

France REPORT

FY27 - July 2026

Travel
South
USA

All Y'all Are
Welcome

Prepared by
B World Communication
32-34 Avenue Kléber, 75116 Paris – France
Web: www.bworldcommunication.com

Barbara Boltoukhine, President
+33 6 83 65 25 21
Barbara@bworldcom.com

Yohann Robert, Account Manager
+33 6 65 05 88 50
yohann@bworldcom.com





Table of Contents

- I. Market Overview**
- II. Executive summary**
- III. Travel trade activities**
- IV. Newsletter & Sales calls**
- V. PR & media activities**
- VI. Social Media**
- VII. Visit USA France membership**

I. Market Overview.

Orchestra/L'Echo Touristique June 2026 - Top 20 destinations and market trends update

Across all destinations, travel sales through French travel agencies finally showed signs of recovery in June 2026, increasing by 2.3% after three consecutive months of decline. Driven by last-minute bookings, this rebound was welcomed by tour operators and distributors, although it will not be enough to fully offset the accumulated delay for the summer season. Proximity and mid-haul destinations performed best, with mainland France leading the way (+7.9%), supported by a 14.5% increase in average spend. Spain and its islands also grew (+2.6%), followed by Greece (+3.7%), while Tunisia and Morocco recorded increases of more than 13%. Further afield, Finland continued to perform strongly (+20.6%), and Mauritius, recently positioned as a "safe haven" destination, saw bookings surge by 27.2%. The United States, which had been among the most impacted destinations in recent months, showed signs of stabilisation, with bookings down by only around 6% in June, alongside a similar decline in average spend. As in previous months, Albania remained one of the strongest performers, continuing to surge ahead and compete with destinations such as Croatia.

Sources : [Baromètre Orchestra/L'Echo : le top 20 des destinations en juin 2026 - L'Echo Touristique](#)

France Remains a Priority Market for Brand USA

While international visitor arrivals to the United States remained below 2025 levels in June, the pace of decline continued to ease. According to the National Travel and Tourism Office (NTTO), overseas arrivals were down 1.8% year-on-year, a notable improvement compared to the sharper declines recorded earlier this spring. The FIFA World Cup also helped drive stronger demand from several international markets, although France remained below 2025 levels, with arrivals down 15.3% in June. Overall, 647,902 French visitors travelled to the United States between January and June 2026, representing an 11.5% decrease compared with the same period in 2025. During a visit to Paris, Brand USA President and CEO Fred Dixon reaffirmed that France remains a priority market and highlighted the organisation's long-term commitment to rebuilding demand through closer collaboration with the French travel trade. While the global America the Beautiful campaign has yet to launch in France due to budget constraints, Brand USA confirmed its intention to bring the campaign to the French market as soon as funding allows, while continuing to invest in local partnerships and promotional initiatives.

Sources : [États-Unis : malgré la Coupe du monde, le tourisme poursuit sa baisse - L'Echo Touristique](#) ; [Brand USA : budget amputé, campagne retardée... Fred Dixon dévoile sa stratégie - TourMag](#)

French Summer Travel Market Shows Signs of Recovery Despite Slower Season

After a challenging spring, the French outbound travel market showed encouraging signs of recovery in June, driven by last-minute bookings and renewed demand for short- and medium-haul destinations. According to the latest EDV-Orchestra Barometer, bookings made in June returned to growth (+2.3% in revenue), while the gap with 2025 narrowed significantly. However, the summer season remains below last year's levels, with July-August bookings down 8.2% in volume and long-haul destinations continuing to underperform (-19.2%). The French tour operating sector estimates a shortfall of around 85,000 customers compared with summer 2025, although booking momentum has stabilised since June and the winter season is already showing more positive trends. Consumer confidence remains cautious, with many travellers booking later, shortening the length of their holidays and favouring destinations closer to home. Overall, the trend for summer 2026 can be summarised as "closer, shorter and better value", with France and nearby destinations benefiting from shifting demand while long-haul travel continues to face greater pressure.

Sources : [Vacances d'été : vers un déficit de 300 000 partants selon Didier Arino - L'Echo Touristique](#) ; [Voyagistes : « Nous avons un retard de 85 000 clients sur l'été » selon Patrice Caradec - L'Echo Touristique](#) ; [Baromètre EDV-Orchestra : les réservations repartent en juin, mais l'été reste sous le niveau de 2025 - TourMag](#)

AI Adoption Continues to Grow Among French Travellers

Artificial intelligence is rapidly becoming part of the travel planning journey for French consumers. In 2026, 40% of French travellers used AI to prepare their trips, up from 19% in 2025 and just 9% in 2024, highlighting the growing adoption of conversational search tools. However, trust remains a significant barrier. Recommendations from friends and family, travel advisors and customer reviews continue to rank well ahead of AI-generated suggestions. According to a recent survey, 74% of French travellers feel the need to verify AI-generated information, while 40% would prefer human validation before completing a booking, underlining the continued value of travel professionals. Families with young children are among the strongest adopters of AI, using it primarily to simplify the planning and logistics of their holidays.

Source : [Voyageurs et intelligence artificielle : les chiffres clés de 2026 - L'Echo Touristique](#)

II. Executive summary.

❖ 2025-2026 France Annual Report.

In July, BWC shared a consolidated report gathering all the content creation (newsletters and press releases), key trade and media events, trainings, workshops, Visit USA France membership, Consumer outreach activities, in-market social media performance, out-of-scope initiatives that were held and achieved on behalf of Travel South USA in France from July 2025 to June 2026.

❖ 2026-2027 scope of work and strategic approach.

BWC finalized and shared the 2026-2027 fiscal year marketing plan for France, that keeps engaging with key travel and media professionals in the constant goal to differentiate the TSUSA destinations through strategic product development, expertise, innovating visibility projects and long-lasting inspirational messaging.

❖ 2026 TSUSA International Showcase -Update.

In July, BWC started to handle air ticket reservation for the trade participants, coordinating the confirmation and reception of e-credit vouchers granted by the Delta Air Lines' French Office in Paris. See III. Travel Trade activities for update.

❖ 2026-2027 out-of-scope suggestions for the TSUSA destinations.

BWC shared two OOS suggestions with the TSUSA GPP partners during the July 28th, 2026, group call presenting France's FY27 annual scope of work:

- **Reworld Media Group & eDreams-ODIGEO visibility campaign and call-to-action for all GPP partners.**



A peer-to-Peer partnership opportunity with Reworld Media, France's leading thematic media group, that combines the power of premium lifestyle content (Grazia) with the influence of the country's largest food media brand (Marmiton), creating a unique opportunity to showcase the American South through its most compelling assets: culture, experiences and gastronomy. See section III. Travel Trade activities for full details.

- **GEO France Magazine coverage trip for Missouri, Kentucky, Tennessee, Mississippi and Louisiana.**



A targeted self-guided press trip with GEO Magazine, one of France's leading outdoor and nature publications with a 115K print circulation and a 2.83M audience. A unique opportunity to showcase the Lower Mississippi River, explore its DNA and what it means to the people who live here.

Core theme: meet the people who live along the legendary Mississippi River. Explore stories about the river's history, local makers, family heritage across generations, music, culture, food and more.

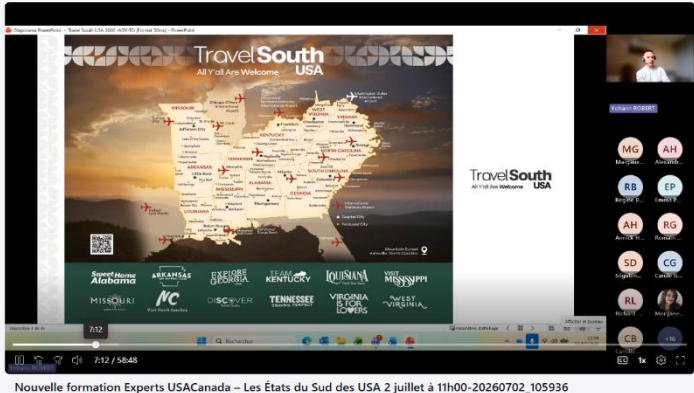
See section V. PR & media activities for more information.

France FY27 Metrics - JULY 2026 (Q1)

		July 2026	August 2026	September 2026	Q1 TOTAL	FY 26/27 TOTAL
9 partners AL/KY LA/MO/MS/ NC/ROTS/SC /TN	FRANCE					
	TRAVEL TRADE					
	Trade Meetings/ Trainings	9			9	9
	Number of Agents Trained	28			28	28
	PR & MEDIA					
	Media Meetings	6			6	6
	Total number of articles published	12			12	12
	Impressions	1 085 790,00			1 085 790,00	1 085 790,00

III. Travel Trade activities.

FY27 Trade events or marketing and product highlights with Tour Operators.

Event/ Action	Contact person	Activity/Activation	Follow up /Next step
2026 TSUSA SHOWCASE, NASHVILLE (TN)	Various	1. TSI Showcase 2026 -Update. After completing the recruitment of 9 tour-operators in June, BWC handled logistics for all the participants, coordinating the receipt of five (5) \$1,000-value credit vouchers by Delta Air Lines France, and started booking tickets for the tour operators and the BWC team.	BWC fill finalize ticket reservations in August.
SALAUN HOLIDAYS TRAINING WEBINAR	Bertrand Gaillard Regional Sales Coordinator & Camille Boulant Assistant Communication Manager	2. Trade Webinar with Salaün Holidays. Salaün Holidays is France's #6 tour operator and second-largest private distribution network with over 160 travel agencies. BWC provided a 1-hour TSUSA-dedicated training on July 2nd, to a selection of targeted FIT specialists among the Salaün Holidays sales force, focusing on how to sell The South in the most efficient way (accessibility, seasonality, history, culture, and travel themes, key pillars). The goal was to increase travel agents' knowledge and understanding of TSUSA destinations' assets versus other U.S. destinations allowing them to better serve Salaün Holidays' repeating customers willing to return to the USA. Online attendance: 28 travel agents.  	

REORLD
MEDIA
GROUP
&
E-DREAMS
ODIGEO

3. OOS Visibility Campaign with Reworld Media Group and eDreams-ODIGEO.

Over the last months, BWC worked together with the Reworld Media team to suggest a custom-made six-months visibility campaign with a peer-to-peer approach for the TSUSA GPP partners.

A powerful and complementary media & trade strategy to successfully position the American South among French travelers and prospects, with an ecosystem capable of inspiring audiences at every stage of their travel journey.

OBJECTIVES

- Grant TSUSA optimal visibility through a six-month campaign display (October 2026 thru March 2027).
- Discover the states through their iconic specialties and unique culinary identity.
- Inspire French people to travel through food.
- Drive travel conversion through a trade call-to-action (OTA).

INCLUSIONS

- One (1) article per GPP partner pinned on Marmiton.org and Grazia.fr homepages. (all articles remain available permanently on the websites).
- SEO optimization, ensuring long-term discoverability among French audiences.
- Integrated reservation links to the eDreams-ODIGEO booking platform (10.4M unique monthly users in France).
- META amplification campaign on Marmiton and Grazia social platforms.
- Dedicated newsletters.
- 6-minute YouTube video filmed in Marmiton's studio with face-to-face camera cooking and storytelling. An immersive format that blends food, culture and exploration.

BWC will share the full proposal deck in August through the TSUSA team and will follow up on the GPP partners' decision.

Our belief.

**THE GREAT CULINARY ROAD TRIP
THROUGH THE SOUTHERN US**

21 marmiton
MILLIONS
visitors / month

7M
of followers

35M
viewers/month

TravelSouth
All Y'all Are Welcome USA

X marmiton

Food has become one of the strongest travel motivators. Through Marmiton's editorial ecosystem and YouTube content, we transform Southern gastronomy into a gateway to the region's culture, heritage and local communities.

IV. Newsletter & Sales calls.

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

No newsletter in July and August. Activity will resume in September.

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

Company Name	Contact mode	Contact person	Activity/Activation	Follow up/Next step
TRAVELIB	Meeting	Audrey Labarthe CEO	Travelib is a new travel platform based on the 'ATAWAD' model (Any Time, Any Where, Any Device), offering a dedicated team of travel specialists focusing on niche interests and travel habits (solo, couple, woman only, luxury, local encounters, outdoor and more). BWC had a meeting with Audrey to explore interest in the 2026 TSI Showcase, TSUSA destination webinars, potential B2B2C partnerships and call-to-actions.	Audrey regretfully declined TSI participation this year due to calendar conflict but confirmed interest for 2027.
GATE-ONE VOYAGES	Meeting	Antoine Depres Project Manager	Gate-One Voyages is a sport-oriented agency that has been working on the U.S. market for over a decade, organizing individual sports-focused trips, particularly around NBA games. After sending clients to virtually every NBA arena, Antoine now aims to leverage their expertise towards the public by showcasing the TSUSA destinations and strengthening their brand appeal to attract new customers. Antoine requested images and videos of Charlotte (NC), Memphis (TN) and New Orleans (LA) to showcase the NBA venues and games.	BWC coordinated with TSUSA and state teams to provide content and will remain available for any further assistance needs and partnership opportunities.
YUCAIPA VOYAGES	Meeting	Pauline Carpier Founder & Product Manager	Pauline participated in the 2025 TSI Showcase in Kansas City, MO. BWC had a call with her in July to follow up on product development and assistance needs. Pauline informed BWC that she is touring parts of The South in a camper van this summer (did not request assistance) and will be in touch as of September to review her projects.	See future reports for product development updates.
BACK ROADS	Call	Nadège Peccavet Product Manager	In July, Nadège contacted BWC to discuss a B2B2C activation that Back Roads and agency partner Terres de Charmes are planning for February 2027. The event would gather 30 targeted customers and would include a dedicated presentation and on-site visibility for The South.	BWC expressed interest in the partnership and will explore details with Nadège in September.

JETSET VOYAGES	Call	Valérie Heurtel Product Director & Jérôme Thomann Travel Specialist	The Jetset team contacted BWC for assistance with Jérôme Thomann's trip to The South in September 2026. With TSUSA's approval, BWC reached out to the Missouri and Louisiana teams to help with overnights and activities in St. Louis (September 3 & 4, 2026) and Lafayette (September 7-9, 2026).	BWC will finalize coordination in August and will ensure Jérôme's feedback is shared with the involved partners after his trip.
AMERIGO	Meeting	Nathalie Delame Product Director	Following the recent release of a new itinerary dedicated to The South (including North Carolina and South Carolina), BWC and Nathalie discussed the opportunity to highlight Amerigo's product range and increase TSUSA's visibility during a B2B webinar for their distribution network partners.	The date is confirmed for October 6 th , 2026, and BWC will work on further details after summer.
TOUNDR VOYAGES	Meeting	Geoffrey Duval France & Europe Sales Representative	Toundra is a B2B destination management company based in Montreal, Canada, that has been designing unique and unforgettable trips to North America for over 25 years. Their team is made up of travel enthusiasts eager to showcase and develop the TSUSA destinations. Geoffrey Duval recently joined the team as their Paris-based brand and product ambassador.	BWC will explore collaboration options including a B2B training event outside Paris and/or a webinar.
AUSTRAL LAGONS	Call	Lou Cousin Marketing & Communication Assistant	Austral Lagons is part of the Marrietton Développement travel group and includes FIT brands such as Jetset Voyages. Their marketing department contacted BWC for B2B training event opportunities in three cities this Fall (Annecy, Lyon and Perpignan).	BWC declined due to a calendar conflict but will consider options for Q1 2027 and/or FY28 scope of work.
RICHO VVOYAGES	Email	Mathilde Barotin Communication & Marketing Manager	Richou Voyages is one of France's historic coach tour specialists and has been developing its FIT business segment. After reviewing their online offers for product update purposes, BWC identified their recent addition of the Amtrak Mardi Gras Train Service (Mobile, AL to New Orleans, LA) as a suggested extension to their escorted tours or fly-drive itineraries.  Link to product : De NOLA à Mobile en train Thèmes Richou Sur-mesure	Follow-up will be done on training and assistance needs for the TSUSA destinations.

Company Name	Contact mode	Contact person	Activity/Activation	Follow up/Next step
Monthly media contacts				
GEO MAGAZINE	Meeting	Anne-Laure Pineau Freelance Journalist	Following previous meetings and discussions, BWC shared an OOS proposal to the TSUSA GPP partners on July 28th, during the group call that presented France's FY27 annual scope of work. The suggestion includes the states of Missouri, Kentucky, Tennessee, Mississippi and Louisiana, to cover the following editorial angle: <i>"The Mississippi River from St. Louis to the Gulf: meeting the people who live along the legendary river"</i>. BWC shared a tentative travel timeframe (weeks of November 9 & 16, 2026), along with a budget approach and a draft content suggestion for each state.	BWC will keep coordinating with TSUSA in August to follow up on states' approval and/or further information needs.
JOGGING INTERNATIONAL	Meeting	Cécile Bertin Freelance Journalist	Following her participation in the TSUSA 2026 Global Media Marketplace, BWC had a follow-up call with Cécile to reconfirm her interest in collaborating with New Orleans & Company and Arkansas Tourism to run and cover the 2026 New Orleans Marathon and the 2027 Little Rock Marathon respectively.	BWC will coordinate the assistance requests through both NOLA and TSUSA teams.
VOYAGE VOYAGE MAGAZINE	Meeting	Evane Haziza-Bonnamour Publishing Director	Voyage Voyage has a hybrid format between a magazine and a guidebook, offering travel experiences in intimate, unique settings deeply rooted in the culture of a country, region, or city. Spanning both urban and rural landscapes, each issue features three cities and an intriguing journey connecting them, alongside suggestions for wandering through the countryside or along the coast. A quarterly magazine with 35K print circulation and an urban readership from higher socio-professional categories, with a 40% masculine / 60% feminine audience. 230K Instagram community and 3M cumulative views. Evane contacted BWC for an 8-day Mississippi (handled by Visit Mississippi) and Louisiana (handled by Louisiana Office of Tourism) coverage trip project in Fall 2026.	BWC had a meeting with Evane in July to review assistance needs and will place the request for the Louisiana portion through LOT.
EN TRAIN MAGAZINE	Meeting	Damien Courcoux Partnership Manager	With a 60K print circulation and a 180K traveler readership, "En Train" magazine keeps pace with evolving tourism trends by highlighting destinations that innovate and offer alternative ways to travel —approaches that are more responsible and respectful of local regions. "En Train" reaches two key demographic groups: •Ages 25–45: Young adults and young families who embrace "slow travel" and seek to minimize their environmental footprint. •Ages 55+: Active retirees with the time and budget for travel, particularly outside peak seasons.	BWC had a meeting with Damien and will explore opportunities for the TSUSA destinations that include rail activities or journeys.

TRAVMEDIA (FRANCE)	Email	Joanna Golebiowska Partnership Director	Joanna contacted BWC to explore interest in registering for the 2027 edition of the IMM Media Show in Paris. BWC declined participation for TSUSA as the show is not part of the FY27 scope of work.	No follow up needed.
BEFORE SUNSET	Email	Marie Chatelain Business Developer	Following discussions in June, BWC had a meeting with Marie to further explore the needs of content creators (https://www.samfaitvoyager.com), who will visit some of the TSUSA destinations in September and October (Georgia and North Carolina).	BWC is awaiting more details about their exact travel dates and assistance needs before considering placing a hosting request.

VI. Social Media.

Content

B World Communication published 10 Facebook and Instagram posts in July, with a selection of highlights and events such as Culinary/Food & Libations (North Carolina, South Carolina, Alabama), Neighborhoods and Attractions (Mississippi, Missouri, New Orleans, Tennessee), Festivals & Events (Nashville, Kentucky), and history & culture (Louisiana).

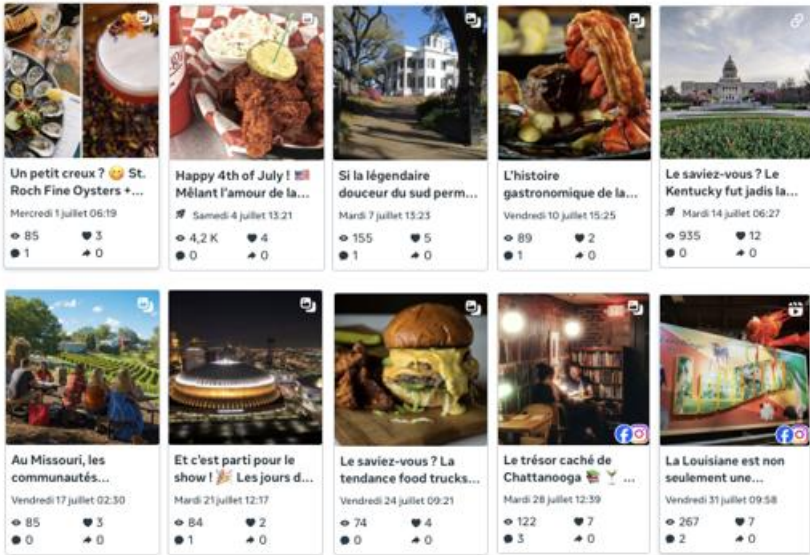
Facebook	July 2026	Evolution vs last month	Instagram	July 2026	Evolution vs last month
Facebook page followers	7,643	Up 0.49%	Instagram page followers	513	Up 8.69%
Facebook reach	11,875	Up 9.66%	Instagram reach	9,827	Up 12.33%
Facebook views	17,160	Down 2.65%	Instagram views	11,935	Up 14.05%
Facebook likes	68	Even	Instagram likes	140	Up 7.7%
Facebook comments	15	Down 16.67%	Instagram comments	15	Up 7.14%
Facebook shares	2	Even	Instagram shares	6	Up 20%

Paid promotion

B World Communication sponsored 5 posts in July, 2 Facebook posts for a total amount of \$25.47, as well as a sponsored post of the Facebook page for an amount of \$18.16 and 2 Instagram posts for a total amount of \$48, totaling \$91.63 spent on paid promotion.

The sponsored Facebook posts resulted in 12,558 views and 346 interactions including 247 clicks on the Facebook page. The sponsored Instagram posts resulted in 10,472 views and 317 interactions including 262 clicks on the Instagram page.

July Facebook posts



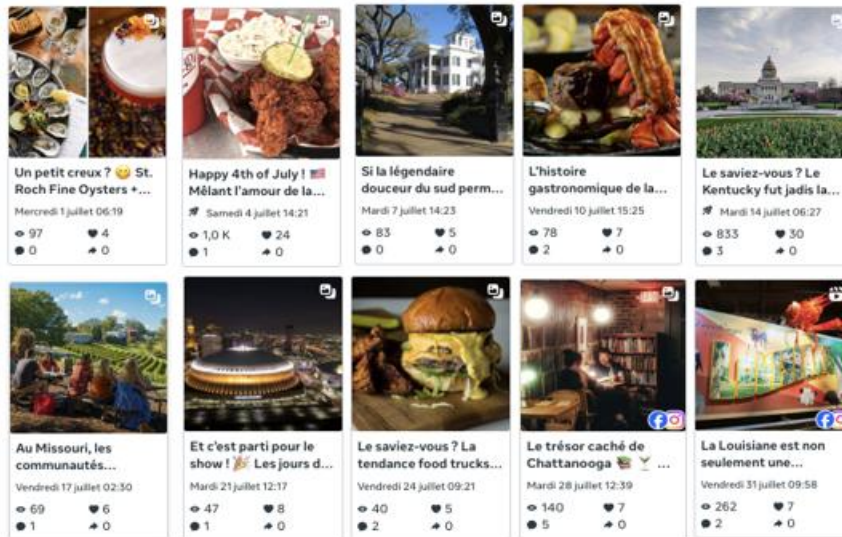
Organic post with best views and interactions



Best sponsored post



July Instagram posts



Organic post with best views and best reach



Organic posts with best interactions & story with most interactions



Best sponsored post

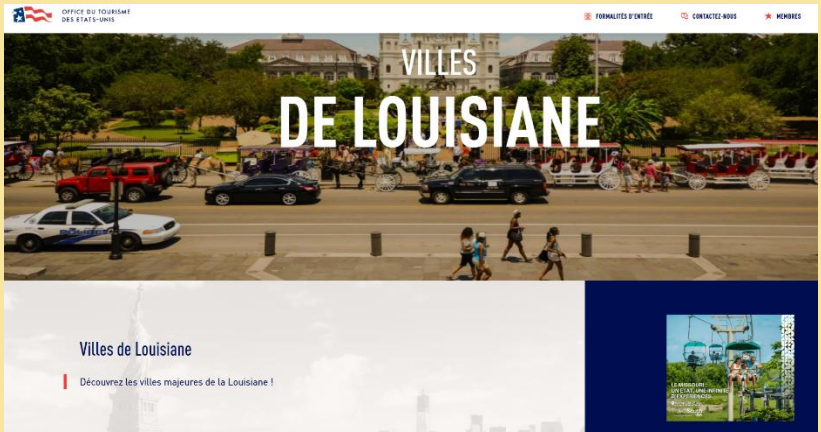


Post highlights

North Carolina - culinary - MICHELIN, **Nashville** - events & festivals - Nashville Hot Chicken Festival, **Mississippi** - neighborhoods & attractions - Natchez, **South Carolina** - culinary, **Kentucky** - events & festivals - America250, **Missouri** - neighborhoods & attractions - Farmer's Table Wine Trail, **New Orleans** - neighborhoods & attractions - Caesars Superdome, **Alabama** - food & libations - food trucks, **Tennessee** - neighborhoods & attractions - The Reading Room/Chattanooga, **Louisiana** - history/culture/culinary

VII. Visit USA France membership.

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

Source	Activity/Activation	Follow up/Next step
	1. 2026 Membership monthly banner promotion. The state of Missouri was promoted in June, out of the Louisiana and Illinois Visit USA France source pages.  	The cities of Rhythms of the South will be promoted in August.

2. E-learning -Update.

The V11 version of the E-learning program was launched in February 2026.

2026/2027 statistics for the V11 version as of July 31st, 2026:

- 550 Trade professionals and US specialists connected to the program (+23 vs June).
- 184 of them (33.45%) reached the Expert level (+14 vs June).
- 130 of them (23.63%) entered the 1st Class Club (+11 vs June).

Mid-year detailed statistics and completion scores for the TSUSA destinations:

-Alabama: 78.66%
 -Kentucky: 82.72%
 -Louisiana: 71.80%
 -Missouri: 83.17%
 -North Carolina: 77.55%
 -Rhythms of the South: 88.06%
 -South Carolina: 75.75%
 -Tennessee: 76.23%

ALABAMA	08/03/26	KENTUCKY	08/03/26	TENNESSEE	08/03/26
Number of people who took the quiz:	111	Number of people who took the quiz:	103	Number of people who took the quiz:	104
Number of people who passed the quiz (score of over 80%):	108	Number of people who passed the quiz (score of over 80%):	100	Number of people who passed the quiz (score of over 80%):	102
Average score (mean of all results):	78,66%	Average score (mean of all results):	82,72%	Average score (mean of all results):	76,23%
NORTH CAROLINA	08/03/26	LOUISIANA	08/03/26	RHYTHMS OF THE SOUTH	08/03/26
Number of people who took the quiz:	110	Number of people who took the quiz:	130	Number of people who took the quiz:	222
Number of people who passed the quiz (score of over 80%):	102	Number of people who passed the quiz (score of over 80%):	123	Number of people who passed the quiz (score of over 80%):	220
Average score (mean of all results):	77,55%	Average score (mean of all results):	71,80%	Average score (mean of all results):	88,06%
SOUTH CAROLINA	08/03/26	MISSOURI	08/03/26		
Number of people who took the quiz:	100	Number of people who took the quiz:	112		
Number of people who passed the quiz (score of over 80%):	97	Number of people who passed the quiz (score of over 80%):	109		
Average score (mean of all results):	75,75%	Average score (mean of all results):	83,17%		

3. IFTM/Top Resa Trade Show.

BWC will attend the annual Visit USA France IFTM Cocktail on September 15th, 2026, on behalf of Travel South USA.



4. New images request for South Carolina.

In July, the Visit USA France team reached out to BWC to get images for the following sites:

- Mast General Store
- Village at Sandhill
- Hammock Shops
- Gaffney Premium Outlets
- The Island Fudge Shoppe
- Tanger Outlets à Myrtle Beach
- Arthur Ravenel Jr. Bridge
- Giordana Velodrome
- Hampton Plantation State Historic Site
- Stumphouse Tunnel Park and Issaqueena Falls
- Little Pee Dee State Park
- Landsford Canal State Park
- Edisto State Park
- Cherokee Foothills Scenic Highway
- Florence
- Sumter

BWC coordinated with the TSUSA team and Jayne Baker from South Carolina Department of Parks, Recreation & Tourism to provide a full selection of up-to-date visuals.
