people living in the territory and consuming there).
- **Attractiveness of the market:** developed spaces, transport adapted to all, accessible cultural wealth which gives rise to the new visibility of the professionals participating in the approach. The disability becomes a salesman in relation to the interest of the companies. The adaptations will also be useful to other sectors of the population such as seniors, young people, families (with strollers in particular), or any other person with a loss of autonomy (temporary or not): loss of sight, need to rest during a visit, accident or illness for example. Addressing people with disabilities reveals the importance of a great capacity to mobilize and support the various professionals in their approach.
- **Universalism:** universal ethics of inclusion based on equal opportunities and active solidarity. The universal design of products and services so that no individual is left behind. Respect for the diversity of all. Enabling people to live their citizenship to the fullest by participating in social life and in particular by enjoying the right to tourism and leisure, two fundamental areas in the development of the self. Thinking about beneficial solutions and adaptations: specific practices will tend to be normalized and inserted in ordinary devices. Seeing the disabled person through the prism of the ability to do, otherwise capable, hence the name of the working group "Disability-friendly tourism".



RECOMMENDATIONS

• Information/awareness/training for tourism professionals

- Proposing webinars and training to allow the skills development and answer the needs regarding the reception of people with disabilities in the tourism field. A complementary and digital alternative delivered to existing tourism professionals to broaden the perspectives of each profession. Specific modules for the hotel and restaurant industry, management of tourist sites may be included.
- A "specialization" on request will be proposed.
- Participation via the "tourism networks" (group training for the professionals of a network, for example).
- Possibility of organizing training by city by grouping travel agencies that request it.

• Training for tomorrow's tourism professionals

Through current school/university courses (HND/12th Grade in tourism, general and professional Bachelor's Degree and Master's Degree, tourism schools). Integration of course modules:

- Typology of the different clienteles in tourist locations.

- The modalities of reception for specific audiences.
- Awareness of the different types of disabilities (visible/invisible) and the evaluation of needs.
- A reminder of the legislation concerning tourism, but also the rights of people with disabilities.
- Participation of external speakers (from the associative sector, professionals in a situation of disability(ies)) to provoke role-playing. This is not a common practice but it allows us to realize the reality of the field and its constraints.
- Exercises and design of inclusive products (travel for a type of disability for example).
- Adapted geography: learn about a range of destinations accessible to people with disabilities, such as Japan, Quebec.

● Resources sharing and expertise – Networking

Construction of a website dedicated to accessible tourism for tourism professionals who wish to engage in an inclusive approach. Ultimately, this site will function as a database allowing a centralized reorganization of information and documentation:

- Specific documentation on the various disabilities, the needs that arise from them, the necessary reception and the possible answers to be brought in terms of travel.
- Directory of travel agencies and associations specialized and recognized (internationally) in travel with disabilities that each registered professional is free to consult
- Directory of accessible suppliers as well as other tourism and travel professionals specialized in the field of disability (guides/accompanists, service providers, airline contacts for disability-related requests, hoteliers) that will allow you to find certified professionals in order to compose customized trips, to establish partnerships.
- Frequently Asked Questions.
- Contact between professionals via an intranet search facility.

● Labeling/ ISO service standard

Thinking about the future of inclusive tourism means federating the professionals of the sector around the same international project: the universalism of tourism practices. For this reason, our objective is to create a label of quality and recognition of the expertise accumulated by the various branches of tourism. A bit like the United Nations 2030 program (17 SDGs - Sustainable Development Goals - accessibility is a small part of it).

- **Label:** A sign of distinction, a criterion of reliability and expertise that attests to a level of quality, and brings a significant advantage. It is meant to be a way of highlighting and communicating a particular field (or product). It is granted by a public authority and can be considered in a voluntary approach, or have a mandatory character. (e.g.: the “Tourisme et Handicap” label, which covers our field of action, has been officially recognized since 2001).

Creation of the label HANDI'NCLUSIVE TRAVELS ©

Supported by the association Respire France with the signature of an agreement that commits the beneficiaries to respect a set of specifications as well as an ethical code.

- Steering and evaluation tools by experts
- Efficiency and performance measurements as guarantees of quality and trust
- Cost control
- A strategic plan implemented by an audit committee
- Visibility of accessibility actions at the global level, recognition of actions carried out in favor of the inclusion of people with disabilities in the tourism sector.
- Differentiation from the competition and opportunity of the carrier network.

ISO International Standard: a written document providing substantive information and practices. It specifies a way of doing things or a solution to a problem (see references "ISO in brief", site www.iso.org). ISO only develops a standard if the market needs it. Each individual's accessibility needs vary. Disabilities may be permanent or temporary, visible, invisible or unrecognized. Therefore, the needs of people with disabilities and frailties must be considered in the standards development process. Use the ISO guide below to promote the quality of our label.

ISO/IEC Guide 71: 2014 Guide for incorporating accessibility into standards

- Recommendations that target systems, products, services and the built environment (standard not yet confirmed, review closed in March 2020).
- Technical/qualitative prescriptions on strict specifications
- Active monitoring of regulatory changes
- A common language between economic professionals (producers and consumers)
- Harmonization of products, practices and services, particularly in the field of tourism innovations and the management of the accessibility of tourist destinations
- Protection of the traveler through the traceability of tourism and travel professionals

To this day, no published and accepted standard on accessibility exists outside of that of the built environment (architectural constructions), the field of ergonomics and equipment (assistive devices, technical aids), as well as that of ICT (Information and Communication Technologies). [Filing of an ISO/DIS 21902 Tourism and related services - Accessible tourism for all - Requirements and recommendations (under review since October 2019)].

- **Strong partnerships**

Around **HANDI'NCLUSIVE TRAVELS** ©, The aim is to bring together a network of renowned and essential partners in the field of accessibility to tourism and inclusion of people with disabilities. A collaboration envisaged in order to give more visibility and notoriety to the public and international professionals of the sector of tourism.

This alliance between international associations would bring together the knowledge and best practices of the world's leading experts.

- Association Tourisme et Handicap (France)
 - European Disability Forum (Belgium)
 - CAWaB (Belgium)
 - Destination Everywhere Accessible Travel (Belgium)
 - Destination for All – World Summit on Accessible Tourism (Belgium)
 - World Travel and Tourism Council – WTTC
 - European Network for Accessible Tourism – ENAT (Belgium)
 - United Nation World Tourism Organization
 - Handicap International – Humanity and Inclusion
-
- Repository of best practices and concerted actions at the organizational level to concretely address global issues, such as the universality of tourism practices.
 - Better use of available resources.

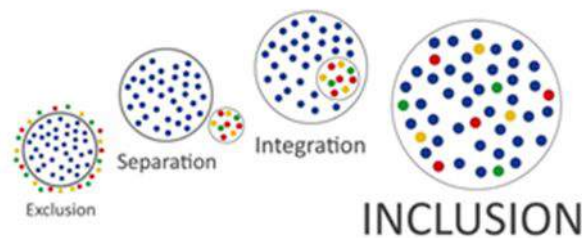
The awareness of a large part of the political authorities has allowed the improvement of accessibility conditions in recent years. Inclusion still remains a challenge, and people with disabilities are confronted with the difficult acceptance of difference. « *The inaccessibility of a large part of society for people with disabilities, coupled with the absence of a real mobility policy, accentuates situations of exclusion when mobility should be the primary vehicle for inclusion* » (National Commission on Disability 2018).

The preparation and realization of a trip or a tourist activity then becomes a real overall organization. The cooperation of professionals, the evolution of professional practices, the reflections on the new professions, are so many tracks or even keys for a decompartmentalization of the sector.

Disability-friendly tourism is based on a universal concept where living together becomes a commitment for all. Travel should no longer be exceptional, but possible. Based on the concept of a disability-friendly trip, it is clear that there is no real difference with any other travel idea. Who can do more can do less. In this complex period for the tourism world, we have time to reinvent ourselves and rethink the modalities of tomorrow's travel, where everyone, in their diversity, will be taken into consideration.

« We were not born as a tourist: we become tourist, and each in its own way. »

(Knafou Rémy, 1997)



ANNEXES

Definition of disability according to the WHO

"A disability is any limitation of activity or restriction of participation in society suffered by a person in his/her environment due to a substantial, lasting or permanent impairment of one or more physical, sensory, mental, cognitive or psychological functions, a multiple disability or a disabling health condition". (Law n°2005-102 of February 11, 2005 for equal rights and opportunities, participation and citizenship of disabled people).

5 categories of classification

- Physical disability

All disorders that can lead to partial or total impairment of motor skills, particularly of the upper and/or lower limbs (difficulties in moving, maintaining or changing position, picking up and handling, performing some gestures).



Disability-friendly tourism

- Sensory disability



- Visual disability: concerns blind and visually impaired people.
- Hearing disability: hearing impairment (as a total loss is rare) usually amplified by a hearing aid; a disability that is sometimes accompanied by difficulty in speaking.

- Psychic disability



Mental disorders or psychic illness, neurosis, psychosis, depression, addiction...
Personality dysfunction, without affecting intellectual capacities.

- Mental or intellectual disability



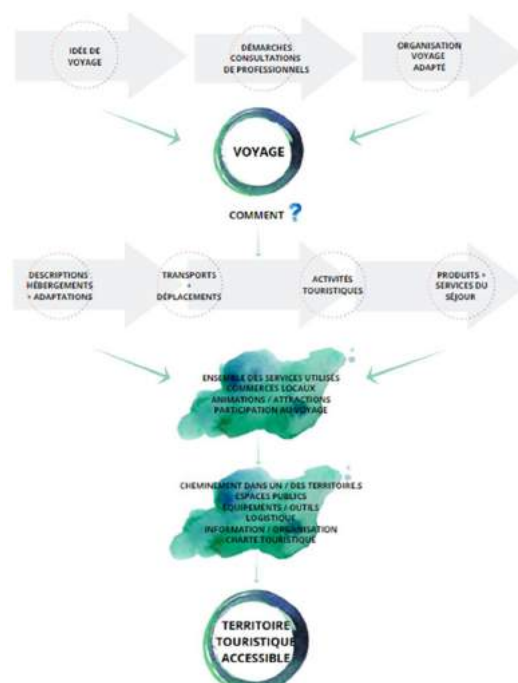
Difficulty in comprehension and limitation in the speed of mental functions in terms of understanding, knowledge and cognition.

- Disabling diseases



All respiratory, digestive, parasitic, infectious (diabetes, hemophilia, cancer), temporary, permanent or progressive diseases.

Process of the elaboration of the trip (adapted)



(By Jean-Pierre PINHEIRO with Eric BAETENS, Aurélie Berthet ORENGO, Adrien CHAMPAGNAT, Emilyne CHAUMONT, Caroline COURET, Audrey LAMPS, Luc TROMME, Célia MELCUS, Sylvia MILAGROS, Magali NOHALES and Armelle SOHELHAC)

« For a better-aware tourist » Jean-Pierre PINHEIRO

In the last few years, tourism has come under fire: it is said to destroy ecosystems and disturb local populations, to be a source of pollution, to misallocate revenues between professionals in the sector, to be a tourist in a hurry driven by FOMO[1]. Many are the ills for which the sector is accused.

While these observations are real, it is necessary to remember that the tourism sector, directly or indirectly, employs one in 10 people worldwide and is responsible for one-fifth of the new jobs created each year (WTTC, 2019). The sector offers opportunities, particularly for otherwise precarious populations, and helps to revitalize landlocked territories isolated from large urban areas.

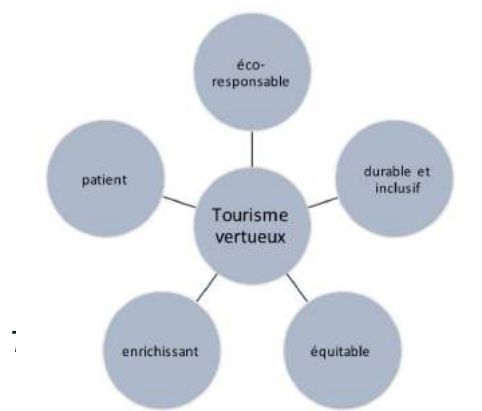
Therefore, a transformation of the tourism sector is more necessary than ever so that the sector is no longer perceived as the paroxysm of a consumerist society that is losing its meaning, but that it is instead a professional of change and a driver of the transition of our societies towards new models. This transformation is already desired by a large proportion of consumers, 87% of whom say they want to change their consumption habits in order to travel more responsibly[2].

This is why we are calling for a paradigm shift so that righteous tourism, still sometimes perceived as too elitist, becomes the frame of reference for the development of the sector in years to come.

Many have tried to define righteous tourism or its many lexical variants. The righteous epithet allows us to make a more global reading of it without limiting ourselves to environmental criteria. We will try to synthesize this and review the main concepts that have guided our analysis.

The 5 guidelines of righteous tourism

Righteous tourism is :



- An **eco-friendly tourism** that reconciles business development with respect for the environment and natural resources. This can be achieved through the adoption of more environmentally friendly tools, but also beforehand, through a transformation of travel consumption patterns.
- A **sustainable and inclusive tourism** with flows that are better distributed geographically and over time, and that benefit above all the populations of the territories visited by limiting the predation of outside professionals. It is a tourism that contributes to the resilience of local populations.
- A **fairtrade tourism** that remunerates all the professionals involved along the value chain at their fair price, valuing the service providers at different levels with intermediations that ensure a better remuneration of all professionals.
- An **instructive tourism** and training for the individual, which contributes to dialogue and tolerance between populations.
- A **patient tourism** (slow tourism) that, in a frenetic information society, questions our modes of over-consumption of travel. Rather than a bucket list tourism, it is a tourism that takes its time, favors encounters, and more in-depth discoveries.

These major principles must guide the future development of the tourism sector. We propose several areas of intervention, at each stage of the tourism value chain:

- Upstream, the prior imperative of full recognition by all public professionals concerned;
- The application of the principles of righteous tourism by the providers of tourist goods and services;
- Downstream, the empowerment, and awareness of consumers.

The perception of tourism by public professionals remains narrow

Tourism is a cross-cutting sector that involves a wide variety of professionals, which makes it difficult to measure its impact and spin-offs. Many countries have created Inter-Ministerial Committees on Tourism, which regularly bring together all the ministries concerned. This is part of this global recognition of the sector. Tourism is not only the prerogative of the Ministries of Economy and Finance (and of Recovery) on the one hand and of Europe and Foreign Affairs, on the other hand, its development raises issues for agriculture, culture, health or defense.

While we can congratulate ourselves on the 18 billion euro recovery plan announced by the Government, it is limited to helping professionals in the sector without taking into account its many interconnections. Similarly, the national macro-economic objectives of 100 million tourists and 50 billion euros in revenues in 2020 (pre-Covid) maintain the illusion of an industry whose success is measured only in quantitative terms.

Our recommendations:

We encourage the appreciation of tourism in its real measure, as an essential component of social and cultural balance and not only economic:

By public decision-makers:

- Encouraging the adoption of the Faro Convention by the Member States of the Council of Europe, including France. The Faro Convention, ratified by 19 States, defends a more global approach to the notion of cultural heritage by including the role of the human being as one of its components. <https://www.coe.int/fr/web/culture-and-heritage/faro-convention>

By civil society:

- Encouraging, on the model of the "Community of Faro", bottom-up citizen actions "allowing heritage communities to participate in the management of common cultural assets" (Marija Pejčinović Burić, Secretary-General of the Council of Europe).
- Encouraging the appreciation of tourism as a theme within the Citizen's Conventions projects, or even as a full-fledged object of such a Convention.

The fragmentation of tourism professionals limits the scope of many initiatives already taken

In the last few years, and even more so in the last few months during the health crisis, we have seen a multiplication of initiatives led by many professionals in order to define the guiding principles of righteous tourism. Some of them, in France, are led by associations and groups. At the international level, the Global Sustainable Travel Council has brought together 6 NGOs within the Future of Tourism Coalition, calling for a transformation of the sector - already gathering 22 signatories.

These numerous initiatives reflect a desire for change shared by all professionals. They should be seen as a positive signal. However, it is difficult to find one's bearings in the face of this inflation of plans and other manifestos. The fragmentation of initiatives also limits their scope. For example, 12,000 people have left with one of the 11 ATES tour operators, a drop in the bucket.

This is why the system that could be put in place will have to be thought through and then directed at a wider audience.

Our recommendations:

We propose to create a working group with the organizations that have initiated these different charters in order to establish a harmonized framework that will allow the development of common tools:

- Identifying all the initiatives, manifestos and codes of conduct put in place by professionals in the sector
- Federating the professionals of the sector within a working group to define, together, a common framework and to harmonize the criteria and indicators within a code of sustainability and virtue.

After this harmonization and coordination with the different French initiatives and projects:

- Expanding the discussions to the European level, and then beyond.
- Encouraging the networking of professionals on a European and international level, building on existing professionals.

Consumers struggle to access clear, reliable and complete information

Studies indicate that consumers want to adopt more responsible travel behavior. Their motivations are diverse: a negative experience with mass tourism that has raised awareness (54%), consideration of the possible positive consequences on local populations (47%), or the desire to continue to see beautiful sceneries (60%)^[3].

Nevertheless, if the perceived higher price of such stays remains the main obstacle (42% of respondents), they also declare that they do not know how to find their way in the face of the flood of information, and the absence of credible and extensive international certification (32%). 40% of them also said that an eco-responsible filter on the booking sites could help them in their decision.

It is therefore important to think about a harmonized tool to support this desire to make consumers and travelers more aware of their responsibilities.

Existing tools (taxes, carbon compensation) are above all corrective tools (once the action has been taken). We would like consumers to have access to transparent and complete information before their stay to help them make their choices. Some initiatives are interesting to follow.

Our recommendations:

We would like to see the implementation of information and decision support tools for consumers, before and during the travel experience:

- Systematizing the listing of existing initiatives (tourist guides, websites) and centralizing information through a common search engine (Think about how to work with other professionals).
- Considering the development of ethical codes of conduct for travelers to be signed by the customer traveler upon arrival in the territory.
- Establishing a harmonized impact code model with different degrees (based on the Nutri-score model), to classify products and destinations:
 - Creating a working group with other professionals in the sector, in order to reflect on the criteria of the system, especially with those mentioned above who have already launched initiatives that are close to it.
 - Adopting a marketed codification that is easily adopted by tourism professionals, and understood by the general public.

- Thinking jointly about the criteria with the different professionals mentioned above, but they will have to integrate the notions mentioned in the introduction (that make up the term righteous tourism). It is important that these criteria are not limited only to transportation issues (carbon) but also to all the themes (inclusive, sustainable, fairtrade).

Prepare the future generations of tourism professionals as of today

- In school courses, integrating Civic, Legal and Social Education modules of awareness on responsible tourism.
- Promoting and encouraging N.E.C. (New Explorer Challenge) type projects that mobilize the younger generation, especially tourism students, future professionals.
<https://www.thenewexplorerchallenge.com/>

Righteous tourism is not a sector for a niche target group. It is rather a paradigm, even a norm, to be adopted, which should precede the future development of the sector. This is why it is above all necessary for public professionals to become truly aware of the non-economic dimensions of tourism and its interdependencies with other sectors. Tourism product and service providers as well as consumers all show a desire for transformation but are confronted with fragmented and unclear information. We encourage the adoption of harmonized frameworks for tourism professionals and transparent and readable information tools for consumers to respond to their desire for awareness.

The main principles of righteous tourism can be applied to each of the themes addressed in this White Paper.

^[1] « Fear of Missing Out », A form of social anxiety characterized by the fear of missing an important event or information, sustained by the use of social networks, especially Instagram.

^[2] Survey conducted in 2019 by Booking.com with a panel of over 22,000 people in 12 different countries (Oceania, North and South America, Asia, Europe)

^[3] Booking.com survey of 22,000 customer travelers, 2019

^[4] Survey MALT-OUI SHARE 2018

^[5] Infography Twitter

Conclusions

The year 2020 has been extremely devastating for our industry, and for many activities in tourism and elsewhere. We know that. Yes, it's difficult, it's complicated. Very complicated.

All this, instead of discouraging us, Respire, has pushed us to think, to resize expectations, to reconsider, evaluate and respect our true values.

Personally, I have a positive view of this year, which at first sight, seems so catastrophic in many ways.

Many companies had difficulties or went out of business, but in many cases, it was not because of Covid: the pandemic was only the trigger or the trigger of this process.

I remain convinced that this whole revolution in our practices, our habits, our ways of working is not destruction in itself, but a unique opportunity for transformation, an opportunity that we must seize to question ourselves and find the means to start again on new foundations and with new founding principles.

Are we working in an appropriate way and respecting sustainability criteria?

Are we aware of the real problems of our sector?

How should we work tomorrow after this historical crisis?

With this in mind, we have created Respire, which has the ambition to accompany thousands of professionals who want to think about how they should (re)work when all this is behind us.

We have tried to imagine new economic, societal and behavioral models to perpetuate the work of thousands of people and to lay the foundations for a new approach to travel and its organization that can be safer, more serene and respectful of the environment and populations, understood as a natural setting but also as a place to live for millions of people suffocated by the success of certain destinations where they live.

Today, 90% of all travel is concentrated on 5% of the planet, and seasonality is generally quite short. To imagine being able to broaden the travel offer by informing future travelers and to make it possible over longer periods thanks to decompartmentalization of the tourist seasons is not a utopia, but a necessity and a righteous way to face the evolution and the necessary restructuring that this sector will have to face without further delay.

This pandemic has brought us face to face with our responsibilities and has made us aware of the mistakes, sometimes gross, that we have made over the last few decades.

Traveling differently will not only depend on a new approach to the tourism product. The revised approach will also have to be societal.

If we do not teach our children to respect their living space and that of their guests, the natural habitat of endangered animal species and to take the necessary measures to do so, the tourism sector will not be able to change itself.

Conclusions

This change will also have to be coupled with education in certain virtuous practices, through the planning of targeted and detailed information, aimed at the youngest people but not only.

It is a political commitment that authorities in place in each country must make, in order to organize international coordination so that such recommendations are taken into account and respected by all.

All this will have to be done in stages and in strict and scrupulous compliance with the modalities that will be established. We must ensure that the analysis of the consequences of this lesson, which has been imposed on us, becomes a reality within a reasonably short time.

We do not have time to wait.

It is necessary to intervene and act, and we must do it now and all together.

« Alone, we can go faster, but together, we can go further. »



Changer pour continuer à exister