France REPORT February 2025



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I. Market Overview

Orchestra/L'Echo Touristique January 2025 - Top 20 destinations and market trends update

All destinations combined, travel sales by physical and online travel agencies were back on the rise in January 2025 (+6.1% compared with January 2024). This is an encouraging sign after the stagnation of the cumulative business volume in December 2024 (-0.3%) and the growth of the previous months (+2.6% in September, +10% in October). The top three destinations are Spain, Greece and metropolitan France. Asia has been recovering for several months. In January, this was illustrated by the surge in Vietnam (+235.6%), whose average basket was down (-6.3%). The country has climbed to 11th place. According to our information, a commercial operation between a tour operator and a distribution network boosted sales of holidays to this destination. The United States is ranked 9th with a 15% decrease in business volume VS January 2024.

Source : Baromètre Orchestra/L'Echo : le top 20 des destinations en janvier 2025 (lechotouristique.com)

French visitor profile to the United States

With 1,706,081 French visitors to the United States in 2024, the French market performed 7.10% better than in 2023 and only 7.46 points behind the record year of 2019. France's dynamic performance was similar to that of 2018. Despite the many challenges posed by inflation and the unfavourable EUR/USD exchange rate, the attractiveness of the US as a multi-destination in France remains undeniable. It is the number one selling destination for many tour operators, agencies and OTAs, and repeat travellers (more than 75% of the market) return to the USA with an unchanged average length of stay (14 nights).

Source: France 2024 Advanced International Visitor Profile (travelmi.com)

Univairmer files for bankruptcy

Univairmer, a network of 52 travel agencies, filed for bankruptcy on February 12, 2025, after declaring a suspension of payments. This follows the failure of rescue attempts, in particular the refusal of the shareholders to provide the necessary €3 million. The damage is estimated at between 7 and 8 million euros, affecting customers, tour operators and financial partners. On February 20, 2025, the Commercial Court of Compiègne decided to place Univairmer in receivership, according to the network's management. The receivership will last until 5 March 2025. This decision will have significant consequences for Univairmer's employees, suppliers and customers.

Sources : Univairmer dépose le bilan ! (tourmag.com) ; Univairmer en redressement judiciaire (lechotouristique.com)

TUI Group: business up 13% in the first quarter

The TUI Group delivered a solid performance in the first quarter of the 2024/2025 financial year. Turnover rose by 13% year-on-year to \leq 4.9 billion. The number of customers grew by 6% to 3.7 million, of which 700,000 opted for dynamic formulas, an increase of 18%. Operating profit was \leq 50.9 million, a significant improvement on the \in 6 million recorded in the same period last year. This is the tenth consecutive quarter of positive results for the Group. The 'TUI Musement' segment, which specializes in excursions and transfers, reduced its loss to 2.3 million euro, compared with 10.7 million euro in the previous year. The 'Markets & Airlines' segment, which includes tour operators, also recorded a loss of 125.2 million euro due to seasonal factors and delays in the delivery of Boeing aircraft. Despite moderate growth of 2% in summer bookings, TUI remains optimistic for the coming year and expects an increase in turnover and operating profit of between 5% and 10%.

Source : <u>TUI Group : l'activité progresse de 13% au premier trimestre (lechotouristique.com)</u>

E-commerce in France in 2024

In 2024, French e-commerce reached €175.3 billion, with growth of 9.6%. The services sector, including tourism, accounted for €108.4 billion (+12%). Online sales of travel and leisure products grew by 4%, confirming their dynamism despite a slowdown compared to the post-Covid years. With inflation down, prices held up better, stabilising the average basket. Consumers have maintained a high purchasing rate, with an average annual expenditure of €4,216 per consumer. The tourism sector has benefited from this trend, although growth will no longer be in double digits as in 2022-2023. Online booking platforms remain indispensable, and the digitalisation of tourism offers continues to evolve to meet new consumer expectations. According to Fevad, this growth will be driven by an increase in transactions and the search for competitive offers. Online tourism is proving to be a key driver of French e-commerce, reinforcing its weight in the digital economy.

Source : Bilan du e-commerce en France en 2024 (quotidiendutourisme.com)

II. Executive summary

✤ 2024 TSUSA International Showcase -Follow up :

The Tourmag article and video following journalist Xavier Petit's participation in the Atlanta Showcase (December 2-5, 2025) was released on February 16th, 2025. See section V. PR & Media activities for review.

Tennessee 2025 International Marketing Strategy :

On February 26th, BWC participated in a call with the Tennessee Tourism teams and a panel of global reps to discuss in-market trends, insights and priorities that Tennessee would like to consider when addressing overseas markets and planning actions in 2025.

OOS Trade Fam Trip to Tennessee with Icelandair -Update :

BWC completed the recruitment of five French top-tier tour operators to participate in the Tennessee trade fam trip in partnership with the Icelandair French office (April 11-16, 2025). See section III. Travel Trade activities for full update.

NAAR Voyages Newsletter highlight :

NAAR Voyages contacted BWC to feature the South in their monthly BtoB Newsletter, with a special focus on Mississippi, Tennessee and Louisiana. See section III. Travel Trade activities for details and screenshots.

		July	Aug	Sept	Q1 TOTAL	Oct	Nov	Dec	Q2 TOTAL	Jan	Feb	Q3 TOTAL	FY 24/25 TOTAL
	France												
	Travel Trade)											
	Trade Meetings/ Trainings	5	6	11	22	12	8	9	29	6	4	10	61
i o paranero	Number of Agents	3	2	12	17	2	67	28	97	0	41	41	155
	Trained												
LA/MO/MS/	DD												
NC/ROTS/SC /TN/WV	Media Meetings	2	15	7	24	8	5	7	20	7	4	11	55
	Total number of articles published	13	25	8	46	22	12	23	57	21	29	50	153
	Impressions	4 381 940,00	3 821 475,00	899 920,00	9 103 335,00	3 599 340,00	9 080 010,00	11 171 427,00	23 850 777,00	13 884 467,00	15 596 200,00	29 480 667,00	62 434 779,00

International Metrics for FY25 - Q1 through Q3

III. Travel Trade

FY24 Trade Marketing co-operative digital with a Tour Operator and Content Editor



119,580 contacts, achieving 41.02% open rate. The video was also published on Tourmag's You tube channel, totalizing 6,400 views by the end of February.

Link to content : Travel South USA International Showcase, le rendez-vous incontournable pour les tour-opérateurs français spécialistes des États-Unis

Travel South USA International Showcase, le rendez-vous incontournable pour les touropérateurs français spécialistes des culturelles et divertissements musicaux comme le sud en a le secret. Etats-Unis

connaître cette région aux voyageurs français.





Du 2 au 5 décembre 2024 avait lieu à Atlanta, vibrante capitale de l'État de Géorgie, le salon « Travel South USA International Showcase », le plus grand évènement régional BtoB dédié aux destinations du sud-est des États-Unis. Sous l'impulsion de Liz Bittner, President & CEO de Travel South USA, cet événement a réuni 450 professionnels du voyage venant de 19 pays durant trois journées riches en discussions et rendez-vous productifs, découvertes

L'occasion pour 130 tour-opérateurs et réceptifs internationaux dont 7 français (Califun, Cercle des Voyages, Directours, Les Maisons du Voyage, Partir aux États-Unis, Salaun Travel South USA est un groupement de destinations du sud-est des Etats-Unis qui Holidays et Terre d'Escales) déchanger avec les représentants locaux venus venter les œuvrent ensemble depuis 1965 à la promotion et au développement du tourisme national attraits et nouveautés de leurs destinations. Un seul et unique but, mieux appréhender les et international pour l'Alabama. la Caroline du Nord, la Caroline du Sud, le Kentucky, la richesses du « Vieux Sud » américain pour proposer aux visiteurs français toujours plus Louisiane, le Mississippi, le Missouri, Rhythms of the South Atlanta, Nashville, Nouvelle- d'offres de voyage incluant des hébergements authentiques ou insolites, des activités et Orléans), le Tennessee et la Virginie-Occidentale. Représenté en France par B WORLD visites immersives ou méconnues, ainsi que des événements culturels et musicaux qui tous ! ») auquel la population locale reste fidèle.



TourMaG @tourmagcom · 3,27 k abonnés · 1,4 k vidéos

Les plus

FourMaG est le média incontournable pour les actualités du tourisme francophon



S'abonner

Accueil Vidéos Shorts Playlists





Travel South USA International Showcase, le rendez-vous pour les TO français... 1.5 k vues • il v a 4 iours



Travel South USA International Showcase, le rendez-vous pour les TO français spécialistes des États-Unis

ICELANDAIR (FRENCH OFFICE)	Juliette Desmul Account Manager France	3. Trade Fam Trip to Nashville -Update. BWC completed the recruitment of five top-tier tour operators to participate in the April 11-16, 2025, Tennessee fam trip in partnership with Icelandair. Final list :
		2011/02 April 1
	Stéphane Michaut Regional Sales Coordinator	4. NAAR Voyage Newsletter highlight. NAAR is a fast-growing tour operator on the French market, regularly adding new networks to his distribution portfolio. Stéphane contacted BWC in February to highlight the Travel South USA destinations in their monthly Newsletter with a new format. BWC coordinated the suggested angles and provided Q&A Interview-type content. The Newsletter was shared on February 24 th to both NAAR's BtoB diffusion list and social media page (LinkedIn). It included a special focus on the states of Mississippi, Tennessee and Louisiana.
NAAR VOYAGES	Il n'existe aucune région des à l'est, par des kilomètres di les vagues de l'Atlantique, ai golfe du Mexique, et avec le l'ouest, ces 12 Etats sont un culinaires, sans en oublier l Découvrez 3 étapes impor	<image/> <section-header><section-header><section-header><section-header><section-header><section-header><section-header><image/><image/><image/><image/><image/><image/><text><text><text><text><text><text><text></text></text></text></text></text></text></text></section-header></section-header></section-header></section-header></section-header></section-header></section-header>

IV. Sales calls

Trade monthly Newsletter: share inspirational content, event calendar, must-do attractions, and new travel suggestion with trade partners.

Newsletter release

BWC created and distributed a press release featuring the destinations of Rhythms of the South, Kentucky, Missouri, North Carolina and Tennessee. It highlighted tips and places to escape the crowds and plan unforgettable moments in the South. The Newsletter also included a section to promote the Tourism Exchange USA platform, with a Kentucky product highlight. LINK

-Trade contacts: 1.290 -Open rate: 30.7%





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NEWSLETTER

LE SUD-EST AMÉRICAIN HORS DES SENTIERS BATTUS : ASTUCES ET BONNES ADRESSES

TOURISM EXCHANGE USA

Tourism Exchange USA - Trouvez des offres comissionnables dès aujourd'hui !

Tourism Exchange USA, en partenariat avec Brand USA et Travel South USA, est une plateforme B2B de pointe qui propose aux professionnels du tourisme du monde entier des expériences touristiques authentiques, sur mesure et auparavant difficiles à trouver dans le sud-est américain. Avec pour mission de rendre les États-Unis faciles à réserver, cette plateforme élargit l'accès aux riches trésors culturels, historiques et culinaires de la région. Ce mois-ci, nous mettons en lumière le Kentucky, État qui recèle certaines des visites les plus captivantes présentes sur « The Exchange » à l'exemple de « Whispers on



Louisville, Kentucky Whispers on Whiskey Row: Murder, Crime, & Ghosts of Derby City - Louisville Food Tours

From \$35.00

Discover the dark history of Derby City on this thrilling walking tour through downtown Louisville. Duration 1.5 Hours About Step into the shadows of the past on a haunting journey through the... Trade contacts, meetings, phone calls: explore training, action, and partnerships.

Company Name	Contact mode	Share Contact person	Activity/Activation	Follow up/Next step
CELTEA VOYAGES (SELECTOUR)	Email	Maria	Celtea Voyage is a Selectour-affiliated travel agency network, mainly located in the Western regions of France. Maria contacted BWC to get advice on an itinerary she was working on for clients in September 2025. BWC suggested overnights and not-to-miss attractions in Kentucky, Tennessee, Mississippi and Louisiana, together with useful links for music events. The agency advised BWC that the trip was later confirmed and booked.	No follow-up for now.
JET BLUE	Meeting	Aurélie Trouillard France Sales Manager	BWC had a meeting with Aurélie in February to review common interest and partnership opportunities to promote the South in 2025. Seizing Jet Blue connectivity to TSUSA regional airports from Paris-CDG through Boston Logan and New York JFK airports, BWC will explore potential common activations and/or trainings to plan with Aurélie.	Follow-up in future reports.
AMERIGO	IERIGO Email Dela Dela Prod Direc		Nathalie contacted BWC for a personal trip she is taking in April to the South (Georgia and South Carolina). She requested assistance with overnights in Charleston and Hilton Head. BWC shared details with the TSUSA team to review and coordinate with the South Carolina team.	Follow up in March.
PARFUMS DU MONDE	Meeting	Cathy Moulin Product Manager & Christelle Huet Regional Sales Coordinator	Parfums du Monde specializes mainly on group escorted tours and contacted BWC for training assistance in presenting a Louisiana and Mississippi itinerary to an Ad-hoc group that will be travelling in October 2025, put together with U.S. receptive Go West Tours. BWC gave a 1.15-hour training session to Christelle on February 21 st to help her highlight the destinations' assets and the itinerary's added value in terms of activities, visits and lodging inclusions. After being in touch for the first time, Christelle and BWC will explore further opportunities to collaborate to promote the South in her influence area (West of France).	BWC will follow up on future cooperation opportunities.

V. PR & media

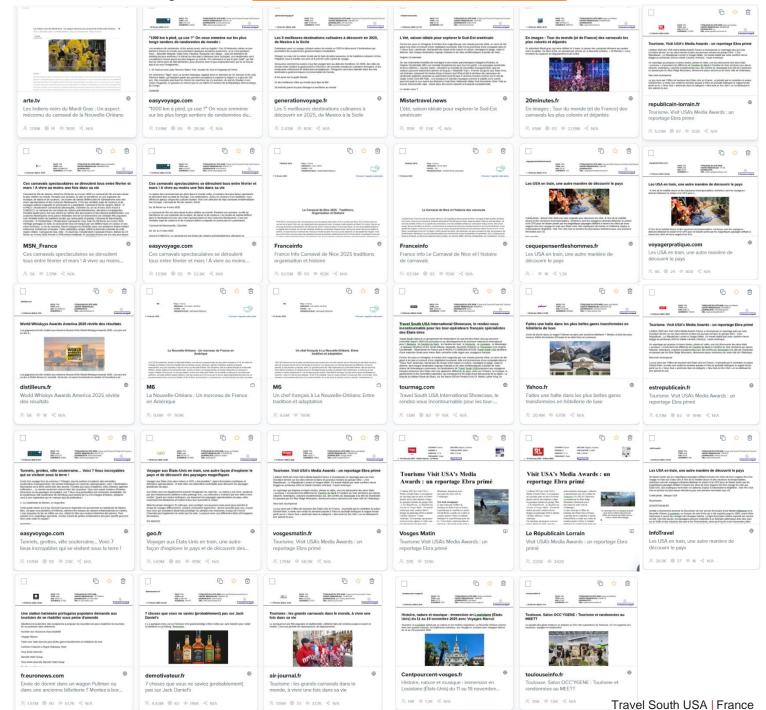
Contacts with the media, meetings, releases, coverage opportunities, clipping, press trips.

Press releases and Media contacts.

Press release : BWC created and distributed a press release featuring the destinations of Rhythms of the South, Kentucky, Missouri, North Carolina and Tennessee. It highlighted tips and places to escape the crowds and plan unforgettable moments in the South. <u>LINK</u>

-Media contacts: 491 -Open rate: 32.15%

Coverage book Link : February 2025 | GPP France - FY 24/25 | CoverageBook



Company Name	Contact mode	Contact person	Activity/Activation	Follow up/Next step				
Global Media Marketplace & pre-trips March 26 - April 3, 2025 (update)								
with the TSUSA tea	In February, BWC completed air ticket reservations for all participating journalists, shared the flight tracking template with the TSUSA team and coordinated appointment scheduling for the Louisville marketplace sessions. BWC also recommended Jean-Michel de Alberti to be France's representative during the April 1 Media panel discussions in Louisville that will focus on key travel trends, how the South can better tell stories and what makes the perfect press trip.							
MASCULIN.COM	Call	Vincent Charretier Journalist	Monthly visits : 4.5 millions. <u>Masculin.com – Mode, Montre, Auto, High-</u> <u>Tech – les tendances pour Homme</u> Registration completed. Destination : Missouri. Louisville City Tour : Taste of Kentucky.	Coordination in Louisville, KY.				
PRESTIGE MAGAZINE	Call	Brice Charton Journalist	Audience : 100.000 https://prestiges.international Registration completed. Destination : Louisiana. Louisville City Tour : Louisville Icons.	Coordination in Louisville, KY.				
DESIRS DE VOYAGES	Call	Jean-Michel De Alberti Editor in Chief	Print circulation : 70.000. www.desirs-de-voyages.fr Registration completed. Destination : Tennessee. Louisville City Tour : History and Architecture	Coordination in Louisville, KY.				
LA VIE EST BELLE MAGAZINE & RADIO J	Email	Judith Lossmann Editor in Chief	Audience : 80.000 (+ Radio). www.lavieestbellemag.com Registration completed. Destination : North Carolina. Louisville City Tour : New & Coming Soon.	Coordination in Louisville, KY.				
EASYVOYAGE	Call	Fallon Bouvier Journalist	Monthly visits : 340.000 www.easyvoyage.com Registration completed. Destination : Kentucky. Louisville City Tour : awaiting choice.	Coordination in Louisville, KY.				

Company Name	Contact mode	Contact person	Activity/Activation	Follow up/Next step
VOYAGER MAGAZINE	Call	Dominique Krauskopf Editor in Chief	OOS Voyager Magazine coverage trip -Update. Following previous discussions, BWC reached out to Delta Air Lines and Air France teams in Paris for air sponsorship. After both airlines declined the opportunity for budget issue, BWC coordinated with the TSUSA team to review the costs for the trip and suggest the Rhythms of the South and Visit Mississippi teams to split the expenses, which was approved. After checking black-out periods, BWC confirmed April 9-20, 2025, as selected dates for all the partners involved (New Orleans, Natchez, Jackson (MS), Clarksdale or Cleveland (MS), Tupelo, Nashville and Atlanta. The answer was a go for all the cities. BWC booked the air tickets and car rental for the two participating journalists, and shared additional details about content angle and expectations for the coverage trip.	BWC will help coordinate logistics and content finalization in March.
<mark>Gault</mark> &Millau	Meeting	Daniel Dias Partnership Director	Gault&Millau is a well-known culinary guide and quarterly magazine that takes the readers around the world through gastronomy and hospitality reviews that feature news, encounters, address book, recipes from chefs (new talents or multi-award-winning), restaurant openings, visits of hotels, palaces, guest rooms, books, exhibitions, lifestyle Print circulation : 45,000 copies. Print diffusion : kiosques, 'Relay' boutiques (train stations, airports), Department Stores, 12 'Salons Grands Voyageurs' SNCF train station lounges, premium hotels, Golf clubs, Uni- Presse, e-shops. Digital diffusion : PressReader, e-shop and free copies through Air France Press, SGV SNCF, FFGolf. BWC had a meeting with Daniel in February to discuss partnership and Louisiana coverage opportunities in 2025/2026. Follow up and suggestions to highlight the TSUSA destinations' culinary assets will be shared with the TSUSA team if relevant.	Follow-up will be provided in future reports.

I-TOURISME.FR	Email	Juliette Barron Partnership Director	I-Tourisme press group owns prominent Travel Trade media brands such as Tour Hebdo and Le Quotidien du Tourisme with two websites and one joint daily Newsletter (six articles per day). Key figures : 2.59 million cumulative Page Views 2.12 million cumulative Visits 25.000 Newsletter contacts with 41% Open Rate. BWC had contact with Juliette to receive I-Tourisme's full media kit and will explore potential advertorial and/or editorial opportunity for the TSUSA destinations.	Follow-up will be provided in future reports.
MICHELIN EDITIONS	Email	Catherine Guégan Travel Guides Editor	The Michelin Editions content team is working on updating their Louisiana & the American southeast Travel Guide for a new release in 2026. The priority is to focus mainly on Atlanta and their author, Catherine Zerdoun, will travel there during the 2 nd half of April 2025 (exact dates to be confirmed). BWC informed the TSUSA team, who approved the assistance request and will coordinate with Atlanta CVB when the dates are known.	Follow-up will be provided in future reports.

VI. Newsletters & Visit USA activity key points.

Meetings, Newsletter, Workshops update, Consumer shows, E-learning, and projects.

Activity/Activation Follow up/Next Source step -2024 Monthly Newsletters (French and English): BWC created and shared an article dedicated to the state of North Carolina. It featured musical highlights such as festivals and venues (Merle Fest in Wilkesboro, Tuck Fest in Charlotte, Lexington Barbecue Festival, Outer Banks Kite Festival and more). CA EMPS FORTS MUSIC Des montagnes à la côte Atlantique, la Caroline du Nord dispose d'une palette de festivals et de concerts mettant en lumière sa riche diversité culturelle et ses paysages pittoresques. L'un des plus emblématiques, MerleFest, est organisé chaque année en avril à Wilkesboro. Il attire durant quatre jours 75.000 fans du monde entier pour rendre hommage au Bluegrass, au Folk et à la musique Americana. Associant les sports de plein air et la musique, **<u>Tuck Fest</u>** se tient quant à lui au U.S. National Whitewater Center à Charlotte. Cette expérience unique en son genre combine le frisson d'activités en plein air comme le kayak, l'escalade et le VTT, avec trois jours de musique live exaltante. En juillet, les Highland Games at Grandfather Mountain sont un événement incontournable mêlant musique et traditions celtiques dans le splendide cadre des Blue Ridge Mountains. Les amateurs de barbecue ont ensuite rendez-vous à Lexington, surnommée la « capitale mondiale du barbecue » pour le Lexington Barbecue Festival, célébration des recettes locales de viande de porc fumée au feu de bois, dans une ambiance hautement festive. Côté mer, le Outer Banks Kite Festival réunit au son des vagues et d'une musique vibrante les amoureux de cerfs-volants colorés planant haut au-dessus des dunes, dans l'esprit décontracté des Outer Banks. Link to content : Temps forts musicaux en Caroline du Nord - Office du tourisme des USA

-2025 Online banner promotion:

In February, BWC coordinated the creation of the 2025 promotional banners that will highlight the TSUSA destinations from March to December 2025. BWC created a new welcome message and selected relevant imagery with the TSUSA team. The display calendar was validated with the Visit USA France team, so the destinations rotate in the opposite order compared to 2024.



-2025 Training Day :

As part of the FY25 Trade plan of actions, BWC attended the 2025 Visit USA France Training Day dedicated to the southern destinations on March 4th, 2025 (Mardi Gras Day).

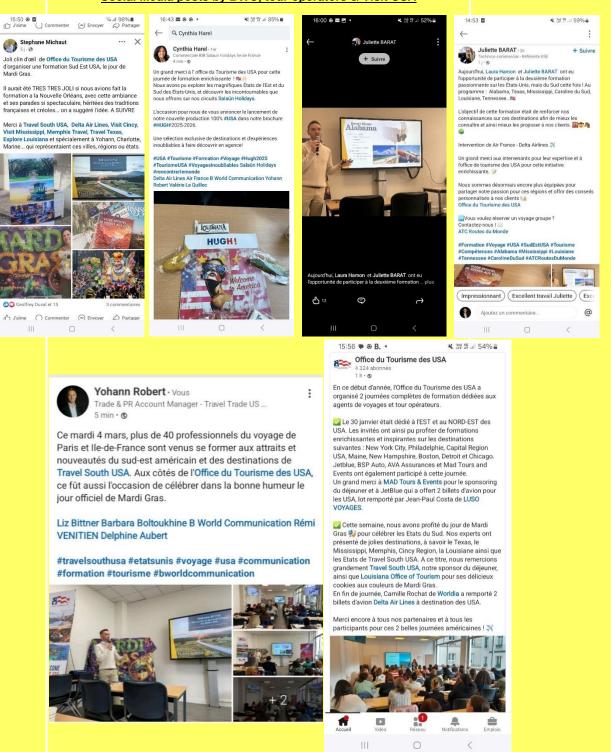
Format :

- On-site signage (TSUSA roll-up and on-screen asset).
- Lunch sponsoring entitling TSUSA to a dedicated web banner for two months on the Visit USA France website (March & April 2025).
- 2-hour TSUSA presentation provided by BWC.
- TSUSA French travel guides and note maps offered to each participant.
- TSUSA-branded hike bag plus a 'Civil Rights Trail' book offered to lucky winner Marjorie Chataigne from the 'Jancarthier' travel distribution network.
- Final attendance : 41 travel professionals from tour operators and travel agencies.

Photos of the event



Social Media posts by BWC, tour operators & Visit USA



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- 2024/2025 statistics for the V10 version launched in October 2024 : -398 Trade professionals and US specialists connected to the program. -130 of them (32.66%) reached the Expert level. -100 of them (25.12%) entered the 1st Club level.

Travel South USA | France

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