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HOW TO ENHANCE TOURIST ATTRACTIVENESS BY USING THE "CLIENT PATHWAY" METHOD

The purpose of this new series on "Tourism and attractiveness" is to understand the position of the Paris Region in a very competitive international tourism sector. This high stakes sector in economic and employment terms is entering a period of deep change, driven by new societal and consumption uses. Several *Note rapide* will report on the Paris Region's strategies for renewing its tourist offering and adapting it to visitors' new expectations. The IAU îdF also shares a territorialised vision of tourist activity.

WELCOME CITY LAB

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WHILE INTERNATIONAL VISITOR FLOWS NOW EXCEED 1.3 BILLION, MAJOR TOURIST DESTINATIONS ARE DIFFERENTIATED BY THEIR DEVELOPMENT STRATEGIES. THE BEST-PERFORMING DESTINATIONS BASE THEIR TOURIST OFFERINGS ON IN-DEPTH STUDIES OF THEIR VISITORS' EXPECTATIONS INSPIRED BY THE "CLIENT PATHWAY" APPROACH DEVELOPED BY MARKETERS. HOW DOES THIS METHOD APPLY TO THE WORLD OF TOURISM? WHAT LESSONS CAN TOURISM PROFESSIONALS DRAW FROM SUCH AN APPROACH?

Like many other sectors, the world of tourism has been disrupted by new technologies such as dedicated apps, e-tickets, advisory websites, augmented reality visits, etc., which are making travel professionals keep up-to-date, revise their offerings and create new tools to meet the expectations of their highly connected clients, notably the millennials who are arriving on the market. Furthermore, the abundance of tourist offerings is leading these professionals to implement new strategies based mainly on user experience and personalisation of services.

Although the "client pathway" approach means many different things depending on the context, this marketing tool provides a methodology for assessing the motivations, behaviours and expectations of clients. In the field of tourism and territorial attractiveness, this concept helps to establish the "scenario" of the visitor's experience, from the initial expression of a desire to travel, to post-travel activities, including the organisation of trips. Each of these steps highlights a visitor's interactions with a territorial destination (points of contact, of conflict, etc.). Such an analysis is the key to undertaking strategies and making investments that will improve the welcome extended to travellers.

THE CRITICAL STEP IN TOURISM MARKETING: DEFINING THE CORE CLIENT BASE TARGET
Visitors have multiple aspirations and needs. In approaching the client pathway, tourism marketing of territories must first define its core client target and answer the following crucial question: who are my actions aimed at? This is how the world's major tourist destinations, such as New York, London or Tokyo, have operated to capture tourist flows by means of targeted offerings. In Europe, the recent examples of Amsterdam, Barcelona or Dubrovnik show that targeting is the key to capturing

WELCOME CITY LAB: THE FIRST INCUBATOR DEDICATED TO TOURISM

Established in 2013, the Welcome City Lab is an innovation platform specialised in urban tourism, which includes the world's first incubator dedicated to the tourist sector. It provides start-ups and travel stakeholders with a range of services: sectorial technology watch; a network of contributors from the worlds of tourism, digital technology and institutions; a meeting and exchange forum; a coworking space; and an experimentation platform. For two years, the Welcome City Lab has been publishing a guide to tourism trends, which sums up its analyses of tourism prospects.

the "desired flows" and to avoiding the pitfall of excessive tourism with its negative effects on the quality of life of inhabitants and visitors.
The targeting of client bases reflects a new approach: "a relationship of trust" with peers. Tourism clients seek the opinions of trustworthy third parties on social networks, such as bloggers, expatriates, cultural institutions, specialist websites, associations of enthusiasts, etc. The best-performing destinations have taken these new behaviours into account and now target travel prescribers.

ATTRACTIVENESS ENHANCEMENT BASED ON THE TRAVELLER'S LIVED EXPERIENCE

To assess the competitiveness of your tourist offering, it is necessary to compare it with the visitor's lived experience, which is now at the heart of territorial attractiveness strategies. This approach challenges the classical tourist model featuring the valuation of heritage assets. Thanks to the Internet, the client pathway becomes omni-channel. By alternating digital and physical points of contact[1], a visitor uses a 5-stage pathway (see infographics below). Each stage is essential because the process for selecting destinations and making travel arrangements is ruthless. The final decision results from a combination of rational and subjective factors: emotions, aspirations, peer reviews and even stress. Thus, it is very important to analyse the motives of satisfaction and dissatisfaction.

Stage 1: the longing for travel is developed through the creation of a tourist's image of a destination
The starting point for a tourist's stay is a dream about a holiday, a discovery, a rest period, etc.

This prompts potential visitors to start seeking possible destinations by collecting as much information as possible for a weekend visit or a medium to long stay. The more expensive or longer the planned trip, the greater the importance of this preliminary analysis. The perceived image and reputation of a destination are of fundamental importance to the criteria for assessing its attractiveness. Several other factors also come into play:
• past travel experiences;
• recommendations via the internet, hotels, tourist offices, etc.;
• exposure to advertising campaigns (videos, the press, posters, etc.);
• the reception of targeted e-mail messages;
• "territorial promotion" by means of films or TV series ("Lord of the Rings" filmed in natural locations in New-Zealand, or "Dreams Link", a Chinese TV series filmed in Provence);
• a very attractive territorial offering developed by certain countries (La Réunion and its breath-taking videos with 360-degree panoramic views).
To stimulate the imagination and capture the attention of travellers, it is essential to base the construction of a tourist image on emotions. Incubated in the Welcome City Lab (see box opposite), Fotonower provides tourism operators with tools to exploit these "emotional" photos generated on crowdsourcing platforms, including Instagram, the most used one. ClapNClip provides the same service for the creation of video clips. However, the travellers themselves become the best ambassadors, while the territories are responsible for making these images "go viral". Landscapes remain a major tourist resource, as we can see in Peter Jackson's trilogies: "Lord of the

The five key stages in the tourist pathway

Create a desire, Make people dream
Preselection
Compare destinations
Propose an attractive vision
Look up social networks
Planning
Facilitate the use of services
Anticipation
Reassure the visitor
Personalisation of the experience
Share opinions
Evaluate the stay
Take care of the client relationship

1 Aspiration
Target the right audience
Cost assessment
Choice of accommodation

2 Decision-making
Facilitate the choice
Search for specific information
Manage the underlying imaginary
Choice of transport mode

3 Preparation of the visit
Propose tutorials
Create the «wow!» effect

Arouse emotions
Leave a mark
Interaction with digital tools

4 The visit
Improve the welcome
Meet expectations
Simplify the life of visitors
Offer the unexpected

5 Post-visit
Win client loyalty
Propose new reasons to travel
Exchange views with your networks

Tourists' aspirations and needs

Desires created by professionals and their responses to them

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Rings" and "The Hobbit", whose extraordinary landscapes have boosted tourism in New-Zealand since the first film came out in 2001. These films have had an unprecedented promotional impact: thus, one visitor to New Zealand out of five intends to visit a location relating to these films. The 150 shooting locations and the film studio in Wellington are now promoted by the national tourism agency.

Thus, the more targeted the tourism marketing, the greater a destination's attractiveness in the eyes of the public. However, although visitors are often conditioned to follow pre-planned tourist routes marked with signs, it is equally necessary to surprise them by offering the possibility of a different relationship with the destination. Unusual sites and a warm welcome by local people can be exploited to encourage visitors to get off the beaten track. For example, thanks to the "It's Liverpool" brand, the birthplace of the Beatles has refocused its communication on the visitors and their urban experience. The heritage remains in the background, because today experiencing the visit has priority over actually touring the destination itself.

Stage 2 : decision-making with the help of social networks and peer reviews

This stage comprises four parts: a search for more detailed information (on tourist locations, prices, accommodation, transport, etc); assessment of the overall cost of a stay; connections with social networks to get the opinions of visitors; and making comparisons between destinations.

The information collected via social networks, notably travel blogs, unquestionably influences decision-making. This is particularly the case in countries where digital usage is intensive, such as Korea, or among the younger generations. Thus, according to an OpinionWay survey for voyages-sncf.com (2017), 34% of French people use social networks to find a holiday destination. This rate rises to over 50% for French people aged under 35. During this second stage, the narrative and image of the tourist location play a central role. The factors influencing the choice of destination are mainly the following:

• an attractive image of the destination and its proposed activities;
• the design of the websites;
• the inclusion of links and tools for engaging in dialogue, notably with the bloggers who manage the travel sites;
• special offers;
• the reception of personalised information, etc.

Travel blogs such as the Urban Travel Blog, with its very positive slogan: "The Independent City Guide", are major promotional shop-windows for towns, cities and countries. They have dropped the purely marketing approach based only on official websites. Capturing these influencers has become the strategic focus of destination organisations.

The targeting of mini social networks centred on communities (of runners, climbers, yoga and architecture fans, etc.) makes for the development of an equally fruitful approach to economic influence

and intelligence. It requires the identification of key people with whom to establish trustful relationships, which is a long-term process. This trend towards hyper-personalisation has led to the emergence of new tools based on smart data. The Visitdata start-up, for example, offers players in the tourism sector tools and methods to help them consolidate, handle and visualise all their data, be they internal or external, *i.e.* from tourist information systems, partners, the INSEE French National Statistics agency, the Internet, etc.

If a visitor confirms his/her interest by contacting the players in charge of a tourist destination, he/she becomes a prospect as identified in a "client acquisition" sales approach. The aim of this approach is to allow a favourable decision to be taken.

Stage 3 : preparing for the visit with high expectations regarding travel services and tools

This is the stage where people look for precise information to plan the logistics of their trip and activities. In apparent contradiction with this practice, a growing number of travellers act at the last minute, by inclination or to try to take advantage of good deals.

At this organisational stage, the challenge for tourism sector stakeholders is to plan a trip that is fluid, pleasant and reassuring to avoid an emotionally charged break in the continuity of the client's life, which would be detrimental to the client's overall satisfaction. The idea is to anticipate the client's questions, notably about transport and accommodation. Like in London, the use of online video tutorials remains the most effective and appreciated practice. Thus, destinations are judged according to the quality, reliability, personalisation or ease of use of their travel services (online or not), even when they provide paid services, such as the City Pass: the London Visitor Oyster Card is indispensable for travelling by public transport. At an additional cost, this card can be purchased before the stay and delivered to the client's home by VisitBritain. This facilitates the preparation for the stay and reassures travellers.

Stage 4 : the visit and personalized marketing tools

This key stage comprises three important moments: arrival, stay and departure.

The arrival is important because it is often emotional, particularly in the case of "first time" visits. The points of entry (stations, airports, parking lots, landing points, etc.) and public/private transport operators play a strategic role because they give the visitor his/her most durable first impressions - hence the efforts made in recent years to improve visitors' reception conditions, notably their practical aspects: information, signage, catering, sanitation, wi-fi, etc.

During this stage, new expectations come to the fore: today's visitors increasingly want a personalised experience, during which they feel "active" by meeting the local inhabitants, immersing themselves in their daily lives, being in close contact with local realities, all of which are seen as signs of conviviality and authenticity and no longer privileges

DIGITAL NATIVES ARE MAJOR TOURISM PROMOTERS

The 18 to 28-year-old generation have had a decisive impact on the success of urban destinations. They have a powerful influence on clients in other age groups, notably thanks to their intensive use of social networks. By disseminating their opinions on their stays, they promote the destinations they have enjoyed. Thus, the digital natives are a destination's best investment because they will certainly return to the places that marked their youth.

Faced with the very aggressive marketing campaigns of Greater London or Dubai, for example, the Paris Region must invest in this section of the public to rejuvenate and reinforce its tourism outreach.

Under this new generational approach to tourist destinations, the smartphone has become the new fellow traveller as a replacement for the guide-book, map and camera. It features the three basic parameters of the tourist experience, namely: mobility, customisation and instantaneousness, thereby renewing the very way destinations are depicted.

reserved only for old-style backpackers. Evidence of this is the success of formulas such as "Vivre comme un parisien" (Living like a Parisian) or street art trails, now available all over the world. This is where travel professionals must display their creativity by imagining attractive visitor itineraries featuring suitable services, starting with a high quality "physical" reception with, for example, the deployment of "tourist angels" in public spaces to respond to any requests for assistance.

Interaction with digital tools is inescapable and of strategic importance. Although some activities may have been reserved ahead of a tourist trip, new ones can be added to the programme in response to location-specific recommendations made in real time or as a result of on-the-spot exchanges between visitors and the people they meet. A good illustration of this is the Internet de séjour© concept (a website for your trip) defined by Pierre Eloy and François Perroy: "Through a whole range of tools (free wi-fi, special during-the-stay websites, mobile solutions, access to tourist information offices and printed information), tourists are encouraged every day 'to consume' their destination, the intention being to get them to increase their average daily spend." The Internet de séjour© includes an application developed by Toot Sweet that offers information on local programmes (concerts, plays, films, etc.) for which seats/tickets are available within one hour at the most. Another example: the City Helpline de Paris provides international visitors with a concierge service by telephone in six languages.

Finally, the departure moment remains crucially important to the visitor and the host country in terms of reputation, notably if the departure takes place in stressful conditions (poor coordination, lack of compliance with timetables/schedules, etc.).

Stage 5: the post-stay period is critical to the reputation of a destination and to retaining the client's loyalty

If the client has already provided information and instantly expressed his/her opinions during a trip, the post-stay phase will truly strengthen his/her connection with the destination: this is the moment when the visitor will "decide on" the reputation to give to the destination by becoming either an ambassador for the destination… or a detractor of it. Thus, the destination's ability to preserve close links with its visitors becomes a key factor of success. Effective management of this relationship makes it possible to produce high "client value" and strengthen visitor loyalty, as they will become "repeaters" (visitors who come back again and again). A good way of doing this may be to organise a prize competition. In 2016, the Hong Kong tourist office organised the "I Never Knew" competition for international visitors, who were invited to share their images and videos showing the most surprising sites in the agglomeration. The best photo and video content was rewarded. It is less expensive to win the heart of a loyal client than to win a new client. It is essential to master client relationship management (CRM) tools, as the Val Thorens ski resort in France has done: its shared web-based tool enables public- and private-sector resort operators to remain permanently in touch with their clients in order to offer them new stays.

KEY FACTORS OF SUCCESS AND LESSONS FOR FRANCE

Thanks to Paris, Versailles, Disneyland and many other tourist locations, the Paris Region has many assets it can leverage in its rivalry with major global tourist destinations. Indeed, in 2016, it topped world rankings with 18.4 million international tourists generating 83.8 million overnight stays[2]. To improve its tourist offering, numerous initiatives are being deployed, such as: the Tourism Volunteers; the "Paris, ville augmentée" destination contract; "The Impressionists" destination contract in partnership with Normandy; the Grand Paris Express new metro transport network; development of the Welcome City Lab innovation platform, etc. The start-ups that work on identifying trends and usages are becoming vital links in the tourism industry value chain. They will enable the Paris Region to enhance its tourism attractiveness by developing tools that are in tune with the times and by adapting to visitors' new consumption practices. ∎

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1. "The borderline between physical and virtual channels of communication is getting less distinct due to a new 'omni-channel' approach, which aims to deliver a more consistent and smoother customer experience whatever channel of communication is used." [Filser, Roederer, 2015].
2. Source: Comité régional du tourisme (CRT) Paris Île-de-France / visitparisregion.com/en

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