

France REPORT

August 2025



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I. Market Overview

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

All destinations combined, travel sales by physical and online travel agencies declined by 8% compared to July 2024. Tourism activity has declined significantly, though less sharply than in June (-16.7% year-on-year), a month hit by the Israel-Iran conflict. Most destinations showed annual drops. Mainland France, the leading choice for French travelers, slipped slightly (-5%), performing better than Spain (-11.9%) and like Greece (-5.3%). Tunisia, ranked 4th, plunged (-17.1%). Italy (5th) managed a modest gain (+1.3%), alongside Portugal (+8.3%). Egypt posted a strong rebound (+14.4%), while Japan soared (+80.6%) despite a notable rise in average spend (+10.2%). Another key takeaway: the United States are recovering. Their decline (2.9%) remains below the overall barometer drop; a sharp improvement compared to their 30% fall last spring.

Source : [Baromètre Orchestra/L'Echo : le top 20 des destinations en juillet 2025 - L'Echo Touristique](#)

French Travel to the US holds strong in 2025

In July 2025, France ranked third worldwide among source markets for travel to the United States, just behind the United Kingdom and Japan. With near-perfect stability compared to July 2024, France has recorded 907,920 visitors since January 1st, a 4.3% increase versus 2023, though still 6.61% below 2024. This momentum, fueled by last-minute bookings, a favorable EUR/USD exchange rate for Europeans, and the strong appeal of local offerings, keeps the USA at the top of summer travel choices—even as the French tourism market faces headwinds this year.

Source : [NTTO, Brand USA](#)

French travel agencies navigate a mixed but resilient summer

The latest EdV-Orchestra Observatory figures show a summer season marked by contrasts. While overall volumes are slightly down, several destinations continue to perform well and offer encouraging signs for travel operators. Departures in July 2025 declined by 5% year-on-year, but France recorded a modest increase (+1.9%). Some destinations stood out with strong growth, including Canada (+20.4%), Belgium (+31.8%), Egypt (+13.3%), and the Netherlands (+15.2%), offsetting declines in Spain, Greece, and the United States. Bookings in July 2025 also reflected cautious demand, with a 9% overall decrease. Yet, positive momentum was visible in Egypt (+14.5%) and Belgium (+39.6%), demonstrating travelers' appetite for diverse destinations. Looking ahead to August, bookings remain 8% lower compared to last year, but France, Spain, and Greece continue to dominate the top three choices. Several markets show strong upward trends, notably the UK (+45.6%), Canada (+20.5%), Egypt (+9.8%), and Italy (+6.5%), confirming the dynamism of certain segments.

Source : [L'été difficile des agences de voyages en France - MisterTravel](#)

Voyamar unveils its 2026 brochures

The tour operator introduces its new 2026 brochures, featuring circuits across Africa, the Americas, Asia, and the Middle East, along with its Stays & Clubs – Winter 2025 / Spring 2026 edition. Voyamar continues to refresh its visual identity with carefully crafted covers. Each one highlights a female figure — a symbol of emotion and escape. Generated with AI, these visuals reflect a human vision of travel while celebrating the central role of women in tourism. Americas: From Canadian Rockies Road trips to Mexican beaches, with a spotlight on Route 66's centennial. New circuits in Central and South America include small-group tours (12–20 travelers) and revamped itineraries in Argentina, Chile, Brazil, Ecuador, Panama, Mexico, and Guatemala.

Source : [Voyamar présente ses nouvelles brochures 2026 - Tour Hebdo](#)

Global air travel & destinations

French skies are close to pre-crisis records, with 177.9 million passengers in 2024—99.1% of 2019 levels. Europe remains the cornerstone of outbound travel, led by Spain (17.1 million passengers, +7.5%), Italy (+7.5%) and the UK (+6.6%), driven by proximity and low-cost carriers. The Maghreb and Turkey are booming ; Morocco (+16.2%), Algeria (+10%) and Tunisia (+7.7%) all saw double-digit gains, while Turkey matched Tunisia's performance (+7.7%). Long-haul travel is also rebounding: the U.S. welcomed 9.7 million French passengers in 2024 (+5.4%), Canada surged (+13%), and Brazil showed strong growth in 2025 (+13.6%). China made a dramatic comeback (+80% in 2024), while Japan's momentum slowed. Overall traffic from France rose +4.8% in H1 2025 compared with 2024. If this trend continues through the summer, volumes could surpass 2019 records.

Source : [Baromètre 2024-2025 des destinations de voyages des Français - Tour Hebdo](#)

II. Executive summary

❖ FY26 French Social Media Content

As of August 2025, BWC handles in-market monthly content creation for the Facebook and Instagram Travel South USA French-language platforms, promoting each of the TSUSA destinations with identical post on both platforms. See section VI. Social media for performance results and screenshots.

❖ NAAR Voyages Roadshow (October 2025) :

As part of the FY26 plan of action, BWC is preparing for the partnership with NAAR Voyages (B2B tour operator), consisting in a two-city roadshow in Eastern France (Strasbourg and Metz), in October 2025. The events will include a 45-minute presentation, on-site signage and a seated dinner for a targeted 20-25 travel agencies per city. BWC handled logistics and shared marketing assets (TSUSA logo, French video) in August and will follow-up on the invitation's visual in September.

❖ TSUSA International Showcase -Update (November/December 2025) :

Following the completion of recruitment for the 2025 TSUSA International Showcase in Kansas City, BWC worked on flight reservations and logistic details. See section III. Travel Trade for full update.

❖ TSUSA Pan-European Roadshow -Update (March 2026) :

In August, BWC reviewed venue options, secured visits and handled rate quote requests for the 2026 TSUSA France Mission, confirmed on March 16th, 2026. Venue selection will be shared with the TSUSA in early September to move onwards with the event's components and layout.

❖ International Metrics for FY26 - Q1 :

		July	Aug	Sept	Q1 TOTAL	FY 25/26 TOTAL
9 partners AL/KY LA/MO/MS/ NC/ROTS/SC /TN	France					
	Travel Trade					
	Trade Meetings/ Trainings	5	11		16	16
	Number of Agents Trained	2	0		2	2
	PR					
	Media Meetings	3	4		7	7
	Total number of articles published	9	10		19	19
	Impressions	282 680,00	2 877 330,00		3 160 010,00	3 160 010,00

III. Travel Trade

FY26 Trade events or marketing highlights with Tour Operators

Company Name	Contact mode	Contact person	Activity/Activation	Follow up/Next step
2025 TSUSA INTERNATIONAL SHOWCASE November 29 - December 7, 2025 (Kansas City, MO) & Post Tours				
Update : BWC completed the recruitment of six pre-qualified tour operators and ensured all of them selected two visits of Kansas City for November 30 th and December 1 st , along with the post-tour of their choice, given that a maximum of two participants from a same market can be on a similar itinerary. After reaching out to the Delta Air Lines Sales office in Paris, confirmation was shared by Béatrice De Rotalier (France Director of Sales) to grant six ecredit vouchers with a value of \$1,000 each to cover French participants' airfare. Travel South USA and B World warmly thanked the Delta Air Lines French office for their continued partnership and support, and will continue to highlight the airline through any promotional opportunity in France and worldwide. BWC started to handle air ticket reservations and will complete the process in September. Note that Intermèdes Voyages had to withdraw from the event due to work calendar conflict, and was replaced by Yucaipa Voyages.				
BACK ROADS	Meeting	Delphine Berteuil USA Specialist & Product Referent	Registration completed with post tour : Beats of Memphis to Music City Vibes (Tennessee). Kansas City tour #1 : Rhythms & Roots. Kansas City tour #2 : Gangsters & Gin.	BWC will handle insurance form in September.
CARACTERES D'AMERIQUES	Meeting	Caroline Compain Product Manager	Registration completed with post tour : Get Your Kicks, a Missouri Route 66 Road Trip Adventure (Missouri) Kansas City tour #1 : Morning Genera Tour. Kansas City tour #2 : Urban Art & Wine Tour.	BWC will handle insurance form in September.
EVASIONS USA	Meeting	Manon Cherel Product Manager	Registration completed with post tour : Beer, Baseball, Blues & A Little Bit of Route 66 – A True St. Louis Experience! (Missouri) Kansas City tour #1 : Afternoon Genera Tour. Kansas City tour #2 : Kansas City Crafted, a journey Through Local Makers.	BWC will handle insurance form in September.
NAAR VOYAGES	Meeting	Fanny Pousson USA Specialist & Product Referent	Registration completed with post tour : Get Your Kicks, a Missouri Route 66 Road Trip Adventure (Missouri) Kansas City tour #1 : Morning Genera Tour. Kansas City tour #2 :	BWC will handle insurance form in September.
PARTIR AUX ETATS-UNIS	Meeting	Olivier Pulcini Founder & CEO	Registration completed with post tour : Art & Adventure in Arkansas (AR) (Arkansas) Kansas City tour #1 : Morning Genera Tour. Kansas City tour #2 : KC BBQ Experience.	BWC will handle insurance form in September.
YUCAIPA VOYAGES	Meeting	Pauline Carpier Founder & Director	Registration completed with post tour : Beats of Memphis to Music City Vibes (Tennessee). Kansas City tour #1 : Kansas City's Historic Treasures Tour. Kansas City tour #2 : Kansas City Crafted, a journey Through Local Makers.	BWC will handle insurance form in September.

IV. Newsletter & Sales calls

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

Newsletter release

No Newsletter by BWC in August. Content creation will resume in September.

Trade contacts, meetings, phone calls: explore training, action, and partnerships.

Company Name	Contact mode	Share Contact person	Activity/Activation	Follow up/Next step
TOURCOM	Email	Mélissa Da Silva Partnership Manager	Tourcom is one of France's prominent retail distribution networks. BWC had a sales call with Mélissa to discuss training opportunities for the Travel South USA destinations in 2025 or 2026, especially among Tourcom's best USA specialists. Mélissa will update BWC once confirmed time slots become available, most likely during Q1 or Q2 2026.	No follow up for now.
LECLERC VOYAGES	Meeting	Louana Roumazeilles Travel Specialist	Update – Following the assistance request shared in July, BWC coordinated with Atlanta (GA), Savannah (GA), Asheville (NC), and Nashville (TN) to provide visits, passes and tips. BWC will finalize coordination in September to ensure Louana receives the replies she is expecting.	Follow-up in the September report.
JETBLUE (FRANCE)	Meeting	Auréliе Trouillard Senior Sales and Marketing Manager & Eve Messulam Market Representative to Expedia TAAP	BWC had a meeting on August 7 th with JetBlue France and the Expedia TAAP French office to review interest in common actions to promote the South. JetBlue and BWC confirmed a 1-hour Trade Webinar on November 6 th , 2025, at 11:00 AM. Target : 45 to 60 participants from tour operators and travel agency networks nationwide. Goal : raise awareness, share new information and encourage product development and/or extended visibility for the TSUSA destinations.	BWC will explore further opportunities with Expedia TAAP in France for dedicated travel agency trainings.
VOYAGE EN FRANCAIS	Meeting	Marlène Perillat Sales Director	Voyage en Français sells French-speaking guided tours in New Orleans and other U.S. cities and handles ad-hoc group trip reservations. Marlène reached out to BWC to get advice and contacts for French-speaking services in Natchez, Mississippi for a group that will travel to the South at the end of September 2025. BWC shared contacts and suggestions.	No follow-up for now.
KUONI FRANCE	Email	Emmanuelle Delbecq Tour Operating Coordinator & Charline Lambert USA Product Manager	In August, BWC was in touch with the Kuoni France team to discuss training opportunities during Q1 2026. Emmanuelle took note of BWC's interest in being part of their Roadshow events for TSUSA and will update BWC later this Fall. BWC also shared suggestions with Charline to update her selection of newly opened hotels in New Orleans for her upcoming brochure.	Follow-up in future reports.

V. PR & media

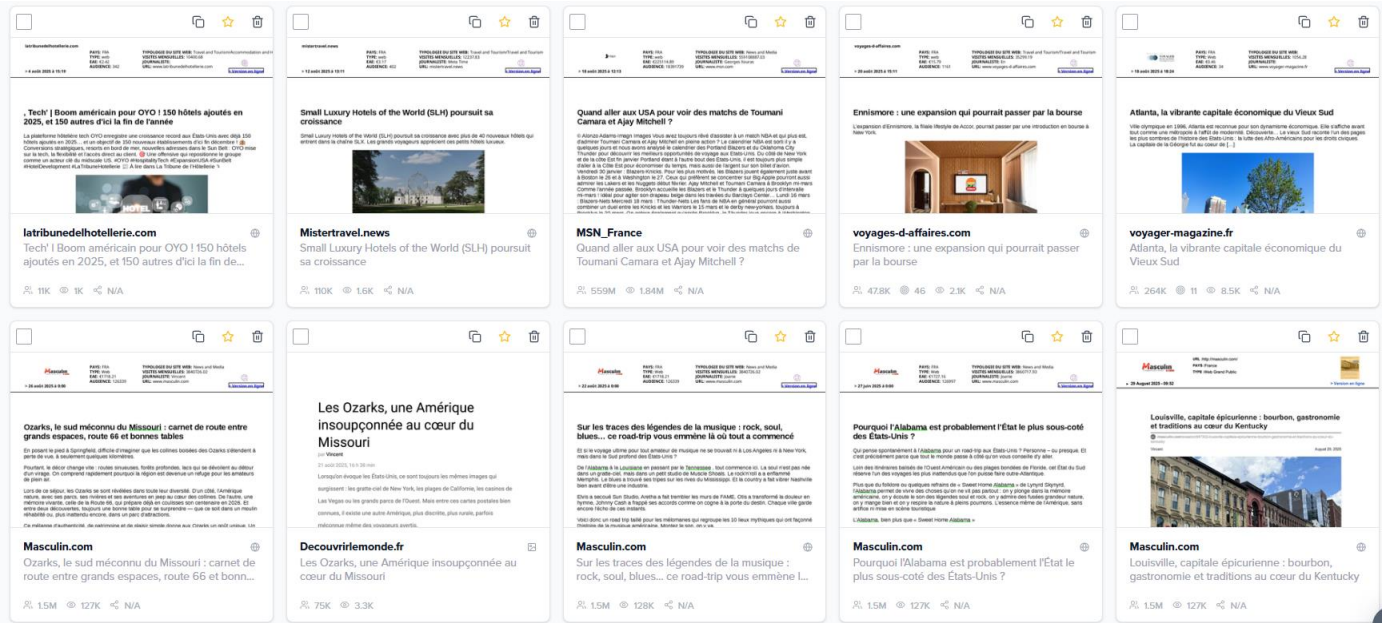
Contacts with the media, meetings, releases, coverage opportunities, clipping, press trips.

Press releases and Media contacts.

No press release in August. Content creation will resume in September.

❖ Coverage book Link : [August 2025 | GPP France FY25-26 | CoverageBook](#)

August 2025



Company Name	Contact mode	Contact person	Activity/Activation	Follow up/Next step
Monthly media contacts				
VOYAGER MAGAZINE	Meeting	Dominique Krauskopf Chief Editor	Following the OSS press trip in April 2025 for Rhythms of the South and Visit Mississippi, Dominique released his 3rd article dedicated to the city of Atlanta. Link to content : Atlanta, la vibrante capitale économique du Vieux Sud - Voyager Magazine In August, BWC helped Dominique get imagery for his 4th and last article dedicated to the state of Mississippi. Release is expected mid-September.	Follow-up in the September report.

Company Name	Contact mode	Contact person	Activity/Activation	Follow up/Next step
Monthly media contacts				
MASCULIN.COM & DECOUVRIRLEMONDE.FR	Email	Vincent Charretier Chief Editor	Post-GMM 2025 update : following his participation in the 2025 TSUSA Global Media Marketplace, Vincent published three articles in August : two on his Missouri pre-fam itinerary (on two different media platforms) and one on his Louisville discovery. Links to content : https://www.masculin.com/evasion/847148-ozarks-le-sud-meconnu-du-missouri-carnet-de-route-entre-grands-espaces-route-66-et-bonnes-tables/#adday https://decouvrirlemonde.fr/les-ozarks-une-amerique-insoupconnee-au-coeur-du-missouri/ https://www.masculin.com/evasion/847302-louisville-capitale-epicurienne-bourbon-gastronomie-et-traditions-au-coeur-du-kentucky/	No follow-up needed.
LOST IN THE USA.FR	Meeting	Delphine Givord & Jean-Philippe Cavaillez Travel bloggers and trip Facilitators	Lostintheusa.fr is a Travel Blog fully dedicated to the USA and sharing multiple tips and advice for visitors to get inspired by authentic, not-to-miss or off the beaten path experiences. Website : 52,000 unique monthly visitors. Facebook : 21,000 followers. Instagram : 12,700 followers. Delphine and Jean-Philippe reached out to BWC on July 13th with a trip project starting August 11th through September 7th, 2025, and including overnights in Missouri, Tennessee, North Carolina and Louisiana. Given the last-minute notice, BWC could not place a request for assistance through the TSUSA teams but shared tips about the new experiences and visits they had not covered during their previous visits. BWC encouraged them to anticipate their requests at least a couple of months in advance if they plan to travel to the South again in the future.	Post-trip blog articles will be shared in the September report.
LUXE INFINITY	Meeting	Patrick Koune Chief Editor	Luxe Infinity is an online and print magazine dedicated to various luxury trends in travel, fashion, lifestyle, jewelry, gastronomy, culture, art, and more. A combination of elegance, editorial quality, targeted distribution, and technological innovations to offer a high-performance media for a high-earning readership. For Luxe Infinity magazine, luxury is the sublimation of know-how and creation, from past, present, and future, that makes every moment exceptional and enjoyable. Print circulation : 10,000 copies. Readership : 55,000. Patrick contacted BWC to discuss potential editorial partnership in 2025/2026. A meeting will be planned on the upcoming IFTM/Top Resa Show to explore further.	Follow-up in future reports.

VI. Social Media

As of August 2025, BWC is handling in-market social media content creation on dedicated TSUSA Facebook and Instagram French pages.

Throughout the month of August, BWC coordinated with the TSUSA team to ensure a successful transition for the following aspects :

- ✓ Working access to the platforms.
- ✓ Head of page presentation updates.
- ✓ TSUSA KPIs expectations.
- ✓ Content delivery timeline and calendar layout.
- ✓ Monthly reporting process.

Paid promotion

BWC suggested using paid promotion to help gain new followers, especially among the Instagram community. The TSUSA team agreed on sponsoring a selection of posts each month, for a maximum amount of \$100 out of the existing Social Media activity budget line.

Extended visibility

Decision was also made to promote the French Facebook and Instagram pages through BWC's upcoming Newsletters and press releases to Trade and Travel Media contacts, along with the Visit USA France monthly content.

Content

B World Communication published 9 Facebook and Instagram posts in August, with a selection of highlights and events such as Arts & Culture (Mississippi), Music festivals (Atlanta), Food & Libations (Louisiana, Tennessee), Neighborhoods and attractions (Kentucky, Missouri), Beaches & Nature (Alabama, North Carolina, South Carolina).

Facebook	August 2025	Instagram	August 2025
Facebook page followers	7,647	Instagram page followers	20
Facebook reach	1,072	Instagram reach	90
Facebook views	1,705	Instagram views	1,803
Facebook likes	32	Instagram likes	65
Facebook comments	2	Instagram comments	6
Facebook shares	3	Instagram shares	0

Post highlights

North Carolina - beaches & nature: Outer banks, Corolla's wild horses.

Mississippi - street art/arts & culture: Jackson, Hattiesburg.

South Carolina - beaches & nature: Lowcountry Nature Adventures.

Louisiana - culinary/food & libations: Commander's Palace New Orleans.

Atlanta - Summer festivals.

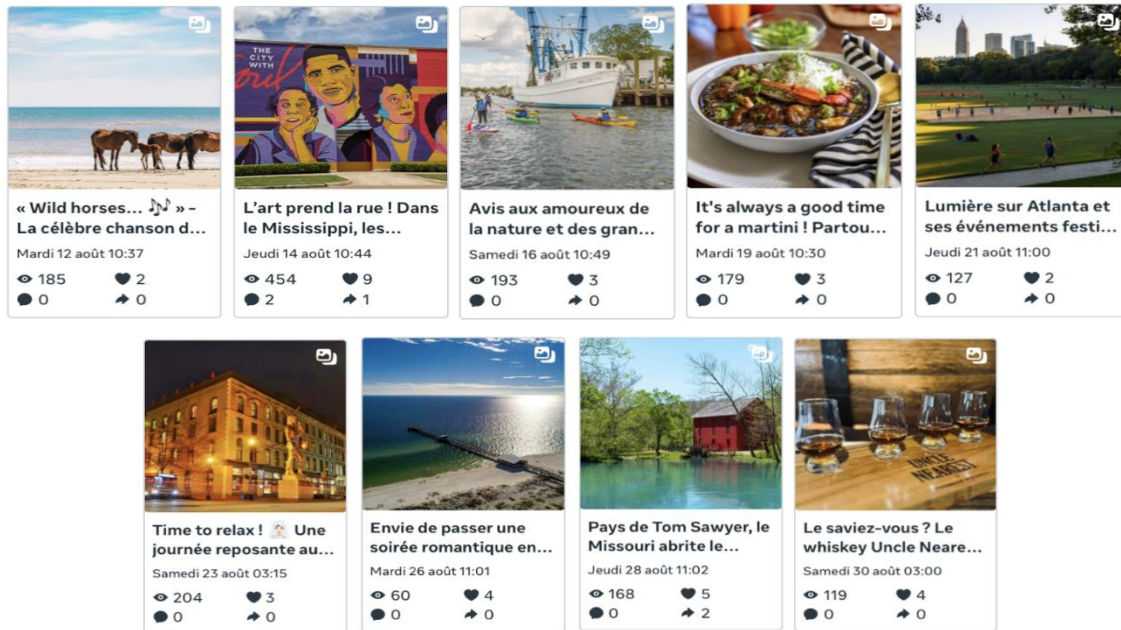
Kentucky - spa/neighborhoods & attractions: 21c Museum Hotel Louisville, The Kentucky Castle, Versailles.

Alabama - beaches & nature: Gulf Shores and Orange Beach sunsets.

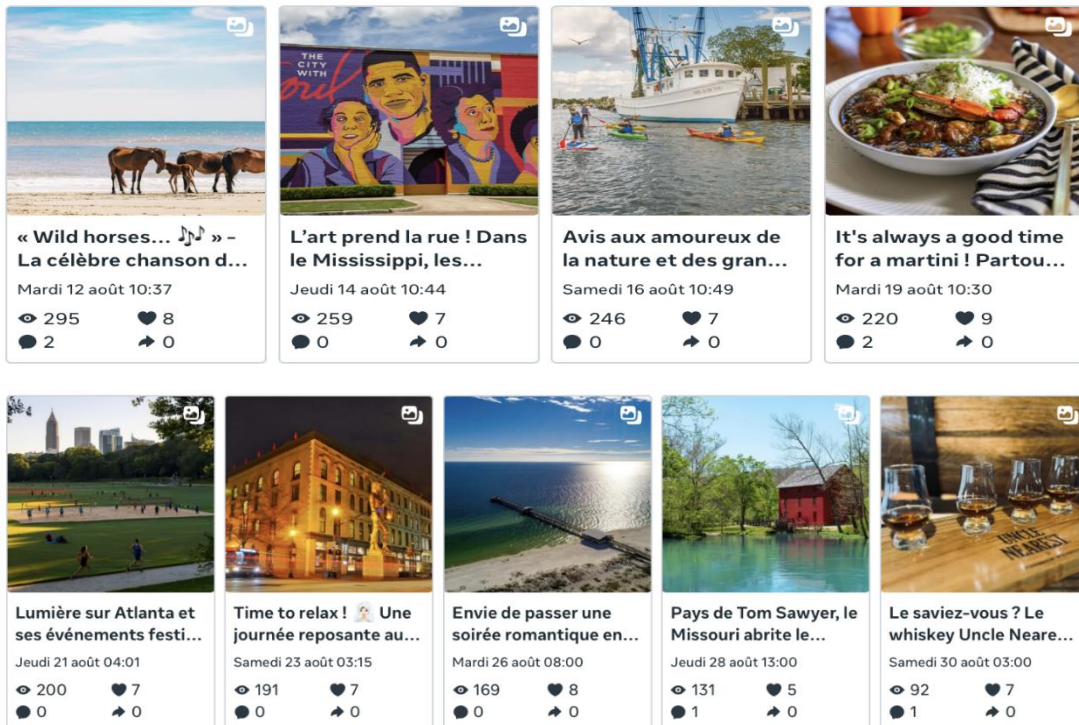
Missouri - neighborhoods & attractions: Alley Spring and Mill.

Tennessee - whiskey/food & libations: Uncle Nearest.

August Facebook posts

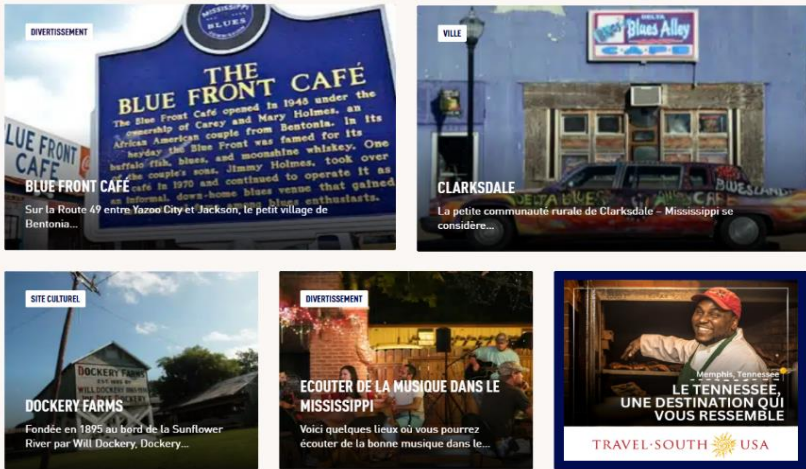


August Instagram posts



VII. Newsletters & Visit USA activity key points.

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

Source	Activity/Activation	Follow up/Next step
	1. 2024/2025 Membership Monthly Newsletter (French and English). No content shared in August. Industry Newsletter distribution will resume in September. 2. 2025 Membership monthly banner promotion. Tennessee was promoted in August, out of Mississippi and Louisiana Visit USA France source pages.   3. E-learning -Update. 2024/2025 statistics for the V10 version launched in October 2024 : -730 Trade professionals and US specialists connected to the program. -187 of them (25.61%) reached the Expert level. -142 of them (18.04%) entered the 1st Class Club.	
