FRENCH MARKET
• Emmanuel Macron, French President since May 2017, was reelected in May 2022 for another 5 years - Centrist and social-liberal political party

• In 2022, France remains the 7th largest economy in the world and represents approximately 1/5 of the Euro area gross domestic product

• GDP: $2.685 trillion in 2021- GDP Growth: +0,20% vs 2020 - In the first quarter of 2022, GDP fell slightly (-0.2%), the purchasing power of households per consumer unit fell sharply (-1.9%)

• GDP per capita: $39,037 in 2021 vs 40,560 in 2020 (source: data.worldbank - tradingeconomics.com)

• Unemployment rate in Q1 2022 is almost stable at 7.3% vs 8% in 2020 (source: INSEE)

• The French business climate has deteriorated sharply in March 2022, due to decline in the forward-looking balances of opinion in manufacturing and the deterioration of the climate in wholesale trade

• Inflation rate is expected to reach 5.5% in 2022 (vs. 1.6% in 2021), the highest level since 1985 due to the Russia/Ukraine conflict (source: INSEE)
• Population: 67 million
• Capital city: Paris (2.2 million residents)
• France is the 3rd most populated country in the European Union
FRENCH TRAVELER PROFILE

TRAVELING IS A THERAPY
Recharge batteries, gather with family, take a break from daily life

DECISION MAKER’S CONSIDERATIONS
Trip cost, weather, security level

TRAVEL INTERESTS
Outdoors adventures, culture and heritage, authenticity, gastronomy

PREFERRED ACTIVITIES
Sightseeing, eating out, relaxing, entertainment, shopping, sports

LIVE LIKE A LOCAL
Immerse in local culture
Participate in unique experiences

SOCIAL & SUSTAINABLE TRAVEL
Share experiences, connect places, people and memories
FRENCH TRAVELER PROFILE

SAFETY FIRST
High security level, proper health system, certified international standards

BOOKING ONLINE
In 2021, 52% of the French booked their vacation online

LAST-MINUTE BOOKINGS
The pandemic context has increased the number of last-minute bookings

OFF-SEASON TRAVEL
Always more destinations to explore, lower rates

FLEXIBILITY IS KEY
Flexible booking conditions are an important criteria when booking one’s next vacation

RELY ON TOURISM PROFESSIONALS
Manage the increasingly complicated logistics of travel planning
### FRENCH TRAVELERS’ FAVORITE DESTINATIONS

**Top 10 Long-haul Destinations in 2019**

1. United States
2. Thailand
3. Indonesia
4. Vietnam
5. Cuba
6. India
7. Mexico
8. Canada
9. Mauritius
10. Japan

**Top 10 Medium-haul Destinations in 2019**

1. Spain
2. Italy
3. Greece
4. Portugal
5. Morocco
6. United Kingdom
7. Turkey
8. Iceland
9. Belgium
10. Tunisia
FRENCH TRAVELERS TO THE U.S.A.

✓ In 2019, France was the 3rd European source market for the United States. 1.84 million French visitors travelled to the U.S. in 2019 and another 279,968 in the first quarter of 2020.

✓ In 2022, France is the 2nd European source market for the U.S. after the U.K. and the 4th International market after Canada, Mexico and the U.K.

✓ The United States remains one of the top choices among long-haul destinations for French travelers. 66% of French travelers to the U.S. are repeaters.

✓ Visitation increased by 4.3% vs. 2018 and doubled between 2001 and 2019

✓ The average length of trip is 15.9 nights and the average number of states visited is 7

✓ The French spent $6.46 billion in the U.S.

✓ Spending trends France in 2019:
  Total Travel & Tourism Exports: $5.98 billion
  Travel Receipts: $4.75 billion
  Passenger Air Transportation: $1.23 billion

✓ Total spending has increased by 2% in comparison with 2018

✓ France ranks 11th in comparison to other overseas markets

✓ The average expenditure is $3,487

Source: Brand USA Market Information, U.S. Department of Commerce/National Travel and Tourism Office (NTTO)
FRENCH TRAVELERS TO THE U.S.A.

### Q31b/c. Age and Gender

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 - 24 Years</td>
<td>6.6%</td>
<td>7.8%</td>
</tr>
<tr>
<td>25 - 29 Years</td>
<td>5.2%</td>
<td>6.6%</td>
</tr>
<tr>
<td>30 - 34 Years</td>
<td>6.0%</td>
<td>6.0%</td>
</tr>
<tr>
<td>35 - 39 Years</td>
<td>3.9%</td>
<td>3.3%</td>
</tr>
<tr>
<td>40 - 44 Years</td>
<td>8.4%</td>
<td>4.1%</td>
</tr>
<tr>
<td>45 - 49 Years</td>
<td>6.4%</td>
<td>6.7%</td>
</tr>
<tr>
<td>50 - 54 Years</td>
<td>4.5%</td>
<td>4.2%</td>
</tr>
<tr>
<td>55 - 64 Years</td>
<td>6.9%</td>
<td>5.3%</td>
</tr>
<tr>
<td>65 or More Years</td>
<td>4.2%</td>
<td>3.9%</td>
</tr>
</tbody>
</table>

Average age global: 41 years old

Source: U.S. Department of Commerce/National Travel and Tourism Office (NTTO), 2020
FRENCH TRAVELERS TO THE U.S.A.

Main purposes of trip for French travelers in 2019:
- Vacation/Holiday: 65.3%
- Visit Friends/Relatives: 15.1%
- Business/Professional: 18.9%

Top activities from French visitors while traveling in the USA:

- Shopping: 82.9%
- Sightseeing: 75.6%
- Small Towns/Countryside: 34.3%
- Nightclubbing/Dancing: 49.0%
- American Indian Comm...: 9.4%
- Amusement/Theme Parks: 24.7%
- Art Galleries/Museums: 42.2%
- Camping/Hiking: 8.4%
- Casino/Gamble: 9.6%
- Concert/Play/Musical: 14.0%
- Cultural/Ethnic Heritage...: 19.7%
- Environmental/Eco. Exc...: 4.4%
- Experience Fine Dining: 19.0%
- Golfing/Tennis: 2.8%
- Guided Tour(s): 16.0%
- Historical Locations: 30.8%
- Hunting/Fishing: 0.8%
- National Parks/Monume...: 11.6%
- Other: 2.1%

Source: U.S. Department of Commerce/National Travel and Tourism Office (NTTO), 2020
FRENCH TRAVELERS TO ARIZONA

• NUMBER OF FRENCH TRAVELERS TO ARIZONA:
  ➢ 21,800 TRAVELERS

• FRENCH SPENDING:
  ➢ $14.06 MILLION
# Airlift from France: Connections to AZ

<table>
<thead>
<tr>
<th>Airline</th>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air France</td>
<td>Paris CDG</td>
<td>Detroit, Atlanta, Dallas, Denver, Los Angeles, Seattle, New York JFK</td>
</tr>
<tr>
<td>American Airlines</td>
<td>Paris CDG</td>
<td>Dallas, New York JFK, Chicago, Philadelphia</td>
</tr>
<tr>
<td>Delta Air Lines</td>
<td>Paris CDG</td>
<td>Minneapolis St Paul, Salt Lake City, Atlanta, Seattle, New York JFK, Detroit</td>
</tr>
<tr>
<td>United Airlines</td>
<td>Paris CDG</td>
<td>Chicago, Washington DC, Newark, San Francisco</td>
</tr>
<tr>
<td>British Airways</td>
<td>Paris CDG</td>
<td>London</td>
</tr>
<tr>
<td>Lufthansa</td>
<td>Paris CDG</td>
<td>Frankfurt</td>
</tr>
<tr>
<td>Air Canada</td>
<td>Paris CDG</td>
<td>Montreal</td>
</tr>
<tr>
<td>Air Tahiti Nui</td>
<td>Paris CDG</td>
<td>Los Angeles</td>
</tr>
<tr>
<td>French Bee</td>
<td>Paris Ory</td>
<td>Los Angeles</td>
</tr>
</tbody>
</table>
TOP 5 REASONS TO TARGET THE FRENCH MARKET

The demand for travel in 2022 is strong among French people. There is a burning desire to spend quality time in safe and exciting destinations ("revenge travel").

France is a mature market

France is the 2nd European source market for the U.S. after the U.K.

France boasts a high repeater rate (66%)

“Living the American Dream”: images of expansive landscapes and wide-open spaces, as made popular by classic American TV shows and movies, remain vivid in the French imagination, which explains why Western states are popular in France. Arizona is most definitely one of the French’s top destinations in Southwestern U.S. and enjoys a very positive image and perception.
ACHIEVEMENTS & ACTIVITIES
TRADE AND PR ACTIVITIES – FY22

- Creation and distribution of **electronic newsletters** to key travel industry contacts, to keep them updated about what’s happening and what’s new in Arizona.

- Organization of **sales calls and meetings** with tour operators and airline representatives to strengthen relations with AOT, push sales, ensure that all product segments are included, and develop partnership opportunities.

- Organization and participation in **trainings**, including customization of a master deck presentation.

- Creation and distribution of **press releases** to keep the media informed and updated on Arizona.

- Organization and coordination of **individual press trips** to showcase Arizona as a premier US destination and generate positive coverage.

- Creation of a **calendar of posts** for AOT’s dedicated French Facebook account.

- Creation of 2 to 3 **Facebook posts** a week and follow-up.
TRADE ACTIVITIES APRIL-JUNE: NEWSLETTERS

QUOI DE NEUF EN ARIZONA ?


**Nouveautés Loisirs**

Un passeport digital pour découvrir les parcs et monuments de l'Arizona

À l'occasion de la semaine des Parcs nationaux, du 15 au 24 avril, l'Office du Tourisme de l'Arizona a mis en place un nouveau passeport digital afin d'encourager plus facilement la citoyenneté de parcs et monuments que compte l'État. Le "AZ Parks Passport", c'est son nom, permet d'accéder à nombreuses informations utiles près des parcs et monuments. En plus de trouver des suggestions d'itinéraires, des cartes, des conseils pour bien choisir le ou les parcs que l'on souhaite visiter, mais aussi de gagner des prix exaltants.

Les parc sont répartis par catégories, telles que "canyons colorats", "désert éclatant" ou encore "paysages historiques". Le passeport est téléchargeable.

**Opening rate: 15.99%**

**AZ PARKS PASSPORT**

HI-THE ROAD
COUNT THE PARKS

**Opening rate: 20.23%**

**ARIZONA OFFICE OF TOURISM**

**Opening rate: 19.22%**

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1. "The Lost Osceola’s Gold Mine"
   Aussi dit "le trésor d’Osceola perdu", la légende raconte qu’un trésor d’or aurait été caché dans la montagne Superstition, à l’est de Phoenix. A défaut de le trouver, les voyageurs peuvent toujours se balader sur une randonnée de 2 heures sur la Superstition Trail.

2. "Descente du mont Laguna"
   Situé au nord de Tucson, le pont culminant des 3,26m offre un panorama sublime. [Liens du site officiel](https://azcentral.com).

**Quoi de neuf en Arizona ?**

9 extraordinaires aventures en plein air

L’Arizona offre de nombreuses expériences et activités de plein air, pour beaucoup uniques et propres à l’État. Une les 9 aventures que vous ne trouverez qu’en Arizona et qui vous coûteront le tarif de...
# TRADE ACTIVITIES APRIL-JUNE: SALES CALLS & TRAININGS

<table>
<thead>
<tr>
<th>TRADE FY22</th>
<th>Apr-22</th>
<th>May-22</th>
<th>Jun-22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Calls</td>
<td>18</td>
<td>15</td>
<td>12</td>
</tr>
<tr>
<td>Training Seminars</td>
<td>1</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Total # of people present at training seminars</td>
<td>12</td>
<td>33</td>
<td>87</td>
</tr>
<tr>
<td>Tradeshow Appointments</td>
<td>0</td>
<td>0</td>
<td>16</td>
</tr>
</tbody>
</table>

**Total KPIs: 193**
PR ACTIVITIES: INDIVIDUAL PRESS TRIP

- Jean-Paul Frétilllet, Régal – Bimonthly #1 food magazine, circ. 201,276 - copies/565,298 readers

12-page travel report which came out in the May-June 2022 issue of Regal magazine, following his individual press trip earlier this year.

Value: $226,800
PR ACTIVITIES: INDIVIDUAL PRESS TRIP

• Jean-Paul Frétillet, La France Agricole – Weekly agriculture magazine, circ. 101,000 - copies/195,123 readers

2-page travel report which came out June 10th in La France Agricole magazine, following Jean-Paul Frétillet individual press trip.

Value: $71,457
PR ACTIVITIES : PRESS RELEASES

12 newsletters distributed throughout FY22

Various themes: craft beer, ghost towns, sustainable tourism, wine & vineyards, hiking trails, road trips...
## PR ACTIVITIES: FY22 GENERATED COVERAGE

<table>
<thead>
<tr>
<th>Month</th>
<th>FY22 Generated coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 2021</td>
<td>$181,081</td>
</tr>
<tr>
<td>October 2021</td>
<td>$10,150</td>
</tr>
<tr>
<td>November 2021</td>
<td>$47,513</td>
</tr>
<tr>
<td>December 2021</td>
<td>$1,100</td>
</tr>
<tr>
<td>January 2022</td>
<td>$17,700</td>
</tr>
<tr>
<td>February 2021</td>
<td>$611,940</td>
</tr>
<tr>
<td>March 2021</td>
<td>$4,150</td>
</tr>
<tr>
<td>April 2022</td>
<td>$2,534</td>
</tr>
<tr>
<td>May 2022</td>
<td>$226,800</td>
</tr>
<tr>
<td>June 2022</td>
<td>$12,534</td>
</tr>
<tr>
<td><strong>TOTAL FY22</strong></td>
<td><strong>$1,646,968</strong></td>
</tr>
</tbody>
</table>
FRENCH FACEBOOK:

- 2 to 3 posts / month
## FRENCH FACEBOOK:

<table>
<thead>
<tr>
<th></th>
<th>FY 19</th>
<th>FY 20</th>
<th>FY 21</th>
<th>FY 22</th>
<th>Evolution vs N-1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Likes (year end)</td>
<td>5,131</td>
<td>5,282</td>
<td>5,370</td>
<td>7,578</td>
<td>+41%</td>
</tr>
<tr>
<td>Followers (year end)</td>
<td>4,912</td>
<td>5,077</td>
<td>5,178</td>
<td>113,585*</td>
<td>+2090%</td>
</tr>
<tr>
<td>Total Reach of the page</td>
<td>N/A</td>
<td>85,649</td>
<td>45,797</td>
<td>71,919</td>
<td>+57%</td>
</tr>
<tr>
<td>Total engagement</td>
<td>3,639</td>
<td>6,290</td>
<td>3,001</td>
<td>4,912</td>
<td>+64%</td>
</tr>
<tr>
<td>Videos /minutes viewed</td>
<td>494</td>
<td>773</td>
<td>1,329</td>
<td>N/A</td>
<td>/</td>
</tr>
<tr>
<td>Average engagement rate</td>
<td>6%</td>
<td>9.2%</td>
<td>6.5%</td>
<td>6.67%</td>
<td>+2%</td>
</tr>
</tbody>
</table>

*NOTE: The huge increase of fans, interactions and reach is explained by the fact that Herrmann Global sponsored 4 posts in December running in January on behalf of AOT.*
B WORLD COMMUNICATION
28 rue de l'Amiral Hamelin
75116 Paris - France