

The UK & Ireland

British and Irish travelers have a sense of adventure, whether hitting the open road behind the wheel of an RV or 4WD or taking the children to experience life on a ranch! They will challenge themselves beyond their comfort zone on foot or two wheels, by horseback or on the water.

Evening meals are generally taken around 7:30 p.m. If they are not happy about something, they will say so. By American standards, the British and Irish are poor tippers – usually between 10% and 12%, and only for good service. They are obsessed with the weather! Most importantly, UK and Irish people love a cup of tea and often bring their own tea bags. To make a proper cup of tea, the water must be boiling, and it is drunk with fresh, cold milk. With the rise in cost of living, value for money is much more important – so any “freebies” such as breakfast, WiFi, happy hours, etc. are very appealing.



\$75,000

Avg. Annual Income



\$350

Avg. Daily Spend



55% / 45%

Traveler Gender (F / M)



16 days

Avg. Length of Stay



Interested In

**National parks, scenery,
wildlife, Native American
& cowboy culture**



Travel Preference

Fly-drive & escorted tours



Avg. Party Size

Couples (families increasing)



Avg. Traveler Age

55+



Avg. Time Off

20-25 days

Perception of the Great American West ...

The region is a bucket-list destination for UK and Irish travelers. Mostly speaking the same language is a huge draw, but it's the diversity that's appealing. It is seen as rugged and authentic America, and British and Irish visitors see the Great American West as a chance to explore the great outdoors.

They are keen to learn more about the local heritage and culture, which is also hugely important while on vacation, and Western heritage and Native American culture offer travelers the opportunity to learn something new and expand their horizons.

British and Irish travelers love to boast about their holidays to their friends and family, sharing photos, experiences and anecdotes to anyone who will listen.

With a wide variety of activities and experiences including national parks (especially Yellowstone), scenery, wildlife and culture, the GAW is a natural fit for the British and Irish.

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German Speakers*

German-speaking travelers love a good breakfast – and appreciate it being included in the room rate. They also appreciate anything “free” or “included,” such as WiFi, coffee/tea, complimentary happy hours, etc. Value for money remains important. They are also diligent waste separators and try to avoid plastic cups or plastic silverware. They like to sit outside whenever possible and prefer open-air dining options, as they are not used to air conditioning. If giving directions or explaining distances, it is best to provide the driving time in kilometers.

German speakers still love printed brochures and maps and continue to request them in large numbers. While there is often talk of sustainability, vacationers are not changing their travel habits when it comes to long-haul holidays. Bookings are being made very early again (January-March), with long-haul USA vacations sometimes booked up to a year in advance.



*Germany, Austria & Switzerland



\$107,000

Avg. Annual Income



\$420-\$470

Avg. Daily Spend



51% / 49%

Traveler Gender (F / M)



18 days

Avg. Length of Stay



Interested In

**National parks, culture,
pristine nature, wide-open
spaces, soft adventure,
authentic experiences**



Travel Preference

Fly-drive by car or RV



Avg. Party Size

2 (couples)



Avg. Time Off

35-44 days



Avg. Traveler Age

**35-65: The baby boomer
retirement wave is starting!**

Perception of the Great American West ...

Germans/Austrians/Swiss think of the Great American West as a place with wide-open spaces, authentic experiences, wildlife, and a great mix of iconic destinations and hidden gems! The GAW is perceived as pristine, safe and friendly, and with so much open space away from the hustle and bustle and the stress of density at home.

There are plenty of unique sights and attractions that can only be discovered here: bison herds, Native American and cowboy culture, ranch stays and horseback adventures, glamping, national and state parks, national monuments and memorials, scenic byways, ghost towns, unspoiled night skies and so much more. The region offers small, charming American towns and friendly people, and there is plenty of soft adventure within unspoiled nature, like rafting, hiking, mountain biking or zip lining. Taking a vacation here without time pressure goes hand in hand with the idea of experiencing nature and time as a new kind of luxury.

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Benelux

Ever spotted a tourist from the Benelux in the wild? Fear not, they're not hard to miss! Just look for the towering figures, usually in comfortable shoes, doing some kind of active thing during their vacation such as hiking or biking. Indeed, their love affair with bicycles is not limited to their borders – they often bring their bikes with them behind their caravan or on their cars during road trips through Europe. What they also might bring, being as economical as possible, is their own sandwich lunches, drinks and fruit. However, once they are at the destination, they always want the full experience and will spend their money.

Be aware that there is a lot of beer offered in their own countries, so they may be considered fine tasters in this area. And if they aren't happy with something, they will let you know. Their directness is considered feedback and shouldn't be taken as offense!



\$62,000

Avg. Annual Income



\$500

Avg. Daily Spend



46% / 54%

Traveler Gender (F / M)



16-18 days

Avg. Length of Stay



Interested In

National parks, adventure, ranches, off-the-beaten-path experiences, Native culture



Travel Preference

Fly-drive by car or RV



Avg. Party Size

2-3



Avg. Time Off

25 days



Avg. Traveler Age

35-60 years

Perception of the Great American West ...

Many Benelux visitors travel as a couple or with family, by RV or car, and stay a maximum of two nights in one place.

They will look for nature, genuine experiences, national parks and wildlife. They are interested in lifestyles that can't be found in the Benelux: ranches, cowboy lifestyle, Native American history, monuments, etc.

General travel trends are sustainability, farm-to-table dining and being active in nature. They prefer to stay in unique accommodations such as bed-and-breakfasts and ranches. As the Benelux countries are quite crowded, they will look for off-the-beaten-path destinations and wide-open spaces.

They appreciate contact with locals (they like to speak English abroad) and small-town atmosphere. All four states have the features that appeal to those trends and needs. These are the core ingredients that contribute choosing the GAW over other U.S. destinations.

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France

French travelers are known for seeking authentic experiences, preferring to immerse themselves in local culture rather than visiting tourist-heavy attractions. Their love for gastronomy drives them to explore regional cuisine. Boutique hotels or accommodations with charm and character are favored over large chains, reflecting their preference for quality over quantity. French tourists often opt for in-depth exploration of fewer destinations and enjoy walking tours to discover hidden gems and absorb a city's atmosphere. Historical and cultural landmarks hold great appeal for them. Sustainability is also a priority, with many choosing eco-friendly travel options. They value good customer service with a touch of formality and politeness, and often travel during school holidays. They enjoy long, relaxed meals; visit local markets for authentic products; and appreciate efforts to communicate in French.



\$47,700

Avg. Annual Income



\$560

Avg. Daily Spend



52% / 48%

Traveler Gender (F / M)



17 days

Avg. Length of Stay



Interested In

Authentic experiences, food, culture, history, nature, arts, architecture, shopping local



Travel Preference

Fly-drive



Avg. Party Size

2-6 (couples, families w/ kids)



Avg. Traveler Age

30-60



Avg. Time Off

25 days

Perception of the Great American West ...

French travelers often view the region as rich in natural beauty, untouched landscapes and unique Western culture.

Wyoming, with its iconic Yellowstone National Park and the Grand Tetons, is seen as a place of vast, dramatic wilderness, appealing to outdoor enthusiasts and nature lovers.

North Dakota and South Dakota are often associated with historical landmarks like the Badlands, Mount Rushmore and Native American heritage, offering a glimpse into America's frontier past.

Idaho, with its rugged mountains, scenic rivers and outdoor recreation opportunities, is perceived as an adventure haven, especially for those interested in hiking, fishing and skiing.

These states are increasingly appealing to French travelers seeking authenticity, wide-open spaces, and opportunities for cultural exploration far from crowded tourist spots.

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Italy

The USA continues to fascinate Italian travelers, who love to travel by car or motorcycle, exploring, grinding mileage and being passionate about the greatness of the country, looking for something special, authentic, historical, unmatched, extraordinary. The road, the travelling journey, the planned discovery remain a constant to immerse themselves in local life by optimizing an average holiday time of 10-15 days. They are "modern travelers" – able to get the right information, use new technologies, take advantage of specialized travel consultants for creating THE TRIP – but still want to leave a free space for personal exploration. They will dine after 8 p.m., and will never eat Italian food in the U.S., instead opting for a good American meal. They hate water with ice, the lack of bread and the cold AC that forces them to wear a jacket in the middle of summer. And in case of limping knowledge of the English language, Italians can communicate perfectly with gestures and hands!



\$38,000

Avg. Annual Income



\$550

Avg. Daily Spend



49% / 51%

Traveler Gender (F / M)



10-15 days

Avg. Length of Stay



Interested In

**Native American heritage,
Old West culture, nature,
national & state parks**



Travel Preference

Fly-drive, FITs, mini groups



Avg. Party Size

2-4



Avg. Time Off

26 days



Avg. Traveler Age

45-65 years old

Perception of the Great American West ...

Italians see the Great American West as a land of nature and abundant wilderness, open spaces, stunning landscapes and rich history of the Old West. The GAW region is considered the true escape from conventional travel in the USA, the American destination that people have always dreamed of through movies and music, myths and legends. It represents the wild side of the United States – authentic, unspoiled, and the quintessential iconic true America.

They expect authentic Native American and Western heritage galore! The lure of freedom, room to explore, a wide choice of activities and profusion of wildlife draw Italians to the region.

Getting in touch with new cultures and traditions, visiting small towns and museums, and having a true Western experience at a ranch are the elements considered key to a successful holiday. Tribal tourism also has a strong influence.

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Australia & New Zealand

Aussies and "Kiwis" are friendly rivals and quite different (including our accents!). New Zealand is not a state of Australia! Aussies appreciate a hot breakfast included in hotel rates, tea-making facilities (not part of a coffeemaker) and cold whole milk in the fridge (not creamer). We like to dine outdoors and love a BBQ. Our "entree" is the U.S. appetizer and our main course is the U.S. "entree." U.S. portion sizes are much larger than we are used to. Tipping and added taxes on checks are foreign to Aussies, and Kiwis are not particularly used to it, either. We do love a road trip, but drive on the left at home and calculate distances in kilometers. We are happy to drive longer distances, especially on scenic highways, but we are not used to driving in snow. Temperatures are measured in Fahrenheit as opposed to Celsius in AU/NZ.



\$60,000

Avg. Annual Income



\$500

Avg. Daily Spend



63% / 37%

Traveler Gender (F / M)



17+ nights

Avg. Length of Stay



Interested In

**Food, wellness, sustainability,
iconic destinations, culture,
off-the-beaten-path, luxury,
set-jetting, adventure**



Travel Preference

Fly-drive & small-group tours



Avg. Party Size

2 (couples)



Avg. Traveler Age

44



Avg. Time Off

28 days

Perception of the Great American West ...

Aussies and Kiwis have a sense of adventure and love of nature and the great outdoors. Western movies and TV have created an enduring love affair with cowboy and Native American culture, and we can't get enough of the authentic experiences "for real."

The national parks with scenery, wildlife and geological attractions are a major drawcard and considered unique and destination-specific. The diverse range of outdoor adventure activities available in GAW are very popular.

Visiting original locations where history was made – museums, landmarks and monuments – is a major interest. We love meeting locals and feel an affinity with the laid-back GAW lifestyle.

Sampling local cuisine; shopping for authentic souvenirs; and enjoying the entertainment, events and culture available are part of the high appeal of the GAW. The region is also seen as more affordable than the major cities.

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Nordics*

Collectively, Nordic travelers are among the world's most frequent globetrotters and share a deep appreciation for nature, authenticity and sustainability. Danes, known for their sociable and talkative nature, enjoy engaging with locals and immersing themselves in new cultures, while Finns tend to seek serene, nature-centric experiences that reflect their reserved demeanor. Norwegians, passionate about the outdoors, gravitate toward activities like hiking and skiing, embracing rugged natural beauty; whereas Swedes, who value organization and efficiency, prefer well-structured trips filled with cultural experiences and active pursuits. Like the Finns, the Icelanders are not very fond of small talk, and they appreciate direct and efficient communication rather than excessive politeness or corporate language. For all Nordic travelers, authentic cultural immersion is highly valued and culinary experiences are cherished.



*Sweden, Norway, Denmark, Iceland & Finland



\$57,900

Avg. Annual Income



\$548

Avg. Daily Spend



51% / 49%

Traveler Gender (F / M)



16-18 days

Avg. Length of Stay



Interested In

**Culinary experiences,
beaches, nature & outdoors,
cultural & historical sites,
small & unique towns**



Travel Preference

Fly-drive



Avg. Party Size

2



Avg. Time Off

25-35 days



Avg. Traveler Age

30-70 years

Perception of the Great American West ...

Nordic travelers have long been drawn to the U.S., but the GAW remains a hidden gem compared to other regions. That's changing, but the steady interest in TV series like "Yellowstone" also continues to spark curiosity about the region's breathtaking landscapes and rich heritage.

What truly resonates with Nordic visitors is the authenticity of the region – untamed nature, diverse wildlife and endless opportunities for adventure. Whether hiking in majestic mountains, exploring charming small towns or experiencing the region's deep-rooted cowboy and Native American cultures, there's always something to discover.

Nordic travelers appreciate itineraries that combine active outdoor experiences with cultural depth, making the GAW an ideal destination. As interest in immersive and meaningful travel grows, this region offers exactly what we seek – wide-open spaces, real experiences and the freedom to explore.

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