



TRAVEL
SOUTH
USA

THE INTERNATIONAL
GATEWAY TO THE
SOUTHERN USA



Program of Work France

Growth Trajectory

2015-2019 CAGR

-1.1%

Spending

-1%

Visits

2023-2027 PROJECTED CAGR

5.2%

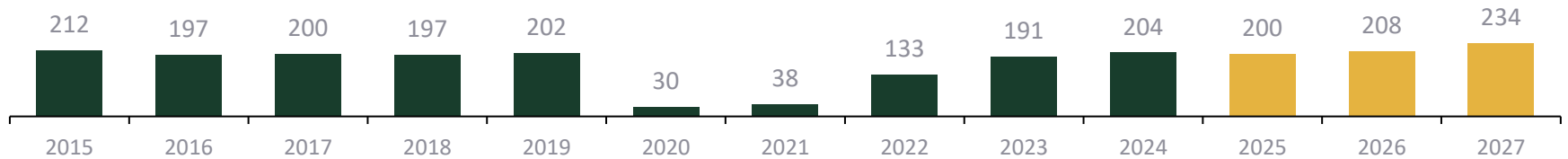
Spending

2.6%

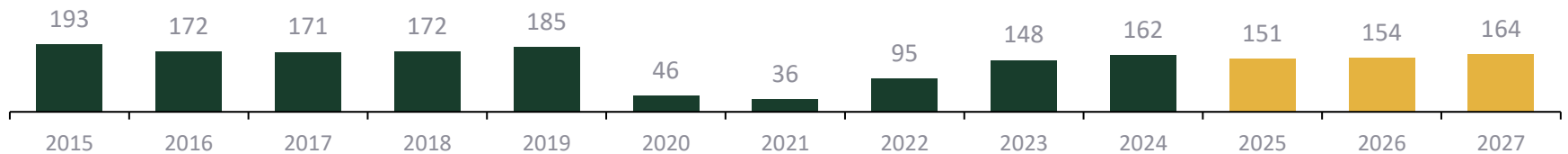
Visits

CAGR is Compound Annual Growth Rate.

Visitor Spending (\$M)



Visits (K)



■ Historic ■ Forecast

France

\$208.3M

2026 TSUSA Spending

+4.4% YOY vs. 2025

153.5K

2026 TSUSA Visitors

+1.6% YOY vs. 2025

\$5B

2026 USA Spending

+5.4% YOY vs. 2025

2.5M

2026 USA Visitors

+3% YOY vs. 2025

\$199.6M

2025 TSUSA Spending

-2.2% YOY vs. 2024

151.1K

2025 TSUSA Visitors

-6.5% YOY vs. 2024

\$4.7B

2025 USA Spending

-1.7% YOY vs. 2024

2.4M

2025 USA Visitors

-7.4% YOY vs. 2024

Where are we?

France remains USA's world #9 and Europe's #3 inbound market with 1,589,676 visitors in 2025 and an average 74% repeating rate.

French travelers are increasingly interested in visiting destinations offering authentic, meaningful experiences, and Travel South USA is uniquely positioned to meet these expectations through its music, gastronomy, history, festivals and vibrant culture.

130 tour operators, retail networks and online platforms sell the TSUSA destinations in France, with over 1,150 products available.

Trade Engagement: 504 agents trained, 93 tour operator meetings, 26,9% newsletter average engagement rate.

Media Response: 176 earned media articles with over 92M generated impressions, supported by 75+ media meetings and 5 journalists attending TSUSA 2026 Global Media Marketplace & trips.

In-market Social media performance: 105 Facebook and Instagram posts published from August 2025 to June 2026, generating 222,079 Reach and 266,787 Views. Consistent paid social amplification is crucial to Travel South USA's visibility, especially among younger generations of travelers using social media as their primary source of travel inspiration.

Looking ahead, the French outbound market is expected to remain resilient, with travelers increasingly prioritizing quality experiences over quantity and seeking destinations that offer strong emotional experiences. Maintaining Travel South USA's visibility is therefore essential in an increasingly competitive environment, where many U.S. destinations are significantly increasing their marketing investments to capture international market share. Consistent in-market representation ensures Travel South USA remains top of mind among consumers, the media and the travel trade throughout the travel planning cycle.

Strategic Plan for FY 2026-27

For FY2026-27, the strategy will focus on expanding multi-state product, strengthening trade and media relationships and inspiring travel through authentic Southern storytelling.

TRAVEL TRADE OUTREACH

Keep nourishing trade industry partners with reassurance messaging and long-lasting business perspectives by increasing ground level expertise and encouraging conversion-focused approach.

Key Activities:

- Tour operator meetings for targeted product development.
- Travel agent trainings and webinars.
- Monthly trade newsletters.
- Trade call-to-action in a collaborative campaign (OOS).
- TSI Showcase recruitment, coordination and attendance.

PR & MEDIA OUTREACH

Maintain and strengthen TSUSA destinations’ visibility through targeted earned media efforts and outreach.

Key Activities:

- Monthly media newsletters.
- One-to-one media meetings to highlight TSUSA pillar themed-content.
- Extension of relationships across top-tier national newspapers, magazines, broadcast media, digital platforms and influencers.
- Meaningful OOS media partnership suggestions.
- 2027 Global Media Marketplace recruitment & attendance.

SOCIAL & CREATOR

Amplify TSUSA’s visibility through monthly content creation with compelling visual storytelling and engaging themed content to support reach, engagement and community growth.

Key Activities:

- Organic Facebook and Instagram posts and stories featuring both iconic and lesser-known topics.
- Paid Meta boost on strategic content towards French audiences.
- UGC use of macro, niche and passion-driven creators showcasing the South.

FRANCE Market Overview

KPI's & GOALS

Project	KPI
Trade	
Tour operator meetings	80
Agent Trainings	400
International Showcase & FAMs participants	9+1
Travel South Travel Trade Newsletter	10x
Open rate for Newsletters/leads generated	25%
Managed Media	
Media Meetings	75
No. of Articles Generated	175
Impressions	80M
Global Media Marketplace & FAMs	5
Travel South USA PR Newsletters	10
Open rate for Newsletters/leads generated	25%
Social Posts - Owned Channels	
Facebook	
# of Posts (at least 8 per month)	8+ per month
Instagram	
# of Posts (at least 8 per month)	8+ per month
Consumer Campaigns	
Subject to a peer-to-peer opportunity (out of scope)	
Partner Engagement	
Alabama Highlighted Activation	1
Kentucky Highlighted Activation	1
Louisiana Highlighted Activation	1
Mississippi Highlighted Activation	1
Missouri Highlighted Activation	1
North Carolina Highlighted Activation	1
South Carolina Highlighted Activation	1
Tennessee Highlighted Activation	1
ROTS Highlighted Activation	1

France - 2026

Category	Date	Description	Location
Trade	October 1, 2026	B2B Roadshow Event with Visiteurs	Rouen, France
Trade	October 6, 2026	B2B Roadshow Event with Jetset Voyages	Rennes, France
Trade	November 5, 2026	B2B Roadshow Event with Visiteurs (Lunch)	Tours, France
Trade	November 5, 2026	B2B Roadshow Event with Visiteurs (Dinner)	Poitiers, France
Trade	November 26, 2026	Visit USA France annual B2B Workshop	Paris, France
Trade	November 29- December 3, 2026	Travel South USA International Showcase	Nashville, TN, USA

France - 2027

Category	Date	Description	Location
Trade	TBC	Additional opportunity with a TO in 2027	TBC
Trade	February 2, 2027	Visit USA France Training Day (South USA) -Main Sponsor	Paris, France
Media	April 26-29, 2027	Travel South USA Global Media Marketplace + FAMs	Bentonville, AR, USA
Trade & Media	May 2-6, 2027	IPW 2027	New Orleans, LA, USA