

France REPORT

FY27 - August 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





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I. Market Overview.

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

Across all destinations, travel sales through French travel agencies slipped back into negative territory in July 2026, declining by 1% after a 2.3% rebound in June. The number of bookings also fell by nearly 4%, confirming that summer departures remain below last year's levels. Spain was one of the strongest performers among the leading destinations, with sales up by 6.7%, while Tunisia also continued to grow (+3.1%). Metropolitan France remained the top-selling destination, although sales declined by 6% and the number of bookings dropped by 10%. Italy ranked fourth, generating higher revenues despite a decline in booking volumes. Further afield, Turkey, Mexico, the United States and the Dominican Republic recorded some of the sharpest declines among the top 20 destinations. In contrast, Albania continued its strong momentum, alongside Mauritius, Montenegro, the United Kingdom and Finland, all of which posted solid growth. As in previous months, occasional promotional campaigns may have contributed to some of the variations observed across destinations.

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

French arrivals to the U.S.

The French market continued to evolve in 2025, with 1.59 million French visitors travelling to the United States, down 7.3% compared with 2024 and below the 2019 record of 1.84 million. France nevertheless remained the ninth-largest international source market for the U.S. and the third largest in Europe, behind Germany and the United Kingdom. This trend was also observed across several major international markets, while Mexico stood out with a 6% increase. Changes in travel costs, economic conditions and perceptions of the destination have all contributed to shaping travel demand, alongside evolving entry requirements and the wider media context. In response, Brand USA launched a campaign aimed at "dispelling misconceptions" and highlighting the many experiences available to international visitors. In 2026, French arrivals have remained below last year's levels, with more than 647,000 visitors recorded between January and June, compared with over 731,000 during the same period in 2025. Despite these fluctuations, the United States continues to be the leading long-haul destination for French travellers, highlighting the enduring appeal of the destination.

Source : [États-Unis : 100 000 touristes français de moins en 2025 - L'Echo Touristique](#)

Air travel demand remains resilient despite higher costs

Air travel demand continues to show strong resilience despite higher fares and a complex geopolitical environment. According to IATA, global passenger demand in July 2026 remained 0.2% above the previous year's record level, while July 23 marked the busiest day ever recorded for global commercial aviation, with more than 153,000 flights tracked by Flightradar24. Airlines are also preparing for continued activity, with capacity for September expected to be 2.9% higher than in 2025. This momentum reflects the broader strength of international tourism, with air travel accounting for 58% of all cross-border trips. Passenger sentiment towards flying also remains positive: a recent NATS survey in the UK found that 70% of respondents believe the benefits of air travel outweigh its drawbacks, up from 58% three years earlier. Despite changing travel conditions, flying therefore remains a central part of international mobility, with demand continuing to hold up.

Source : [L'avion toujours aussi populaire malgré la hausse des prix - Bee Travel News](#)

French travellers show signs of returning to earlier booking habits

The latest *EDV-Orchestra Observatory* of French Holidays highlights a contrasting picture for the French travel market in August 2026. While departures remained below 2025 levels, with the number of bookings down 9.3%, the decline largely reflects weaker reservations accumulated over previous months rather than a sudden slowdown in summer demand. At the same time, bookings made in August increased by 2.9% in volume and 7.6% in sales value, pointing to a more positive outlook for the months ahead. The rebound was not driven by a surge in last-minute bookings: the average booking window extended to 55 days, while bookings made less than 30 days before departure fell to 46.2%, from 49.7% in 2025. Early bookings of more than 90 days also edged up, suggesting a gradual return to more forward planning. Mid-haul travel led the recovery, with bookings up 8%, while long-haul remained more subdued. Although September bookings were still 5.8% below 2025 levels as of August 26, the latest figures offer encouraging signs for the autumn and end-of-year travel period.

Sources : [Baromètre EDV - Orchestra : les réservations repartent en août, mais l'été 2026 reste en retrait - TourMag](#) & [Baromètre EDV/Orchestra : Un été en retrait, mais des réservations en nette reprise - La Quotidienne](#)

II. Executive summary.

❖ 2026 TSUSA International Showcase -Update.

In August, BWC completed air ticket reservations for all trade participants and requested insurance forms to be filled and signed. See III. Travel Trade activities for update.

❖ 2026-2027 scope of work and strategic approach.

On August 6th, 2026, BWC participated in the 2026-2027 fiscal year's scope of work presentation for the Rhythms of the South destinations alongside the TSUSA team and GNP partners, addressing key messages on coverage and visibility highlights, strategic insights and out-of-scope opportunities for Atlanta, Nashville and New Orleans on the French market.

❖ Trade webinars with tour operators.

BWC is working on dedicated webinars with key industry partners (Amerigo and Voyage en Français) to support product development and expertise awareness. See section III. Travel Trade activities for details.

❖ 2026 Global Media Marketplace -Update.

BWC keeps monitoring earned media coverage following the French journalists' participation in the TSUSA 2026 Global Media Marketplace and press tours in Mobile, Alabama. Articles on Mississippi (Arts magazine) and Tennessee (Yonder) are expected to be published in September. See section V. PR & media activities for update.



❖ 2027 Global Media Marketplace, Bentonville, Arkansas.

In August, BWC received and signed the collaboration agreement to recruit four (4) top-tier media journalists from France to participate in Travel South USA's Global Media Marketplace and Press Trips Program in April 2027. Recruitment will start in September and BWC will keep the TSUSA team informed of progress.

France FY27 Metrics – AUGUST 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	5		14	14
	Number of Agents Trained	28	0		28	28
	PR & MEDIA					
	Media Meetings	6	5		11	11
	Total number of articles published	12	18		30	30
	Impressions	1 085 790,00	6 439 250,00		7 525 040,00	7 525 040,00

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	TSI Showcase 2026 -Update. In August, BWC completed the air ticket reservations for all trade participants and BWC escorts (Barbara Boltoukhine and Yohann Robert), informing the TSUSA team that the entire French delegation will arrive on Saturday, November 28th, 2026. BWC also shared the Insurance forms with all the tour operators, adding a cancelation/change requirement policy stating that neither Travel South USA nor B World Communication can be held responsible for non-refundable expenses resulting from a spontaneous change, cancellation, or no-show of a buyer participant. BWC is awaiting confirmation of a trade media participant and will finalize registration and travel arrangements in September.	Follow up will be shared in future reports.
TRADE WEBINARS WITH AMERIGO & VOYAGE EN FRANCAIS	Nathalie Delame Amerigo Product Director & Marlène Périllat Voyage en Français Sales Manager	Trade webinars. BWC is actively working on planning trade webinars to support the promotion of new products and itineraries with partners, such as Amerigo and Voyage en Français. BWC considers it crucial to stand alongside tour operators and service providers as they continue their efforts to develop and diversify their product range in the South, with the aim of attracting new customers and strengthening the loyalty of their existing clientele. Tentative webinar dates are scheduled on October 6th, 2026, with Amerigo and October 8th, 2026, with Voyage en Français. BWC will keep securing similar opportunities with other key industry partners throughout fiscal year 2026-2027.  	Follow up will be shared in future reports.

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 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
CERCLE DES VOYAGES	Meeting	Roxane Pasquier-Desvignes Marketing & Communication Manager	BWC held a meeting with the Cercle des Voyages marketing team to discuss a potential partnership in 2027, including some of their new visibility offers. A proposal was shared, and BWC will assess the interest and relevance for the Travel South USA destinations.	A follow-up will be shared in future reports.
EVANEOS	Meeting	Adeline Sullivan Partnerships and Trade Development Advisor	Since 2009, the Evaneos platform has been connecting travelers with local experts to co-create 100% tailor-made itineraries that are more memorable, more beneficial to local communities, and more sustainable for destinations. As a freelance advisor, Adeline Sullivan is currently assisting Evaneos' International Trade & Partnerships team, with the aim of developing US sales by promoting selected regions in 2027. BWC met with Adeline in August to discuss interest and opportunities for TSUSA.	A follow-up will be shared in future reports.
TOUNDRA	Meeting	Geoffrey Duval France & Europe Sales Representative	BWC met with Geoffrey in August to discuss destination promotion initiatives for the Southern states, as well as opportunities to support product development. Toundra shared several proposals, which BWC will review for potential activation in 2027, including a multi-city roadshow, dedicated communications, webinars, and other initiatives.	A follow-up will be shared in future reports.
GERALD EN AMÉRIQUE	Call	Gérald Ponsard Founder & CEO	Gérald en Amérique is a US-specialist French-speaking tour operator based in Belgium. The Belgian travel market, particularly its high-spending French-speaking region, presents an incredible, untapped opportunity for American destinations. On January 28, 2027, Gérald en Amérique is launching a groundbreaking initiative to help capture this premium audience: the inaugural American Roadbook Experience in Belgium. A B2B-only dedicated event on January 28, 2027, in the city of Liège. Opportunity: gain direct, premium exposure to a market known for longer stays, higher travel budgets, and a deep appreciation for authentic American experiences.	BWC declined participation because of calendar conflict and Belgium being out of the geographical area of activity.

**Pauline
Carpier**
Founder
& Product
Manager

Following her participation in the TSI Showcase 2025 and a new personal trip to the South this summer, Pauline informed BWC of the creation of a new itinerary featuring four states: Louisiana, Mississippi, Tennessee and Alabama. BWC provided Pauline with suggestions to further refine and enhance the itinerary, as well as recommendations regarding the selection of images. Pauline will soon work on a new offer that will include North Carolina, South Carolina and West Virginia.

Link to content : [Circuit Sud des États-Unis : Nouvelle-Orléans, Nashville & Alabama](#)

YUCAPI VOYAGES

Yucapa Voyages Road Trips Camping-car Les destinations Blog

+1 514 789 33 77 65

ROAD TRIP LE VIEUX SUD AUTHENTIQUE

L'Amérique historique & culturelle

Street scene with a tram and a person riding a bicycle.

A row of large, colorful beer bottles (Pilsener, IPA, etc.) displayed outdoors.

A street sign reading "DOWNSIDE PARK ET DU PARC FREE".

A large, ornate church building with a tall steeple.

A large, leafy tree in front of a white building.

A mural of a person in a striped shirt and dark pants, possibly a dancer or performer.

A park area with a large, mature tree and green foliage.

A wooden boardwalk or path leading through a field.

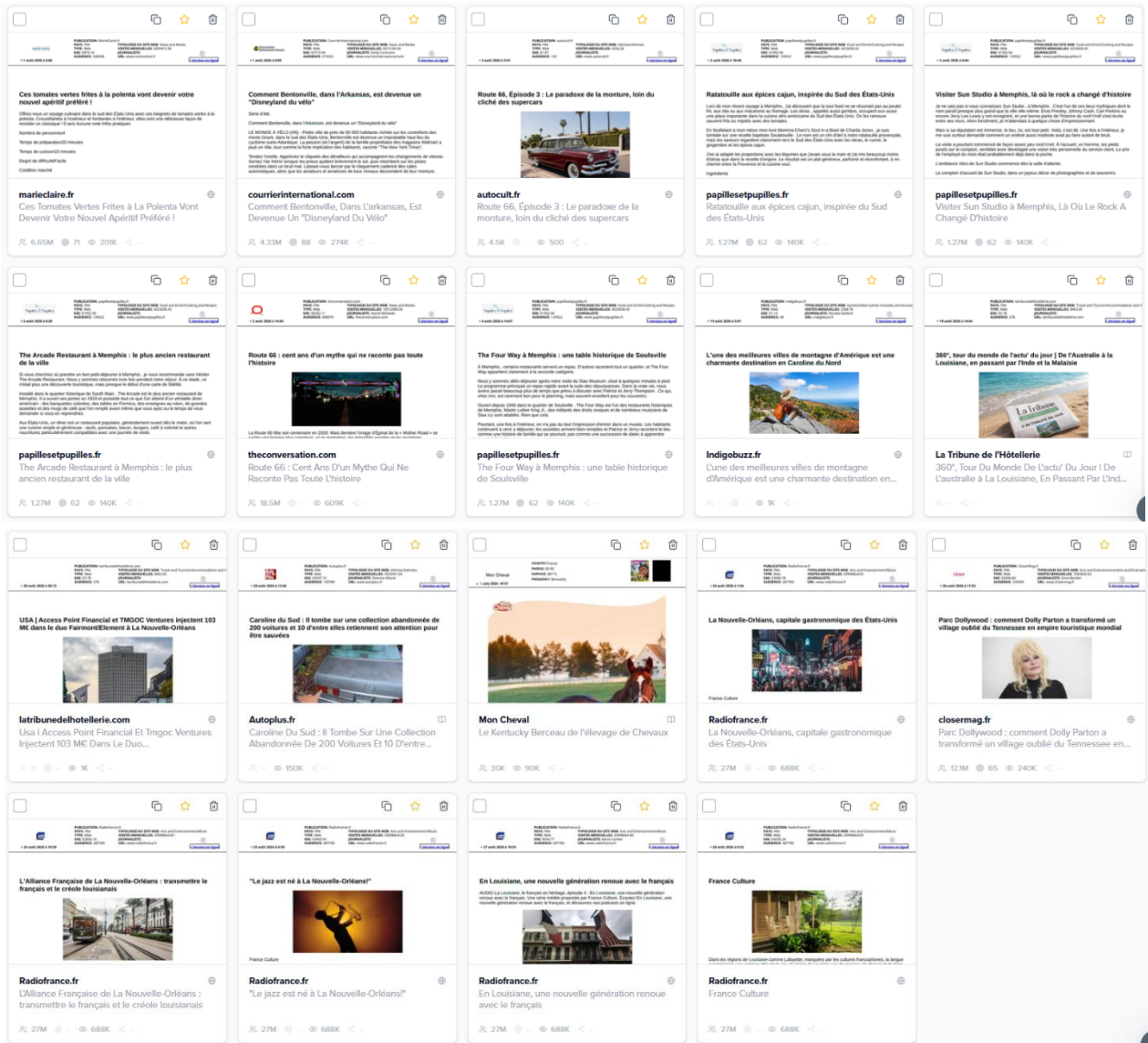
A historical marker for "GRACELAND" and "NATIONAL RESERVE OF HISTORIC PLACES".

V. PR & media activities.

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

No press release in August. Activity will resume in September.

❖ Coverage book Link: **AUGUST 2026 | GPP France FY26-27 | CoverageBook**



Company Name	Contact mode	Contact person	Activity/Activation	Follow up/Next step
Monthly media contacts				
GEO MAGAZINE	Meeting	Anne-Laure Pineau Freelance Journalist & Axelle Budan de Russé Photographer	Update - Following BWC's proposal to organize a press trip for GEO France magazine focusing on the Mississippi River, all five states involved — Missouri, Kentucky, Tennessee, Mississippi and Louisiana — confirmed their interest. In August, BWC shared the final dates (September 26 to October 8, 2026), along with the preliminary itinerary and content suggestions, with the destinations. BWC also coordinated logistic details with the participating journalist and photographer and created the Travefy itinerary for partners to start working on their respective portions of the trip.	BWC will finalize the travel arrangements and the itinerary inclusions in September.
CUISINE ET VINS DE FRANCE	Call	Daniel Dias Advertisement & Partnerships	Founded in 1947 by a renowned food critic, Cuisine et Vins de France is a leading magazine dedicated to food enthusiasts, wine lovers and French art of living. With a strong, affluent and diverse readership of 780K upper-income readers, its audience continues to grow younger, and remains highly engaged. BWC met with Daniel Dias to review editorial and advertorial opportunities to showcase the TSUSA destinations.	A follow-up will be shared in future reports.
HELLO LAROUX	Meeting	Amélie Blondiaux Founder & Editor in Chief	Created in 2016, Hellolaroux is an inspirational travel blog and media platform focusing on strong storytelling, featuring distinctive article design and high-quality visuals. Key content formats include city guides and road trip-focused articles, complemented by a strong presence on social media (Instagram) to extend their editorial work across a diverse community of readers. BWC had a meeting with Amélie in August to discuss a potential trip her team is planning to the South in November-December 2026.	BWC will review the request for assistance and will follow up on relevance for TSUSA.
ROLLING STONE FRANCE	Call	Belkacem Bahlouli Chief Editor	BWC helped Belkacem in August by providing a photo selection of Beale Street, Memphis, for an article he has been working on.	The article will be shared through Coverage Book upon release.
ART(S) MAGAZINE	Call	Françoise Le Bras Editor in Chief	Following her participation in the 2026 Global Media Marketplace and press tour, Françoise shared with BWC her Mississippi article covering Coastal Mississippi and the Amtrak Mardi Gras train service experience. The article will be featured in the September issue of Art(s) Magazine. Françoise also informed BWC that two additional articles will result from the trip, one by Business Events magazine covering the city of Mobile, Alabama, and one by Histoire magazine about the Clotilda Slave Ship story.	A follow-up will be shared in future reports.

VI. Social Media.

Content

B World Communication published 9 Facebook and Instagram posts in August, with a selection of highlights and events such as Culinary/Food & Libations (Mississippi, South Carolina), Neighborhoods and Attractions (Kentucky, North Carolina, Missouri, Tennessee, Atlanta, Louisiana), and nature/beaches (Alabama).

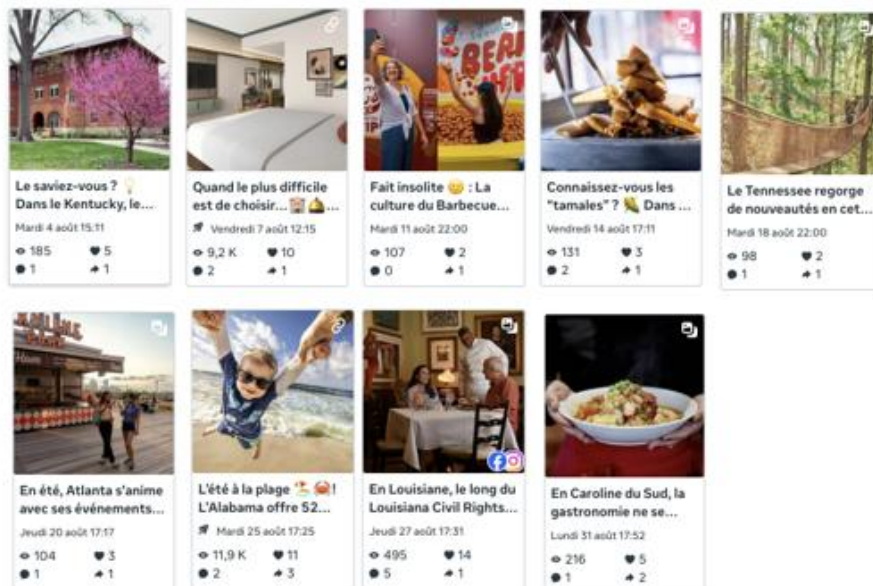
Facebook	August 2026	Evolution vs last month	Instagram	August 2026	Evolution vs last month
Facebook page followers	7,647	Up 0.05%	Instagram page followers	532	Up 3.7%
Facebook reach	13,662	Up 15.05%	Instagram reach	15,465	Up 57.37%
Facebook views	24,712	Up 44.01%	Instagram views	20,949	Up 75.53%
Facebook likes	69	Up 1.47%	Instagram likes	159	Up 13.57%
Facebook comments	16	Up 6.67%	Instagram comments	16	Up 6.67%
Facebook shares	13	Up 550%	Instagram shares	7	Up 16.67%

Paid promotion

B World Communication published 4 sponsored posts in August, 2 Facebook posts for a total amount of \$48.40, as well as 2 Instagram posts for a total amount of \$48.20, representing a total paid promotion of \$96.6.

The sponsored Facebook posts resulted in 20,894 views and 354 interactions including 335 clicks on the Facebook page. The sponsored Instagram posts generated 18,621 views and 372 interactions including 350 clicks on the Instagram page.

August Facebook posts



Organic post with Best views



Organic post with best interactions



Best sponsored post



August Instagram posts



Organic post with best views



Organic post & story with best reach



Organic posts with most interactions



Best sponsored post

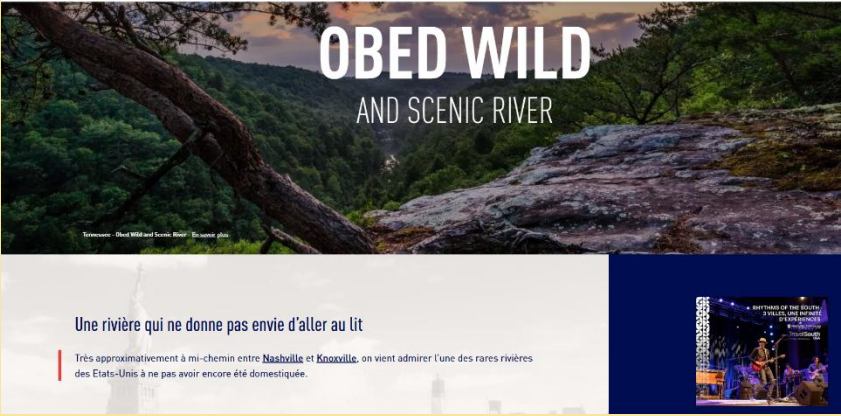
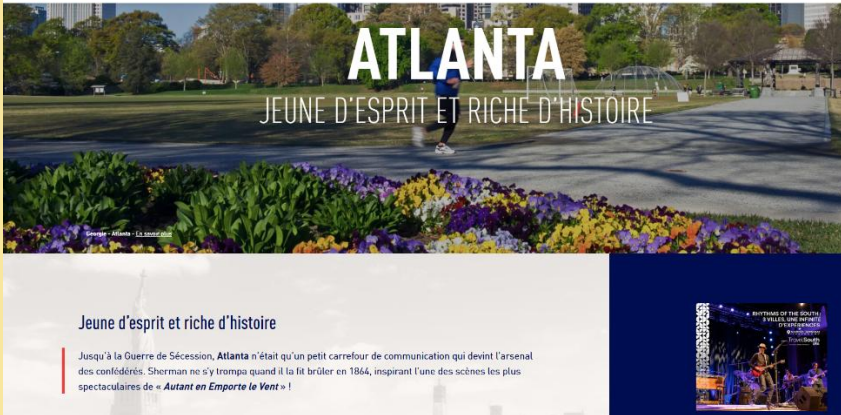


Post highlights

Kentucky - neighborhoods & attractions - Berea College, **North Carolina** - neighborhoods & attractions - hotels, **Missouri** - neighborhoods & attractions - Museum of BBQ, **Mississippi** - culinary - tamales, **Tennessee** - neighborhoods & attractions - Anakeesta Park, **Atlanta** - neighborhoods & attractions - Beltline, **Alabama** - nature - beaches, **Louisiana** - neighborhoods & attractions - Dooky Chase's, **South Carolina** - 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 Rhythms of the South destinations were promoted in August, out of Tennessee, Louisiana and Atlanta Visit USA France source pages.   	The state of Alabama will be promoted in September.

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 August 31st, 2026:

- 563 Trade professionals and US specialists connected to the program (+13 vs July).
- 190 of them (33.74%) reached the Expert level (+6 vs July).
- 135 of them (23.97%) entered the 1st Class Club (+5 vs July).
