

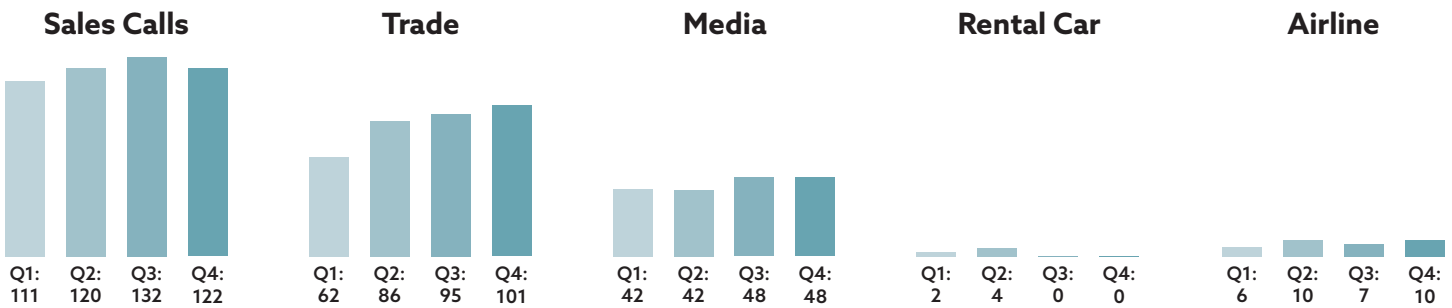


QUARTERLY REPORT

**FY25 QUARTER 4
APRIL-JUNE 2025**

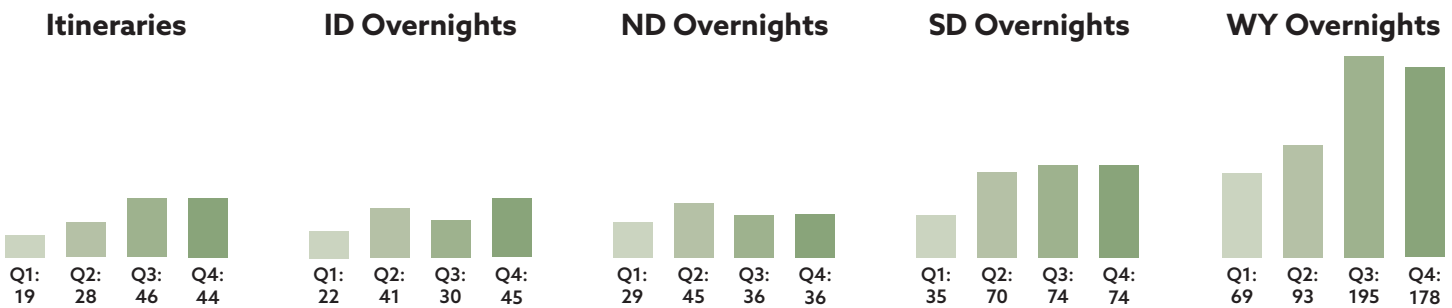
Meetings: Q4

	Sales Calls	Trade Meetings	Media Meetings	Rental Car Meetings	Airline Meetings
UK	9	4	4	0	0
Germany	19	25	7	0	2
Benelux	28	23	3	0	2
France	32	21	5	0	2
Italy	14	12	1	0	1
Australia	14	10	20	0	2
Nordics	6	6	8	0	1
Total	122	101	48	0	10



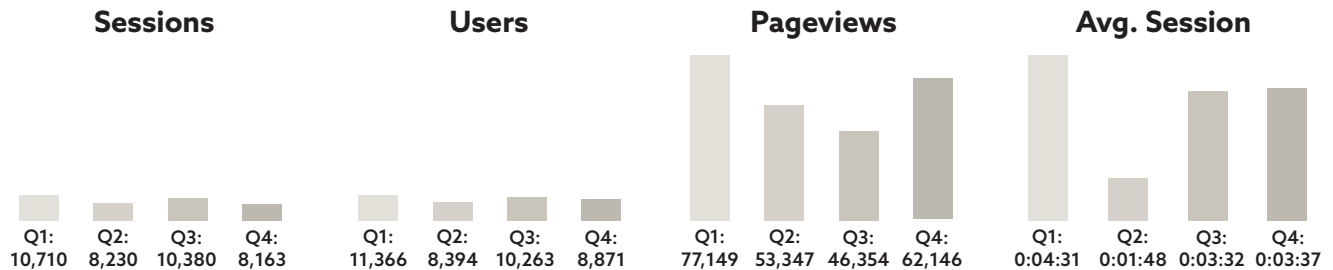
New Product: Q4

	New Itineraries	Idaho Overnights	North Dakota Overnights	South Dakota Overnights	Wyoming Overnights
UK	5	20	17	23	13
Germany	14	4	2	5	61
Benelux	11	11	4	23	45
France	8	10	6	12	37
Italy	3	0	1	7	14
Australia	2	0	0	0	6
Nordics	1	0	6	4	2
Total	44	45	36	74	178



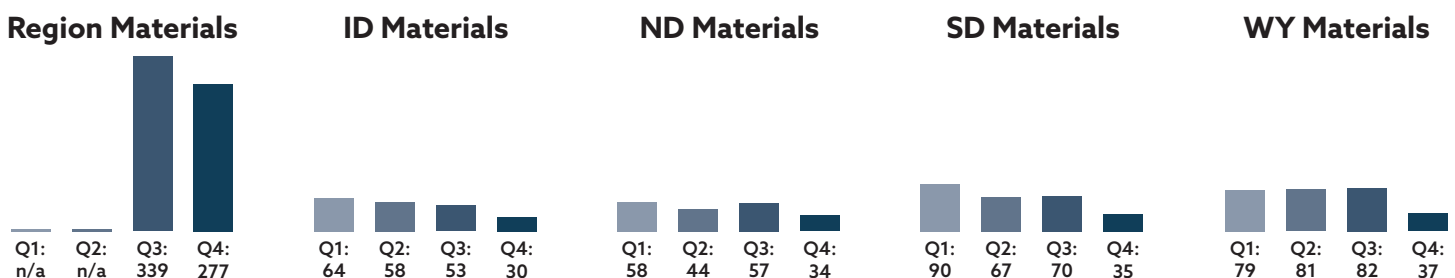
Websites: Q4

	Sessions	Users	Pageviews	Avg. Session
.co	2,133	1,943	6,957	0:01:10
UK	528	576	5,271	0:02:50
Germany	1,065	1,505	21,940	0:06:27
Benelux	797	1,086	1,594	0:02:35
France	509	452	715	0:01:59
Italy	2,153	2,009	11,532	0:02:00
Australia	443	470	2,873	0:02:03
New Zealand	236	486	8,664	0:10:55
Nordics	299	344	2,600	0:02:38
Total	8,163	8,871	62,146	0:03:37



Digital Downloads: Q4

	Region Materials	Idaho Materials	North Dakota Materials	South Dakota Materials	Wyoming Materials
.co	21	2	2	0	0
UK	30	2	2	1	2
Germany	35	0	8	6	4
Benelux	11	8	2	2	2
France	62	8	8	0	6
Italy	100	6	12	22	23
Australia	2	0	0	4	0
New Zealand	7	0	0	0	0
Nordics	9	4	0	0	0
Total	277	30	34	35	37



*Regional materials (GAW Guide, region map and regional itineraries) were produced during Quarters 1 and 2. Download statistics will be available in Quarters 3 and 4.

Quarterly Report – United Kingdom & Ireland

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
9	4	4	0	0

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	American Affair	Mandy McGlade, Product Manager Mandy.McGlade@americanaffair.com	- Meeting with Mandy McGlade, Product Manager - US sales up year over year – looking at triple digit growth for 2026 - Had a good January for sales, February dipped and March as good despite Easter being in April this year - FLA/NYC and Deep South are best sellers – CA struggling - Getting enquiries for 2027 - Adding 5% to all forward bookings outside the World Cup - Developing World Cup itineraries - Frontier airlines are putting on charters domestically to cover FIFA demand
Trade	Brand USA UK	Holly Jordan & Serena Gray, Trade Director UK hjordan@thebrandusa.co.uk	- Waiting for budgets to be confirmed before they can commit to support - Keen to work on road tripping activity - Waiting for more direction on FIFA and keen to support on any activity we may run
Trade	Purely America	Andrew Bird, Director andrew@purelytravel.co.uk	- USA business doing well despite fluctuating start to the year. January was down, February was up, March flat. - Keep developing GAW region, most business has been reactive not proactive - Would love us to invest in 'Purely Great America West' dedicate microsite - Marketing focus is social media, google ads and London Life magazine which is getting some good uptake - Advised that will only give figures on the back end of marketing activity

Type	Company	Contact	Details
Trade	Innstant Travel	Selina Pridmore – Head of Product selina@innstanttravel.com Maria Luisa Coello Garrido – Business Development (Brazil Office) maria@innstanttravel.com	Innstant Travel: Global wholesale travel provider headquartered in Dublin, Ireland. Operations: Support teams in 12 countries. Markets: • UK & Ireland (Ireland focused more on corporate travel companies). • B2B product offered via agents and tour operators. Destinations: • USA is a major destination. • Expanding focus beyond cities. Product Focus: • Historically centred on hotel contracting (Hilton, Best Western, Wyndham, Marriott). • Now expanding into: ○ Attractions (via Musement/TUI) ○ Car hire ○ Motorhome product (planned later this year, potentially with Cruise America) Overview • Wants tour/fly-drive itineraries. • Interested in hotels and ranches. • Will prepare logistics once details are received. • Will require support with training afterward.
Trade	Inspire my Holiday	Lockie Kerr – Head of Partnerships lockie@inspiremyholiday.com	Updates IMH have just recruited someone who will manage the weekly emails, merchandising on the website and content updates • Lockie will be attending IPW and looking into some meetings with GAW • Seeing some negative comments on social, however they are just replacing them with new content. He felt that customers are not deterred from visiting the USA this year and their CTR on consumer emails are still just as strong, same as the traffic to the landing pages. Seeing strong interest in Thailand and Europe.

Type	Company	Contact	Details
			- Currently 1,800 agents have registered, with 60% of these as homeworkers. Engagement from trade continues to be strong. FAM Trip Hub is a new concept designed to showcase itineraries, destinations, and products to agents who couldn't attend. It serves as a valuable sales tool, helping them promote the destination or trip style to their clients. - The hub features video content, images, itineraries, Tour Operator info, and top tips. The package includes paid social and email marketing to drive engagement, with full reporting provided. - Potential idea is to promote North Dakota FAM or other FAMs in the future.
Trade	Prestige Holidays	Denise Hunn, Product Manager dhunn@prestigettravel.co.uk	- Overall, their business is strong, and they are ahead of their targets. Canada and Croatia has done specifically well for them this year. - March was a strong booking month, but April performed better than expected. - Average length of stay is 16 nights - Since launching the USA program, they haven't pushed it with their trade partners but have promoted it through the new brochure and e-shots. They want to grow the awareness within the trade that they also offer the USA and are incentivizing them to book with them. London event at the end of June with key suppliers, looking to do more events like this with lesser-known areas.
Trade	Barrhead Travel	Jade Semple, Head of Business Development and Carrie Marr, product Manager - looking after tourist boards and partnerships jade.semple@barrheadtravel.co.uk	Barrhead is a Scottish based B2C tour operator with over 90 retail stores across Scotland and north England. - Working on developing their North America product beyond Florida, Vegas and NYC - Southern states are doing well, Memphis, Nashville and Texas – looking to expand product offering - Receptive – ATI - Work with Brand USA on 'Beyond the Gateway' campaign - Looking to run a 50th anniversary consumer social media campaign, giving away a prize a day in July

Type	Company	Contact	Details
			- Working on a full World Cup strategy that will include staff engagement, training and marketing. - Now running 'Wednesday Webinars' morning for training. LC requested a session - Along with this they are looking to develop more training days and events as well as consumer events – they will be running an OCT training event, invite coming - Keen to have staff attend destination training, fams and events - Open to supporting Media trips and PR activity
Trade	Saga Holidays	From Julian Lawman, Product Manager Julian.Lawman@sagatravelgroup.com	Private email sent 30 May 2025 - Saga's senior management has made the decision to focus exclusively on our core travel offerings: escorted tours, hosted hotel stays, and ocean and river cruises. As a result, the Tailor-Made Travel product will be withdrawn from the market with immediate effect. - Saga will continue to fully support customers who have existing bookings and are yet to travel. However, they will no longer be accepting any new bookings for Tailor-Made Travel. - Consequently, the Tailor-Made product and sales teams have been made redundant.
Trade	Visit USA	Kate Kenwood, CEO Kate.Kenward@visitusa.org.uk	- Membership renewals will be sent out in early May. As the 'EARLY BIRD' rate was such a success last year, they are bringing it back. 2025–26 Membership Fees - Full Membership and Travel Agents (UK based): £579 + VAT or EARLY BIRD £562 + VAT
Trade	HF Holidays	Simon Heighton, Product Manager simonheighton@hfholidays.co.uk	- HF Holidays is a leading British travel company, B Corp certified and established in 1913. Specializing in walking and special interest holidays, it offers over 260 trips across the UK, Europe, and worldwide, focused on community and sustainability. - In 2024 the American Rockies Tour was launched - There are now two walking tours to the US. The other tour is Hawaii Island Hopping. - The tour starts from Denver, and it travels through Wyoming, Lander and Yellowstone National Park. - Operated with a driver-guide; group size is limited to 12 due to walking permit restrictions in certain locations. - In 2024 two departures of 12 travelled.

Type	Company	Contact	Details
			• HF team goal is to increase bookings and expand their reach in the future. • Their recently redesigned company magazine, distributed to a captive audience of 45,000 and available in our UK country houses, features engaging articles and destination coverage.
Trade	Wexas	Katrin Rummer, Product Manager Katrin.Rummer@wexas.com	• Wexas saw a strong start to 2025 for the US, with California emerging as the top-performing state. However, there has been a noticeable decline in enquiries and bookings over the past month. • During their internal meeting on 17 June, the team confirmed that airline partners have shown strong performance for US routes so far this year. • Other markets performing well include South Africa, Canada, and the Nordic countries. • There is potential interest in expanding product offerings as part of a future marketing campaign. Examples of previous campaigns will be shared by Wexas. • Wexas currently has low night volumes in the GAW region, in part due to Montana not being featured in their product lineup. • The team expressed interest in reviewing an updated list of accommodations. Although Wexas primarily sells tours, they are open to cross-checking the list with hotels included in their existing tour packages. • Historically, Wexas offered a tour that included Seattle and Idaho, which they may consider reinstating or finding an alternative tour. The ranches are bringing up the prices of the tour. • Talked about North Dakota, Theodore Roosevelt National Park and other attractions • Katrin enquired about future FAM trips to GAW, citing the Utah FAM as a successful example. I encouraged Wexas to get in touch if a staff trip is planned.
Trade	AAYLI	Angie Colombo, Marketing Manager angie.colombo@americaasyoulikeit.com	The AAYLI campaign was a multi-channel marketing initiative promoting the Great American West region, conducted in March 2025 and continued into April 2025. Results shown below from the national press advertising, digital marketing, email and social media activities. Website Traffic • 8,560 page views on AAYLI website • Average time on page: 2 minutes (good engagement) Digital Advertising • 280,420 impressions

Type	Company	Contact	Details
			7,603 clicks to AAYLI website - Search: Over 7% - Combined (search + display): 2.71% Email Campaign 27.6% open rate (2,898 recipients) 0.5% click-through rate (20 clients) - Paid Social Media Facebook: - Reach: 17,295 - Impressions: 22,977 - Clicks: 578 Instagram: - Reach: 11,813 - Impressions: 17,910 - Clicks: 272
Trade	NATS	Karren Farrar, Product & Marketing Manager karen.farrar@nats-uk.com	- NATS is significantly expanding their GAW program following IRU 2024. - As part of the GAW JMA, they have reviewed all the additions from new hotels and sightseeing to updated content, imagery, and location pages. - NATS are also adding new fly drives, including a North & South Dakota Explorer, Epic Idaho Discovery, plus new ranch options, nearly doubling the program size. - The next phase of marketing will be pushing out the new product onto the market. - Campaign components have been finalized ready for activation. - Interim reporting has been agreed for July and final report end of campaign results.
Media	Various	Various	Highlights and anniversaries happening this year in the Great American West were featured in the spring KBC newsletter, including Boise's Jaialdi festival, 60th anniversary of SD BRU and the anniversary of Devils Tower.
Media	Freelance/Telegraph	Sarah Baxter	Sarah was looking for information on the world's greatest National parks. I spoke to her about TRNP, Badlands SD, Wind Cave and Yellowstone. The world's greatest national parks
Media	Wanderlust	Diana Jarvis	2025 Green Travel List Request. Wanderlust was looking for Green Travel initiatives from destinations. Unfortunately, they didn't give us enough notice this time, but it is a growing area of interest, and it might be useful to investigate each state and have this info ready.

Type	Company	Contact	Details
Media	JRNY/TBA	Lynn Houghton	Lynn Houghton approached us regarding a trip to Devils Tower – the first US Monument, dedicated 120 years ago, and featuring in the iconic film Close Encounters... WY assisted with accommodation. We were also able to suggest she stop in at the new Shortgrass Resort in SD.
Media	Wanderlust/Freelance	Jacqui Agate	Jacqui has been talking to us about featuring local voices from every state to use for the Wanderlust USA Special coming out in Sept/Oct. We are awaiting more details.
Media	Telegraph /Viestra Magazine	n/a	KBC were able to advise journalists approaching the states directly, giving insights into the UK market so that the states could answer accordingly.
Media	Freelance	Zoey Goto	Jennette spoke to Zoey who is always open to quirky stories, off the beaten track angles and ‘modern’ indigenous tales. We will be keeping our eyes open for ideas for Zoey who writes beautifully for national newspapers and magazines and loves the GAW.

Trainings

Summary:

# Trainings	# People Trained
3	31

Significant Training Highlights:

Type	Company	Contact(s)	Details
Trade, Sales Agents	Prestige Holidays	dhunn@prestigettravel.co.uk	Trained 6 Prestige Holidays sales team focusing mainly on Wyoming.
Trade, Webinar	Visit USA	Kate.Kenward@visitusa.org.uk	Trained 15 agents and operators on the Great American West – all 4 states. Training is evergreen on the VUSA website.
Trade, Sales Agents	Ocean Holidays	helen.taylor@ocean-holidays.co.uk	Trained 10 Ocean Holidays key sales team on all 4 states of the Great American West.

New Product

Summary:

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
5	20	17	23	13

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
HF Holidays (escorted Walking holidays)	American Rockies - HF Holidays	DEN	DEN	Denver (2) – Lander (1) – West Yellowstone (2) – Yellowstone (1) – Grand Teton (1) – SLC (1) – Denver (1)
The Internet Traveller	Rockies & Rails - 09 Nights Escorted Tour - Overview			Rockies & Rails Denver (1) – Cheyenne (1) – Rapid City (1) – Cody (1) – YNP (1) – SLC (1)
	Lost My Heart in the Black Hills of Dakota - 13 Nights Fly Drive Holiday - Overview			Lost My Heart in the Black Hills of Dakota Bismarck (3) – Medora (3) – Deadwood (3) – Rapid City (3)
	The Wild West - 13 Nights Fly Drive Holiday - Overview			The Wild West Denver (2) – Cheyenne (1) – Keystone (2) – Cody (1) – Yellowstone (3) – Jackson (2) – SLC (2)
NATS	South Dakota Holidays 2024 Luxury Holidays In USA & Canada Rapid City North America Travel Service Sioux Falls & Chamberlain North America Travel Service	N/A	N/A	South Dakota Hotel Additions ClubHouse Hotel & Suites, Rapid City Holiday Inn Downtown, Rapid City Elevation Inn & Suites, Trademark Collection by Wyndham, Rapid City Hotel On Phillips, Sioux Falls ClubHouse Hotel & Suites, Sioux Falls Spearfish Canyon Lodge, Spearfish Sylvan Lake Lodge, Custer State Park

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
	Custer, Custer State Park & Hot Springs North America Travel Service			Sightseeing & Activity Additions Buffalo Safari Jeep Tour, Custer State Park Horseback Rides, Custer State Park Hayride & Chuckwagon Cookout, Custer State Park Jeep Tour & Chuckwagon Cookout, Custer State Park Crazy Horse Memorial - Admission Ticket Discover Rock Climbing, Custer State Park Mt Rushmore, Crazy Horse and Custer State Park from Rapid City Badlands And Wall Drug from Rapid City Rapid City Day Tour from Rapid City Custer State Park Wildlife Loop from Rapid City Northern Black Hills from Rapid City Devil's Tower from Rapid City North Dakota Hotel Additions ClubHouse Hotel & Suites, Fargo Jasper Hotel, Fargo Radisson Hotel, Bismarck The Olive Ann, Grand Forks Spark by Hilton, Minot Sightseeing & Activity Additions Medora trail Ride North & South Dakota Explorer – 15-night tour MSP (1) – Sioux Falls (2) – Chamberlain (1) – Rapid City (1) – Custer State Park (1) – Deadwood (1) – Spearfish (1) – Medora (2) – Minot (1) – Bismarck (1) – Fargo (2) – MSP
	Holidays to North Dakota 2024 Luxury Holidays in USA & Canada			
	Medora & Bismarck North America Travel Service			
	Grand Forks & Minot North America Travel Service			
	Fargo & Jamestown North America Travel Service			
	North & South Dakota Explorer North America Travel Service			

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
	Holidays to Idaho 2024 Luxury Holidays in USA & Canada Epic Idaho Discovery Fly Drive USA			Idaho Hotel Additions The Harkness Hotel, McCammon Hotel Renegade, Boise Fairfield Inn & Suites, Pocatello Tamarack Resort, Tamarack Moose Creek Ranch, Victor Sightseeing & Activity Additions Zip Line Tour from Twin Falls Kayak Tour from Twin Falls Scenic Boat Tour from Twin Falls Epic Idaho Discovery - 15 nights tour Boise (2) – McCall (1) – Lewiston (1) – Coeur d’Alene (1) – Sandpoint (1) – Salmon (1) – Grand Tetons (1) – Yellowstone (1) – Victor (1) – McCammon (1) – Twin Falls (1) – Sun Valley (2) – Boise (1) – BOI

Website

Sessions	Users	Pageviews	Average Session
528 (-18%)	576 (-17%)	5,271 (-35%)	2m50s (-25%)

Misc.

IPW: Lisa met with RMI and each state to discuss a new themed approach for consumer-facing activity: the Four Elements of the GAW.

All partners are keen to pursue, so KBC will continue liaison with Scott and move forward into the next fiscal year.

Reader Insights Media In-person Event May 30th:
Source: JRNY Magazine

Launched during the pandemic and published three times a year, JRNY has quickly established itself in the UK travel media landscape. Such has been its success that a spin-off magazine dedicated to telling US stories, JRNY America, launched late in 2024. Published quarterly, JRNY America is also going from strength to strength.

JRNY has just unveiled the results of its first-ever reader survey, which was undertaken from January to March 2025. With 29,788 responses, 99.8% of which were from the UK, this is a very robust consumer base and therefore a very meaningful insight into JRNY readers and their perceptions.

Key findings about the readers:

- 60% female
- Age range: 18-25 2.9%, 26-30 6.6%, 31-40 18.5%, 41-50 12.6%, 51-60 32.2%, 61-70 21.9%, 71+ 5.4%
- 71% prefer digital versions of magazines to print
- 46% do not read any other travel magazines
- 20% say they do not have any social media accounts!
- 95% travel internationally at least once a year; 57% more than once a year
- 60% travel as a couple; 25% as a family; 11% solo and 4% in a group
- They draw their travel inspiration from: 25% family & friends; 23% TV travel documentaries; 21% travel magazines; 11% social media; 11% travel apps; 10% travel blogs

When asked about their **travel plans in the next two years**, most popular regions for readers were Western Europe (16%), **North America (14%)**, Eastern Europe (11%), Far East (10%), South America (10%), Australasia (9%), Central America (8%), Africa (7%), Central Asia (7%), Indian Subcontinent/Middle East (5%).

Top individual destinations for travel in the next two years were: **1 USA**, 2 Australia, 3 Japan, 4 Canada, 5 Costa Rica, 6 Argentina, 7 Italy, 8 New Zealand, 9 Thailand and 10 Croatia.

From the research, JRNY has determined to focus on:

- ‘Real stories, not just pretty postcards’ – seasoned travelers crave depth, human-led stories that go beyond the obvious.
- Lesser-known destinations – angles that make the familiar feel fresh, and the unfamiliar feel irresistible.
- Practical tips – readers dream big but want to know how to make it happen ... at all levels of budget.
- Multi-platform content – they need high-res imagery, video clips, behind-the-scenes access to ‘help us capture the story, not just the brochure’.
- Longer-term destination partnerships – readers are repeat travelers who want to experience familiar places in very new and different ways; multi-issue story arcs and series features are the way to truly resonate.
- Readers want: more depth; more format variety; more authenticity; more untold stories; more access to the people, places and perspectives that make travel matter.

NEWS: USA Losing International Tourist Appeal with Country set to Lose \$12.5bn in Visitor Spend This Year, WTTC Claims

Source: ITTN

The US is facing a sharp decline in international tourism, with the World Travel & Tourism Council (WTTC) projecting a \$12.5bn drop in international visitor spending this year — falling to \$169bn from \$181bn in 2024.

This marks a 22.5% fall from peak levels and makes the US the only country among 184 studied expected to see a decline in 2025.

WTTC President Julia Simpson called it a "wake-up call," blaming inaction by the US government despite strong global demand. She warned it could take years to recover without urgent leadership.

While domestic tourism remains strong, accounting for nearly 90% of total spend, the decline in international arrivals — including a 15% year-on-year drop from the UK — reveals deeper vulnerabilities in the sector.

NEWS: Money worries lead to drop in number of Brits planning summer holiday

Source: Travel Gossip

The number of Brits planning a summer holiday has dropped from 85% in 2024 to 77% in 2025, according to a new Allianz Partners survey.

Nearly half (46%) of those skipping holidays blame financial worries, as average household spending has jumped £425 to £2,348. One in five say travel is now too expensive.

Domestic travel has seen the steepest decline, with UK holiday plans falling from 57% to 45%. Foreign travel remains steady at 49%, with Europe the top destination (37%), followed by **North America (8%)** and Asia (6%).

To afford trips, 58% will cut leisure spending, and 54% will delay major purchases.

Environmental concerns are rising, with 59% factoring them into travel decisions, up 7% from last year. Global tensions, extreme weather, and stricter border controls are prompting many to reconsider destinations. One in five cite overtourism as a reason not to travel.

Allianz's Andrew Tolman said Brits still prioritise holidays but rising costs, climate fears, and geopolitical risks are reshaping travel habits.

NEWS: Brits continue to spend more on travel, despite economic fears

Source: Travel Weekly

Brits have spent more each year on holidays since the pandemic, even though confidence in the economy has fallen, according to Barclays.

The bank's analysis of consumer spending shows a **5.9% increase in travel spend last year**, with health and beauty the only sector showing a greater increase of 6.5%.

Barclays' 10 Years of Spend' report shows that discretionary spending has grown by 9.2% a year since 2021, outpacing the 5% growth in spending on essential items. Analysis of debit and card transactions abroad shows the top 10 overseas destinations have remained broadly the same, with Spain and France occupying the top two slots since 2019, though in 2024, Germany made it into the top 10 for the first time in six years.

Barclays' analysis also shows that 49% of Brits now value holidays more than they did 10 years ago, 33% spend a greater share of their income on travel, and 38% of holidaymakers use social media for inspiration and guidance.

Barclays Head of Retail Karen Johnson said: "Ten years' worth of analysis tells us that while confidence in the UK economy has declined, UK households' confidence in their ability to manage their money has remained strong, translating into the impressive performance of **categories such as travel**, entertainment and beauty."

NEWS: UK arrivals to the US up year on year despite concerns

Source: Travel Weekly

The US remains the top long-haul destination, says The Travel Network Group, despite concerns over cost and politics.

"I'm surprised it's still number one," said chief commercial officer Vim Vithaldas, noting many cite affordability and political reasons for avoiding it yet still go. A favourable dollar-sterling exchange rate maybe helping.

Other top long-haul spots include Thailand, India, Mexico, and the Maldives.

Tourists are increasingly exploring Eastern Europe over traditional destinations. Mainstream holidays now make up 36% of the market (up from 35%), and cruises 20% (up from 18%).

Vithaldas warned agents that clients often book additional holidays direct, urging them to ask about all travel plans early to secure more bookings. The positive UK figures back up data presented at the Travel Network Group conference in June.

Members were told the US remained the consortium's top long-haul destination, with chief commercial officer Vim Vithaldas admitting he was "very surprised" about the destination's ongoing popularity despite a recent improvement in exchange rates.

NEWS: America the Beautiful hopes to reassure U.S.-bound Travelers

Source: Selling Travel

Brand USA has unveiled its new global tourism campaign, *America the Beautiful*, at IPW in Chicago. Launching in the UK this August, the campaign aims to showcase the best of the U.S. and boost international travel through storytelling and a fresh perspective.

Despite concerns of an 8.7% drop in international arrivals in 2025, Brand USA reports strong 2024 results, including 1.6 million additional visitors and \$6 billion in spending.

The campaign faces funding threats, with proposed cuts slashing Brand USA's budget from \$100 million to \$20 million. Industry leaders warn this could affect promotion ahead of major events like the 2026 World Cup and 2028 Olympics.

CEO Fred Dixon said the campaign is a rallying cry to show the world the U.S. is open and welcoming.

NEWS: Exsus promises more events for frontline agents after 25% growth in trade sales**Source: Travel Gossip**

Exsus Travel is set to increase fam trips and events for agents following a 25% rise in trade sales this year. Agents now account for 95% of the luxury operator's business, up from 90%.

At the company's annual agent lunch and awards, Managing Director Habib Rehman credited agents for the growth and emphasized the importance of healthy competition in driving service quality.

Sales and Finance Director Sinziana Renciu noted a rise in new agents selling Exsus holidays and confirmed more agent-focused activities are in the pipeline.

Speaking to *Travel Gossip*, Rehman added: "We always see a big uplift in sales after events—they work very well for us."

NEWS: Prestige Travel records 30% departures growth for 2026**Source: Travel Weekly**

Prestige Travel treated around 50 travel agents to a Thames cruise aboard the Elizabethan paddle steamer last Friday, celebrating strong trade sales growth since 2022.

Managing director Darren Hollis said trade sales—making up 95% of the business—have exceeded annual growth targets of 15%, hitting around 20% each year, with 2026 departures already up over 30%.

"Agents are vital to our success," said Hollis. "We listen to their feedback and act on it."

Croatia multi-centre trips led European growth, while Australia and New Zealand saw the biggest rise in enquiries. Interest in the US and Canada also increased unexpectedly. Hollis noted a trend towards higher spending and longer stays, especially on long-haul trips.

The evening included dinner, live music, magicians, and supplier presentations, with both long-term and new agent partners in attendance. Hollis concluded, "Tonight is about celebrating our achievements and building future relationships."

Quarterly Report – Germany

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
19	25	7	0	2

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	Usa-reisen.de	Doreen Sell Marketing Director	Finalized GAW promotion with Usa-reisen.de with the social media posts in April to create awareness and promote the new fly drive: https://www.usareisen.de/reisen/tour_leistungen.html?i=517 Social Media GAW Posts on FB and IG to promote the new fly drive tour – April 15, 2025: 15,300 fans on FB, 1,500 follower on IG
Trade	Condor	Eva Zuehlke Marketing Manager	Met at VUSA Members Meeting in Frankfurt. Discussed possible cooperations, marketing activities and will meet in person in Frankfurt soon.
Trade	Air Canada	Thorsten Schuhmann Senior Sales Support	Met at VUSA Members Meeting in Frankfurt. Discussed possible cooperations, marketing activities and will meet in person in Frankfurt soon.
Trade	Pferd und Reiter	Julia Wies Product Manager	Offering a new ranch in WY in their brochure, Lake Guest Ranch in Northeastern Wyoming.
Trade	THV Reisen	Claudia Freiberger	THC Reisen in Austria offers little USA product but once in a while have group tours though the USA in their portfolio. They were offering a trip from LA to Texas for summer 2025 but had to cancel the group tour as they received 20-25 cancellations. Their clients are rather older (65+) which might be a reason for the cancellations. They are currently not offering any other USA trips.
Trade	America Unlimited	Annica Grosche	Followed up with Annica after IRU, which she loved. She said the organization in advance and on site as well as the information and communication were really great. She also really enjoyed the SD Post Fam and IRU and, above all, she was able to gain a lot of new product knowledge. She already has a few routing ideas in mind for new travel suggestions for their website. She was hoping that these routings could be promoted properly with joint marketing campaigns in the future.

Type	Company	Contact	Details
			For example, she is currently thinking of 2 new one-way tours (Seattle - Salt Lake City with Idaho and Wyoming and Minneapolis - Denver via ND, SD and Wyoming). She believes such 2-3 state combinations often work better for customers than trying to fit all 4 states into one big itinerary. After IRU I provided her with input, images and feedback of our visit to Shortgrass Resort, which she thinks could certainly be included in one of the new itineraries. We will stay in touch.
Trade	Karawane Reisen	Petra Schurig	Enjoyed IRU (with excellent appointments) and the SD Post-Fam a lot. Sent her information and images about Shortgrass Resort.
Trade	T.r.u.e. America	Tamara Toemmers	Followed-up with her after IRU. She liked the event a lot (her second IRU so far), got lots of ideas for new product and routings. Sent her information and images about Shortgrass Resort and they are considering adding it to their portfolio.
Trade	Canusa	Tabea Wahl	Followed-up with her after IRU. She liked the event a lot and loved to get to know all the suppliers for new routing and product ideas! Sent her information and images about Shortgrass Resort and they are considering adding it to their portfolio.
Trade	Ruck Zuck Urlaub	Ribanna and Nico Ginsberg	Ribanna attended IRU and Nico joined her on the last evening as they went on a post-fam through WY afterwards. Ribanna loved IRU, as always, and Nico did a site inspection at Shortgrass Resort on his own, which he liked a lot.
Trade	DERtour	Isabelle Wilczek Head of Sports	Isabelle is Head of Sports at Dertour Sports. Tom Rostek is specifically focused on NFL. Dertour Sports focuses on offering travel experiences around major sports events, including the NFL, NBA, darts, tennis, and German Bundesliga (Worldcup promotion pending). They are the official Matchbreak partner for the NFL Germany game and acquire tickets primarily via Ticketmaster and similar platforms. Their travel programs are developed in cooperation with receptive partners in the U.S. Currently, they offer a limited number of small group tours (typically 4–6 participants), with 2025 programs focusing only on Florida and Boston. However, they expressed openness to exploring new collaborations for future seasons. In addition to group tours, Dertour Sports also provides FIT travel options. Product development for the 2025 season is still ongoing. The average trip duration is three to four days, usually covering one to two cities. Contacts to teams are preferred. They are however not

Type	Company	Contact	Details
			willing to pay sponsorship fees. Regular marketing options (B2B & B2C) available.
Trade	Bike The Best	Michaela Fischer Owner/Managing Director	Provided GAW roomnights for 2024.
Trade	Umulana	Elke Metternich	Elke provided GAW roomnights for 2024. She is working on a new fly drive itinerary from/to Minneapolis with ND and SD. She would like to focus on the Native American theme more in these states in particular and was looking for really nice, small accommodations. Provided her with the link for the 4-State itinerary to give her an idea of the Native American product in the region as well as overnight suggestions and will follow up to discuss itinerary details with her: https://greatamericanwest.de/routenvorschlage-gaw/das-erbe-des-westens-und-die-kultur-der-ureinwohner/
Trade	Windrose	Aline Gehl Teamlead America	When we talked in April, their US business had stagnated in recent weeks due to the negative news and the political situation. They still have a good sales increase of +30% and were able to book some nice trips from October to February, but after that it went quieter. Unfortunately, the roomnights for Great American West have decreased. They used to have inquiries and bookings for the Amangani in Jackson Hole, but now that it is being renovated, these have also dropped off. They are currently working on a new national park tour to Yosemite and Grand Teton National Park for 2026, which will go online in a few weeks. This is their current project to push more unknown US national parks and to meet the continuing demand for nature experiences off the beaten track in the USA.
Trade	Usa-reisen.de	Doreen Sell	We talked in April after German media published negative news about stricter entry regulations and political topics: Doreen said that the number of inquiries has slightly gone down, but it's far from being something to complain about or be afraid of. Contra USA comments are occasionally received via social media, but Usa-reise.de customers are USA-savvy, repeat travelers and love the USA. Customers have a passion for the USA. Usa-reisen does not see any cancellations, new bookings are coming in, currently even many. Bus tours were booked slightly less during Trump and currently as well (maybe due to elderly clientele who is more uncertain about travelling, Doreen guesses). No cancellations.

Type	Company	Contact	Details
Trade	Argus Reisen	Manja Trietchen	Talked to Manja in April after German media published negative news about stricter entry regulations and political topics: did not see any cancellations so far, just 1 cancellation request due to the political situation in the US, but not because of uncertainty regarding immigration. However, client did not end up cancelling as he did not want to pay cancellation fee. New booking requests are coming but seeing slight decrease in bookings.
Trade	Argus Reisen	Dirk Buettner	Talked to Dirk at IPW: bookings have picked up again in May and June. Fall and 2026 are still slow.
Trade	Ruck Zuck	Ribanna Ginsberg	Call with Ribanna in April: USA is actually almost at the same level as last year. They cannot report a 40 - 50 % drop, as other colleagues have reported. However, bookings started very early (September/October) for the summer. They did have some cancellation requests, but these were quickly dealt with when customers heard the cancellation costs. Of course there were also cancellations of offers, but one never knows the reasons for those: politics, high prices, personal issues... All of her customers who travelled to the US since January 2025 had a great time in the USA and nothing negative to report.
Trade	TUI	Claudia Ehlen	Asked Claudia about the general booking situation in the USA in April: although there are no notable cancellation figures, unfortunately there have also been no notable new bookings since a certain date in February - compared to usual. As they have many FTI customers, these are also more budget-driven, so costs might be an issue here as well.
Trade	CRD	Pia Hambrock	Feedback from April: Demand for travel to the USA was very high until the end of January and they started the 2025 travel year with a healthy increase. Demand has slightly decreased since February - the daily news from the USA is currently too polarizing. The exchange rate and the price-performance ratio make other destinations more attractive for families, but hardly affect CRD's core target group. However, this sentiment is only a snapshot. It takes a little time to get used to change. Customers travel to the USA for other reasons - politics is rarely the focus for other destinations. They therefore expect last-minute business to be strong. The quality of bookings and the value is very high. Some of the bookings that do not materialize are very small ones. She is optimistic this will change for the better and that last-minute bookings will come in as well.

Type	Company	Contact	Details
Trade	airtours	Steffen Boehnke	Feedback from April: The USA is one of the most popular long-haul destinations for Airtours. They are currently not seeing any changes in demand. Thanks to its great appeal, iconic sights and numerous places of longing, the USA remains one of the most popular travel destinations. Demand can be influenced by local price trends, the euro/US dollar exchange rate and bed availability - particularly in major cities. If the exchange rate continues to develop positively, they expect demand to remain strong in 2025.
Trade	America Unlimited	Timo Kohlenberg	Feedback from April: There has been a noticeable decline in bookings in the USA. Canada, on the other hand, is booming with an almost 100 percent increase in sales compared to the previous year - there is a clear shift. Factors that are currently influencing demand are the new US administration, the political situation in Germany, inflation and higher prices. However, Timo believes that demand will pick up again this year – also thanks to the stronger Euro. At least it was similar in 2017/18. Positive political signals are also currently visible in Germany.
Trade	Canusa	Timmo Krause-Duenow	Feedback from April: They see that North America remains an absolute dream destination for many travelers. Whether impressive natural parks, vibrant cities or road trips along iconic routes - the continent's diversity remains unsurpassed. On the ground, their customers consistently report positive experiences and a welcoming atmosphere. Those returning home report enthusiastically about their travel experiences. There are occasional inquiries from customers about the current political situation or entry requirements, but they have not noticed any general concerns. And the anticipation of the destination usually prevails. So far, they have not had any cancellations due to political concerns, and the booking figures for trips to the USA continue to show stable demand. Bookings for summer 2025 are very good and above the previous year's level. They can't look into the crystal ball either, but they have often observed catch-up effects in the past. They are optimistic that this will also be the case in 2025. Canada as a destination has seen a significant increase in bookings in recent months.
Trade	United Airlines	Thorsten Lettnin	Feedback from April: United is currently experiencing unbroken strong demand from Germany - both in the tourism and business travel segments, as well as in the premium segment in general. In the business travel segment, this demand is primarily driven by medium-sized companies. United believes that two factors are of particular importance for the further development of the tourism sector. One is the development of the US dollar and local prices for hotels, rental cars and other tourism products. The other is related to the coronavirus pandemic: after the end of the pandemic, many holidaymakers had a lot of pent-up demand for the USA. As tour operators and sales partners confirm, this appears to have been exhausted. Accordingly, demand is

Type	Company	Contact	Details
			likely to return to a level that the industry is familiar with from the pre-coronavirus era. Demand for the USA from Germany has always proven to be robust in the past. For many Germans, the USA continues to be an extremely diverse and fascinating travel destination
Trade	Windrose	Christian Boell	Demand remains stable and they are even continuing to record impressive sales growth. However, they are observing a clear shift in the travel flows of their guests towards the so-called "blue states" - in particular the West Coast, the upper East Coast and Hawaii. The political situation and the measures taken by the USA under Donald Trump are increasingly the subject of consultation. Demand is still stable, but they will have to wait and see the long-term effects. Canada in particular is benefiting noticeably from the current political U-turn in the USA. As a direct neighboring country, it offers a comparable tourist infrastructure and diverse travel experiences.
Trade	Aldi-Reisen (Eurotours)	Paula Frischengruber	Aldi is one of the largest discounters in Europe, who also offers their own travel program. The website Aldi-Reisen.de is powered by Berge & Meer Touristik – German tour operator partner based in Rengsdorf. In Austria and Switzerland Aldi also sells vacations via direct sales tour operator partner Eurotours, based in Kitzbuehel, Austria. For 2025 they are offering a new tour including the GAW: https://www.aldi-suisse-tours.ch/de/reiseangebote/nordamerika/usa-the-great-american-crossing-rundreise-hotels-der-mittelklasse-9802544
Trade	America Unlimited	Tom Langlotz	Finalized GAW Campaign with America Unlimited who provided a detailed reporting.
Trade	Stumboeck Reisen	Katrin Blum Sales	Offering a new Freeride Safari to Jackson Hole this winter and promoting it on social media: https://www.stumboeck.com/skireisearten/stumboeck-skireisen/skisafaris-usa/jackson-hole-freeride-safari/jackson-hole-freerideskisafari/
Trade	Art of Travel	Christine Werner Product Manager	Art of Travel is a luxury tour operator based in Munich. They were not working with RMHT, which we highly recommended. She met with RMHT at Go West in February 2025 in Alaska and is considering a cooperation now. She is in contact with them. Art of Travel brings out a client brochure once in a while which is very exclusive and looks like a coffee table book. In their newest edition they feature Wyoming as a must-see for Cowboy-fans: https://e.issuu.com/embed.html?d=the_unmissable_art_of_travel_&u=mrkt1&utm_campaign=67427546-AOT%20Newsletter&utm_medium=email&hsenc=p2ANqtz-

Type	Company	Contact	Details
Trade	Diamir	Deborah Clauss Product Manager	Met at IPW. Diamir offers mainly group tours and now wants to push FIT (trips for repeat customers), especially the northwestern part of the USA. Working with ATI, NWT, RMHT, Tourmappers, A4U, Ratehawk. Susanne to send itinerary samples for her to look at and get ideas. They also have a large consumer event in Dresden in November. She has never been to the region, we will therefore invite her to IRU in Medora.
Trade	TUI Suisse	Philippe von Czapiewski Managing Director TUI Suisse	After a successful winter season 2024/25, TUI Suisse is also on a solid growth path in the current travel year 2025. On long-haul routes, the USA and the United Arab Emirates lead the rankings. These are the most popular summer long-haul destinations in 2025: - USA - United Arab Emirates - Tanzania - Canada - Maldives
Trade	Abgrazanwelt	Klaus Zeiler Managing Director	Met at IPW. Small Austrian tour operator. Their website is www.all-of-usa.at . Currently only offering a Harley bike tour through Colorado, South Dakota, Nebraska, Wyoming, Montana, Idaho and Utah (https://all-of-usa.at/biker-touren/mit-der-harley-durch-den-mittleren-westen/), but would like to offer more product in the GAW – also fly drive tours by car and motorhome. We will send suggestions and stay in touch.
Trade	T.r.u.e. America	Tamare Toemmers CEO	Finalized Great American West Blog Post as part of the GAW promotion: https://true-america.de/portfolio/great-american-west-die-cowboystaaten/ Sent final marketing activities report.
Trade	Kuoni	Tino Swoboda Head of Product North America Carmen Dreymann Product Manager	Tino, Head of North America Product and Carmen, Product Manager at Kuoni moved from the company Kuoni over to a different department at their mother company DERTour. None of them is involved with USA product now. Currently Kuoni does not have their own North America Product team. The North America product of Kuoni might most likely be handled by the German DERTour or the Swiss Hotelplan North America team once the merger to DERTour Germany is approved.
Trade	Para Tours	Hans-Peter Riesen Managing Director	Finalized Para Tours promotion with 4 Social Media Posts published in April: April 4: – North Dakota Post: The Dakotas Selfdrive April 9: – Idaho Post: Off the beaten Track Selfdrive April 13: – GAW Youtube Video April 23: – Wyoming Post: Wyoming Wind River Tour Selfdrive April 28: – South Dakota Post: The Dakotas Selfdrive

Type	Company	Contact	Details
Trade	Canusa	Anngret Rossol Senior Product Manager	Followed up with GAW regarding feedback from SD and WY in regards to support for the Canusa fam trip to the GAW September 13-20, 2025 to SD und WY. A total of 7 Canusa sales managers plus Anngret Rossol, Head of Product, will participate in the fam. Routing: Day 1: Jackson Day 2: YNP Day 3: Cody Day 4: Sheridan Day 5: Deadwood Day 6: Keystone Day 7: Rapid City Day 8: Departure from Rapid City Flights and rental cars will be covered by Canusa. Anngret met with SD and WY at IPW und learned that some hotels and activities were confirmed. Waiting to hear more details.
Trade	Geoplan	Sebastian Glowacki Team Lead USA Nadine Glowacki Product Manager USA	Followed-up regarding their fam to SD and WY June 4-15, 2025. We briefly emailed after their return but will have a proper follow-up call soon to learn more. They had a really great trip, and said it was definitely one of their top 4 experiences they had in the USA. They would like to thank GAW and the states for their support, even though they wished that hotel and activity information for their fam would have been provided with more lead-time to their trip departure - as most of the information came in last-minute and some support could not be provided (or too late), which lead them to make their own arrangements. They mentioned that Cody in particular had really put together a great package and all the activities were great. I will provide more feedback soon.
Trade	Die Reisebotschafter	Dirk Zielinski Product Manager North America	Asked for 2024 roomnights for the GAW, which he provided.
Media	Tracks and the City Blog and Freelancer for German magazines and newspapers	Sandra Wickert	Sent finalized itinerary to Sandra. Handled correspondence during her troubles at arrival, making her miss the first day. Followed up afterwards, sent detailed Deadwood overview and images for her to include "dry". Handled expenses layout and invoice after the trip and sent detailed feedback about her experiences.
Media	RND – Redaktionsnetzwerk Deutschland	Harald Stutte	Press network of regional newspapers with great circulation. Planning a big story about Native Americans in South Dakota and Montana - with a historic anniversary as the backdrop. Informed about procedure and referred to MSI, after the transition.

Type	Company	Contact	Details
Media	Freelance Journalist	Stephan Wagner	Finalized the itinerary and discussed the reimbursement details. Corresponded last minute with Idaho directly about some activities (not) possible. Handled expenses layout and invoice after the trip and sent detailed feedback about his experiences.
Media	FVW.de	Holger M. Jacobs	Informed Holger that SD declined support with hotels. Asked for at least entry fees and passes. Corresponded with him, as well as with GAW and ND and Fargo on the final ND itinerary, clearing up issues with his first hotel and sent additional open questions about the itinerary.
Media	America Journal	Uli Grube	After IRU and the visit to the Shortgrass Property, pitched that to them as news as well as other topics like the New Presidential Library (Uli to visit the press conference at IPW)
Media	LuxusInsider	Iris Koepke	After IRU and the visit to the Shortgrass Property, pitched that to this trade focused luxury publication. As Iris will be in the region herself end of September for Buffalo RU, recommended to ask for a site inspection / visit. Also followed up with Gina Koneche with Custer State Parks to receive answers to specific questions Iris has about her attendance at Buffalo Roundup and to see if it is possible to get her the media VIP treatment during the event.
Media	FVW.de	Holger Jacobs	After IRU and the visit to the Shortgrass Property, pitched that to this trade focused luxury publication. As Holger will be in the region himself recommended to ask for a site inspection / visit, which he did.

Trainings

Summary:

# Trainings	# People Trained
0	0

Significant Training Highlights:

Type	Company	Contact(s)	Details
Trade	Naar Reisen	Angela Gaza Product Manager	Virtual GAW Training for staff was planned for May but had to be postponed to August/September.

New Product

Summary:

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
14	4	2	5	61

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
TMC Reisen	Rocky Mountains und Great Plains	DEN	DEN	DEN (1) – Rock Springs (1) – Yellowstone NP (2) – Medora (1) – Rapid City (1) – Hot Springs (1) – DEN (2)
TMC Reisen	Der Wilde Westen am Oregon Trail	Kansas City	Portland	Casper (2) – Rock Springs (1) – Yellowstone NP (2) – Pocatello (1) – Boise (1)
Travelamerica.ch	Legendaere Tierwelt in Yellowstone & Grand Teton	Jackson	Jackson	Jackson (3) – Yellowstone NP (3)
Journaway	American Est Roadtrip: Space Needle meets Yellowstone	Seattle	Seattle	Yellowstone NP (2) – Jackson (2) – Twin Falls (1)
Pioneer Tours	Yellowstone Wintererlebnis	Bozeman	Jackson	Jackson (2)
Pferd und Reiter	Lake Guest Ranch, WY	Rapid City	Rapid City	Lake Guest Ranch, Hulett (7)
Stumboeck Reisen	Jackson Hole Freeride Safari	Jackson	Jackson	Jackson (7)
Erlebe	Von Las Vegas zum Yellowstone: Grosse Nationalparks Rundreise	Las Vegas	Las Vegas	Jackson (2) – Yellowstone NP (2)
Erlebe	Nordwesten der USA – Bisons, Cowboys & Präsidenten	DEN	SLC	DEN (1) – Custer (2) – Cody (1) – Yellowstone (2) – Jackson (2)
USA SK Travel	Hotels in Wyoming	Jackson	Jackson	Amangani, Caldera House, Four Seasons Jackson Hole, Hotel terra Jackson Hole, Magee Homestead, Teton Mountain Lodge & Spa, The Lodge & Spa at Brush Creek Ranch.
Fairflight	Rocky Mountains & The Great Plains	DEN	DEN	DEN (1) – Rock Springs (1) – Medora (1) – Rapid City(1) – Hot Springs (1) – DEN (1)

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Fairflight	American Grandeurs	DEN	DEN	DEN (1) – Rock Springs (1) – Jackson (1) – Yellowstone NP (1) – DEN (1)
Fairflight	Yellowstone – auf den Spuren der beliebten TV-Serie	Dallas	Boise	Casper (1) – Sheridan (2) – Boise (1)
Fairflight	Coach tour: Die Rockies aus einer anderen Perspektive	DEN	DEN	DEN (1) – Cheyenne (1) – Rapid City (1) – Cody (1) – DEN (1)

Website

Sessions	Users	Pageviews	Average Session
1,065	1,505	21,940	06min 27s
(-39%)	(+11%)	(+137%)	(+301%)

Misc.

- Sent media recommendations for the Presidential library opening 2026 to ND
- Sent media recommendations for the Treefort Music Festival in 2026 to ID
- Carola and Susanne attended RMI Summit Meeting and IRU in Rapid City and participated in SD Post-IRU Rep Fam
- Provided input and suggestions to states for IPW meetings
- Finalized GAW Trip Report for FY 24-25 and included roomnights in TRIP Report Database
- IRU 2025: 5 German tour operators participated at IRU in Rapid City and attended fam tours
 - Canusa, Tabea Wahl – SD Pre-Fam
 - Ruck Zuck, Ribanna Ginsberg – SD Pre-Fam
 - Karawane Reisen, Petra Schurig – SD Post-Fam
 - T.r.u.e. America, Tamara Toemmers – SD Post-Fam
 - America Unlimited, Annica Grosche – SD Post-Fam

Quarterly Report – Benelux

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
28	23	3	0	2

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	Doets Reizen	Anouk Gortzak	They didn't see a decline in booking request in the first two months of this year, but they have seen a slow demand since March, following, among other things, the announced U.S. import tariffs. Reasons are the high prices and travel sentiment. They have had very few cancellations, but the new requests are significantly lower. They aren't too worried yet but do hope it will stabilize.
Trade	UStravel.nl	Wolfgang Hendrix	They have launched a new label: Exploretravel.nl. The brand aims to offer customized, high-quality trips worldwide—including to South America, Asia, Africa, and Oceania—while maintaining the same personal service and expertise his clients know from North America trips. The new brand is both B2C and B2B focused. The idea of the new brand had already been in development for some time. The pandemic highlighted the risk of relying on just one or two destinations. In addition, many past customers who traveled to the US or Canada wanted to book other destinations with the same team. Exploretravel now can meet that demand. They will now have three separate websites with different backends: ustravel.nl, canadatravel.nl, exploretravel.nl. We also spoke with Wolfgang about their US bookings, which haven't been great. They are pushing and pulling for bookings, and still see an effect of the negative travel sentiment. Customers that are returning from the US all report a great visit.
Trade	Do USA	Jan Nijenhuis	Jan reports they benefit from offering more than just the USA, which has been underperforming. Although the initial results were promising, interest has significantly declined since January. Many clients now opt for alternatives such as Canada, Thailand, or South Africa—an understandable shift, though somewhat disappointing. Looking ahead, they do not expect a recovery in 2025, and if current trends continue, 2026 may also present challenges. Fortunately, they are still achieving strong results even without a robust U.S. market.
Trade	Travel2America	Edwin van Delden	Edwin mentions that the USA is still a great country to travel to, immigration has been smooth, and the people

Type	Company	Contact	Details
			are nice as ever. He does see a drop in bookings compared to last year of about 20%. But he also feels confident that the bookings will rise again during the year.
Trade	Riksja Travel	Lianne Boerma	Lianne always provides booking numbers and looks back on a good growth in the region compared to 2023 (mainly SD/WY). She mentions that she hopes to continue that trend, although this is a tough year of course. She also mentioned that adding ND building blocks has helped with interest to the state, with 2 overnights booked so far for Medora in 2025. Their most booked location in Idaho is Idaho Falls, and bookings for this location has shown a significant growth already in 2025 as well. She mentioned that, from experience, they find the distance from SLC to Jackson too far and that they now plan Idaho Falls more often as an extra stopover to Yellowstone and/or Teton. Whereas before they often said, “just drive the whole distance”, now they advise against it. Also, they now have Oregon and Washington in their product since last year, where there is also a lot of demand for the combination with Yellowstone and then Idaho Falls is often a good stopover as well.
Trade	Indelible Travel	Frans Schoon	Frans let us know that, because they have a young company, they do not feel the effects too much. He is still orienting the course of the business that for now has a USA/Japan focus. He also receives requests for other destinations, which may have potential in the future. He is very active in the market with his research and building his network. In their first year they became a member of Visit USA, and he is also member of the board.
Trade	Connections	Sarah Vandermaesen	Sarah let us know that they are finally seeing an uplift again in booking numbers. From December till May it wasn't very positive, March and April were very slow in terms of bookings, last minutes are coming in, which is very non-Belgian. They usually book 6-12 months in advance. They work a lot with Brand USA and are waiting on what will happen there. They had to put a hold on a campaign with them. She provided us with booking numbers.
Trade/Airport	Amsterdam Airport Schiphol	Marcel Lekkerkerk - Airline Partnerships Director	We spoke with Marcel about the potential for a direct route AMS – DEN. He mentioned that the route always has been high on the potential list, and they will definitely consider it again.
Brand USA	Brand USA Benelux	Charonne in 't Veld	Charonne let us know that one of the main PR Managers at Brand USA Benelux, Irene Lipper, has left the company. They are sad to see her go and are still looking for a replacement, but this will be hard to find someone with the same amount of experience. Our main point of contact will remain Charonne.
Trade	Let's Go Travel	Django Hofma	Django provided booking numbers and mentioned that they too noticed that the number of bookings was down a

Type	Company	Contact	Details
			bit compared to last year, but fortunately not in the same percentages as other tour operators have experienced. If they continue as it's going, and the conditions remain the same then the difference for them won't be too bad, he says. Also, the number of questions from people about whether they can go to the US because of the entry requirements has decreased significantly compared to Q1.
Trade	Westbound Travel	Timon Theeuwes – Product Manager	Timon provided booking numbers and mentioned that the west coast (CA/NV/AZ/UT) is their most popular region, as they haven't been offering the GAW for that long yet. The bookings for 2024 were mostly made in 2023 and they were just starting the GAW at that time. He expects that these will increase in the coming years.
Trade	Avila Reizen	Rianne van der Werff	Rianne was very sad that she couldn't join IRU. We informed her about the new Shortgrass accommodation, as we see it very fitting for their brand. She was very excited. She will look how they can incorporate it in an existing itinerary and give it a separate mention as accommodation on their website. She will contact Rachel for imagery etc. and look at how they might be able to include this in a social post as well.
Trade	Patricia Struchel	333 Travel / Travel Platinum	We shared the new Shortgrass accommodation with Patricia, as this fits well with their luxury brand. She said "The location, atmosphere and style immediately appeal to me, and I can well imagine that this is a perfect fit for our Platinum Travel clients. What a special place, and the video completes it! I'm definitely going to see if we can incorporate this into our offerings. Super that you've been there yourself - that always says the most."
Airline	JetBlue	Andre van der Sluis	Andre is looking at their plans for 2025/2026. They did many different marketing activities last year, which now gives them a good idea of what they experienced as effective and valuable for 2025/2026. Amongst their plans is a bigger focus on consumers. They were surprised by the positive experience at Vakantiebeurs last year and plan a B2C stand for 2025. They've noticed that the bookings are coming in very short before departure. For this reason, they aren't worried about the total tickets sold to the USA, even though they do have available seats still for this summer. He mentioned that the last two weeks of May specifically showed a high increase in bookings. Netherlands is doing well now, France and UK less.
Trade	Style in Travel	Birgitte Bosma	Birgitte let us know that the GAW region remains of utmost importance for them, given their high share of repeat visitors to the USA. In a market that is currently down under numbers of clients travelling to the USA in general, they see the numbers to the GAW on par with last year. States are visited either as a trip from Denver and/or Salt Lake City or in combination with the Northwestern States.

Type	Company	Contact	Details
			Popular destinations are Black Hills region and of course, Yellowstone, where they plan a minimum of three nights. They however also see a growing demand for more, less visited destinations, where clients can experience the GAW states without the crowds, e.g. North Dakota in general, but also places like Pocatello, ID (where they love the Black Swan Inn). Birgitte also let us know that they unfortunately couldn't provide booking numbers this year as it takes a lot of effort to pull it out of their systems.
Airline	Iceland Air	Marieke van der Weijden	When asking Marieke about the current booking overview she expressed that their results at the start of the year were in fact much better than the overall -20% which was recorded nationally. In a YTD comparison they were on a plus. She explained this to be a result of Covid. In that time Icelandair has lost a significant market share, as many of the other larger airlines were offering low prices, to fill the planes as much as possible – making Icelandair's tariffs expensive in comparison. At the start of the year Icelandair had lower prices, resulting in a boost of bookings. This is now slightly decreasing again after other airlines have lowered their prices, and they see an audience that is cautious and waiting to book.
Trade	Buitengewoon Reizen	Gerda van 't Land	Gerda expressed that things are improving and gradually falling into place following the acquisition of the booking operations of Buitengewoon Reizen by US Travel. However, she noted that the transition has been quite a challenging process. She also shared her ongoing ambition to enable more tour operators to offer accessible travel packages. She emphasized that travelers with special needs do not limit themselves to one company, and there is a growing need for broader product availability in this segment. To help achieve this, she is offering tour operators the opportunity for a training session that will equip them with the knowledge and tools needed to expand their accessible travel offerings. She also was a keynote speaker at the Oregon Tourism Conference. A few operators have also shown interest. In terms of the bookings – it is okay, but not yet where they want to be.
Trade	Best of Travel (BE)	Gwendolien Depover	She is very excited that part of her fam through the region is hosted (2 ON: Rock Springs and Sheridan). We sent her a goodie bag with WY/SD swag.
Trade	Penta Reizen	Pieter Demuynck	Networkonwheels started 12 years ago. Organize about 7 trips per year (worldwide). Only one USA trip from California to Utah. This was unfortunately cancelled for 2026 due to negative travel sentiment. Motorcycles are booked through EagleRider. He still organizes the TV show "Thuis in Amerika" (Home in America). For 2026 the focus is East Canada, in 2027 West Canada as the last two years it was focused on the USA.

Type	Company	Contact	Details
			For Peter, the most valuable support from the state is support with fams. He really believes that in order to sell a destination, you have to experience it. Therefore, he sends part of his sales team each year to a different part of the US.
Trade	Van Verre Reizen	Irene Dijkstra	About 20% of their bookings are USA. They would like to include more unique accommodations. They work with RMHT but finds their systems difficult to work with. They have building blocks (3-4 days approx. including hotels/activities) on their website and would like to expand these. Focus on soft adventure, slow travel. They only attend self-organized fams (2 persons), rarely organized group fams. IPW is the only fair that they attend in the USA for efficiency.
Trade	USA Travel	Olivier Vandenbrouche	2025 has been affected - partially political and partially economically (pricing of flights). Less family travelling, high end clients are still traveling. Airlines were lowering prices last minute. He would like if hotels had a lower starting price and then moving it up later on - positive message during early booking season. Earliest they've ever seen was August.
Trade	Travel Trend	Peter van Veenendaal	Bookings are down a bit, mainly long-haul travel, except for Asia. Reason is the high air fare prices. They have some last-minute bookings and also are seeing bookings for next year but limited to 11 months in advance due to flights. They are looking to ramp up North America marketing starting in the fall. Hired new staff for B2C and are open for trainings to the new employees. He had a great experience at IRU! He's speaking with partners about unique accommodations. RMHT has the most but he's not working with them (yet). After IRU, he did see how much product for the GAW region could be available through RMHT. He is pushing ATI for unique product. Their new computer system will go live soon, this will make their systems quicker and more efficient. Seeing bookings for next year.
Trade	Joker	Ludwig Verbruggen	Summer season this year is still good, from bookings made last year. They are a bit worried about the following year though as many others. Have sent out the Save the Date for their Joker Reisbeurs and registrations are coming in. With approval for the co-op, we have signed up the GAW.
Trade	Christian Jabor	Aeroglobe	Feels that people are postponing their USA plans, not necessary booking other destinations. They don't have many last-minute bookings. Notice that they have earlier request for next year than previous years. He is worried about next year's booking numbers but is overall confident that US will bounce back again. They are investing this "down time" into their website, sales team is

Type	Company	Contact	Details
			writing blogs. Also started with Meta Ads campaigns again. They had been paused due to negative comments. They do see a different tone of voice now in the comments as well "just came back and had a good trip" etc. Not looking to add another label/destination such as EU or New Zealand, their specialty is the US, and some Canada and Africa. Are interested in group fams (sales team, max 2 people.)
Trade	Naar Bespoke Travel	Eugenio Castelli	Their team (former EURAM employees's) knowledge is sometimes limited so they would like to do in office trainings. English or French, in Brussels. Approx. 6 agents. We will look for options at the end of the year. US market is down by 30-40% for them.
Media	Hey!USA	Sebastiaan Klijnen	He is very excited that there is budget available for a co-op. Will start planning July–August.
Media	Amerika Only	Boy Tijbosch	Boy says that they are experimenting a lot with video content on their socials. Especially video with personal made content resonates well with their audience and generates a lot of views. They expect to shift their focus more toward user-generated content in the future, where they social media becomes their primary platform and their website secondary.
Media	RonReizen	Erik Klap	We have been in contact with Erik, who produces the TV-travel show RonReizen. They were looking to extend an already planned trip to Minnesota with North Dakota. Usually what they ask is a media fam and they charge a fair amount of budget as well. For this reason, our office and theirs reached out to Brand USA in the Netherlands to assist with the costs. Brand USA the Netherlands was willing to request for the budget, but due to the current uncertainties they didn't expect it to be on time.

Trainings

Summary:

# Trainings	# People Trained
2	16

Significant Training Highlights:

Type	Company	Contact(s)	Details
Travel agent training	Exciting West	Ruben Gruyson - Owner	In April we welcomed Ruben and three of his colleagues in our office for a training. They also received a tote bag with swag items.
Travel agent training	Doets Reizen	Anouk Gortzak – Product Manager	In April we went to the offices of Doets and gave their team an extensive GAW training. The group was split in two, so we gave two presentations to total 12 agents trained. We ended the presentation with an interactive GAW Unique Activities Bingo. Everyone received a GAW goodiebag incl. the guide, map and swag items and the two winners of the bingo also received a GAW branded backpack.

New Product**Summary:**

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
11	11	4	23	45

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Travel Store	Nationale parken van Canada en de VS	Calgary	Calgary	Arco (1), Grand Teton NP (2), YNP (3)
Travel Store	Fly-drive Mount Rushmore	DEN	SLC	Denver (2), Twin Falls (1), Jackson (1), Island Park (3), Worland (1), Rapid City (3), Cheyenne (1)
Buitengewoon Reizen	Great National Parks Of The West	Vancouver	Vancouver	Boise (1), Idaho Falls (1), YNP (1)
Rondreis op Maat	Highlights van het Noordwesten	DEN	SFO	Sun Valley (2), YNP (3), Grand Teton NP (2), Black Hills (3), Denver (2)
Symphony Travel	Ontdek de Rockies	DEN	DEN	Denver (2), Idaho Falls (1), Jackson (1), YNP (2), Cody (1), Sheridan (1), Deadwood (1), Custer (1), Cheyenne (1)
Symphony Travel	Ultimate Rockies of USA	DEN	DEN	Denver (2), Jackson (1), YNP (3), Deadwood (1), Custer (2), Cheyenne (1)
Symphony Travel	Rockies & Zuidwest-Amerika Highlights	DEN	SFO	YNP (2), Cody (1), Sheridan (1), Custer (2), Cheyenne (1), Denver (1)

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Symphony Travel	Hoogtepunten van de Rockies	SLC	SLC	Jackson Hole (1), YNP (2), Cody (1), Sheridan (1), Deadwood (1), Badlands NP (1), Custer (2), Cheyenne (1), Denver (1)
Westbound Travel	City Lights to Natural Wonders	SFO	SLC	Idaho Falls (1), YNP (2), Grand Teton (2)
Westbound Travel	The Great American West	DEN	SLC	Grand Teton (2), YNP (2), Buffalo (1), Rapid City (3), Cheyenne (1), Denver (1)
Campers Amerika	Van Denver naar Chicago	DEN	ORD	Denver (2), Fargo (2), Medora (2), Rapid City (3)

Website

Sessions	Users	Pageviews	Average Session
797 (-7%)	1,086 (+4%)	1,594 (+32%)	2:35 (-44%)

**There was a bot on the website on May 28, causing an unusual high peak in pageviews. The data from this day has been removed from this report.*

Misc.

- **IRU Rapid City.** Vivien and a group of 5 tour operators participated in the annual event. Almost all of the Benelux delegation participated in the event for the first time. Lucas van Ampting (Exit Reizen), Marty Noyez (Penta Reizen), Peter van Veenendaal (Travel Trends / NBBS), Bianca van Nispen (Travelnauts), and Bart Verhoeff (AmerikaNu.nl) embraced the opportunity to experience the region first-hand and forge meaningful partnerships. They were very positive about the event, from the activities to the meetings. The entire group joined the South Dakota post-FAM and had a good experience.
- **TRIP Report.** Finalized ON and RN reporting.
- **Market Update.** Updated our industry/market information for the RMI website. Also includes results of the recent survey sent out by Visit USA Netherlands.
- **Visit USA**
 - **Visit USA NL.** We delivered content for the newsletter with theme [City Hopping](#) (Reach 2,000 AVE \$500).
 - **Visit USA BE.** We delivered content for the newsletter with theme 'National Parks and Monuments in the GAW'
- **News release.** We shared the Top 10 things to know about visiting YNP during the 2025 summer season with our trade contacts.

Quarterly Report – France

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
32	21	5	0	2

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	AMERIGO	Nathalie Delame, US Product Manager nathalie@amerigo.fr	FY25 co-op completed: • Creation of two new itineraries (see “new product” section) • Participation in two events: ◦ Trade evening in Rennes (April 23): 62 attendees ◦ Roadshow in Lille (April 29): 24 travel agents trained • Materials distributed: 40 GAW guides and 40 regional maps • Marketing channels: ◦ Dedicated newsletter ◦ Social media campaign ◦ Banner on Amerigo’s booking platform • Training: 1.5-hour Zoom session (May 21) • Results as of June 20: 39 quote requests, 10 confirmed bookings generating 139 room nights • Despite delays due to limited internal marketing support, the campaign was well executed. The itineraries are now integrated into the offer.
Trade	TERRE D’AVENTURES	Sylvain Mer, Product Manager smer@terdav.com	• Since our last update, Sylvain has confirmed that his colleague Thibaut will be joining him on the July 2025 fam trip to South Dakota and Wyoming. • In response, we have updated the fam form accordingly and shared the revised version with RMI. • Sylvain also provided FY25 roomnight numbers, demonstrating the tour operator’s solid engagement with the destination. • Inspired by the upcoming trip, he expressed strong interest in developing new itineraries in the GAW, further reinforcing the value of this renewed partnership. • Sylvain’s involvement marks a strategic opportunity to re-establish a lasting collaboration with this key player on the French market, especially now that the group has dedicated product development resources for the U.S. again.

Type	Company	Contact	Details
Trade	EVASIONS USA	Alexia Soares, US Manager alexia@evasionsusa.com	• Evasions USA is known for sponsoring influencer trips as a way to boost brand visibility and attract new clients. • This summer, Alexia coordinated a trip for French influencer Cyndi Poumeyrol (@cindypoum), who has 525K followers on Instagram. She will be traveling with her husband and children from July 20 to August 6, exploring the region on an itinerary that includes Denver, Cheyenne (during CFD), Custer, Rapid City, Deadwood, Sheridan, Cody, Yellowstone, Jackson, Idaho Falls, and Salt Lake City. • We provided Alexia with recommendations regarding accommodations and activities for the family throughout the trip. • This initiative is expected to generate excellent visibility for the Great American West throughout Cyndi's trip and drive additional bookings to the region through Evasions USA.
Trade	DESTINATION AMERIQUES	Adrien Kevarvran, US Specialist akerarvran@bleu-voyages.fr	• During a sales call with Adrien, he informed us that their website has just had a complete makeover and that they've also launched a brand-new Instagram account. They're actively looking for fresh visual content to bring their page to life and have requested the image bank links for all four destinations. • This was also a great opportunity to reconnect and share the latest updates from the region; especially after IRU. He integrated the Short Grass Resort and the Landmark Hotel in Deadwood immediately in their production. • It is also featured on their website: https://www.destination-ameriques.fr/experience/shortgrass-resort/
Trade	MAD TOURS	Isabelle Mary, CEO and Product Manager isabelle@madtoursandevents.com	• Following a general training session on the GAW provided to Isabelle in February 2025, she expressed strong interest in further developing product offerings in the region. • At her request, we worked on the creation of two new itineraries that will soon be published on their B2B platform for travel advisors. • The first itinerary highlights the contrasting landscapes and heritage of South and North Dakota, while the second focuses on the wide-open spaces and iconic sites of Wyoming and Idaho. These new additions aim to diversify the existing U.S. portfolio and provide fresh options for clients seeking more off-the-beaten-path travel experiences.
Trade	EUROPE ACTIVE	Anthony Laplagne, Owner anthony@europe-active.com	• Anthony has participated in three IRU's since 2016 and continues to show a strong interest in expanding his product offering in the GAW. • Following the Instagram stories posted by Emmanuelle during IRU Rapid City and the post-fam trip, he reached out to request visual content of Deadwood and the Black Hills.

Type	Company	Contact	Details
			His goal is to feature the region in an upcoming newsletter specifically targeting his motorcycle travel clientele, a niche segment with high potential and spending.
Trade	COMPTOIR DES VOYAGES	Camille Rochard, Product Manager	- Camille, Product Manager at Comptoir des Voyages, will be traveling through part of Wyoming in July 2025 with her husband (who also manages the Comptoir agency in Bordeaux) and their son, Pierre. - The purpose of this trip is to reconnect with the region, which she hasn't visited in over ten years, and to better integrate it into future offerings. Camille expressed strong interest in giving the Great American West greater visibility within their U.S. production. - As was the case with Anthony Laplagne, the Instagram stories posted by Emmanuelle during IRU 2025 had an immediate impact: Camille has already added several new properties to their production, including the Short Grass Ranch Resort and the Landmark Hotel in Deadwood. - In addition, we were invited to participate in their internal training format called "Minute Prod", a 20-minute session held every Tuesday at 10:30 AM and attended by all 18 travel advisors at Comptoir des Voyages. Emmanuelle delivered a presentation dedicated to the Great American West during the session on Tuesday, June 24, 2025, allowing the destination to gain further exposure across the sales team. - Camille is also extremely interested in attending IRU 2026 in Medora.
TRADE	VISITUSA FRANCE	Delphine Aubert d.aubert@office-tourisme-usa.com	- We were contacted by Delphine regarding the update of the "Dossiers Destination" featured on their website. She recently completed a review of the content dedicated to North Dakota and South Dakota, ensuring accuracy and consistency across both pages. - Looking to further enrich the platform, Delphine will soon be creating new destination profiles focused on key sites and cities in each state. She requested our support in drafting and providing the content for the first batch of locations, which will soon be published online. Idaho and Wyoming will follow in the next phase. - The first destinations selected include: North Dakota: - Mandan - North Dakota Museum of Art - John D. Odegard School of Aerospace Sciences - Fort Totten Military Post - Camp Hancock State Historic Site - West Acres Mall (Fargo) South Dakota:

Type	Company	Contact	Details
			• Keystone • Spearfish Canyon • Adams Museum (Deadwood) • 1880 Train / Black Hills Central Railroad (Hill City to Keystone) • Akta Lakota Museum (Chamberlain) • Historic Sioux Falls / Old Courthouse Museum (Sioux Falls) • Terry Peak Ski Area • Empire Mall (Sioux Falls) • Wall Drug Store (Wall) This content effort will enhance the website's depth and visibility for the GAW.
TRADE	ALLOA TRAVEL	Liliane Perez, Product Manager prod@alloa.fr	• We were recently contacted by the team at Alloa Travel, a Lille-based agency currently working on updating and enhancing their website, alloa.fr. • As part of this project, they reached out to request high-quality visuals to better illustrate their U.S. content and increase visibility for the Great American West. • In response, we shared all relevant media library links, including a curated selection of images, and took the opportunity to provide a brief overview of the region, highlighting key selling points and must-see experiences.
Media	LUXE MAGAZINE	Karim Larbi, freelance journalist	• We recently held a meeting with freelance journalist, Karim Larbi, who contributes to Luxe Magazine, one of France's premier publications dedicated to the luxury lifestyle sector. • With a strong editorial focus on high-end fashion, upscale travel, fine dining, luxury automobiles, and exclusive events, Luxe Magazine targets a discerning audience passionate about sophistication, elegance, and premium experiences. Its carefully curated content has made it a go-to reference for readers seeking the very best in lifestyle and luxury. • The meeting served as an opportunity to present the GAW through a luxury lens, highlighting unique, immersive experiences and premium accommodations in the region that would appeal to Luxe Magazine's affluent readership. We explored potential angles for future editorial features and are now in follow-up discussions to develop a possible press trip or story concept.
Media	FREELANCE	Sylvie Brieu	• We are continuing to follow up with Sylvie regarding the upcoming press trip scheduled for September 2025, which is shaping up to be an exciting and high-impact project. She recently shared some fantastic updates: the feature has been confirmed with <i>Terres Sauvages</i>, a highly regarded monthly print magazine in France with a circulation of 45,000 copies and an estimated readership of 368,000. Even more impressive, the article is expected to cover 8 to 10 full pages and will include the cover page, offering exceptional exposure for the region. The estimated advertising value

Type	Company	Contact	Details
			equivalent (AVE) ranges from \$76,460 for 8 pages to \$90,380 for 10 pages. - For this media trip, Sylvie will focus on North Dakota, specifically the MHA Nation, and South Dakota, with a story centered around the bison of Custer State Park. While the exact travel dates are still to be confirmed, the trip is scheduled for September 2025. - To meet the magazine's editorial and visual standards, Sylvie has opted to travel with a professional photographer. Fortunately, the photographer is based in the U.S., which helps reduce travel costs, although it does mean we now need to account for two hotel rooms instead of one. - The project is taking time to finalize, but the press fam form is expected to be submitted during the week of July 14, 2025.

Trainings

Summary:

# Trainings	# People Trained
1	18

Significant Training Highlights:

Type	Company	Contact(s)	Details
Trade Tour Operator	COMPTOIR DES VOYAGES	Camille Rochard, Product Manager crochard@comptoir.fr	We were invited to participate in their internal training format called "Minute Prod", a 20-minute session held every Tuesday at 10:30 AM and attended by all 18 travel advisors at Comptoir des Voyages. Emmanuelle delivered a presentation dedicated to the Great American West during the session on Tuesday, June 24, 2025, allowing the destination to gain further exposure across the sales team.

New Product

Summary:

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
8	10	6	12	37

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Kuoni	https://www.kuoni.fr/circuits/au-dela-des-rocheuses/	LAX	SFO	Cheyenne (1), Deadwood (1), Cody (1), Yellowstone (1), Rexburg (1)
Amerigo	https://www.amerigo.fr/programmes/circuits-accompagnes/658/Autotour_Wild_Dakotas_Bisons_Prairies	RAP	FSD	Rapid City (1), Badlands NP (1), Custer (1), Deadwood (1), Medora (2), Minot (1), Devils Lake (1), Fargo (2), Sioux Falls (1)
Amerigo	https://www.amerigo.fr/programmes/circuits-accompagnes/657/Autotour_Into_Wilderness_Wyoming_Idaho	SLC	SLC	Salt Lake City (1), Kemmerer (1), Jackson (2), YNP (2), Idaho Falls (1), Ketchum (1), Boise (1), Twin Falls (1), Lava Hot Springs (1)
Parcours USA	https://www.parcoursusa.com/sejours/loreon-trail-sur-les-traces-des-pionniers	STL	PDX	Casper (1), Rock Springs (1), Pocatello (1), Boise (1), YNP (2)
Salaun Holidays	https://www.salaun-holidays.com/autotours/etats-unis/autotour-au-coeur-des-etats-unis-23-etoiles/452320?srsId=AfmBOooZ-xSwFRiGN4B2MqHZ1Jh947TVaf8ajE9TyHBUgD8JOT4jD2K5	DEN	LAS	Denver (2), Cheyenne (1), Rapid City (2), Deadwood (1), Sheridan (1), Cody (1), YNP (2), Jackson (1)
Nautil/Oovatu	https://www.oovatu.com/voyages/ameriques/etats-unis/ouest-america/itineraire/circuit-privatif/voyage-sur-la-terre-des-bisons	SLC	DEN	SLC (1), Jackson (2), YNP (5), Cody (1), Sheridan (1), Deadwood (1), Custer SP (2), Cheyenne (1), Denver (1)
Terres Lointaines	https://www.terres-lointaines.com/voyage-ouest-america/yellowstone-et-les-parcs-de-ouest/	LAS	BOZ	Pocatello (1), Jackson (2), YNP (2)
Terres Lointaines	https://www.terres-lointaines.com/voyage-etats-unis/les-terres-sauvages-et-yellowstone-en-groupe/	SFO	SFO	Idaho Falls (1), Jackson (2), YNP (3)

Website

Sessions	Users	Pageviews	Average Session
509	452	715	1 minute 59 seconds
-35%	-42%	-78%	+16%

Misc.

- FY26 GAW Swag Options: A selection of proposed swag items was sent to RMI on June 21.
- IPW Chicago Invites: French tour operators attending IPW Chicago received an invitation to join the Buckle Club event during the show.
- IRU 2025: IRU took place in Rapid City from May 6-9, with the participation of several key players in the French tourism industry. Four tour operators: Les Ateliers du Voyage, Evasions USA, Amerikasias, and Objectif Partir — along with a French receptive operator based in Las Vegas, Scenic Roads, were present. All expressed their enthusiasm, highlighting the high quality of the event, smooth organization, and the value of the pre- and post-fam trips offered.
- Major Media Highlights:
 - April 24: <https://www.science-et-vie.com/science-et-culture/enfants-americains-os-dinosaure-138802.html>
 - May 22: <https://www.constructionbriefing.com/fr/news/une-etape-importante-en-bois-massif-pour-le-projet-de-bibliotheque-presidentielle-americaine/8061923.article?zephrossoott=5CIDLj>
- Market Trend Report for France: April 1, 2025 – June 30, 2025

Economic Context

In the first half of 2025, the French economy showed signs of stability, supported by a moderate rebound in consumption and dynamic exports. According to INSEE, growth reached approximately +0.2% in each of the first two quarters. The Bank of France anticipates an annual growth of +0.7%, a figure slightly revised downward due to ongoing trade tensions with the United States.

Inflation, gradually declining, is expected to reach between 1% and 1.5% by mid-year, driven by a slowdown in energy prices. This easing of inflation has helped improve the purchasing power of French households, resulting in a slight increase in consumer spending, particularly in the travel sector.

Regarding consumer confidence, the situation remains mixed. Approximately 34% of French people express high or moderate confidence in the government, a level slightly below the average observed in OECD countries. Although fragile, this climate of confidence still supports intentions to travel abroad.

Tourism Trends

Between April and June 2025, the favorable economic environment supported a modest but steady increase in outbound tourism from France. The combination of strengthened purchasing power, contained inflation, and a favorable euro-to-dollar exchange rate enabled many households to realize their travel plans.

The volume of departures abroad saw a slight increase in this quarter, particularly ahead of spring holidays and the long weekends in May. European and Mediterranean destinations, such as Spain, Italy, Greece, and Morocco, accounted for the majority of demand. Their geographical proximity, political stability, and ease of access contributed to their attractiveness among French travelers.

Conversely, the United States continued to experience a decline in French tourist arrivals, mainly due to diplomatic tensions and an uncertain geopolitical context. However, for those who still choose this destination, certain trends stand out. There is also growing interest in multi-city tours and nature-focused itineraries, such as national parks and themed road trips.

Another significant development during this period is the rise in last-minute bookings (especially in the USA). This trend, which has gained momentum since the health crisis, reflects greater flexibility in travel habits. French travelers are now more inclined to organize their trips closer to departure, based on pricing opportunities, weather conditions, or the geopolitical situation.

In a global context marked by political and commercial uncertainties, caution remains advisable for long-haul destinations. Nevertheless, the stability of the euro against major foreign currencies, combined with a reassuring domestic economic climate, has maintained a good level of consumer confidence in international travel plans.

Quarterly Report – Italy

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
14	12	1	0	1

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	IRU 2025		- Paolo Aloe of Siam Viaggi: WY post fam and additional WY post fam - Luigi Leono of Creo: WY post fam - Ottavia Lombardo of America World: WY post fam - Patrizia Pegolotti of Globalys Travel & Beyond: ND post fam - Evelin Ratti of Travel Island: WY post fam and additional WY post fam - Paolo Zampieri of Tecnitravel: ND post fam All trade partners came back extremely satisfied by the experience and the warm hospitality. All post fams were well organized and contributed to increasing destination knowledge. All tour operators are now more prepared to promote and sell the region.
Trade and Media	May 5 th lunch event	United Airlines team and Rome Fiumicino Airport Authority	- Organization of one media and trade presentation and reception lunch for the direct flight via United Airlines, Rome to Denver. Event took place at Alto Roma, exclusive location in Rome. - Distributed the printed flyer in the Italian language about Denver, Colorado, GAW and branded gifts (provided by all destinations partners) 42 attendees in total - Achieved 17 articles and estimated value of \$20,500.
Trade	GOING	Ivana Di Stasio, Product Manager USA Maurizio Casabianca, Chief Commercial and Operations Officer	June 18: call with Ivana DI Stasio. GOING is planning a webinar to run on September 17 dedicated to GAW region addressing selected travel agents. Requested our participation and Annalisa will present the destination and tours. Focus will be “Stargazing in the Great American West” and presentation will focus on the four states and two travel itineraries designed by Ivana:

Type	Company	Contact	Details
			• 10-day fly/drive tour to “Idaho & Wyoming After Dark” focusing on dark skies with arrival in SLC and departure from JAC • 10-days fly/drive tour featuring North Dakota & South Dakota starting in MSP and departure out of RAP or DEN. This tour is new and will be created soon. • May 15: Denver, Colorado, GAW Activity. Project ran on behalf of Denver, Colorado, and GAW for the new Denver to Rome flight by United Airlines. One travel trade presentation of 20 minutes (B2B) at the GOING USA Roadshow in Turin, followed by a dinner. • Total of 35 travel agents attended the event. • Distributed the printed flyer in the Italian language about Denver, Colorado, GAW and branded gifts (provided by all destinations partners)
Trade	Naar Bespoke Travel	Erica Melegari, Product Manager USA Gaia Crespi, Marketing Department	• May 9: Denver, Colorado, GAW Activity. Project on behalf of Denver, Colorado, and GAW for the new Denver to Rome flight by United Airlines. One travel trade workshop (B2B) powered by Naar. Organized at Radisson Blu hotel in Rome. • Meeting with 83 travel agents divided into 20 meetings • Distributed the printed flyer in Italian language about Denver, Colorado and GAW and branded gifts (provided by all destinations partners) • Naar staff (Erica Melegari, Frederic Naar) traveled to Wyoming and South Dakota after IPW 2025. It was a very good experience. Erica came back more confident and familiar with GAW region and will be able to promote the destination better in the future.
Media	Latitudes Travel Magazine	Eugenio Bersani, Lucio Rossi	• Denver, Colorado, GAW Activity. Exposure of GAW region on Latitudes Travel Magazine. The digital activity ran on behalf of Denver, Colorado, and GAW for the new Denver to Rome flight by United Airlines. • Activity included: ✓ One inspirational article about GAW region. Article will include Alidays logo with hyperlink to the travel packages in GAW https://www.alidays.it/the-great-american-west-3/. ✓ 1 sponsored FB post: 36,794 people reached ✓ 1 sponsored IG post: 13,900 people reached ✓ 1 sponsored reel: 6,748 views ✓ 1 mention in the Latitudes newsletter sent to over 38K contacts

Type	Company	Contact	Details
Trade	Visit USA Italy	Mia Hezi, President of Visit USA Italy Association Lia Maiorca, Secretary of Visit USA Italy Association	- Confirmed digital activity with Visit USA as replacement of co-op marketing with La Superba Viaggi. - Digital activity is as follows: ✓ Two dedicated newsletters about GAW region ✓ One banner in Visit USA Italy website (Visitusaita.org) linked to GreatAmericanWest.it - Date/Timeline: ✓ Newsletters: June 2025 ✓ GAW Banner on Visit USA Italy Website: June 2025 – June 2026 - Predicted Outcome: Increase visibility of GAW destination and traffic to GAW IT website: +10% - Preliminary report has been loaded into Basecamp
Trade	Travel Island	Franco Bondioli Evelin Ratti	FY25 co-op marketing completed. Loaded report in Basecamp
Trade	Siam Viaggi	Paolo Aloe Simona Tonali	FY25 co-op marketing completed. Loaded report in Basecamp
Trade	Giada Viaggi	Emiliano Spagnoli	- FY25 co-op marketing completed. Loaded report in Basecamp - Emiliano confirmed the group tour in Idaho and Wyoming, June 2025 – 11 people.
Trade	Go America by Go World	Carmen Ruggiero/Product Manager, USA c.ruggiero@goworld.it USA booking staff: Davide Rinci, Irene Rossini, Lorenzo Tonucci	- April 29: online training addressed to four people about GAW region - Link to see registration: LINK – Passcode: Wwp5^h9g - Carmen is willing to develop two group itineraries for 2026 and will ask our assistance for suggestions and ideas.
Trade	Lasciati Viaggiare	Cristina Caretti Simona Sacrifici	- Cristina confirmed a group of 16 people on her exclusive group tour created with travel writer, Simona Sacrifici: “Yellowstone & MT Rushmore tour”: September 23 – October 4, 2025. They both escort the tour. Itinerary LINK - Cristina will run a webinar with Visit USA about the region and blocked the date of November 13 for the webinar
Trade	Globalys	Paola Preda, travel consultant for Globalys Patrizia Pegolotti	May 28th: meeting with Paola in our office to discuss the group tour in Wyoming and Idaho focused on Native American culture and heritage in August. Paola will be the tour leader and will escort a group of 10 people.

Type	Company	Contact	Details
			• Itinerary: Salt Lake City/Green River/Flaming Gorge/Rock Springs/Rock Springs/Killpecker/Boar's Tusk/White Mountain/Petroglyphs/Riverton/Lander/Wind River Wild Horses Sanctuary/Fort Washakie/Cody/Yellowstone/Grand Teton/Jackson/Pocatello (Shoshone Bannock Festival)/Salt Lake City. • After the tour he will continue to travel to Wyoming and South Dakota with his family (his family will arrive on August 10 in SLC) ○ August 10: Salt Lake City ○ August 11: Salt Lake City/Jackson ○ August 12: Jackson/Grand Teton ○ August 13: Grand Teton/Yellowstone ○ August 14: Yellowstone ○ August 15: Yellowstone/Cody ○ August 16: Cody/Devil's Tower/Deadwood ○ August 17: Deadwood/Custer State Park/Rapid City ○ August 18: Rapid City (Black Hills attractions) ○ August 19: Rapid City (Badlands) ○ August 19: departure of his sons back to Italy Paola and his husband will remain in the region and will be traveling to North Dakota to learn about Native American history in order to propose a group tour to North Dakota for the 2026 season. Paola will contact North Dakota tourism to get more info and assistance. Patrizia trained Paola about North Dakota thanks to her recent trip experience after IRU 2025. Her itinerary in North Dakota will be: ○ August 20: Medora (Theodore Roosevelt National Park) ○ August 21: Medora/New Town ○ August 22: New Town/Rapid City ○ August 23: departure to Italy • Patrizia published various blog articles on her website about the GAW region contributing to increased exposure of the destination. ○ Casper ○ South Dakota ○ Jackson Hole ○ Bowman ○ Rock Springs ○ Old Faithful, Yellowstone NP ○ Coeur D'Alene

Type	Company	Contact	Details
Trade	Euphemia Travel Agency Parma	Alberto Dell'Acqua	• Call with Alberto to discuss a self-drive itinerary for a family traveling to the GAW region in August. We gave suggestions and info. • Itinerary: Milan – Denver – Boulder – Cheyenne – Custer – Badlands National Park – Deadwood – Buffalo – Cody – YNP – Jackson
Trade	Itine-rari	Manuela Baietto	• May 8th: Manuela ran a webinar (Visit USA webinar) about YNP and Grand Teton https://www.visitusaita.org/2025/martedi-8-maggio-2025-yellowstone-e-grand-teton/ • Total attendees: 171 agents • LINK to see registration https://register.gotowebinar.com/recording/2947643786666107228 (need to insert first/last name and email to access)
Media	BRAND USA PR office	Lucia Pierangeli, PR Manager Brand USA Italy lpierangeli@thebrandusaitaly.com Monica Velardita, Public Relations Account Manager Brand USA Italy mvelardita@thebrandusaitaly.com	• We have been contacted by the Brand USA PR office in Italy for press trip assistance in Wyoming and South Dakota for two Italian journalists (husband and wife) for September 2025. Media commissioned: Vanityfair.it and Repubblica.it • Journalists: Mrs. Daniela Solito, freelance journalist (Repubblica Viaggi, Vanityfair.it) and Mr. Giovanni Messa, editor in chief for Repubblica.it • Itinerary and dates: ○ September 6: arrival in Jackson ○ September 6-9: Jackson Hole ○ September 9-11: YNP ○ September 11-15 ranch stay in Montana (to be organized by Brand USA) ○ September 15-18: Rapid City ○ September 18-19: Sioux Falls
Media	Amanda Ronzoni, freelance journalist	Amanda Ronzoni, freelance journalist	• Press trip to South Dakota and MSPB in June 2025 • Amanda came back extremely happy about the press trip, she appreciated the warm hospitality, and the assistance received. She enjoyed a lot the sceneries, the places, the ranch stay in South Dakota and assistance received in South Dakota and MSP. Unfortunately, the weather was not so good and maybe ask for our help for photos • Will follow up with her about publication of articles

Type	Company	Contact	Details
Media	Simonasacri.com travel blog	Simona Sacrifici	• Simona launched one new podcast, an outcome of her trips in Wyoming: • Devil's Tower National Monument and Vore Buffalo Jump Wyoming: https://open.spotify.com/episode/0lc87FZleSkbzcss15LRLS?si=490757ebd0dd4173&nd=1&dlsi=ccb890647d49431a
Trade	KEL 12	Stefano Gnerucci, travel consultant for KEL 12	• Confirmed the group in Wyoming in August: 17 people. Stefano Gnerucci will escort the group
Trade	Castiglione Viaggi travel agency	Simona Savigni simona.savigni@castiglioneviaggi.it	• Simona left Benetti Viaggi and now works for Castiglione Viaggi in Bologna • Waiting for the final approval of trade fam for Simona in Denver and Wyoming.
Media	The Good Life	Federica Presutto	• Federica contacted our office to get info about ranchs and stargazing in the region to propose an article in The Good Life. Followup will be in July.

Trainings

Summary:

# Trainings	# People Trained
3	122

Significant Training Highlights:

Type	Company	Contact(s)	Details
Trade	Go America by Go World	Carmen Ruggiero, Product Manager USA	One destination training to Product Manager USA and three colleagues of the Booking USA department
Trade	GOING	Ivana Di Stasio, Product Manager USA Maurizio Casabianca, Chief Commercial and Operations Officer	May 15: Denver, Colorado, GAW Activity: One travel trade presentation addressed to 35 people
Trade	Naar Bespoke travel	Erica Melegari, Product Manager USA Gaia Crespi, Marketing Department	May 9: Denver, Colorado, GAW Activity: One travel trade workshop (B2B) powered by Naar organized at the Radisson Blu hotel in Rome. Meet with 83 travel agents

New Product

Summary:

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
3	0	1	7	14

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
LASCIATI VIAGGIARE	YELLOWSTONE & MT. RUSHMORE Group Tour	DEN	SLC	DEN (1) – Cheyenne (1) – Custer (2) – Wall (1) – Gillette (1) – Cody (1) – YNP (2) – Jackson (1) – SLC
VERDIS AMERICA	NEW YORK TO HOLLYWOOD	NYC	LAX	NYC – Washington – Niagara Falls – Detroit – Chicago – Sioux Cade – Rapid City (1) – Cody (1) – YNP (overnight in West YNP) – SLC – Flagstaff – Las Vegas – LAX
USA EXPERIENCE	WEST & COWBOYS	DEN	SLC	DEN (2) – Cheyenne (1) – Rapid City (2) – Sheridan (1) – Cody (1) – YNP (overnight in West YNP) – Jackson (1) – SLC
IDEE PER VIAGGAIRE	FLY&DRIVE AMONG ROCKIES AND GREAT PRAIRIES	DEN	DEN	DEN (1) – Canon City – Grand Junction – Rock Springs (1) – Yellowstone (2) – Billings – Medora (1) – Rapid City (1) – Hot Springs (1) – Scottsbluff – Estes Park – DEN (1)

Website

Sessions	Users	Pageviews	Average Session
2,153	2,009	11,532	2 minutes
-29%	(-23%)	+163%	+121%

Misc.

- Market Outlook
 - April data of arrivals to the USA show a minor decrease from Italy, but nothing dramatic. Certainly, true that the very high cost of food and lodging in the USA is not helping the growing number of travelers, since many choose other, less expensive destinations. We have contacted some selected tour operators (Alidays, Naar, Creo, Enjoy Destinations, Travel Island) who all confirmed that the demand for the USA is still high, but the vertiginous prices for lodging and food are discouraging the entire Italian middle class who would be in the mood for a trip, but they cannot afford. The bulk of the spring and summer bookings were finalized between Fall 2024 and the first quarter of 2025. In April, the busy calendar of Italian holidays slowed down the flow of requests, while in May, there is traditionally a low demand in general, a physiological factor as every Italian citizen prepares to pay taxes by June. For this reason, many tour operators are now very active on the promotional side during May and June, organizing fam trips and roadshows to stimulate the market and collect the next wave of reservations both for the late summer holidays, but also autumn and winter requests and advances to 2026.

- In May, the VisitUSA Association Italy activated a survey among members to evaluate booking progress for the USA to date. Main survey results below:

How would you define the trend of requests for trips to the USA for the season spring/summer 2025?

- Very positive 10%
- More or less the same of last year 20%
- Slight decrease 30%
- Sharp decrease 40%

And what about the finalized bookings?

- Increasing 20%
- Stable 45%
- Slight decrease 10%
- Sharp decrease 25%

Which are the main difficulties you are facing when proposing a trip to the USA?

- Not positive image of the country and also worrying news about immigration and entry in the USA
- Press misinformation about immigration and entry in the USA.
- Some customers are worried about instability of the situation and that they can experience some disruptions
- The exchange factor and the fact that travelling to the US is very expensive
- High travel costs, political developments and growing uncertainty and concern about traveling to the USA

Do you foresee a trend change for the season fall/winter 2025-26?

- Yes, I do 15%
- No, I don't. The decrease could go on 10%
- It is too early to predict it 65%
- I do not know 10%

Additional comments

The U.S. remains a top-selling destination for Italian travelers. The political landscape in the USA does not affect the Italians traveling overseas to the US as much as many other countries. While there are mixed sentiments in the market, partly influenced by political developments and media narratives, the appeal of the USA remains high. This is particularly due to its unique blend of nature, culture and wide-ranging travel experiences. In May 2025, USA recorded 80,197 arrivals from Italy, +10% compared to 2024, with Italy ranking 11 in the total top 20 Overseas Countries. Trade and media are not cancelling trips and are still very interested in selling the US. Tour operators are experiencing slower bookings, not a decrease, due to numerous factors, main one being the cost to travel to the US is very expensive.

- June: Geopolitical tensions are affecting the organized tourism market. This is what emerges from a survey conducted by Fiavet-Confercommercio involving affiliated travel agencies, which, with regard to summer bookings, noted a 'climate change' to be attributed to a growing concern in the Italian clientele for ongoing conflicts and international developments. According to the survey, about 80% of agencies are recording a decline, even a small one, due to wars. Fears about the US are also growing (12%). The States, which have always been particularly popular with the Italian public, are more feared than the Arab Emirates (10.47%) and Jordan (6.98%). 70% of agencies report experiencing fear and insecurity in their travel choices due to escalating conflicts. However, despite this 'feeling' of uncertainty, currently less than 5% of tourists have actually cancelled a trip. The impact of the war on the tourism business remains devastating for about 60% of workers.

- Requested booking numbers from selected Italian trader partners.
- Completed the GAW – RMI TRIP Report™, including Denver
- Attended the Visit USA Italy assembly on June 30
- Sent out the following news releases:
 - What's New ID
 - What's New SD
 - What's New ND

- Wind River Tribal Buffalo Initiative
- 10 things to know when you visit YNP this summer
- Sent proposals for new branded gadgets
- Submitted press clips/earned media of news releases/media fairs/media activity/trade activities: Selected clips featuring GAW were an outcome of the May 5 Denver, Colorado, GAW lunch event in Rome for the inaugural flight Denver to Rome.

Quarterly Report – Australia/New Zealand

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
14	10	20	0	2

Significant Meeting Highlights:

Type	Company	Contact	Details
Sales Mission -trade	Meetings and/or trainings with: Flight Centre/ Envoyage/Travel Associates, Ignite Holidays Group, DealsAway, Mobile Travel Agents (MTA), Helloworld Travel /Viva, Infinity, Chris Watson Travel, Adventure World	As supplied- main contacts plus attendees for trainings included in sales mission leads report	Sales Mission in-person appointments and trainings were held with these companies. Adventure World offered webinar 30–40-minute training opportunity – one per month for each state, to be delivered by each state rep - timing to be arranged on a timetable to suit from June. Contact Kristy Prince: kristy.prince@adventureworld.com
Sales Mission BUSA	Brand USA AU	Jade Glashoff Director BUSA AU jglashoff@thebrandusa.com.au	Met with Jade, CEO BUSA AU for overview of the market, BUSA opportunities – Great USA Road Trip Expo-regional Roadshow was approved for July (now cancelled). Group BUSA fam opportunity for WY – cancelled due to cutback in BUSA funding.
Trade- IRU	Travel USA	Andrew Gay, Director. andrew@travelusa.co.nz	Advised campaign approved for FY26. Discussed timing around Sept/Oct 2025 to take market share from Europe bookings. Andrew did SD post fam and was extremely positive about it. He is working on the 12-night 4 state itinerary to be promoted in the campaign. Andrew or Sean interested to attend IRU 2026
VIP trade function Melbourne	Luxury Escapes Helloworld Adventure Destinations Magellan Entire Travel Group Expedia TAAP Adventure World	Key product or company managers attended. Contacts as supplied for mission attendees	Presentation / training by each state and one-on-one networking opportunities. Pre IPW fam arranged by James Scoon for Jodie Collins (Luxury Escapes) & Vanessa Richards (Brdly) to Vee Bar Ranch in WY. Supplied further info as requested on Laramie activities (post IRU) to both Vanessa & Jodie

Type	Company	Contact	Details
Trade	Agcolab Study Tours	James Nosworthy, Director, james@hurricaneevents.com	Introduced by Monique Roos US Commercial Service. Have arranged a call to discuss agricultural tours for ID & ND post IPW. New rep to follow up.
Media	Freelance/ Editor Ski & Snowboard Magazine	Helen Hayes Freelance Editor and Travel writer helen@hayestack.com.au	Supplied pdf and exposure /reach EAV information on all inclusions for GAW in Ski & Snowboard Magazine. (Value approx. \$30KUSD)
Sales Mission Media Event	Editors and freelancers	List as supplied for Mission attendees	Networking with media at Manly Wharf event. Attended by key media and editors. Discussion of fam opportunities with states.

Trainings

Summary:

# Trainings	# People Trained
9	41

Significant Training Highlights:

Type	Company	Contact(s)	Details
Sales Mission Trade- Sales agents	MTA	Contacts as supplied for 6 mission attendees	Training provided by each States
Sales Mission Trade- sales agents Home-based agents- various companies Training function @ Room Res	Free-to-travel Botany Travel Services Envoyage Peggy Travel Savenio	Contacts as supplied for 7 mission attendees Alice.fisher@flightcentre.com.au	Training by each state given to agents. Flight Centre agent (& Broadway store Manager Alice Fisher requested in-store training for her team. New rep to follow up.
Sales Mission Trade- Sales agents Breakfast, Brisbane	Adventure World Flight Centre V Travel Network Pippa Vann Travel	Contacts as supplied for 6 mission attendees	Training provided by each state

Type	Company	Contact(s)	Details
Sales Mission VIP lunch, Melbourne,	Luxury Escapes Helloworld Adventure Destinations	Contacts as supplied for 9 attendees	Training provided by each state.
Trade – Product Manager, Tour operators	Magellan Entire Travel Group Expedia TAAP Adventure World		

New Product

Summary:

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
2	0	0	0	6

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Travel USA NZ	Blackwater Creek Lodge & Guest Ranch	COD	COD	Ranch package – 3- or 6-night package options; May – Sept
Travel USA NZ	Private Black Hills Monument Package	RAP	RAP	Private tour of Black Hills attractions, monuments ex- Rapid City

Website AU (top) NZ (bottom)

Sessions	Users	Pageviews	Average Session
443 (-20%)	470 (-14%)	2,873 (-18%)	2:03 (-1%)
Sessions	Users	Pageviews	Average Session
236 (+10%)	486 (+38%)	8,664 (+78%)	10:55 (+68%)

Misc.

- Hosted the Australian Sales Mission April 5-12. The trade activity for this quarter was mostly derived from the Sales Mission. The mission leads report, sent separately, prepared by Kim Snape includes personnel training, meeting details and contact information. Mission was completed and feedback generally good. Assisted with mission follow-up, attendee lists, budget and report wrap up.
- Key trainings and meetings are also detailed above- with additional meetings with trade and media also noted.
- A trade fam ranch stay pre-IPW was arranged by James Scoon at the VIP Melbourne trade lunch for Jody Collins (Luxury Escapes) and Vanessa Richards (Brdly). Deliverables agreed by James directly with Jodie and Vanessa. Excellent feedback from stay.
- Michael Cassis from Linkd prepared and provided a trade landscape document for AU to accompany the Sales Mission report, noting the importance of promoting to consumers to incentivize trade demand.
- Worked with key AU ABVUS group of DMOs (A Balanced View of the USA) to compose an information document on sentiment about USA resulting from negative news about entry experiences, media click-bait on President Trump's policies and other unbalanced social media sentiment. Visit USA sent newsletter to 2000+ trade and Linked Tourism provided sentiment document-both forwarded to RMI in advance of Summit.
- Caroline attended Summit Meeting and IRU with one new wholesaler/tour operator, Andrew Gay (Travel USA NZ) who also attended the SD post fam (excellent feedback from Andrew re fam). FY26 activities approved and advised-Brand USA Great USA Road Trip expo (now cancelled) Visit NZ regional shows (now pending), Travel USA campaign (still approved with Andrew for October timing).
- Visit USA held a Committee meeting in Sydney on May 21 and hosted the successful annual AUNZ delegation welcome reception for the AUNZ delegations at IPW in Chicago on June 14. The Visit USA delegation booklet was distributed at IPW.
- Met with new Brand USA AU Director Jade Glashoff during Sales Mission, re upcoming BUSA campaigns, buy-in opportunities and possible support for trade fam opportunity. BUSA group media fam including Wyoming was cancelled (advised at IRU) due to reported lack of budget for BUSA.
- Helen Hayes' new magazine *Ski & Snowboard* (annual issue) was published prior to ski shows in Sydney and Melbourne in May. Publication included exposure for ID, and WY ski resorts – provided with clippings, reach and AVE to RMI. Magazine online view here: <https://digital.signaturemedia.com.au/ss-19/full-view.html>. The circulation and reach for the magazine is print run 20K, readership 80K. Digital subscribers 73K+ and website unique page views of over 331K per month. Helen Hayes' article in Holiday With Kids (July issue) with inclusion of ID- Brundage Resort form fam trip in Feb: The circulation and reach for the magazine is print run 20K, readership 80K, AVE approx. \$5K.
- Brett Dan CEO and MD of Helloworld completed a self-drive itinerary in May with his wife, that included YNP and the Black Hills in SD. Provided information and advice on hotels itinerary etc., as did James Scoon. Also sent Brett a follow-up introduction to Kyler Flock for SD portion.
- Trade fam for Adventure World – received approval from both states SD and WY for adjusted dates. Kristy Prince has advised a personnel change to be communicated to RMI.
- Advised Linkd Tourism replacement for Carrie Nightingale-sent background on Dylan Hearne and plan to include Michael Cassis as leading Trade Director for GAW in AUNZ.
- TRIP Report finalized and booking numbers requested/chased and entered as received. Booking numbers also submitted from HotelBeds to Evan for inclusion in AU numbers in addition to those listed in TRIP report.
- NTT data released as highlights of 2024 included AU as number 5 for visitation to National Parks: Top overseas source markets that visited U.S. National Parks/Monuments were the United Kingdom (1.8 million), Germany (1 million), France (901,000), Brazil (876,000), and Australia, (726,000).

IT'S BEEN AN AMAZING 17 YEARS. The Great American West will always be my second home, and I have made many lifelong friends. For that I will always be grateful.

Caroline the "Audacious Aussie" Davidson.

Quarterly Report – Nordics

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
6	6	8	0	1

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	Bäckman & Berg	Anna Bäckman, co-owner, anna@backmanberg.se	Follow-up with Bäckman & Berg as we wanted to initiate a co-op campaign this quarter. Do to the current lower demand for U.S. travels, they chose not to focus on marketing and product development in this quarter. We will continue the dialogue in the new FY.
Trade	USA Rejser	Christian Willumsen, Marketing & Product Manager, chw@usarejser.dk	We've been working with Christian to develop new itineraries. One new itinerary has strong focus on Idaho since it is the state that had been less included in USA Rejser's program. It also includes a few nights in and around Jackson and YNP. The other new itinerary mainly includes North and South Dakota and MSP as gateway. The new itineraries are expected to be online and bookable from July 2025. A marketing co-op is currently coordinated as an additional activity.
Trade	Nyhavn Rejser	Kim Carlsson, Product manager/Travel Consultant, kim.carlsson@nyhavn.dk	Catch-up meeting with Kim. Until January, everything looked well but demand has taken off. Florida and New York are the top US destinations currently requested.
Trade	Fotefar Temareiser	Yngve Sunde, Managing Director, yngve@fotefartemareiser.no	Catch-up with Yngve; their annual group tour "The Wild West" (ID, WY, SD) with departure in August is almost fully booked for this year.
Trade	Cowboyreiser	Christian H. Bolstad, Partner, post@cowboyreiser.no	Cowboyreiser are celebrating their best year ever since the start of the company. They are overwhelmed by the interest in travels to the U.S. Already in 2024, their room nights for our area were great. We should consider a marketing cooperation in the new fiscal year if funds are available. We have discussed IRU 2026, and Christian is interested

Type	Company	Contact	Details
			in attending to learn more about our region and get valuable contacts.
Trade	Ticket	Eleonore Nilsson, Product manager, eleonore.nilsson@ticket.se Tiyoneh Jah, PR- & Communication (new contact person as Elenore is leaving Ticket), 2iyoneh.jah@ticket.se	Meeting with Eleonore and Tiyoneh. USA is not going as well as last year. No big US promotions have been carried out, but they are interested in working with us to (re-)attract clients. Training of sales agents is generally only possible if we do paid marketing co-ops. As Elenore is leaving (has left by the time of this report) Ticket, we've been introduced to Tiyoneh who will take over Eleonore's tasks.
Trade	Icelandair Denmark	Mille Toft Sørensen, Account Manager Denmark	We've met with Mille and got an update on their US routes as well as discussing future possibilities for joint activities. Routes to Seattle, MSP, and Denver are performing.
Trade	Amerikaspesialisten/ Nordmannsreiser	Vibeke Malthe-Sørensen, Travel consultant, vibeke@nordmann.no	Vibeke joined this year's IRU and had a great experience. She has written a comprehensive experience report that she shared with her colleagues. Unfortunately, demand is not great at the time and not many requests are coming in.
Trade	Go West	Cecilia Andersson, partner, cecilia@gowest.se	Catch-up call with Cecilia, who visited the GAW on our fam trip in 2023. Demand is low and they currently don't have any requests for our area.
Trade	FDM Travel	Birgitte Vraadal, product manager, biv@fdm-travel.dk	FDM has added a new itinerary as well as new "sweet spots" in our area. The demand for travels to the U.S. in general is very limited.
Trade	Saxentours	Crister & Maria Brunnegård, Owners, crister@saxentours.com	Catch-up call with Crister and Maria. The group trip we helped them to set up in 2024 will be repeated as group trip in 2026. First bookings have been confirmed. For 2025 the same itinerary is available as fly/drive.
Trade	Unike Reiser	Katharina Wiig, Product Manager, katharina@unikereiser.no	Catch-up with Katharina; demand is currently limited, but they are positive that things will turn. Have new products online.
Trade	Kilroy Int.	Brian Samuel, Product Manager, brsa@kilroy.net	We've been meeting with Brian to follow-up to add products and agree on sales trainings. Current, no interest in sales trainings as they have to prioritize differently. We will get in touch again in the fall to get the opportunity to train the sales staff. Products have been added in all four countries.

Type	Company	Contact	Details
Media	Politiken / Ritzau / REJSER / Kristeligt Dagblad, Denmark	Jens Henrik Nybo, freelance for tier 1 media	Planning press trip to Denver, Wyoming, Idaho and Salt Lake City in September. Jens Henrik has commissioned stories to four of the leading publications in Denmark. We are currently waiting for approval from the states.
Media	Vi Menn / Villmarksliv, Norway	Mats Ulshagen, editor	Planning press trip to North Dakota, South Dakota and Wyoming. Mats is editor for both Vi Menn and Villmarksliv and will write about the states in both magazines. Vi Menn is Norway's biggest men's magazine. Writing about both outdoor life, science, travel, etc. 164,000 readers per issue. Villmarksliv is an outdoor magazine with 110,000 readers.
Media	Deluxe Magazine, Finland	Juhani Nurmi, editor	Juhani Nurmi is interested in going on a press trip to the states. Deluxe Magazine - is a luxury magazine published quarterly. Readers have a high-income and 62 percent of them spend 15,000 EUR per year on travels. Circulation is 20,000 and the online magazine has 70,000 readers.
Media	Børsen / Berlingske, Denmark	Anne Christine Persson, tier 1 freelancer	Anne Christine Persson is freelance for several tier 1 media in Denmark. She is interested to go to The Great American West on a press trip. Børsen is a leading financial newspaper. Readers are mainly 50+, with high income. They are very interested in travels and spend 86% more than the average Dane on travelling per year. 139,000 daily readers in print. 549,000 UV/M. Berlingske is a daily newspaper with weekly travel section. Readers have high buying power and are very interested in culture and travels. 81% are 40+. The readers earn 44% more than the average Dane and spend 49% more on travels than the average Dane. 213,000 daily readers.
Media	Berlingske / Ritzau, Denmark	Parastou Booyash, tier 1 freelancer	Discussing opportunities for press trips in 2025. She has indicated interest in visiting the states.

Type	Company	Contact	Details
Media	Mondo, Finland	Pekka Hiltunen, Editor	Mondo has published an article from a previous press trip in Wyoming, which has won an award for the best lifestyle article. They are interested in more press trips to The Great American West.
Media	Berlingske, Denmark	Peter Christiansen, tier 1 freelance	Discussing opportunities for press trips in 2025. Peter is particularly interested in writing stories with a family angle.
Media	Denmark, Norway, Sweden, Finland		Sending out media pitch in our Related tourism newsletter to inspire people to visit Great American West and explore different ranches The tourism newsletter is distributed to about 120 editors and journalists.

Trainings

Summary:

# Trainings	# People Trained
1	2

Significant Training Highlights:

Type	Company	Contact(s)	Details
Trade	USA Rejser	Britt Frisk Kümpel, Travel Specialist, britt@usarejser.dk Christian Willumsen, Marketing & Product Manager, chw@usarejser.dk	Sales training held with Britt and Christian to go through a new itinerary we had developed together with Christian. Based on the training, and all the tips and “good-to-knows” for Idaho (which is the state they have less experience with), USA Rejser choose to add two new itineraries instead of one, where one of them has main focus on Idaho (with western WY and SLC).
			We’ve requested the possibility to do sales trainings for the sales staff of +15 companies. Unfortunately, these requests were turned down and we shall come back in the fall to plan for new trainings.

New Product

Summary:

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
1	0	6	4	2

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
FDM Travel	Prairies, Forests and Lakes in the Upper Midwest	MSP	MSP	MSP (2) – Duluth (1) – Bemidji (1) – Fargo (1) – Bismarck (1) – Watford City (1) – Medora (1) – Rapid City (1) – Badlands NP (1) – Custer (1) – Sioux Falls (1) – MSP
Saxentours	The Great American West	MSP	MSP	MSP (1) – SD (1) – Custer (1) – Sturgis (1) – Cody (1) – YNP (1) – Medora (1) – ND (1) – MSP (1)
Kilroy International	Yellowstone Camping Explorer	JAC	JAC	Jackson (1) – YNP (3) – Jackson (2)
Unike Reiser	The Wild West, Cowboys, and Buffalos	MSP	MSP	MSP (3) – Fargo (1) – Bismarck (1) – Medora (2) – Deadwood (1) – Rapid City (1) – Sioux Falls (1)

Website

Sessions	Users	Pageviews	Average Session
299 (+9.5%)	344 (-34%)	2,600 (-71%)	2:38 (+74.5%)

Misc.

- IRU attendance and fam trip: Together with three Scandinavian agents, Nanna (PR representative) and Hanna (sales and marketing) attended this year's IRU as well as a post-IRU fam trip in South Dakota.
- IPW: We've reached out to additional Nordic IPW attendees with the invitation to the Buckle Club Party as well as we've coordinated with Discover America Sweden to have partners attending the Nordic reception.
- Trip report completion with additional dialogues with +30 tour operators
- We've been screening the market and stayed in contact with our key partners to ensure that we don't miss any opportunities.
- Planning of sales mission in FY26 has started, and we have reached out to partners to ensure that they are available on the dates of the different meetings and events.
- SMAL – The association for Finnish tour operators: we are planning to do further GAW webinars with SMAL but no slots have been available this quarter. We are in dialogue about possibilities in fall 2025.

QUESTIONS?

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QUARTERLY REPORT

THE GREAT AMERICAN WEST

The Great American West is the brand for the international marketing efforts of the state tourism offices of Idaho, North Dakota, South Dakota and Wyoming. Collectively, the cooperative markets to both travel trade (tour operators and travel agents) and consumers through advertising and public relations efforts. Individually, each state office works with its industry partners to raise awareness of its state and the region as a whole through the promotion of products and travel destinations. The GAW contracts with RMI to help coordinate their united efforts in seven international markets, including the United Kingdom, Germany, Benelux, France, Italy, Australia & New Zealand and the Nordics. For more information about the GAW, visit GreatAmericanWest.co.