

**TRAVEL
SOUTH
USA**

THE INTERNATIONAL
GATEWAY TO THE
SOUTHERN USA

**Program of Work
Benelux**

Growth Trajectory

2015–2019 CAGR

-0.8%

Spending

0.9%

Visits

2023–2027 PROJECTED CAGR

9.3%

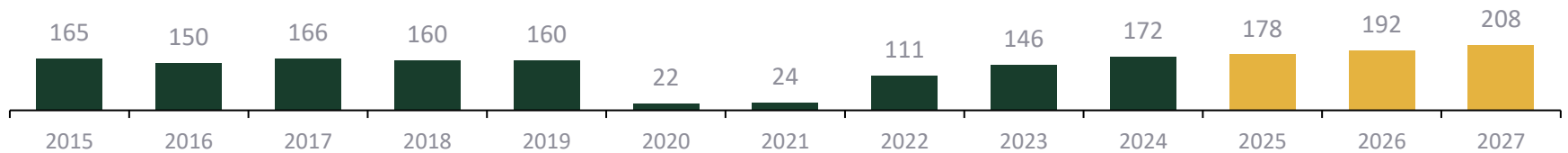
Spending

2%

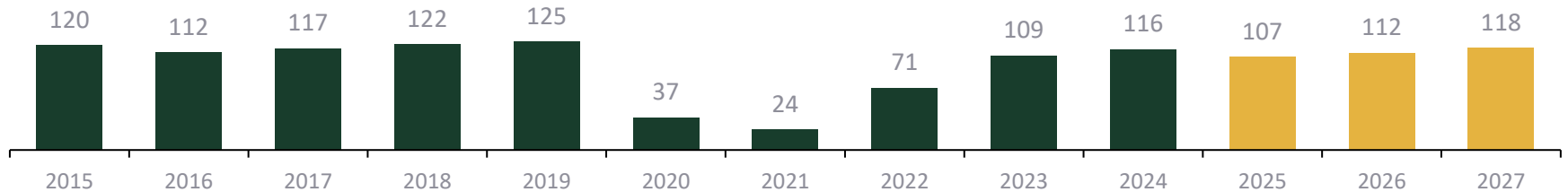
Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending (\$M)



Visits (K)



■ Historic ■ Forecast

Benelux

\$191.9M

2026 TSUSA Spending

+7.9% YOY vs. 2025

111.9K

2026 TSUSA Visitors

+4.3% YOY vs. 2025

\$2.8B

2026 USA Spending

+7.2% YOY vs. 2025

1.3M

2026 USA Visitors

+4% YOY vs. 2025

\$177.9M

2025 TSUSA Spending

+3.4% YOY vs. 2024

107.3K

2025 TSUSA Visitors

-7.4% YOY vs. 2024

\$2.6B

2025 USA Spending

+0.5% YOY vs. 2024

1.3M

2025 USA Visitors

-8.1% YOY vs. 2024

Where are we?

Current international arrival numbers remain below desired levels, and we recognize that both FY26 and FY27 will continue to be challenging for many tour operator partners. However, the impact is mainly visible within the first-time USA traveler segment and traditional gateway destinations.

The Travel South region attracts a more experienced and well-traveled audience, often visiting the USA for a third or fourth time. These travelers are generally more destination-focused, less influenced by short-term political developments, and continue to value the region's culture, authenticity, landscapes, and experiences. As a result, interest in the region remains relatively stable.

The current EUR/USD exchange rate has reduced the effective value of the available marketing budget. Therefore, our FY27 strategy focuses on spending budgets more strategically and prioritizing long-term impact over short-term visibility.

While maintaining a visible market presence remains important, we propose a more selective approach toward recurring event participation and traditional activations. Instead, we aim to invest more strongly in long-term and trade tools that continue generating value beyond a single campaign period.

We therefore choose to propose one bigger, innovative project, which combines online and print channels. A digital e-book campaign with Travel Diaries, which creates lasting consumer inspiration while also serving as a practical sales and marketing tool that can be continuously shared through our own channels and by trade partners directly with their clients.

Strategic Plan for FY 2026-27

For FY2026-27, the strategy will focus on strengthening trade partnerships, expanding bookable product and building destination awareness through sustained content and consumer engagement.

TRAVEL TRADE OUTREACH

Strengthen trade partnerships and expand bookable Travel South USA product through targeted product development and long-term sales tools.

Key activity:

- Product inventory and operator outreach
- Product development and itinerary expansion
- Trade newsletters
- Travel Diaries e-book as a sales tool
- Cooperative campaigns and Visit USA engagement

PR & MEDIA OUTREACH

Maintain destination visibility through thematic media outreach and evergreen content that builds awareness of the South’s culture and experiences.

Key activity:

- Thematic PR newsletters
- Ongoing media outreach
- Travel Diaries editorial content
- SEO destination content and storytelling
- Media relationship building

SOCIAL & CREATOR

Maintain an always-on social presence while using targeted paid amplification and third-party content to grow reach and engagement.

Key activity:

- Facebook and Instagram content
- Reels, stories and community engagement
- Strategic post boosting
- Monthly follower-growth campaigns
- Amplification of Travel Diaries content

Benelux Market Overview

KPI's & GOALS

Project	KPI
TRADE	
Tour operator meetings	95
Agent Trainings	70
International Showcase & FAMs participants	11
Travel South Travel Trade Newsletter	10
Open rate for Newsletters/leads generated	30%
Managed Media	
Media Meetings	35
No. of Articles Generated	70
Estimated Views (online articles)	1950000
Print Readership (Print articles)	50000
Global Media Marketplace & FAMs	5
Travel South USA PR Newsletters	10
Open rate for Newsletters/leads generated	30%
Social Posts - Owned Channels	
Meta - FB /IS (at least 8 per month)	8+ per month
Partner Engagement	
Alabama Highlighted Activation	Travel Diaries Coop
Kentucky Highlighted Activation	Travel Diaries Coop
Louisiana Highlighted Activation	Travel Diaries Coop
Mississippi Highlighted Activation	Travel Diaries Coop
Missouri Highlighted Activation	Travel Diaries Coop
North Carolina Highlighted Activation	Travel Diaries Coop
South Carolina Highlighted Activation	Travel Diaries Coop
Tennessee Highlighted Activation	Travel Diaries Coop
ROTS Highlighted Activation	Travel Diaries Coop

Benelux - 2026

Category	Date	Description	Location
Consumer	September 27, 2026	Joker Reisbeurs	Mechelen, Belgium
Media / Consumer	September - December	Travel Diaries: publicaiton digital content	n.a.
Trade	Nov 29-Dec 3, 2026 + Dec 3 - 6, 2026	Travel South International Showcase	Nashville, TN + FAMS

Benelux - 2027

Category	Date	Description	Location
Media / Consumer	January	Travel Diaries - realease Dedicated E-book	n.a.
Media	April 26-29, 2027	Travel South Media Marketplace	Bentonville, AR + Press Trips
Trade	May 2-6, 2027	IPW	New Orleans, LA