

FY26 Q1 REPORT

July-September 2025

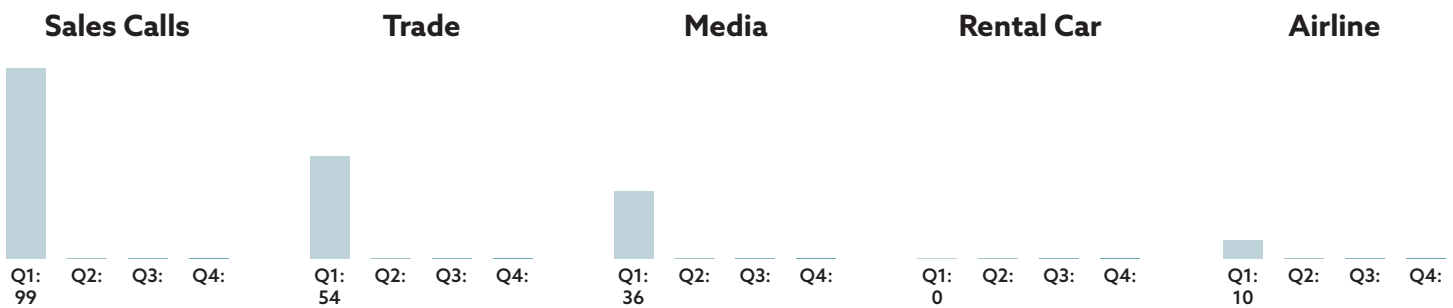


THE GREAT
AMERICAN WEST

IDAHO • NORTH DAKOTA
SOUTH DAKOTA • WYOMING

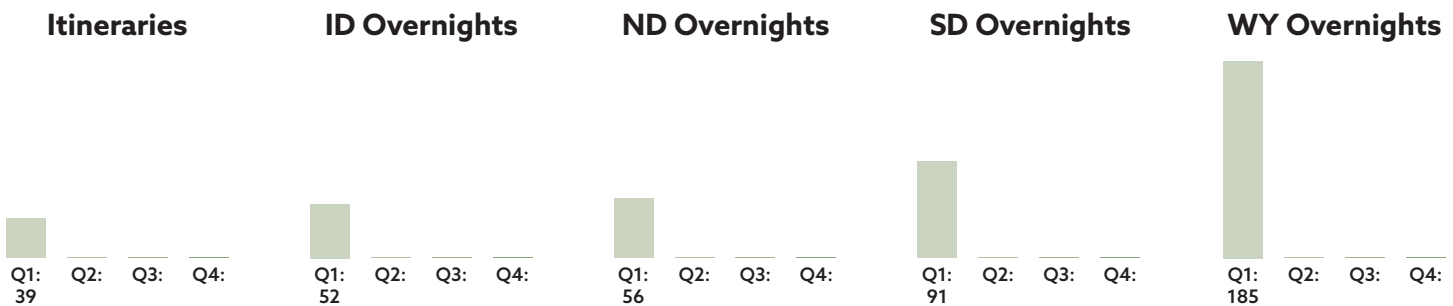
Meetings:

	Sales Calls	Trade Meetings	Media Meetings	Rental Car Meetings	Airline Meetings
UK	7	0	5	0	1
Germany	23	11	12	0	2
Benelux	18	13	4	0	1
France	20	15	3	0	2
Italy	15	5	3	0	1
Australia	4	4	0	0	1
Nordics	12	6	9	0	2
Total	99	54	36	0	10



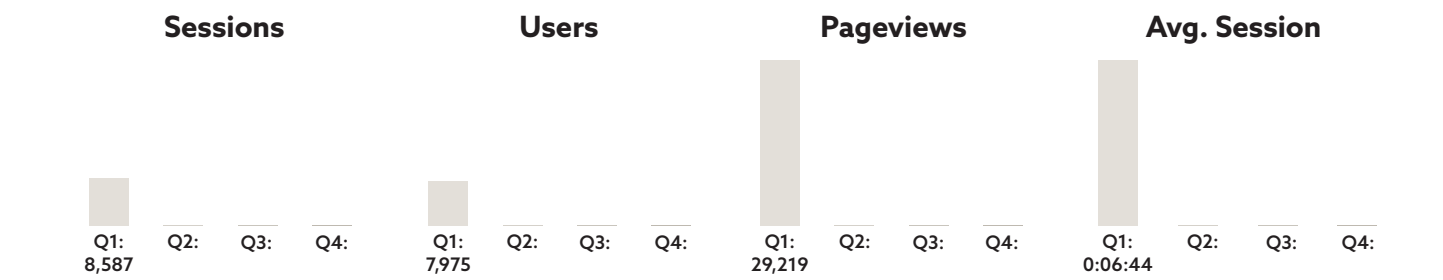
New Product:

	New Itineraries	Idaho Overnights	North Dakota Overnights	South Dakota Overnights	Wyoming Overnights
UK	4	6	5	9	26
Germany	15	25	33	44	76
Benelux	3	7	4	4	18
France	2	0	0	12	5
Italy	9	9	14	16	30
Australia	2	0	0	0	8
Nordics	4	5	0	6	22
Total	39	52	56	91	185



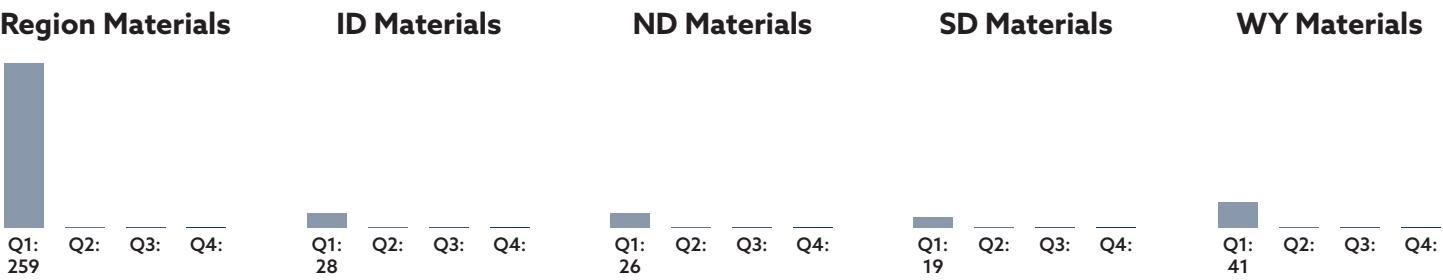
Websites:

	Sessions	Users	Pageviews	Avg. Session
.co	1,840	1,654	4,176	0:47:00
UK	399	277	2,797	0:02:03
Germany	854	761	3,381	0:01:31
Benelux	609	604	856	0:01:47
France	1,162	1,146	4,091	0:01:01
Italy	2,519	2,193	5,843	0:01:07
Australia	521	527	2,792	0:01:40
New Zealand	345	394	2,583	0:02:19
Nordics	338	419	2,700	0:02:09
Total	8,587	7,975	29,219	0:06:44



Digital Downloads:

	Region Materials	Idaho Materials	North Dakota Materials	South Dakota Materials	Wyoming Materials
.co	19	2	4	0	3
UK	21	20	8	9	10
Germany	42	0	6	0	4
Benelux	39	0	0	0	0
France	43	4	4	4	18
Italy	82	2	4	6	6
Australia	8	0	0	0	0
New Zealand	0	0	0	0	0
Nordics	5	0	0	0	0
Total	259	28	26	19	41



Q1 Quarterly Report – UK

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
7	0	5	0	1

Significant Meeting Highlights:

Type	Company	Contact	Details
Airline	Delta Airlines	Katie Devereux Sales Manager, UK & Ireland katie.devereux@delta.com	Meeting Summary (follow up from IPW) <ul style="list-style-type: none"> Kate Devereux confirmed that airline support for IRU 26 has been secured. A voucher system was discussed, allowing the vouchers to offset the cost of flights. UK buyers can book their own flight tickets online using the voucher system. They have the flexibility to upgrade their tickets or make changes to their bookings if needed. Action <ul style="list-style-type: none"> Sent list of operators that are interested in attending IRU 2026
Trade	Stewart Travel	Kevin Preston Product Manager kevinpreston@stewarttravel.co.uk	Current Trends <ul style="list-style-type: none"> Have shifted Trips Beyond focus to AUS/NZ & SA as USA is down 6% Orlando static Deemed as expensive Hidden Fees / commission / parking etc. are problematic They don't see the Increased ESTA and park entry fees as an issue in the overall pricing Conversions are harder as people are looking for itinerary help and then booking it themselves Meeting Summary <ul style="list-style-type: none"> Are being incentivised by Rocky M to push Cayon Spirit – they have implemented new itineraries including a GAW circle route Also see higher end product as an opportunity for development

Type	Company	Contact	Details
Trade	Lotus, Dial a Flight	Aurica Maxim Product Manager USA Aurica.Maxim@lotusgroup.co.uk	<p>Current Trends</p> <ul style="list-style-type: none"> Strong performance: U.S. bookings are up year-on-year. Clear correlation between marketing campaigns and sales spikes. Top-performing US destinations: New York, Las Vegas, and Florida. Booking behaviour is erratic, last-minute bookings are common. Clients are staying longer and purchasing more experiential add-ons. Increased demand for high-end products and luxury experiences. <p>Meeting Summary</p> <ul style="list-style-type: none"> Lotus is collaborating with Tour Mappers to expand product offerings beyond major cities. Lotus welcomes training sessions at its locations in London, Boxley. Sessions typically include around 25 staff members. Itineraries and accommodation were discussed. Lotus is keen on receiving an itinerary that can be included with the Canyon Spirit. <p>Action</p> <ul style="list-style-type: none"> Sent accommodation and itineraries over
Trade	Journeyscape	Rebecca Harley Marketing Manager Rebecca.Harley@journeyscape.com	<p>Meeting to discuss the Wanderlust campaign and next steps</p> <p>Meeting Summary</p> <ul style="list-style-type: none"> Jeanette gave an overview of Wanderlust media and what is required from Journeyscape in terms of assets and links Overview of EOTGAW concept New Itinerary – Lisa will have a meeting with Dominique Rebecca will put a marketing plan together to complement the Wanderlust campaign This will include press release, e-newsletter trade and consumer, blog article Training to be booked <p>Action</p> <ul style="list-style-type: none"> Follow up meeting secured with Lisa and their product manager. Sent summary doc of EOTGAW campaign concept and toolkit Sent dates for availability of training
Trade	Elegant Resorts / If Only	Susan Greenhorn Product Manager susan.greenhorn@elegantresorts.co.uk	<p>Follow up meeting from Unite trade show.</p> <p>Current Market Overview</p> <p>USA Performance: The US market is lagging in new bookings and enquiries, with repeat client interest flat. Rising costs and external factors are dampening consumer confidence and destination appeal. Demand is falling for Florida (incl. Miami cruising), New York and Las Vegas; only Hawaii shows consistent growth.</p>

Type	Company	Contact	Details
			<p>Top Destinations: Caribbean and Indian Ocean lead in bookings and client interest.</p> <p>Booking Trends: Last-minute and all-inclusive bookings remain popular. Growing demand for unique, experiential travel (e.g., foodie tours, photography experiences) for the Elegant Resorts 'Little Black Book'. Average Spend: £12.5k–£18k per booking, with recent highs above £25k.</p> <p>GAW Updates & Opportunities</p> <ul style="list-style-type: none"> • Keen to learn more about IRU 2026 and how it can be incorporated into the offering. • Interested in expanding product coverage to four US states. • Self-drive itineraries are a priority • Actively looking for new and exciting properties – e.g. Shortgrass, which aligns well with the AI market and high-end travel experiences for If Only <p>Training & Product Updates:</p> <ul style="list-style-type: none"> • Open to scheduling training sessions from mid-October • Regarding JMA, once new product is confirmed, she is keen to submit a proposal for our consideration FY27 <p>Action</p> <ul style="list-style-type: none"> • Sent updated 4-State Accommodation and ranches plus more information on Shortgrass • Sent over example self-drive itineraries • Possible dates for training
Trade	Journeyscape	<p>Dominique Kotsias Product Manager dominique.kotsias@journeyscape.com</p>	<p>Met with Dominique to discuss creation of new itinerary to match the Elements joint marketing activity in line with Wanderlust magazine this includes:</p> <p>ND - 3 nights SD - 3 nights WY - 6 nights (3 in NP's) ID - 4 nights</p> <p>New itinerary to go live on the website before the end of August. LINK</p>
Trade	American Affair	<p>Mandy Mcglade Product Manager Mandy.McGlade@americanaffair.com</p>	<p>Sales call with American Affair to discuss the forthcoming Elements of the West campaign</p> <p>US Update</p> <ul style="list-style-type: none"> • US was in triple digit growth last year 2024 • This year there were dips in April, but bookings were strong and 30% up • 2026 performing well • Average spend per booking £12-13k • Deep South is the most popular destination • California, New York and Washington State strong bookings <p>Elements of the Great American West' Marketing</p>

Type	Company	Contact	Details
			<ul style="list-style-type: none"> Interested to hear more in detail about EOTGAW thematic marketing Explained that their MD was taking care of all JMA currently whilst new Marketing Manager in place Keen to run a campaign to include b2b and some b2c activities Timing would need to be Jan/Feb 2026 due to other campaigns stacked up already running, but this is a peak time for enquiries and bookings Product development – Would like to develop some standalone GAW itineraries add in some new ones to the existing GAW product. Explained about the beautiful GAW guides and from 8-17 September American Affair are on the road in North and South England visiting agents and would be happy to distribute some GAW guides Training prior to the JMA would be welcome in November/December for their homeworkers. <p>Action</p> <ul style="list-style-type: none"> Sent summary doc of EOTGAW campaign concept and toolkit Sent dates for availability of training Sent box of brochures for OTR training Agreed end of September deadline for the proposal
Trade	Freedom Destinations	<p>Mark Sykes Product Manager marks@freedomdestinations.co.uk</p> <p>Rowan Wallis Marketing Manager rowanw@freedomdestinations.co.uk</p>	<p>Sales call with Freedom Destinations about the Elements of the GAW campaign.</p> <p>Update</p> <ul style="list-style-type: none"> US bookings dipped in May/June but now at normal levels again Since Mark Sykes attended IRU this year he has been developing products with South Dakota and wants to look at further development of the States. He has now signed with Rocky Mountain Holiday Tours so that they have more choice of GAW products. <p>Campaign</p> <ul style="list-style-type: none"> Discussed the EOTGAW campaign concept in detail and how each element correlates with each state. Discussed some marketing ideas and agreed that mid-October commence the marketing Update on North Dakota and Idaho that are less known Agreed to develop some new itineraries to support the marketing Discussed some training to commence before the campaign starts

Type	Company	Contact	Details
			Action <ul style="list-style-type: none"> • Sent summary doc of EOTGAW campaign concept and toolkit • Sent dates for availability of training • Provided some fly-drive itineraries and accommodation ideas. • Freedom Destinations will send the campaign by 24 September.
Media	Freelance	Rashmi Narayan	KBC spoke to Rashmi as part of a small networking brunch. Rashmi is an award-winning writer and was particularly interested in the flourishing beer & cider scene in Boise especially the focus on female brewers.
Media	Freelance	Katja Gaskell	KBC spoke to Katja as part of our small networking lunch. Katja is a well-respected ski and winter sportswriter and would like to be kept up to date on any new ski developments.
Media	Mail titles	Harriet Sime	Jennette attended a meeting with Hattie Sime. On questioning she said that although some readers were nervous about visiting USA, there was still a good appetite for holidays for the states amongst their readership (which is massive). They need a new/strong reason to visit before they consider any trips/features, but their team do sometimes take group press trips.
Media	Wanderlust	Jacqui Agate	Jennette offered ideas for Jacqui's feature on local voices which appeared in Wanderlust issue 241 this September. Idaho – Dive into Boise's Basque heritage/ Wyoming – connect with cowgirl history in Cheyenne/South Dakota – Embrace Indigenous culture in the Black Hills/North Dakota – Munch your way around Fargo.
Media	Wanderlust	James Smith	Jennette met with James to negotiate and scope out the 'Elemental' digital promotion which went live in September.
Media	Multiple	Multiple	KBC send out a monthly press release highlighting news from their clients. This quarter we have sent out information on the Devils Tower anniversary, the Idaho River Soul Journey and information on Journeyscape's new Elements of Nature self-drive tour.

Training

Summary:

Trainings

People Trained

Significant Training Highlights:

Type	Company	Contact(s)	Details
Tour Operator	Travel Bag	Geoff Dobson Regional Destination Manager Geoff.dobson@travelbag.co.uk	In-house training – 12 sales staff from Travel Bag
Tour Operator	Freedom Destinations	Mark Sykes Product Manager marks@freedomdestinations.co.uk	2 online training sessions – 13 sales and marketing and product
Tour Operator	Journeyscape	Dominique Kotsias Product Manager dominique.kotsias@journeyscape.com	In-house training – 14 sales, marketing and product from Journeyscape
Tour Operator	NATS	Karen Farrar Product Manager karen.farrar@nats-uk.com	2 online training sessions – 13 sales staff and homeworkers

New Product

Summary:

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
4	6	5	9	26

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Rendezvous Trips	15 Day self-drive Peaks, Plains and Parks: A Scenic Road Trip Through the American West - rendezvousroadtrips.com	DEN	DEN	Day 1 – Denver Day 2 - Denver - Canyon City Day 3 - Canyon City – Vail Day 4 – Vail – Grand Junction Day 5 – Grand Junction – Rock Springs Day 6 – rock Springs – West Yellowstone Day 7 – Yellowstone Day 8 – West Yellowstone – Billings Day 9 – Billings – Medora Day 10 – Medora – rapid City Day11 – Rapid City – Hot Springs Day 12 – Hot Springs – Scottsbluff Day 13 – Scottsbluff – Estes Park Day 14 – Estes Park – Denver Day 15 – Denver
	15 Day self-drive Wagons West - Following the	STL	PDX	Day 1: Arrive in St. Louis, Missouri - Gateway to the West Day 2: Explore St. Louis - Art, Music and Old Trail Towns Day 3: St. Louis to Independence (400 km) - Gateway to the Trail

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Rendezvous Trips	Oregon Trail - rendezvousroadtrips .com			<p>Day 4: Explore Kansas City - Kansas City Jazz, Barbecue and City Culture</p> <p>Day 5: Independence to Fairfield, Nebraska (340 km) - Rivers, Prairies and Wagon Wheels</p> <p>Day 6: Fairfield to Scottsbluff, Nebraska (370 km) - Pioneer Icons and Prairie Skies</p> <p>Day 7: Scottsbluff to Casper, Wyoming (300 km) - Fortresses, River Crossings and Trails Converging</p> <p>Day 8: Casper to Lander, Wyoming (280 km) - Over the Divide at South Pass</p> <p>Day 9: Lander to Soda Springs, Idaho (406 km) - Trails Converge and the Bear River Beckons</p> <p>Day 10: Soda Springs to Jerome, Idaho (approx. 288 km) - Hot Springs, Geysers and Scenic Plains</p> <p>Day 11: Jerome to Baker City, Oregon (approx. 280 km) - Canyons, Waterfalls and Crossing into Oregon</p> <p>Day 12: Baker City to The Dalles, Oregon (360 km) - Wagon Ruts and River Crossings</p> <p>Day 13: he Dalles to Portland via Mount Hood (230 km) - Around the Mountain to the End of the Trail</p> <p>Day 14: Portland - A Modern Frontier</p> <p>Day 15: Departure Day: Farewell to the Trail</p>
Stewart Travel	15 nights by rail and road Red Rocks to Cowboy Country by Rail and Road TripsBeyond	DEN	DEN	<p>Day 1: Denver</p> <p>Day 2: Canyon Sprit, Denver – Glenwood Springs</p> <p>Day 3: Canyon Spirit, Glenwood – Moab</p> <p>Day 4: Canyon Spirit, Moab – Salt Lake City</p> <p>Day 5: Salt Lake City – Jackson Hole</p> <p>Day 6: Jackson Hole</p> <p>Day 7: Jackson Hole – West Yellowstone</p> <p>Day 8: West Yellowstone</p> <p>Day 9: Yellowstone - Cody</p> <p>Day 10: Cody – Buffalo</p> <p>Day 11: Buffalo – Deadwood</p> <p>Day 12: Deadwood</p> <p>Day 13: Deadwood – Badlands</p> <p>Day 14: Badlands – Cheyenne</p> <p>Day15: Cheyenne – Denver</p>
Journeyscape	18 Days self-drive Elements of Nature: A journey through the American West - Journeyscape	FAR	GEG	<p>Day 1: Arrive in Fargo and collect your rental car.</p> <p>Day 2: Explore Fargo's great outdoors.</p> <p>Day 3: Head west to Medora.</p> <p>Day 4: Explore Theodore Roosevelt National Park. Medora</p> <p>Day 5: Head south to Rapid City.</p> <p>Day 6: Spend the day at Badlands National Park. Rapid City</p> <p>Day 7: Visit some of South Dakota's native icons. Rapid City</p> <p>Day 8: Start exploring the Old West with a night in Sheridan.</p> <p>Day 9: Leave for the quintessential Western town of Cody.</p> <p>Day 10: Drive to the world-renowned Yellowstone National Park.</p> <p>Day 11: Discover more of Yellowstone's pristine ecosystem.</p> <p>Day 12: Continue to the rugged resort town of Jackson Hole.</p> <p>Day 13: Go for an adventure in Grand Teton National Park. Jackson</p> <p>Day 14: Head to Sun Valley for a slice of alpine paradise.</p> <p>Day 15: Drive on to McCall – Idaho's ultimate outdoor destination.</p> <p>Day 16: Spend the day in McCall's beautiful natural surroundings.</p> <p>Day 17: End your journey among the majestic mountains and crystal shores of Coeur d'Alene.</p>

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
				Day 18: Return rental car and fly home from Spokane, Washington.
NATS	Product Development Wyoming (last of the product development 2025)	-	-	Hotel and Ranch Additions Iron Creek Inn, Upton Ramkota Hotel, Casper Kara Creek Ranch, Sundance Hampton Inn & Suites, Buffalo Sheridan Inn, BW Signature Collection, Sheridan Horseshoe Bend Motel, Lovell Holiday Inn, Riverton Hampton Inn & Suites, Green River Wyoming Inn Of Jackson Hole Vee Bar Guest Ranch, Laramie TA Ranch, Buffalo Blackwater Creek Ranch, Cody Best Western, Thermopolis

Website

Sessions	Users	Pageviews	Average Session
399 (-25%)	277 (-32%)	2,797 (-47%)	2m3s (-28%)

Misc.

Brand USA September meeting

We had a call with Holly to discuss their plans for the coming year.

- Their plans from October onwards are still being finalised. Although their budget has been reduced, it remains reasonable as the UK continues to be a key market. They're awaiting direction from Head Office on strategy and objectives before finalising plans.
- There will be an increased focus on marketing with trackable results. Roadshows will still feature but on a reduced scale. The mega fam will continue, while sponsored events such as the RHS Garden Show will not be included. Joint marketing campaigns will continue, but budgets are still being finalised.
- Partnerships with Hays Travel and Travelbag will continue and be managed by Head Office.
- In the Irish market, they have previously worked with Tour America, American Holidays, and Click and Go, and are considering how to approach joint marketing there. Attendance at the Aer Lingus Roadshow is under consideration but not yet confirmed, as many destination partners participate.
- They will not be joining the Visit USA Roadshow

VISITUSA - Ireland Inhouse Meeting

Main consensus looking ahead is optimism and remaining positive. 2025 YTD figures are encouraging.

Market update:

- Good economic growth: 2025 = +3.4%, 2026 = +2.5%
- EU/ US trade deal has created more assurance and certainty within the market – capped 15% tariff will be introduced.
- More favourable exchange rate - \$1.18 / €1.00
- Sentient has stayed consistent, Irish market is remaining resilient to the political scene more focused on destination experience.
- September bookings have picked up according to TO/agent feedback.
- January – July I-94 Statistics - Passenger figures are down by 200 YOY
2025 = 278,288 vs 2024 = 278,465.

Online activity:

- Always open to receiving content/submissions on industry events, packages or socials to go up on VUSA website. Please continue to send over.
- Aer Lingus event – very successful, great feedback on networking opportunity.

Future events:

- 20th November – Thanksgiving 2025 roadshow.
- 25-29th November – VUSA FAM trip in Michigan & Detroit

BUSA updates:

- Things are starting to settle post Big Beautiful Bill announcement.
- Figures are down by 0.05%, which is not reflective of recent media reports
- BUSA are concerned as they haven't received any matching funds for 2025 – is expecting to receive funding in the next month or so.
- 2026 – BUSA is working with government representatives to hopefully improve the budget.
- Has reserved funds for the next 18 months
- Travel Week – 9 reps from Ireland including Aer Lingus & United.
- Rebrand Mega FAMS to Destination Emergent FAMS.
- They will only be organizing 1 FAM in 2026 due to FIFA World Cup & resources.
- Mentioned TW 2026 would be in Amsterdam from 28th Sept.

Finance updates:

- Full financial year report will be released later in the year.

Visit USA Members September Meeting

UK Quarterly Meeting:

- Currently 192 members, but keen to increase hotel suppliers
- Webinars – They have hosted 40 webinars since they launched this last march and seeing great success of these. They are currently booked for 9th December. £100 per webinar.
- Consumer newsletter – The launch of these have been positive. The database of consumers is 11k and these are distributed once a month and include up to 5 member offers. These are available to all tour Operators. £50 per inclusion.
- Member satisfaction survey will be sent in December.
- Travel Planner inclusion – offer expires at the end of September, so please liaise with Selling Travel if of interest.
- Member profiles – These need to be checked to ensure all details are correct.
- Summer Affair 2025 – There were 362 guests and overall, the feedback was positive. They will be returning to this venue next year on 1st July 2026. Bookings will open soon Roadshows – These are now filled and there are 23 members taking part at the events in Gatwick and Glasow. 70 agents are registered at each event with agents listed on a wait list. Travel Gossip are now managing these, and they have been able to negotiate partner inclusion in their newsletter. VUSA considering a roadshow in December/Spring, with more details to follow.
- Media marketplace 2025 – Positive feedback on this year's event, but they will look for a new venue for next year. 2026 event will take place on 30th June 2026.
- Meet the Media – This will take place at Smith & Wollensky on 12th January 2026.
- WTM – 8 tables have been confirmed so far. Cost is £5800 per table. There will be a trade and media reception on the stand on Tuesday at 4pm.
- Thanksgiving Event – This will take place at Joe Allen's again on 26th November. Please register for attendance.
- Destinations 2026 – 1 space available in Manchester and 5 in London. This year there will be a video wall and brochure rack.
- Ideal Homes Show 2026 – This will be available for 24 members and held at Olympia London over 10 days in April. The cost will be £2300 per member to attend 5 days of the show (12 members for each 5 day slot). Kate to send demographics and attendance figures.
- IPW flight promotion – Aer Lingus are offering a discount of £100 on economy seats for those attending IPW. Kate to share details and promo code.

Brand USA Update:

- UK visitors – 2,644,598 for arrivals January – August 2025 +2.11% YOY.
August arrivals +4.6% for the UK
- Spending at \$254b, +12% in 2024 vs 2023. \$2,496 average spend per person in 2024.
- Airlift – 52 routes to 30 destinations. 12.9m nonstop seats in 2024. Capacity is -2% for 2025.
- USA remains number 1 long haul destination. Europe remains top short haul destination.

- Mega fam 2025 – 60 agents included across 6 different itineraries. The fam will return in Spring 2026.
- Travel Week – Opening event will take place at 180 The Strand. The media reception takes place on 22nd October at Radio Rooftop. 76 buyers are registered. Next year the trade show will take place on September 28th – October 1st in Amsterdam.
- PR focuses – Art and Culture, holiday events, romantic places and visits out of season.
- Group press trip – Taking place in Seattle and Washington State on 4-9th November in partnership with Travelbag.

Forum: Sports Tourism

- Lesley Roberts (United), Matt Lorenzo, Ryan Roodt (MVP Travel)
- Estimated value of \$48b – UK market
- \$153b projected growth by 2030, annual growth of 18%

SOURCE: IPW Committee update meeting

- Visitation for 2025 went up overall by 1.6%
- April and May were way up, Whilst June & July were down.
- Tracking down towards the end of the year and into 2026

Brand USA Travel week - Over 100 attending the Leadership track. Rumored that it won't be in London in 2026, but back in Europe.

IPW dates

- Monday 18MAY – opening night – Visit Florida to sponsor Brits & Irish party. Time and location TBC
- Tuesday / Wednesday / Thursday – meetings
- Tuesday 19MAY - free night
- Wednesday 20MAY - free night
- Thursday 21MAY- closing night, likely directly after the show (5-8pm) because everyone needs to leave the beach for the turtles to go back on the beach

Source: Travel Gossip

LINK: [US visitor numbers tumble, but UK outperforms many markets - Travel Gossip](#)

NEWS: US visitor numbers tumble, but UK outperforms many markets

Overseas arrivals to the US continued to fall in June, down 3.4% at the same time last year.

The UK was among 11 of the US' top inbound markets showing a decline, but it performed better than many other source markets, with UK visitors down 1.1% in June 2025 compared to June 2024.

This compares to a 3.7% drop in German visitor numbers and a 5.5% drop in French visitors. Arrivals from Denmark dropped by 17.8%, while visitors from Norway, Sweden and Finland dropped by 13-14%.

The preliminary figures, released by the US National Travel and Tourism Office, are at 80% of pre-COVID levels in 2019. The figures do not include Canada and Mexico.

SOURCE: Travel Weekly

LINK: [Agents outstrip other sectors for transaction growth in July - News](#)

NEWS: Agents outstrip other sectors for transaction growth in July

Consumer card spending with travel agents rose 15.9% year-on-year in July, outpacing all other sectors, according to Barclays.

Overall travel spend grew 2.9% despite a 2% fall in transactions. Travel agents saw a 2% monthly rise in spending, recovering from just 0.5% growth in June. Airline spend increased 4.7%, though transactions fell 6.6%, while hotel and accommodation spending was up 1.4% with transactions down 1.8%.

Barclays noted discretionary spending rose 2.4% in July, helped by mixed weather boosting both indoor and outdoor purchases.

The bank also reported growing use of AI for trip planning. 7% overall, rising to 13% among Gen Z. Across all ages, 12% use AI to compare prices, 11% for research, and 10% for budgeting.

Barclays' head of retail, Karen Johnson, said that while confidence remains subdued, AI-driven budgeting and prudent spending are supporting household resilience.

SOURCE: Travel Gossip

LINK

NEWS: Advantage identifies 'ultra late' and 'ultra early' booking trends

Travellers are booking holidays either much earlier or closer to departure, according to new data from Advantage Travel Partnership. 'Ultra-late' bookings trips within two weeks of departure have risen 7% year-on-year, now making up 11% of all bookings. At the same time, 'ultra-early' bookings made over a year in advance represent 9%. The average lead time has extended from 6–10 months to up to 15 months.

Advantage said early bookers are planning ahead for better value, while late bookers are chasing last-minute deals.

Leisure travel sales are up 12% this year, with average booking value rising 9%. Summer 2025 sales revenue has grown 13%, though family passenger numbers are down 3%. Nearly half (46%) of summer bookings were made and travelled within 12 weeks, and 45% were all-inclusive up from 40% last year.

Long-haul bookings have climbed 19%, with the Maldives, US, UAE, Caribbean, and Thailand proving most popular.

Sales for October half term are up 22%, Christmas up 11%, and overall autumn bookings up 28%. Long-haul shoulder-season revenue has risen 16%.

Quarterly Report – Germany

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
23	11	12	0	2

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	Condor	Eva Zuehlke Marketing Manager	Set-up a meeting with Condor in Frankfurt for November 6th.
Trade	Air Canada	Frank Hartung Leisure Sales and Marketing Manager frank.hartung@aircanada.ca	Met in Frankfurt. Important part of their business is flights into the US via stops in Canada, where US immigration can be done. In general, open for fam tour cooperations. Business from Europe to the US still good, but a lot less Canadians flying into the US.
Trade	Argus Reisen	Dirk Buettner Owner	Bookings are fine. They recently received a flurry of inquiries, but not many for the fall. Most were last-minute, but they've already received quite a few for next year. Argus can't complain; it's been a very good year for them with lots of very high-priced inquiries.
Trade	CU-Camper	Timmo Krause-Dünow timmo@cu-camper.com	Timmo, Tilo Krause-Duenow's son (CANUSA) runs camper tour operator CU Camper (and is also Chief Information Officer at CANUSA). In 2024 CU-Camper (who sell worldwide motorhome rentals) had a lot of bookings to the GAW with lots of rental nights. They are working with Cruise America, El Monte, Escape Campervans. Discussed marketing activities to push travel to the region. Will send proposal.
Trade	Canusa	Tilo Krause-Duenow & Kolja Kassner	<p>Asked Canusa in August for feedback regarding bookings and trade sentiment. Here is the feedback from Tilo Krause-Duenow, CEO and Kolja Kassner, Chief Commercial Officer at Canusa:</p> <p><i>In 2025, the U.S. market shows a slight decline in both revenue and passenger numbers, with 80% of bookings already secured by the end of February 2025 and a drop in demand only occurring thereafter. Canada, on the other hand, is expected to end the year with over 25% growth in revenue and 18% in passengers, indicating higher average revenue per person despite slightly lower prices.</i></p> <p><i>For the upcoming winter season, Canada is projected to see over 25% growth in revenue and around 20% in passengers, again despite lower prices. The U.S. is currently showing a 10% decline in revenue and a 7% decline in passengers. Looking ahead to summer 2026, the U.S. is about 20% down</i></p>

Type	Company	Contact	Details
			<p><i>in both metrics, while Canada shows a 30% increase in revenue with slightly lower growth in passenger numbers.</i></p> <p><i>In terms of demand trends, customers have been increasingly focused on quality for several years, willing to pay higher prices for hotels or motorhomes to ensure a seamless travel experience. In both the U.S. and Canada, the luxury segment is defined not only by hotel star ratings but also by the quality of experiences and activities during the trip. There are no significant shifts between peak and off-peak seasons, as non-holiday months have historically been well booked. While current figures indicate a shift from the U.S. toward Canada, this is expected to be temporary. Secondary destinations have long been in demand, especially among repeat customers who seek new regions and experiences.</i></p> <p><i>To stimulate U.S. demand, destinations, service providers, and tour operators must consistently communicate that politics does not diminish the travel experience. The country's landscapes, vibrant cities, and unmatched diversity continue to offer enormous potential, even with the noticeable change in price levels for 2026 bookings. Now is the time for sustained investment and strong marketing strategies to reinforce that, like other parts of the world, political changes in the U.S. do not lead to less enjoyable vacations. The enthusiasm of returning travelers should be leveraged to boost the country's image, promoting the U.S. as a safe, outstanding land of endless possibilities.</i></p> <p><i>And Kolja added the following to Tilo's comments: It should be noted that the "slight decline in revenue and passengers" mentioned by Tilo is, in fact, already in the double digits for both passengers and room nights, while revenue is only down in the single digits thanks to a higher average revenue per trip.</i></p> <p><i>As for my specific additions regarding the Great American West: To my own surprise, 2025 is looking exceptionally good here — a real exception to the general trend. Interestingly, and certainly not solely due to the exit from the consortium, Montana is the only state in the Northern Rockies following the overall negative trend, down by 7.3%, which is still less than the average decline.</i></p> <p><i>The actual GAW states are all showing year-to-date growth as of July 31: North Dakota: +8.1% South Dakota: +6.5% Wyoming: +2.4% Idaho: +9.7%</i></p> <p><i>This is fantastic, placing the GAW states in the very small group that has not lost ground in 2025.</i></p>

Type	Company	Contact	Details
			For the autumn season, we do not expect much more business to the Rockies, as the year is already well advanced. For 2026, however, we will definitely need a strong push, since the overall booking decline for the U.S. remains unbroken (as noted in Tilo's comments above). While the GAW states are performing slightly better than the overall trend, they are still showing double-digit declines from a very low base.
Trade	CRD	Pia Hambrock	Feedback from Pia Hambrock, Deputy Managing Director at CRD in August regarding bookings and trade sentiment: Bookings for this year are slightly behind last year, although strong advance bookings have limited the gap. Whenever negative press appears, inquiries drop, but when things are quiet, the situation stabilizes quickly. This autumn is further behind last year than the summer, but destinations for second- and third-time visitors, including GAW, are performing relatively well and are only slightly down. For next year, it is still too early to provide a meaningful forecast; a clearer picture will be available from autumn onwards.
Trade	America Unlimited	Timo Kohlenberg	Feedback from Timo Kohlenberg, CEO at America Unlimited in August regarding bookings and trade sentiment: <i>Currently, overall bookings for this year are slightly down, by about 5%, although GAW is around 10% up. The situation remains stable without any noticeable sharp decline. The outlook for this autumn is still positive due to strong advance bookings. For next year, bookings and inquiries are currently 20% up year-to-date.</i>
Trade	Ruck Zuck	Ribanna Ginsberg	Feedback from Ribanna Ginsberg, owner of Ruck Zuck in August regarding bookings and trade sentiment: <i>Bookings for this year were actually okay, as they were made very early on. We are currently slightly below last year's figures, by about 10%, but we still have a trade fair coming up in November. This is actually similar to every year. We will only be able to give realistic feedback at the end of the year, when bookings for next season more or less start. We have already received enquiries for next year and have also placed a few bookings. We have not had any cancellations either. But I think it always depends on how you approach sales yourself. I was also torn about the upcoming trade fairs, but it would be the wrong signal not to attend them now. I think it's even more important to show presence right now.</i>
Trade	America Unlimited	Annica Grosche	Worked with her to create the new 4-state itinerary, which is part of the FY 25-26 campaign: LINK Sent IRU invitation for 2026, waiting to hear back from her.
Trade	Karawane Reisen	Petra Schurig Product Manager petra.schurig@karawane.de	After this year's IRU Petra worked on a new WY-only fly drive tour, which is now online: LINK We assisted her with input and detailed information.

Type	Company	Contact	Details
Trade	Para Tours	Isabelle Huber Product Manager isabelle.huber@para-tours.ch	Confirmed promotions for this FY with Para Tours: <ul style="list-style-type: none"> - Create new 4-State Fly Drive Tour - GAW presentations (45-min) and brochure distribution at 2 consumer shows: Ferienmesse Bern Jan 22 - 25, 26 (GAW Presentation Friday, Jan 23, 26) and Canada Weeks in Feb 26 (date TBC) - Brochure Distribution at Fespo Zürich Jan 29-Feb 1, 26 - Promote new itinerary via social media posts on Facebook (1.2K+ fans) and Instagram (400+ followers) through their 50 partner travel agencies plus three own agencies
Trade	America Unlimited	Tom Langlotz Marketing Manager	Confirmed GAW Marketing Activities for FY 25-26: <ul style="list-style-type: none"> - Product Development (new 4-state fly drive): LINK - Social Media Campaign (FB + IG Takeover), Nov 3-7, 25 - Top 5 video production incl. YouTube ad campaign, Nov 27, 25 - B2C Newsletter inclusion Oct 8, 25 – finalized and approved
Trade	Canusa	Nina Wulferding Marketing Manager nina.wulferding@canusa.de	Confirmed GAW Marketing activities for FY26: <ul style="list-style-type: none"> - B2B E-Newsletter, Oct 21, 25 - Pinterest Week, Nov 3-7, 25
Trade	CRD	Marie Callsen Marketing Manager m.callsen@crd.de	Confirmed GAW Marketing activities for FY26: <ul style="list-style-type: none"> - Product development: new 4-state fly drive tour was created - Axolot Promotion and Axolot Banner, Oct 13, 25 – finalized and approved - 1/3-page ad in B2B2C magazine „Meine Reise“, Oct 8, 25 – finalized and approved - GAW inclusion in 1 CRD B2C NL – Oct 25
Trade	Dertour	Laura Koenig Product Manager North America Laura.Koenig@dertouristik.com	Confirmed GAW Marketing activities for FY 25-26: <ul style="list-style-type: none"> - Product development: new 4-state fly drive (link not available as only available in their B2B platform) - ComeCloser Facebook Group Post, Oct 13, 25 – finalized and approved - ComeCloser Current tip (incl. GAW flyer pdf), Oct 13, 25 – finalized and approved - DER Digital Signage Video, Oct 13-18, 25 – finalized and approved
Trade	Umfulana	Elke Metternich Product Manager	Continued working with Elke on a new fly drive itinerary from/to MSP incl. ND and SD with focus on the Native American theme more in these states in particular. She wants to include really nice, small accommodations – which is the biggest challenge. Will stay in touch.
Trade	Tourconsult	Andreas Fraissl Owner info@tourconsult.com	Small tour operator with focus on USA and Canada. Offers fly drive tours and motorhome tours. Business is going well. Sees a slight decline in bookings to the US (and a shift to bookings for Canada), but the decline is minor. He has clients spending a lot of money for their personalized/tailor-made bookings thus for him it is more about the quality rather than

Type	Company	Contact	Details
			quantity. Discussed new itineraries through the GAW and talked about marketing activities for next FY.
Trade	CRD	Patrick Schreiber Produkt Manager p.schreiber@crd.de	Invited Patrick for IRU 2026. CRD confirmed that either Patrick or Mareike Massel (who attended IRU in Casper in 2024) will be able to attend. Patrick used to work for Meso Reisen in Berlin and is now PM at CRD, together with Mareike.
Trade	TUI	Claudia Ehlen Senior PM	Scheduled a meeting after the VUSA Members Meeting beginning of November to discuss product, but had to push the meeting to end of November in Hannover now.
Trade	Canusa	Anngret Rossol	Learned that Canusa has started to offer motorcycle tours again, which they had not offered for a while, e.g. a tour to Sturgis for 2025 and 2026. LINK and a guided tour through UT, WY, MT, SD LINK
Trade	CRD	Pia Hambrock	Confirmed GAW Inhouse-Training at the CRD office for Dec 3 for product managers and sales staff.
Trade	USA Reisen Experte	David Siemietzki CEO siemietzki@dnds.de	<p>Provided him with the links to the two 4-state fly drives from our website which he uploaded onto their website, together with 2 additional tours including the GAW. The itineraries are also available in Bistro, the B2B booking platform, bookable for all travel agents:</p> <ul style="list-style-type: none"> - https://ibe.usa-reisen-experte.de/travel/routes/18-tagige-rundreise-durch-north-und-south-dakota - https://ibe.usa-reisen-experte.de/travel/routes/oregon-trail-und-der-wilde-westen - https://ibe.usa-reisen-experte.de/travel/routes/das-erbe-des-westens-und-die-kultur-der-ureinwohner - https://ibe.usa-reisen-experte.de/travel/routes/great-american-west-inkl-idaho-wyoming-north-south-dakota <p>Sent him an invitation for IRU in Medora 2026. Waiting for his reply.</p>
Trade	USAReisen.de / Flamingo Company	Axel Mosel, Product Manager axel.mosel@flamingocompany.de	Sent him an invitation for IRU in Medora 2026. Would love to attend but has to check internally. Waiting for his reply.
Trade	Go2Travel	Michael Boetschi, Owner michael.boetschi@go2travel.ch	Sent an invitation for IRU 2026. Michael happily confirmed participation.
Trade	Knecht Reisen	Anja Maier Product Manager	GAW will participate at Knecht Reisen consumer Event November 27 in Zurich with own table – free of charge – as Knecht Reisen wanted to have the GAW region be presented.
Trade	Ikarus Tours	Tobias Bening Product Manager	Booking requests are a little down, but not much. Offer Worldwide group tours (6-16 people, age 50-60+) with focus on culture, heritage, museums. Groups also like to do 2–3-hour hikes. Also offer FIT. 85% of their clients book via travel

Type	Company	Contact	Details
			agencies. Offer one tour incl the GAW, provided him with additional information and input.
Trade	Explorer World of Travel	Sabine Besgen Team Lead Product Management sabine.besgen@explorer.de	Large tour operator offering worldwide tailor-made FIT tours. Biggest shareholder is tour operator Schauinsland (do only package tours and worldwide trips), work with 8000 travel agencies. Since working with Schauinsland increase to the USA is 50%; they work with ATI, Expedia, Ratehawk. Deborah Bernardi is the Product Manager. She is not familiar with the GAW region. We will invite her to attend IRU.
Trade	Travel Hub	Federico Fava sales@travel-hub.biz	Swiss tour operator who does groups (25-50 people) from 7-15 days worldwide. Very little FIT. Mostly Southwest USA, but extending to Mid and Northwest. Interested in outdoor activities (hiking etc). Work mainly with the Italian market (as company is based close to the Italian border in the Italian speaking part of Switzerland), Germany (a little bit) and Scandinavian market. Offering several tours through the region https://www.travel-hub.biz/ouritineraries . Provided information on the GAW and will follow up.
Trade	Fairflight	Laura Thurm Marketing & Product Development laura.thurm@fairflight.de	Offer regular fly drive and bus tours through the USA (several GAW itineraries). Also major tour operator for sports tickets/sports events. Work with ATI, NWT, Tourmappers, RMHT. Discussed to update some of the itineraries they offer and to possibly promote them with marketing activities. Are looking for authentic activities as they have younger clients since the pandemic. If German speaking tours are available, that would be great.
Trade	Bike The Best	Michaela Fischer	Bike the Best works with Expedia and Rate Hawk. Micky mentioned some marketing activities we could do with the GAW to promote bike and fly drive tours: there is a consumer motorbike event taking place in Ruedesheim (at the river Rhein) every year in June where we could promote GAW tours to consumers with flyers (plus they attend more consumer shows as well); mentioned a media group tour with regular biker clients and media traveling through the GAW and posting about it (incl. movies on YouTube about the trip etc - usually have 8 participants - financial investment approx. 10,000 USD
Trade	Die Reisebotschafter	Dirk Zielinski	We discussed to update their GAW tour in the next months to focus on a new routing and overnights, as it still includes Montana. LINK - We provided him with new routing suggestions and will assist him in putting the new tour together.
Trade	Fairflight	Laura Thurm Marketing Manager	Discussed inhouse-presentation for their product managers and sales staff in Wittenberg and Leipzig in spring 2026. Details TBD

Type	Company	Contact	Details
Trade	Canusa	Anngret Rossol	<p>Finalized the Canusa fam and followed up with Anngret after the fam tour to SD and WY September 13-20, 2025. A total of 7 Canusa sales managers plus Anngret Rossol, Head of Product, participated in the fam and had an absolutely fantastic and amazing time.</p> <p>Routing:</p> <p>Day 1: Jackson</p> <p>Day 2: YNP</p> <p>Day 3: Cody</p> <p>Day 4: Sheridan</p> <p>Day 5: Deadwood</p> <p>Day 6: Keystone</p> <p>Day 7: Rapid City</p> <p>Day 8: Departure from Rapid City</p> <p>Flights and rental cars were covered by Canusa. SD and WY covered activities, meals and accommodations.</p>
Trade	Windrose	Aline Gehl Teamlead America	<p>Provided Aline with information on the national parks in the GAW as she was working on a new national park tour to push more unknown US national parks and to meet the continuing demand for nature experiences off the beaten track in the USA. The tour is online now: LINK and includes WY and SD.</p>
Media	Hamburger Abendblatt	Rupert Fabig, editor	<p>Rupert is in charge of sports stories connected to travel information. We introduced the GAW region.</p>
Media	FVW	Holger Jacobs, chief editor for North America	<p>Talked about his trip to SD and ND, his articles (published in September) and discussed possible new stories/topics.</p>
Media	Freelance	Bettina Hagen	<p>General introduction to the GAW. She writes for DPA news wire and for L-MAG (Lesbian magazine, Reach: 30k) and MONOPOL (leading Art magazine in DACH, Reach: 120k)</p>
Media	Auto Touring Österreich	Stephan Hoeckner, editor	<p>He is considering a trip to the GAW region in 2026 to write a 3-5 pages article about ranch stays, western culture (native Americans and cowboys), national parks, state parks, scenic byways, authentic towns. Provided him with some story ideas. Will discuss further details later this year.</p> <p>Circulation: 2.1 mio, monthly magazine, Auto Touring ist he Austrian motorclub (comparable to AAA), largest club magazine in Austria, media value for 5 pages approximately. 100,000 Euros</p>
Media	Travel Media Network/ Luxus Insider	Iris Koepke, editor in chief, iris@travelmedianetwork.de	<p>She travelled to South Dakota for her vacation end of September/beginning of October and was interested in media passes for Buffalo Round Up in Custer State Park. Provided information and connected her to the contact person at Custer State park in South Dakota</p>
Media	Freelance	Ralf Johnen	<p>Intense dialogue about his planned trip to Idaho for a travel book project. Idaho declined the opportunity to host Ralf.</p>

Type	Company	Contact	Details
Media	RND RedaktionsNetzwerk Deutschland GmbH	Harald Stutte, editor	Harald plans to travel to North & South Dakota in spring 2026 to write a story on native Americans in both states. First exchange, provided ideas and topics. Will get back to us with further information.
Media	Freelance	Jenny Mansch	She has been at Buffalo Roundup a few years ago and published a story last year in Verdipublic. Now she resold the story to "Aerztliches Journal" and we provided updated images. Will send the clipping once available.
Media	Partly SZ/partly freelance	Verena Wolff	Verena writes partly for SZ Sueddeutsche Zeitung and we had a general update exchange call. Introduction of upcoming highlights of all four states. She will get in touch if an opportunity arises to create a story.
Media	Connoisseur Circle	Andreas Dressler, editor in chief	Connoisseur Circle is always interested in high end culinary experiences, new wellness & SPA trends and authentic cultural tailor-made events. General exchange.
Media	HNA Hessisch Niedersaechsische Allgemeine	Stephanie Ruch, editor	General exchange to place GAW and its four states on her wish list to further explore and discover in the future.
Media	Freelance	Oliver Schindler	Pitched the GAW region. He writes for several regional daily papers in Germany and Switzerland, e.g. Stuttgarter Zeitung (Southern Germany, reach 450k), Frankfurter Rundschau (Central Germany, reach 300k), Berliner Zeitung (East Germany, Reach 210k), Neue Zuercher Zeitung (Switzerland, Reach 270k).

Trainings

Summary:

# Trainings	# People Trained
0	0

Significant Training Highlights: (Upcoming)

Type	Company	Contact(s)	Details
Trade – Product Manager	Naar Reisen	Angela Gaza Product Manager	Virtual GAW Training for staff is planned for November 18.
Trade – Product	Fairflight	Laura Thurm	Working on a date for an inhouse training at their offices in Wittenberg and/or Leipzig in January 2026.

Type	Company	Contact(s)	Details
Mangers, sales staff			
Trade – Product Mangers, sales staff	CRD	Pia Hambrock	December 3 rd , 25 we will hold an inhouse training at the CRD headquarter for sales staff and product managers.

New Product

Summary:

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
15	25	33	44	76

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Dertour	The Great American West (online, on B2B platform)	Spokane	MSP	Coeur d'Alene (1) – Lewiston (1) – Boise (2) – Idaho Falls (1) – Jackson (1) – YNP (2) – Cody (1) – Sheridan (1) – Deadwood (1) – Rapid City (2) – Medora (2) – Bismarck (1) – Fargo (1) – De Smet (1) – Sioux Falls (1)
CRD	Badlands und Bisons (online)	MSP	MSP	MSP – Sioux Falls (1) – Rapid City (2) – Deadwood (1) – Cody (1) – YNP (2) – Idaho Falls (1) – Ketchum (1) – Boise (1) – Twin Falls (2) – Jackson (1) – Casper (1) – Medora (2) – Bismarck (1) – Fargo (2) – MSP
America Unlimited	Von den Great Plains zu den Rockies (online)	MSP	SLC	Minneapolis – Sioux Falls (1) – Fargo (1) – Bismarck (1) – Minot (1) – Medora (1) – Deadwood (1) – Rapid City (2) – Sheridan (1) – Cody (1) – Jackson (2) – Idaho Falls (1) – Ketchum (1) – Boise (1) – Twin Falls (1) – Salt Lake City
Karawane Reisen	Howdy, Wild West – Mit dem Auto durch das echte Wyoming (online)	DEN	DEN	Denver – Cheyenne (2) – Casper (2) – Buffalo (2) – Cody (2) – YNP (3) – Jackson (2) – Rock Springs (1) – Laramie (2) – Denver
Windrose	Faszinierender Wilder Westen	DEN	SLC	Cheyenne (1) – Rapid City (3) – Buffalo (1) – Cody (1) – YNP (1) – Teton Village (3)
Imbach	USA Westen	DEN	DEN	Saratoga (1) – YNP (3) – Jackson (2)
Canusa	Sturgis Motorcycle Rally	DEN	DEN	Cheyenne (1) – Rapid City (2) – Spearfish (3) – Casper (1)

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Canusa	Guided Motorcycle Tour through UT, WY, MT, SD	SLC	SLC	Jackson (1) – Yellowstone (2) – Deadwood (4) – Cheyenne (1)
USA Reisen Experte	Rundreise durch North und South Dakota	DEN	DEN	Cheyenne (1) – Torrington (1) – Hot Springs (1) – Rapid City (2) – Chamberlain (1) – Sioux Falls (1) – Fargo (2) – Jamestown (1) – Bismarck (2) – Medora (2) – Deadwood (1) – Casper (1)
USA Reisen Experte	Oregon Trail und der Wilde Westen	MCI	PDX	Casper (2) – Rock Springs (1) – YNP (2) – Pocatello (1) – Boise (1)
USA Reisen Experte	Das Erbe des Westens und die Kultur der Ureinwohner	SLC	DEN	Boise (1) – Wallace (1) – Salmon (1) – Montpelier (1) – Evanston (1) – Lander (1) – Deadwood (1) – Rapid City (1) – Pierre (1) – Bismarck (1) – Medora (1) – Minot (1) – Devils Lake (1) – Jamestown (1) – Mitchell (1) – Rapid City (1) – Casper (1) – Cheyenne (1)
USA Reisen Experte	Great American West ink. Idaho, Wyoming, North Dakota und South Dakota	GEG	MSP	Coeur d'Alene (1) – Lewiston (2) – Idaho Falls (2) – Jackson (1) – YNP (1) – Cody (1) – Sheridan (1) – Deadwood (1) – Custer (1) – Rapid City (1) – Medora (2) – Minot (1) – Bismarck (1) – Fargo (1) – Mitchell (1) – Sioux Falls (1)
Travel Hub	America Grandeurs	DEN	DEN	Rock Springs (1) – Jackson (1) – YNP (2)
Travel Hub	Minneapolis, Yellowstone and the Rockies	MSP	MSP	Sioux Falls (1) – Rapid City (1) – Cody (1) – YNP (2) – Medora (1) – Bismarck (1) – Fargo (1)
Travel Hub	Escorted Coach Tour	DEN	SLC	Cheyenne (1) – Rapid City (1) – Cody (1) – YNP (1) – Jackson (1)

Website

Sessions	Users	Pageviews	Average Session
854 (-20%)	761 (-44%)	3,381 (-85%)	1m31s (-77%)

Misc.

- Wrote and sent out a press release to 643 media contacts with the following topics:
 - MSi as new representation company for the GAW
 - Brunea Dunes State Park is now certified Dark-Sky-Park
 - Shortgrass Resort – new luxury accommodation in South Dakota
 - Theodore Roosevelt Presidential Library to open July 2026
 - Guided Tours in the Flaming Gorge National Recreation Area
- Published press release on [www.vusa.travel](https://vusa.travel/state/wyoming/post/e3a4f89a-54b7-494e-a6dc-a899e5387a13) website for consumers, travel agents and media with the following topics: <https://vusa.travel/state/wyoming/post/e3a4f89a-54b7-494e-a6dc-a899e5387a13> (the website has approx. 60,000 monthly views):
 - MSi as new representation company for the GAW

- Bruneau Dunes State Park is now certified Dark-Sky-Park
 - Shortgrass Resort – new luxury accommodation in South Dakota
 - Theodore Roosevelt Presidential Library to open July 2026
 - Guided Tours in the Flaming Gorge National Recreation Area
- Sent out invitations to selected tour operators for IRU 2026 in Medora

Quarterly Report – Benelux

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
18	13	4	0	1

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	Style in Travel	Birgitte Bosma	Style in Travel has launched a new travel brand: GreatDiscoveries. Building on the success of existing brands GoAmerica and GreatLakes-Travel, GreatDiscoveries expands the company's offerings beyond North America to include tailor-made individual trips to destinations such as Australia, South Africa, and Oman. While USA and Canada tours will still be offered under the GoAmerica and GreatLakes-Travel labels, all new long-haul destinations will be featured under GreatDiscoveries. The brand was already in the works but got sped up due to the decline in USA bookings. Due to the many brands of Style in Travel, we are considering merging the TRIP report database input under one brand to have a better overview and to avoid any duplicate content.
Trade	Dutchies Travel	Lynn Kersten – Destination Manager USA & Canada	Dutchies Travel is a fully serviced OTA. They make customized campervan itineraries for Dutch and Belgian travelers. Specialize in: NZ, Australia, Fiji, Canada and the USA. Dutchies Travel also has a sister company, Germans Travel, which services the German-speaking market. They aren't very experienced with the USA market and are investing more now incl. adding product (see product details below).
Trade	Opdroomreis.nu	Judith Maas – Owner	Judith says it has been an eventful year for her business. The US demand has almost completely disappeared. The few bookings she had, which were made before Trump took office, are departing this quarter. She notes that Canada appears to have been hit hard too. She has temporarily removed the US (excluding Alaska) from her website. She is awaiting customer feedback later next month and adds that she plans to revisit the destination herself in order to provide updated, first-hand experience. Her focus has shifted to Oceania. While this region was already a key market in terms of turnover, she now expects it will account for 85% of her business in 2025, and potentially more if the current trend continues. She acknowledges that the situation could change, particularly after she returns from her own visit in 2025,

Type	Company	Contact	Details
			which may present new opportunities for promoting family travel to areas where she sees added value.
Trade	Best of Travel (BE)	Gwendolien Depover	<p>Gwendolien was very happy with her trip to the region. WY hosted two nights (Rock Springs and Sheridan). She reports a positive meeting with Allison from the Rock Springs Tourist Office, including a guided activity and dinner, which added value to the trip.</p> <p>She says the Badlands, along with the Notch Trail, were among the highlights of the trip, while Custer State Park impressed with the Needles Highway and Sylvan Lake. Sheridan, Buffalo, Cody, and Big Horn National Forest were also highlights. Yellowstone, though very crowded, is remarkable and unique, with geothermal features such as geysers and mud pots unlike any other park; she will recommend clients to enter early to make the most of the visit.</p> <p>Looking forward, she will add a new itinerary on their website, followed by a customer travel presentation scheduled for late September. We have sent her GAW Guides and Maps to share with clients.</p>
Trade	Riksja Travel	Lianne Boerma	<p>Despite softer U.S. demand this year, Lianne notes they believe the market is slowly recovering. With key milestones ahead (America250 and Route 66) they see strong opportunities for new campaigns. She explains that ideally these campaigns would be developed in cooperation with U.S. tourism boards to maximize impact. She adds that the GAW is performing well, especially following last year's Wyoming trip with Sophie and Isabel.</p> <p>A marketing proposal has been prepared, and we'll consider it for next fiscal.</p>
Trade	Little America	Robert	<p>Robert approached us for a marketing co-op with the region. He adds that it could be valuable to align this with IRU in North Dakota, which they have also tentatively scheduled.</p> <p>He reports that bookings are already coming in for next year and that demand for the U.S. is rebounding. He notes that July was a very strong month and August is also performing well. He emphasizes that the outlook for a successful campaign and strong sales in Dec/Q1 are therefore highly positive.</p>
Trade	Joker Reizen	Ludwig Verbruggen	We have signed up for their show and have redesigned their GAW Road Trip itinerary on their website (now it doesn't feature MT anymore). The promotional activities will follow before the show (Oct 19, 20205).
Trade	GeraldenAmerique	Gerald Ponsard	Gerald has experienced some challenges this summer, particularly due to recent strikes (public transportation in Belgium and Air Canada) and adverse weather conditions impacting travel plans. Although 2026 is looking good, he is also concerned about the high costs associated with the World Cup, which could deter Belgian travelers, who in

Type	Company	Contact	Details
			general are quite price savvy. He shared insights from a successful event in Liège that attracted 75 travel agents. He highlights the importance of targeting the French speaking agents of Belgium. For this, the event should be in Namen or Liège, which then also attracts agents from Luxembourg.
Trade	Avontro	Chesko Woldendorp	<p>Simi Reizen, led by Robbert, is expanding with a new brand called Avontro, which Robbert is launching together with Chesko Woldendorp. Each year, Simi Reizen brings about 1,500 travelers to the US and Canada on self-drive group trips of 15 to 20 participants, targeting the 18–38 age segment.</p> <p>Avontro focuses on FIT package travel, designed to simplify the booking process for US trips. Instead of back-and-forth quotes and custom adjustments, customers can choose from ready-made base itineraries with optional pre-set extensions, making it easy to select, book, and travel.</p>
Trade	U.S. Foreign Commercial Service (FCS) at the U.S. Embassy in Belgium	Ira Bel	Ira regretfully confirmed there is no ambassador yet in Brussels. We could regain a lot if the new ambassador would be someone as the well-remembered ambassador Gutman. A change of administration in DC always trickles down.
Trade	Travelhome	Tabitha van Kessel (leaves position Oct. 2025)	<p>Tabitha shared that the booking season is already well underway and performing positively. The U.S. market remains challenging, which will require extra attention in the coming months. She expressed confidence in the long-term potential of the U.S. market and emphasized her interest in continued collaborations to further promote America and strengthen its positioning.</p> <p>She also mentioned that, after many successful years at Travelhome, she has decided to pursue a new opportunity outside of the travel industry and will be leaving her current position in October.</p>
Trade/Airport	Amsterdam Airport Schiphol	Marcel Lekkerkerk - Airline Partnerships Director	<p>Marcel has sent us the updated airlift between AMS Schiphol to the USA for this season (details in Misc.). He notes there is slightly more capacity than last year, with two new destinations added: Tampa (Delta) and San Diego (KLM).</p> <p>He emphasizes that there is still potential for growth, and that Denver remains a strong candidate for future expansion. He clarifies, however, that this remains a longer-term project. Work is ongoing, but progress depends on the capacity constraints at Schiphol as well as fluctuating market sentiment driven by external global developments.</p>
Trade/Airport	Brussels Airport	Hhouda Draouil - Market Development Manager	We connected with Hhouda Draouil to review their current airlift. The airport provided an overview of direct flights to the United States for both the summer and

Type	Company	Contact	Details
			winter seasons. At this time, no additional U.S. routes are planned.
Airline	United Airlines	Alexander van Ryckeghem	<p>During the Visit USA Belgium board meeting, Alexander expressed that aviation is a challenging business nowadays, as media spread negative ideas about immigration and access to attractions. There is no reason for panic – the flights are not empty, but travel patterns are shifting.</p> <p>In September, Alexander accompanied an economic mission to Los Angeles. The mission included members of the royal family as well as journalists. This presented an opportunity for positive coverage and messaging about travel to the USA.</p>
Trade	WRC/Outsight travel	Jón Jonker	At the Visit USA Roadshow, we met with Jón, Product Manager for WRC Reizen/Outsight travel. We discussed to do a meeting in our office to give him more detailed information and help him with product development.
Trade	Travel Trend	Natasja Eshuis	We met with Natasja and discussed the opportunity to plan a trainings session at their office.
Trade	World Explorers	Tessa Wanders	World explorers is the tour operator exclusively for Personal Touch Travel. They offer only destinations they have visited themselves. Neither she nor her colleagues have been in the GAW region. At this point they don't have any product on their website. They prefer to travel by themselves instead of joining a fam. They are on our mailing list.
Media	Hey!USA	Sebastiaan Klijnen	<p>CO-OP UPDATE: The planning was to start posting the articles/longreads in July, but Hey!USA has developed a new layout for these articles which took some time. It includes a lot of images and videos to inspire readers. For this reason, the first article was published in August. We made a schedule to feature one state 4x per year and 4x a GAW article featuring all four states (runs till June). The first articles: TRNP & Mount Rushmore.</p> <p>Their team will also start on the individual dedicated landing pages of each state. They plan to have ND & SD ready this month so these can be linked to the articles. The marketing activities (post, stories, USA post newsletters) haven't started yet. They first want to gain some organic reach before setting these up. They will send us a full report with all the ROI at the end of the co-op.</p>
Media	Freelance	Gijs Hardeman	Gijs visited the region in February of 2024 and wrote a story in HighLife Plus following his fam. After a conversation with Gijs and approval of ID he will do an additional story from his fam in SOUL Media in return for commission; this 6-8 page advertorial will be published in December.

Type	Company	Contact	Details
Media	Freelance	Bas van Oort	We have reopened his fam to ID with the Salmon River / wild water rafting angle. We currently in contact with Bas van Oort and HEARTS Media about the ad buy opportunities for Nat Geo.
Media	Hearst	Helen Kuipers	<p>Helen Kuipers oversees Bazaar, Quote, Quest, as well as the editorial operations for National Geographic, including three print titles (National Geographic, Historia, Traveller) and the Dutch website nationalgeographic.nl.</p> <p>She highlighted that magazine readers and the online audience are almost completely distinct, with only a 1% overlap. Cross-channel campaigns therefore generate the strongest results by reinforcing each other.</p>

Trainings

Summary:

# Trainings	# People Trained
0	0

New Product

Summary:

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
3	7	4	4	18

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Joker Reizen	Discover the Great American West	MSP	SLC	<u>Route changed based on COOP:</u> MSP (1) – Fargo (1) – Bismarck (1) – Medora (2) – Badlands (1) – Rapid City (2) – Deadwood (1) – Sheridan (1) – Cody (1) – YNP (2) – Jackson (2) – Idaho Falls (1) – Sun Valley (1) – Stanley (1) – Boise (1) – SLC (1)
Dutchies Travel	Rondreis westkust Amerika en Canada	SEA	SEA	Seattle (2) – Mount Rainier NP (2) – The Dalles (1) – John Day Fossil Beds NM (1) – Boise (1) – Craters of the Moon (1) – Grand Teton NP (3) – YNP (3) – Helena (1) – Glacier NP (3) – Banff NP (3) – Jasper NP (2) – Wells Gray (2) – Whistler (2) – Vancouver (2) – Seattle (1)
Dutchies Travel	Het ultieme reisschema - de nationale parken	SLC	SLC	SLC (3) – Grand Teton (3) – YNP (4) – Twin Falls (1) – Yosemite (3) – Sequoia (2) – Death Valley (2) – Las Vegas (2) – Grand Canyon (3) – Bryce Canyon (2) – Zion (3) – SLC (1)

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
	aan de westkust van Amerika			


Website

Sessions	Users	Pageviews	Average Session
609 (-24%)	604 (-44%)	856 (-46%)	1:47 (-73%)

**There was a bot on the website on Aug 22, causing an unusual high peak in pageviews. The data from this day has been removed from this report.*

Misc.

- **Visit USA**
 - **Visit USA NL.** We delivered content for the newsletter and [blog](#), we highlighted the 22-day GAW itinerary (Reach 2,000 AVE \$ 500).
 - **Visit USA BE.** We delivered content for the [newsletter](#) with theme 'Ranch experiences in the GAW'
- **Additional proposal.** Our proposal to attend the Visit USA Belgium USA Workshop was confirmed and we have been preparing our booth. Show takes place on October 14, 20205.
- **News release.** We shared the updates about the Government Shutdown and what this means for the National Parks in WY/SD. These have been well received by the trade.
- **Airlift Update.** Please find below an overview of the current airlift from Amsterdam and Brussels.

Airline	Services
	USA Brussels <ul style="list-style-type: none"> • 4x weekly to New York (JFK) • 3x weekly to Atlanta (ATL) – seasonal service in summer
	Amsterdam <ul style="list-style-type: none"> • 28x weekly to Atlanta (ATL) • 3x weekly to Austin (AUS) • 18x weekly to Boston (BOS) • 7x weekly to Chicago (ORD) • 21x weekly to Detroit (DTW) • 7x weekly to Houston (IAH) • 7x weekly to Las Vegas (LAS) • 14x weekly to Los Angeles (LAX) • 24x weekly to Minneapolis/St. Paul (MSP) • 32x weekly to New York (JFK) • 7x weekly to Orlando (MCO) – seasonal service in winter • 5x weekly to Portland (PDX) • 10x weekly to Salt Lake City (SLC) • 3x weekly to San Diego (SAN) – seasonal service in summer • 7x weekly to San Francisco (SFO) • 14x weekly to Seattle (SEA) • 4x weekly to Tampa (TPA) • 7x weekly to Washington (IAD)



USA

Amsterdam

- 28x weekly to Atlanta (ATL)
- 3x weekly to Austin (AUS)
- 18x weekly to Boston (BOS)
- 7x weekly to Chicago (ORD)
- 21x weekly to Detroit (DTW)
- 7x weekly to Houston (IAH)
- 7x weekly to Las Vegas (LAS)
- 14x weekly to Los Angeles (LAX)
- 4x weekly to Miami (MIA) – seasonal service in winter
- 24x weekly to Minneapolis/St. Paul (MSP)
- 32x weekly to New York (JFK)
- 5x weekly to Portland (PDX)
- 10x weekly to Salt Lake City (SLC)
- 3x weekly to San Diego (SAN) – seasonal service in summer
- 7x weekly to San Francisco (SFO)
- 14x weekly to Seattle (SEA)
- 4x weekly to Tampa (TPA)
- 7x weekly to Washington (IAD)

Canada

Amsterdam

- 14x weekly to Toronto (YYZ) in summer, 10x weekly in winter
- 7x weekly to Calgary (YYC)
- 7x weekly to Vancouver (YVR)
- 5x weekly to Montreal (YUL) in summer, 3x weekly in winter
- 5x weekly to Edmonton (YEG) in summer, 3x weekly in winter



USA

Brussels

- 3x weekly to (IAD) – seasonal service in summer
- 7x weekly to New York (JFK) in summer – 5x weekly in winter



USA

Brussels

- 7x weekly to Chicago (ORD)
- 14x weekly to (EWR) in summer – 7x weekly in winter
- 7x weekly to (IAD)

Amsterdam

- 7x weekly to Chicago (ORD)
- 7x weekly to Houston (IAH)
- 7x weekly to New York (EWR)
- 7x weekly to San Francisco (SFO)
- 7x weekly to Washington (IAD)



USA

Amsterdam

- 7x weekly to Dallas/Fort Worth (DFW) – seasonal service in summer
- 7x weekly to Philadelphia (PHL)



USA

Amsterdam

- 7x weekly to Boston (BOS)
- 7x weekly to New York (JFK)

	<p>Canada</p> <p><u>Brussels</u></p> <ul style="list-style-type: none"> • 4x weekly to Toronto (YYZ) – seasonal service in summer • 7x weekly to Montreal (YUL) <p><u>Amsterdam</u></p> <ul style="list-style-type: none"> • 7x weekly to Toronto (YYZ) 	
	<p>Canada</p> <p><u>Brussels</u></p> <ul style="list-style-type: none"> • 4x weekly to Montreal (YUL) <p><u>Amsterdam</u></p> <ul style="list-style-type: none"> • 7x weekly to Toronto (YYZ) – seasonal service in summer 	

In addition to nonstop connections, several airlines also offer one-stop services to the United States and Canada, including Icelandair, Air France, British Airways, Aer Lingus and newcomer SAS Airlines, a budget carrier via Copenhagen.

A notable trend is that travelers near the Dutch-German border increasingly opt for German airports, while passengers from Luxembourg often rely on Frankfurt as a primary hub.

Quarterly Report – FRANCE

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
20	15	3	0	2

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	Marco Vasco	Florence Cusset – Product Manager fcusset@marcovasco.fr	<p>Meetings with the Marco Vasco team to ensure the proper implementation of the co-op, and everything is now finalized.</p> <ul style="list-style-type: none"> • A banner on the homepage, redirecting visitors to a dedicated page showcasing GAW itineraries will be live from November 17 for a period of 15 days. • A newsletter highlighting five itineraries will be sent to over 69,000 subscribers on November 22. • An advertorial article in <i>Envois</i> (1,000,000 UVM) will be published between late November and early December, first featured on the homepage for one week and then archived with a permanent link. • A 1.5-hour training to the team is scheduled on November 5, 2025. <p>All content and visuals have already been provided to the marketing team. This campaign will offer targeted and long-lasting visibility among a qualified audience.</p> <p>Florence also informed us about the appointment of a new Managing Director at Marco Vasco. A few months after Alexandre Vercoutre's departure, Caroline Marro, who has a strong background in the tourism industry, has taken on the role. Her main focus is to boost sales to the United States by expanding the sales team, particularly Florence's team, which was reduced following the Covid period. The U.S. remains the company's number one destination, often tied with Japan.</p>

Type	Company	Contact	Details
Trade	Visiteurs	Roxane Vergught – Marketing Director rvergught@visiteurs.com	<p>Another co-op campaign has been confirmed and will be launched in November :</p> <ul style="list-style-type: none"> A 15-day banner will be featured on the trade website, highlighting the two itineraries included in their current program and driving traffic to dedicated content about the region. A newsletter will be sent to their professional contact database, designed to inspire travel advisors and tour operators. The approved theme, “Top 5 Reasons to Discover the Great American West,” will showcase the region’s most compelling highlights, from iconic landscapes and cultural heritage to authentic experiences, dark night skies and diverse activities.
Trade	La Route des Voyages	Laetitia Galera – Product Manager laetitia@laroutedesvoyages.com	<p>Meeting with Laetitia, who informed us about the acquisition of La Route des Voyages by the Eluxtravel Group. Founded in 1993, this tailor-made travel specialist has five locations in France (Bordeaux, Lyon, Toulouse, Annecy, and Angers) as well as a subsidiary in Geneva, and will retain all 25 of its travel agents.</p> <p>Both brands will continue to operate under their respective identities while developing synergies, with some agencies expected to operate under a dual-brand model. This acquisition will allow Eluxtravel to expand its offering to more accessible high-end trips (average booking around €10,000, compared to €22,000 for Eluxtravel) and reach a broader clientele, while preserving the DNA and premium positioning of both brands.</p> <p>Additionally, a new agency in Paris will be inaugurated in the coming weeks, further strengthening the group’s presence in the French market.</p>
Trade	Amplitudes	Clémence Robert – Product Manager clemence.robert@amplitudes.com	<p>Clémence organizes monthly state-focused training sessions for travel advisors.</p> <p>In September, she invited us to present the GAW during a session attended by six U.S. specialists. Amplitudes, an agency primarily specializing in luxury travel and honeymoon trips, provided the perfect platform to showcase our region’s highlights, with a focus on luxury accommodations and ranches.</p>
Trade	Terres D’aventure	Sylvain Mer – Product Manager smer@terdav.com	As a follow-up to the recent fam trip (early July 2025), the feedback received from Sylvain and

Type	Company	Contact	Details
			<p>Thibault has been extremely positive. They reported an excellent experience overall.</p> <p>They particularly highlighted Custer State Park as a favorite and plan to add a second night there in their online itinerary, which will soon undergo a complete update. Additionally, the horseback riding experience in the Bighorn Mountains was described as “absolutely amazing,” and they are now in contact with Ellen to include this activity in their future tour programs.</p>
Trade	Comptoir des Voyages	Camille Rochard – Product Manager crochard@comptoir.fr	<p>Camille also shared very positive feedback following her summer trip in July, during which she explored Jackson, Grand Teton National Park, and Yellowstone. The experience allowed her to deepen her knowledge of the destination and strengthen her interest in promoting the region.</p> <p>She expressed a strong desire to expand her product offering within the Great American West and is already planning to participate in the International Roundup in Medora in 2026. Her goal is to build new partnerships, connect with additional local suppliers, and further enrich her future itineraries.</p>
Trade	Nautil	Gregory Bailleul – Product Manager gregory@nautil.com	<p>Team Reorganization: This fall, the team’s structure will be adjusted to strengthen production. Gregory now focuses exclusively on USA/Canada and English-speaking Caribbean production (Oovatu & Tropicament Vôtre), stepping away from sales. Thomas Dubost continues to handle sales for USA/Canada/Japan while also taking on Japan production. Finally, Laëtitia (formerly with Directours and more recently Evasions USA) joined the team in early September as Senior USA/Canada specialist. Going forward, all communications related to production, updates, trade shows, fam trips, and trainings should be addressed directly to Gregory.</p> <p>We took the opportunity to train Gregory who doesn’t know much about our states.</p>
Trade	Verdié Voyages	Carine Foucras – Product Manager carine.foucras@verdievoyages.com	<p>Verdié Voyages is a network of 28 agencies, traditionally known for their coach tours. Since the post-Covid period, the company has developed a new “À la Carte” offerings, focusing on off-the-beaten-path trips in small groups of 6 to 8 people. Carine, the head of production, recently launched a new brochure, which features product in the GAW (mostly Wyoming). We took the opportunity to train her on the four states, and she is eager to launch a new product for 2026.</p>

Type	Company	Contact	Details
Trade	France Moto Voyages	Coralie Fournier – Travel Specialist resa@francemotovoyages.com	Since the closure of All Ways on Wheels two years ago, Coralie has recently joined the team at France Moto Voyages, which specializes in motorcycle tours. We took this opportunity to introduce her to the many scenic byways in the four states which would be perfect for their travelers. We also recommended a tailored itinerary featuring selected “biker friendly” accommodations.
Trade	Jetset Voyages	Valérie Heurtel – Product Manager valerie.heurtel@premiumtravel.fr	Jetset Voyages joined the Monde à la Carte - Austral Lagons group in May 2025, strengthening its position among the tailor-made brands of the Marietton group, one of the largest networks in France. The experienced team benefits from a new organization and refreshed visual identity. With seven sales representatives in the field and privileged listings, notably with Sélectour GOLD, Jetset has started to distribute its 2026 brochure mid-August. Valérie will be able to focus more on production and itinerary development, with a meeting planned at the end of October with the sales team.
Trade	Kuoni	Charline Lambert – Product Manager Charline.Lambert@kuoni.fr	Charline is currently working on the new 2026 brochure, which will be distributed to more than 2,500 travel agencies starting in January. Sales to the U.S. are down by 20%, and the company is implementing various initiatives to boost demand and ensure a strong 2026 season. The meeting was also an opportunity to review current itineraries.

Trainings

Summary:

# Trainings	# People Trained
2	7

Significant Training Highlights:

Type	Company	Contact(s)	Details
Trade	Amplitudes	Clémence Robert	Presentation of the GAW during a 1.5-hour session attended by six U.S. specialists.
Trade	Nauti/Oovatu	Gregory Bailleul	Updated Gregory (new in his position) and doesn't know the four states. In depth training provided.

New Product

Summary:

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
2	0	0	12	5

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Les Ateliers du Voyage	In the Land of the Sioux	RAP	RAP	Rapid City (1) – Pierre (1) – Sioux Falls (1) – Chamberlain (1) – Badlands NP (1) – Custer State Park (3) – Keystone (1) – Black Hills (1) – Deadwood (1) – Rapid City (1)
Verdié Voyages	Western from Yellowstone to Arches	DEN	DEN	Denver (1) – Casper (1) – Cody (1) – Yellowstone NP (2) – Jackson (2)

Website

Sessions	Users	Pageviews	Average Session
1,162 (+128.29%)	1,146 (+153.54%)	4,091 (+472.17%)	1.01 (-36%)

Misc.

- VUSA France:
 - Visit USA France will celebrate its 30th anniversary in 2026
 - A special event will be organized in Paris to mark the occasion
 - GAW France will be a part of two workshops organized by VUSA in Le Havre and Montpellier (November 25 and December 9)
- Article Published in AR Magazine following Julien Gilleron's trip in April 2025: <https://ar-mag.fr/sous-le-cuir-la-lumiere-wyoming-et-dakota-du-sud-42443/>
 - UVM: 133,000
 - AVE: \$28,000
- FY26 GAW Swag items were received on September 29

French Market update: The third quarter of 2025 has shown encouraging signs of recovery for both domestic and international travel among French travelers.

- **Summer holiday departures:** In July, the start of the school holidays triggered a significant wave of vacation departures, both within France and abroad. According to Atout France, 74% of French people planned to travel this summer, with a strong preference for domestic destinations. Last-minute bookings were particularly active,

especially for trips within France. Tour operators also reported very encouraging bookings and departures to the United States in the second half of the year, signaling a strong rebound in international tourism.

- **France as a source market to the US:** Early August statistics confirmed France as the third-largest international source market to the United States, behind the United Kingdom and Japan. From January 1 to early August, France recorded 907,920 visitors, representing a 4.3% increase compared to 2023 and a -6.6% difference with 2024. This performance was driven by last-minute bookings, a favorable EUR/USD exchange rate, and the attractiveness of local offerings, keeping the US among the top preferred destinations for French travelers despite a challenging tourism year.
- **Travel sales and bookings:** Overall travel sales in France rose by 2.2% in September 2025 compared to September 2024, following three consecutive months of decline (-16.7% in June, -8% in July, and -5.5% in August). This indicates that French travelers are gradually regaining confidence and adapting to ongoing political and geopolitical uncertainties. Tour operators report a slight uptick in bookings to the United States, not only for the coming months but also for spring and summer 2026, further supported by the favorable euro-to-dollar exchange rate.

The quarter demonstrates a resilient recovery for French outbound tourism with the United States maintaining a strong position as a preferred long-haul destination. The combination of last-minute booking trends, economic factors, and targeted offers has supported positive momentum heading into the end of 2025 and beyond.

France – Political Update (Q3 2025):

- France has been experiencing significant political instability. President Emmanuel Macron's government, led by Prime Minister François Bayrou, collapsed in September after losing a confidence vote in Parliament. This followed strong backlash to the proposed 2026 budget, which included spending cuts and unpopular measures seen as too austere.
- The country has faced repeated changes of government, making it difficult to pass reforms or maintain political continuity. Public discontent remains high, driven by concerns over inflation, public debt, and purchasing power. Protests and social unrest have highlighted the growing divide between the government and citizens, while uncertainty continues to weigh on France's economic outlook.

Quarterly Report – Italy

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
15	5	3	0	1

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	NAAR Bespoke Travel	<p>Erica Melegari, Product Manager, USA</p> <p>Gaia Crespi, Marketing Manager</p> <p>Isabella Campora, Assistant Marketing Manager</p>	<p>Co-op Marketing activity:</p> <ul style="list-style-type: none"> • One B2B presentation/event addressed to 40 agents in Northwest Italy in February (Location to be announced in fall) • Two trade newsletters to be sent to 2,000 targeted agents with two itineraries in GAW region • Four Facebooks posts • Three Instagram posts <p>Talked to Erica and the marketing team to discuss the above activities.</p> <p>Erica confirmed her willingness to attend IRU 2026 Medora.</p>
Trade	CREO	Luigi Leone, Director of Product	<p>Co-op Marketing activity:</p> <ul style="list-style-type: none"> • Two B2B training sessions/presentations in January 2026 in Florence and Rome • One newsletter to be sent out in October/ November • Four Facebook/Instagram posts scheduled for October/November <p>Luigi also confirmed his willingness to attend the IRU 2026 Medora.</p> <p>September 23: Luigi ran a Visit USA webinar and talked about Wyoming and Idaho. Total attendees: 86</p>
Trade	GOING	<p>Ivana Di Stasio, Booking Supervisor & Product Development Manager USA, Canada, Mexico</p> <p>ivana.distasio@going.it</p>	<p>September 17: Webinar with Going Tour Operator addressed to Bluvacanze and Vivere & Viaggiare network*. We had calls with Ivana and Giulia in July and September to organize the webinar and slides in the presentation.</p> <p>The webinar highlighted the theme of dark skies and stargazing opportunities. Annalisa shared an</p>

Type	Company	Contact	Details
		Giulia Ruggiero, Marketing Coordinator giulia.ruggiero@bluvacanze.it	<p>overview of the region, while Ivana presented in-depth information about their itineraries.</p> <p>Ivana also introduced a new tour that combines ND and SD: MSP – Fargo (1) – Bismarck (1) – Medora (2) – Rapid City (1) – Wall (1) – Cheyenne (1) – DEN</p> <p>Total travel agent attendees: 125</p> <p><i>* Going is fully owned by the Bluvacanze Group, a leading Italian tourism distribution hub that also includes the travel agency networks Bluvacanze, Vivere & Viaggiare, and the Travel Management Company Cisalpina Tours.</i></p> <ul style="list-style-type: none"> Ivana is included in our target leads for IRU 2026 in Medora
Media	Simonasacri.com	Simona Sacrifici	<ul style="list-style-type: none"> Simona published a podcast about Mt Rushmore and an article about Theodore Roosevelt Library. Outcomes of her trips to South Dakota, North Dakota and IPW. Idaho press trip in September 2025: Simona returned from Idaho very happy. She truly believes this trip exceeded all her expectations. Idaho is an incredibly diverse and rich state, beautiful sceneries, lots of art and culture opportunities. She thanked a lot for the exceptional assistance received and for the perfect organization of the trip. She will start to write articles about Idaho as of October and the podcast as of January 2026. <p>YTD social insights results:</p> <ul style="list-style-type: none"> Instagram: approx. 700 stories were shared throughout the duration of the trip. Each story received an average of 800 to 1,300 views. Additionally, she posted two photo posts and two reels, reaching a total of 60,000 views, along with comments and several shares. Overall, the 16-day trip to Idaho resulted in 773,000 views. That's nearly a million views over two weeks for an account with around 25,000 followers, exclusively dedicated to U.S. travel content. The most significant aspect lies in the comments and direct messages, where users often express interest in planning their own trip to Idaho inspired by Simona's itinerary. Facebook page: She published eight extensive carousel posts, each containing around 20 photos, and within two weeks reached an average of 151,000 views per week during her trip. The post focused on the Nez Perce Reservation performed very well. On Simona's Facebook profile, a total of 16 carousel posts received an average of 120 likes each along with numerous

Type	Company	Contact	Details
			<p>comments. No insights available since it's a private profile.</p> <ul style="list-style-type: none"> • LinkedIn: Nine carousel posts published with over 12,000 views. • Overall, she has reached a total of one million views on social media during her 16-day trip to Idaho! • Simona took also part of the exclusive group by Lasciati Viaggiare TO (Mrs. Cristina Caretti) combining SLC, SD and WY (17 people in total). Thanks to the recent Idaho trip, Simona was able to revise the itinerary on the last day including a final day in Idaho, featuring a visit to the Oregon/California Trail and the Butch Cassidy Museum in Montpelier.
Media	Brand USA	<p>Monica Velardita, Brand USA PR Account Manager</p> <p>Lucia Pierangeli, Brand USA PR Manager</p> <p>Journalists: Daniela Solito and Gianni Messa</p>	<p>Approved press trip assistance to South Dakota from September 15-19. Sent fam itinerary to Brand USA Italy office and journalists Daniela Solito, freelance journalist (Repubblica Viaggi, Vanityfair.it) and Giovanni Messa, editor in chief for Repubblica.it.</p> <p>Follow-up: The trip was a great success, the journalists returned both happy and highly enthusiastic. Even though there were a few rainy days, they appreciated the destinations, attractions, and the excellent organization by South Dakota Tourism.</p> <p>Journalists requested a few images of Custer State Park and Crazy Horse Memorial.</p>
Media	SD Buffalo Round Up press fam	Ornella D'Alessio, freelance journalist	<p>Confirmed the attendance of freelance journalist, Ornella D'Alessio. Finalized all travel arrangements and shared the itinerary with her. Ornella returned home, full of praise for South Dakota and eager to share her excitement with her circle of friends, family, colleagues, and soon, her readers. Her first words to us have been: "Stunning journey, enriching and beautifying".</p> <p>Ornella is now working on an article to be published on IO DONNA, weekly feminine magazine. Follow up in October.</p>
Trade	Skywalk Viaggi	Silvia Cuppari, silvia@skywalkviaggi.com	<p>Feedback about group tour escorted by Silvia in GAW region in August:</p> <ul style="list-style-type: none"> • Minneapolis: The city is very manageable and pleasant. The airport is conveniently close and accessible via public transportation, as well as

Type	Company	Contact	Details
			<p>Uber or taxis. She found the city clean and well-organized.</p> <ul style="list-style-type: none"> • SD: Sioux Falls, Rapid City, Sturgis, Deadwood, and Custer State Park, Badlands NP. Returning to South Dakota was an absolute delight, especially finding it even better than before! The Badlands will forever hold a special place in Silvia's heart. • WY: Devils Tower, Sheridan, Cody. Entering Wyoming from South Dakota, the group came across a delightful visitor center. The staff welcomed them warmly, leaving a positive impression. Staying at the Sheridan Inn Best Western Signature Collection was an enjoyable experience for everyone. As for dining, Wyoming's Rib & Chop House in Sheridan won the award for "Best Dinner of the Trip." The rodeo experience in Cody is a "must-do." She highly recommends stopping by Cody's visitor center as staff were extremely helpful. • Yellowstone National Park: Three days are perfect to explore most of the natural wonders. Even though it was August, they didn't encounter excessive traffic or long lines. • Jackson: Charming, very trendy and expensive, with stunning art galleries and vintage shops. • Rawlins: Genuine snapshot of small-town life, surrounded by miles of prairie. Fascinating from an anthropological perspective. • Denver: Silvia's love for Denver is more than consolidated! Beautiful, welcoming, and well-organized. Union Station is always a great place, even just for a quick breakfast. Denver won over everyone, both the young and the old.
Trade	Go2West by EKO LTD srl	<p>Raffaello Butori, Executive Director</p> <p>raffaello@go2west.org</p>	<p>July 1: Meeting with Raffaello who left Konrad Travel and joined EKO LTD tour operator in Tuscany as the Executive Director. Raffaello is responsible for designing, planning and budgeting trips, negotiating with suppliers and vendors for the new brand GO2WEST which is focused on the USA, Caraibi and Polynesia. The tour operator is planning to launch a new website.</p> <p>Trained him about the region (he never visited before) and developed a new itinerary based on the suggested GAW itineraries published in the Italian website: Native American heritage</p>

Type	Company	Contact	Details
Trade	Kel12	Stefano Gnerucci, US Specialist stefano.gnerucci@kel12.com	<ul style="list-style-type: none"> July 16: Meeting with Stefano in our office. Talked about the tour in August he escorted and his future plans with Kel 12. Stefano will develop new group tours for Kel 12; he is planning to create a new tour combining MSP, ND and SD. August 30: Follow up with Stefano about the tour. Here his feedback about the experience: The itinerary was well-designed (he worked with America 4You). An important key factor was the small group size (16 people), all were true travelers. These were cultured, polite, and respectful, the ideal kind of clients who represents the typical Kel 12 customer profile. Yellowstone was a standout experience, where they spent 4 full days. Cody turned out to be an unexpected and pleasant visit. At the Buffalo Bill Center, they had the pleasure of meeting two incredible staff members who treated them to a private tour of the Buffalo Bill section and the Plains Indian exhibits. They were phenomenal and passionate storytellers. The rodeo, including dinner and a pre-show, Irma Hotel offered an authentic slice of U.S. culture that everyone thoroughly appreciated. The group really enjoyed Sheridan and the Sheridan Inn, a true “museum”. The same goes for the lunch and visit to the Occidental Hotel in Buffalo. Lovell, with the Horseshoe Motel, turned out to be the revelation of the trip. Overall, it has been a successful group tour. Stefano is included in our target leads for IRU 2026 Medora
Trade	Globalys Travel & Beyond	Paola Preda, Travel Consultant of Globalys Travel & Beyond Patrizia Pegolotti, CEO	<ul style="list-style-type: none"> Follow up group tour in Wyoming and Idaho focused on Native American culture and heritage in August (10 people). Itinerary: SLC – Green River – Flaming Gorge – 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) – SLC The itinerary proposed has been greatly appreciated, both in terms of logistics and the content and experiences it offered. The clients were captivated by the variety and beauty of the landscapes, and what truly made the journey special was the opportunity to explore many places off the typical tourist paths. The stay at Shoshone Rose Casino in Lander was great. The facility is impressive; the rooms are comfortable. The experience with the mustang horses was wonderful and the organization is truly

Type	Company	Contact	Details
			<p>commendable. The group explored the reservation extensively. However, while guests enjoyed the visit, they wished for more interaction with the Native community, similar to what was offered last year.</p> <ul style="list-style-type: none"> • Yellowstone and Grand Teton were the major highlights. Placing them toward the end of the trip made the experience even more thrilling for the clients, who had been eagerly anticipating their visit. They only passed through a small portion of Idaho, but it left a big impression. The Shoshone Bannock Festival was incredibly moving; it was absolutely unforgettable and unique. On the final day, they were also able to see the Indian Relay Race, an exciting first-time experience for all of them. • At the end of the tour Paola stayed in the region with the family because she wanted to explore North Dakota in order to organize a group tour for 2026. Patrizia and our office trained her before the trip and her feedback about the experience she had in North Dakota: <p>“The experience in North Dakota was equally delightful and very enriching. Gary, Stacey, and Jason were incredibly kind, accommodating, and provided clear explanations about the types of experiences they could offer. During our brief stay, we were fortunate to be there on the evening they hosted a sunset cruise, which brought together many members of the Chamber of Commerce with the purpose of fostering networking among them. Having interacted with both the Lakota and Shoshone tribes, I was able to observe the differences in their mindsets. The tribes in North Dakota are noticeably open to tourism and impressively well-organized. Clients who joined trips both this year and last have already expressed interest in participating again next year if I organize another one. They’ve seen the photos from North Dakota and were thrilled by them.”</p> <ul style="list-style-type: none"> • September 22: Meeting with Paola and Patrizia. Assisted them to develop a new itinerary featuring North Dakota.
Trade	Castiglione Viaggi	Simona Savigni	<ul style="list-style-type: none"> • Received approval from Wyoming to assist Simona for her trip to Wyoming and Denver in September 2025. Wyoming Office booked her lodging in YNP and Laramie and arranged a few meetings/visits while Denver offered her a Mile High Cultural Pass. • Simona returned delighted by her experience in Wyoming. As it was her first visit, the trip will significantly help her in promoting the state to her clients. She will send us and Naar (she booked few lodging with Naar tour operator) a report about the trip.

Type	Company	Contact	Details
			This is her second visit to the region, last year she traveled to SD.
Trade	Go America by Go World	Carmen Ruggiero, Product Manager USA c.ruggiero@goworld.it Davide Rinci, Booking Department, d.rinci@world.it	<ul style="list-style-type: none"> Assisted and trained Carmen and Davide about the GAW region. Gave them info and suggestions for new tours featuring the four states. They plan to develop and revise their tours online. Davide and Carmen would like to create a group tour in Wyoming and Idaho for summer 2026 and have requested quotes from receptives (America 4 You and RMHTours).
Airline	United Airlines	Christian Josso, Account Manager	<p>Meeting with Christian who informed us that the company has celebrated significant success with its direct flight linking Rome to Denver. The airline has announced plans to bring back this route for 2026, scheduling operations from March 29 through late October or early November.</p> <p>United is also available to join the co-op marketing activities and Alidays Mini Roadshow helping with the promotion of the United Airlines flight.</p>
Consulate	US Commercial Service in Milan/U.S. Consulate Milan	<p>Mrs. Luisa Salomoni, Commercial Specialist U.S. Consulate Milan luisa.salomoni@trade.gov</p> <p>Mr. Sunil Ravi officer of Foreign Service U.S.Dept. of State</p>	<p>Olga Mazzoni was invited September 29th to be part of a meeting at the U.S. Commercial Service in Milan, with Caroline Chung (Federal, Consul Comm Affairs), Ms. Luisa Salomoni, Mr. Sunil Ravi officer of Foreign Service U.S. Department of State who is coordinating right now with the USA Teams and delegations at the Winter Olympics in Milan-Cortina. They are wanting to find opportunities in the travel/export segment to embrace common goals of presenting the extraordinary next decade of sporting events in the USA, including the Olympics in Los Angeles, as a "magnet" to attract the most business traffic in the United States. It seems that Utah will send a very large delegation to Italy in view for the Salt Lake City, Utah 2034 Winter Olympics. Foreign Service wishes to maximize the USA-Italy Showcase event which will be held at the end of February, after the Olympics and the Paralympic Games, as a promotional opportunity for American DMOs who want to promote their sports-related events and destinations.</p>
Trade	L'ORA FELIZ travel agency & TO	Giulia Sturmman, Owner info@lorafeliz.com	<p>Giulia spent her vacation in the GAW region this summer (August). Assisted with info and suggestions. Itinerary as follows:</p> <p>Arrival in Missoula, MT – Glacier NP – Helena – YNP (4 overnights in the park in 4 different properties) – Cody (1) – Sheridan (1) – Deadwood (1) – Custer State Park (1 overnight inside the park) – Rapid City (1) – Cheyenne (1) – DEN (2).</p> <p>Overall trip was great, and it exceeded her expectations. Giulia is planning to send us a brief</p>

Type	Company	Contact	Details
			report with her feedback. Giulia posted her trip on Instagram and Facebook .
Media	"Running Scenery" by Icarus SKY TV	Mr. Paolo Venturini paolo@paoloverturini.it https://www.paoloverturini.it/curriculum-sportivo/#tab-id-2	<p>Icarus Ultra by SKY TV is a dynamic and innovative TV program that shares adventures, stories, achievements, and curiosities about sports in a unique way, with a special focus on sustainability. "Running scenery" is the TV program inside Icarus Ultra run by the ultrarunner Paolo Venturini. YouTube - Facebook - Instagram</p> <ul style="list-style-type: none"> • Broadcasting: One episode every week, with 52 episodes per season, broadcasted on Sky Sport Arena, Sky Sport Max, Sky Sport Uno, and available for free on Sundays on Cielo. • Audience: From 170,000 to 630,000 viewers per episode (with an average of 300,000 viewers), the show is estimated to gather around 20 million viewers per season. <p>Paolo contacted our office to propose a press trip in South Dakota in order to finalize a series of four TV episodes of the program dedicated to Black Hills SD and Denver, as gateway (Paolo has traveled to SD in 2011 for "Black Hills 100" ultra-trail)</p> <ul style="list-style-type: none"> • Tentative period: first week of June (three nights in Denver and seven nights in SD) • Crew composed of three people • Requested flights, lodging, and car rental • Partner sponsor/opportunity: Alidays and possibly United <p>July – September: Had calls and meeting with Paolo and Alidays to discuss the project. Will review the entire project and fill in the press fam form in October/November.</p>
Trade	Ti.Es.Bi. TRAVEL	Carmen Bassi, owner cbassi@boateltravelevent.it	This tour operator has a portfolio of high-end clients, and all their trips are always customized. They have updated the website as anticipated in a July call, with a new itinerary in GAW region: The Great American West: The Myth of the Frontier
Trade	Viaggiare in USA	Mattia Crippa, owner	Tour operator dedicated a landing page to the GAW region with three selected itineraries featuring the GAW: https://www.viaggiareinusa.com/destinazioni/stati/great-american-west

Type	Company	Contact	Details
Media	Turisti per Caso - “TG del Turismo Syusy & Patrizio News®” by Italia Slow Tour	Gianfranco Nalin gianfranco@italiaslowtour.com	<p>Turistipercaso.it is the renowned website launched by Syusy Blady and Patrizio Roversi in 1998, marking the first Italian travel community.</p> <ul style="list-style-type: none"> Users: 951,500/month Pageviews: 1.6 million/month) <p>Syusy & Patrizio News® is a tourism digital TG new weekly television format focused on tourism and cultural news launched in 2023.</p> <ul style="list-style-type: none"> Audience: 200,000 weekly viewers <p>Sent Gianfranco images and info about North Dakota and South Dakota (Native American heritage). The editorial staff produced the following: https://www.turistipercaso.it/syusy-e-patrizio/tg-del-turismo-18-luglio.html which includes the Syusy & Patrizio News®, episode with video available on YouTube.</p>
Trade	Down Under Viaggi	Marco Guarlotti info@downunderviaggi.it	Marco requested GAW images to use in promoting the GAW region to clients. He plans to use images in their social network, having recently completed a course on social networking.

Trainings

Summary:

# Trainings	# People Trained
3	286

Significant Training Highlights:

Type	Company	Contact(s)	Details
Trade	Going, Webinar	Ivana Di Stasio, Product Development Manager Annalisa Mereghetti, GAW Italy	<p>September 17: Ran a one-hour webinar plan addressed to Vivere & Viaggiare - Bluvacanze network. The webinar highlights two unique itineraries in the GAW region, developed by Ivana focusing on dark skies/stargazing experiences: <i>Idaho and Wyoming After Dark</i> and <i>Stargazing in North Dakota and South Dakota</i></p> <p>Total travel agent attendees: 125 Link registration</p>
Trade	CREO Travel, Visit USA webinar	Luigi Leone, Director of Product	<p>September 23: Visit USA webinar about Wyoming and Idaho by Luigi Leone, CREO Travel.</p> <p>Total travel agent attendees: 86 Link registration</p>

Type	Company	Contact(s)	Details
Trade	SIAM Viaggi, Visit USA webinar	Paolo Aloe, Co-Founder & Product Manager	<p>September 25: Visit USA webinar about North Dakota and South Dakota by Paolo Aloe who narrated his personal experience in the states.</p> <p>Total travel agent attendees: 75 Link registration</p>

New Product

Summary:

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
9	9	14	16	30

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
GOING	Stargazing in North & South Dakota	MSP	DEN	Arrival MSP: Fargo (1) – Bismarck (1) – Medora (2) – Rapid City (1) – Wall (1) – Cheyenne (1) – Depart: DEN
GO2WEST by EKO	Native American Heritage	SLC	DEN	Arrival DEN: Boise (1) – Wallace (1) – Salmon(1) – Montpelier (1) – Evanston (1) – Lander (1) – Deadwood – Badlands NP (1) – Pierre (1) – Bismarck (1) – Medora (1) – Minot (1) – Devils Lake (1) – Jamestown (1) – Mitchell (1) – Hot Springs (1) – Casper (1) – Cheyenne (1) – Depart: DEN
VIAGGIARE IN USA	Great American West	FCA	DEN	Arrival FCA Coeur d’Alene (1) – Lewiston (2) – Ketchum (1) – Idaho Falls (1) – Jackson (1) – Yellowstone NP (1) – Cody(1) – Sheridan (1) – Deadwood (1) – Custer (1) – Rapid City (1) – Medora (2) – Minot (1) – Bismarck (1) – Fargo (1) – Mitchell (1) – Sioux Falls (1) – Depart: MSP
	Yellowstone: exploring the wild West	DEN	DEN	Arrival DEN (2): Cheyenne (1) – Deadwood (1) – Cody (2) – Yellowstone NP (2) – Jackson (1) – Salt Lake City – Moab – Aspen – Depart: DEN
	Beyond the Peaks: An Adventure Through the Rocky Mountains	DEN	DEN	Arrival DEN (2): Cheyenne (1) – Custer (2) – Rapid City (1) – Devils Tower NM (1) – Cody (2) – Yellowstone NP (3) – Grand Teton NP (1) – Green River (1) – Depart: DEN
Ti.Es.Bi.	The Great American West:	DEN	JAC	Arrival DEN (2): Cheyenne (1) – Keystone (2) – Cody (1) – Yellowstone NP (3) – Teton Village (1) – Depart: JAC

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
	The Myth of the Frontier			

Website

Sessions	Users	Pageviews	Average Session
2,519 (+17%)	2,193 (+9.16%)	5,843 (-50%)	1m 7sec (-44%)

Misc.

- Market Outlook:** The summer of 2025 highlights steady growth that aligns with the evolving landscape of the industry. Travel is undergoing a significant shift, as people increasingly seek out not just destinations, but personalized experiences designed to create lasting impressions. Tour operators want to deliver authentic emotions, enhancing the connection with local territories, people and cultures.
- According to NTTO, Italy is currently one of the most dynamic overseas markets for U.S. travel, with +10% growth in both April and May 2025. Despite global uncertainty, interest remains strong — and the travel industry is responding. *International Visitor Arrivals YTD August 2025**

Top Twenty Overseas Tourist-Generating Countries - August 2025 and Year-to-Date:

Country of Residence	August 2025		
	Number of Arrivals	% Change from 2024	Rank
United Kingdom	413.430	4,7%	1
Japan	244.402	10,5%	2
India	204.692	(14,8%)	3
China, PRC	199.901	(8,3%)	4
Italy	199.824	4,9%	5
Germany	192.874	(9,4%)	6
France	185.096	(1,6%)	7
South Korea	150.428	2,4%	8
Spain	131.531	0,2%	9
Brazil	131.121	(4,1%)	10
Colombia	90.672	6,8%	11
Australia	78.264	(8,0%)	12
Argentina	56.938	11,0%	13
Ecuador	52.199	2,2%	14
Netherlands	51.995	(10,1%)	15

Dominican Republic	50.410	1,0%	16
Bahamas	49.707	(6,4%)	17
Israel	48.071	23,0%	18
Taiwan	42.410	0,1%	19
Poland	39.969	7,4%	20
Total Top 20 Overseas Countries	2.613.934	(0,7%)	

Country of Residence	Year-to-Date 2025	
	Number of Arrivals	% Change from 2024
United Kingdom	2.644.598	2,1%
India	1.486.944	(4,3%)
Japan	1.272.573	5,8%
Brazil	1.243.649	3,6%
Germany	1.163.938	(10,0%)
China, PRC	1.099.338	(2,0%)
France	1.093.016	(5,8%)
South Korea	1.051.922	(8,0%)
Italy	812.987	7,4%
Colombia	667.217	(0,9%)
Australia	630.612	(3,5%)
Spain	611.811	2,4%
Argentina	554.369	19,1%
Netherlands	395.853	(6,1%)
Dominican Republic	344.572	0,6%
Ireland	314.406	(0,3%)
Ecuador	293.008	(11,3%)
Israel	292.057	9,6%
Taiwan	291.364	5,5%
Poland	262.187	5,4%
Total Top 20 Overseas Countries	16.526.421	(0,5%)

- **Trends:** Sports tourism is now one of the fastest growing sectors within the global travel industry, a phenomenon that involves spectators of large events as much as enthusiasts who travel to practice their discipline, up to those who visit iconic places linked to the history of sport. All over the world, and of course also in Italy, specialized agencies and tour operators are leading the market with packages dedicated to tennis, rugby, football, F1 and other disciplines offering complete experiences that combine sport, culture and entertainment.

- **ESTA new procedure:** Starting from July 2025 there is a new requirement for ESTA applications: For every traveler it is now mandatory to upload a selfie. This new step is part of the application process and is intended to enhance security and improve the accuracy of identity verification. Moreover, as of October 1, 2025, the fee for the ESTA electronic travel authorization has been increased from the current \$21 to \$40. The increase is part of the recently passed "One Big Beautiful Bill Act".
- **United Airlines** has achieved great success with its direct flight connecting Rome to Denver. As a result, the company has decided to reintroduce this direct route for 2026, operating from March 29 through October or November.
- **DELTA Airlines** has confirmed that for 2026 the direct flight connecting Rome to Minneapolis scheduled to operate four times a week.
- **IRU 2026 Target leads:**
 1. Erica Melegari of NAAR
 2. Luigi Leone of CREO
 3. Alessandra Pisoni of VOLONLINE
 4. Stefano Gnerucci of KEL12
 5. Ivana Di Stasio of GOING
- **Showcase USA ITA February 28 - March 1 Milan:** GAW participation has been confirmed, and the quoted amount has been paid. Received proposal for VUSA Forum organized by Visit USA Association on February 27 addressed to travel agents.
- **News Releases:** sent out the following news:
 - July 31 - *Idaho: A Journey Through Flavors, Hot Springs, and James Beard Awards*: 3,709 delivered – 29.39% open rate
 - September 16 - *Great American West: A "Presidential" Journey for Nature and History Enthusiasts*: 3,659 delivered 32.30% open rate
 - September 22 - *Travel South Dakota introduces an engaging five-episode western mini-series*: 3,698 delivered - 28.99% open rate
 - September 29 - *Journey through the ghost towns of Wyoming*: 3,644 delivered – 31.37% open rate

Quarterly Report – Australia & New Zealand

Meetings

Summary: Q3 – Account Establishment, Product updates, Introduction meetings

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
4	4	0	0	1

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	Intrepid	Holly Miller	<p>They are seeing good interest and sales for their GAW tours, particularly to Wyoming and South Dakota.</p> <p>They haven't attended IRU in a few years and would like to consider them for 2026.</p> <p>Additionally, as a follow up to this call, we provided some recommendations for indigenous hosted tours in Wyoming and South Dakota for their consideration.</p>
Airline	Qantas	Emily Gaunt	<p>She is open to hearing of land package specials for inclusions in Qantas FF edms.</p> <p>These are free but are selected by their team based on offer. These can be with a trade partner, but it must be exclusive to Qantas for the offer to be picked up.</p> <p>They are also open to hosting press trips and trade fairs and partnering on opportunities.</p> <p>Flight forward bookings to the USA remain strong, and they are actively still looking at increasing capacity and adding new routes.</p>
Trade	BrandUSA	Jade Glasoff	<p>Introduction to the new representative.</p> <p>Upcoming events – key editions for GAW via B2B event in February</p> <p>Opportunity to work together – showcase to Dylan how the Brand works with partners</p> <p>Call out for GAW, seeing interest in the market and the opportunity to leverage Alamo via the gateway cities.</p>

Trainings

Summary:

# Trainings	# People Trained
0	0

Significant Training Highlights:

Type	Company	Contact(s)	Details
N/A	N/A	N/A	N/A

New Product

Summary:

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
2	0	0	0	8

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Designer Journeys	4-day Yellowstone and Grand Teton Fully Guided Camping Experience	SLC	SLC	SLC – Grand Teton NP (1) – YNP (2) – SLC (1)
Hunter Travel Group	Yellowstone Discovery	BZN	JAC	BZN – YNP (3) – Grand Teton NP (2)

Website

Sessions AU	Users AU	Pageviews AU	Average Session AU
521 (+17%)	527 (+12%)	2,792 (-4%)	1m 40s (-19%)
Sessions NZ	Users NZ	Pageviews NZ	Average Session NZ
345 (+47%)	394 (-19%)	2,583 (-71%)	2m 19s (-79%)

Misc.

- **AU/NZ Sentiment** – Market remains steady overall, with mixed reporting between NTTO (-2% YOY) and ABS (+3.2% YOY). Net effect is a flat trend for January–June, with NTTO forecasting a flat finish for 2025.
- **Airlines** – Forward loads remain comparable to 2024. Major carriers (Hawaiian, Delta, United, American, Qantas) are expanding capacity. Industry chatter continues around a possible direct Australia–Seattle service (Qantas or Alaska), a potential boost for GAW gateways such as Idaho.
- **Trade** – Mixed performance: Flight Centre citing a ~15% decline in USA land bookings, while Helloworld and Adventure World report YOY growth. Intrepid and Collette remain stable; Wyoming and South Dakota continue to perform well for AU pax.
- **Luxury Focus** – Growing emphasis on Virtuoso, Signature, Ensemble and luxury operators (Tauck, Insight). Outreach underway to position GAW for high-value Travel Trade partners.
- **Brand USA Engagement** – GAW Trade Manager July 2026 trip flagged: BUSA considering air allowance support for 8–10 AU trade. Driving & luxury identified as key pillars, with Wyoming highlighted in her personal itinerary.
- **Visit USA Planning** – Initial webinars launched to support February 2026 B2B events. Sydney confirmed for main trade activation. Sponsorships and location details advancing.
- **Visit USA NZ** – Collateral all sourced, and available in time. Audience updates approx. 120 Trade Agents across three events. Briefing for suppliers October 15. Event kick off October 20.
- **IRU** – Early introductions made with select AU agents for 2026 program attendance. Three qualified prospects identified, with strong follow-up push in Q4 to confirm attendees.

Quarterly Report – Nordics

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
12	6	9	0	2

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	FDM Travel	Brigitte Vraadal, Product Manager, biv@fdm-travel.dk	<p>Meeting held with Brigitte in their new store in central Copenhagen. They are seeing a slight increase in requests for travels to the U.S. and are also interested in working with us on the FY26 Approval Marketing Activity: Collaboration with Brand Ambassador. Brigitte will talk to the marketing department as they are the ones to decide.</p> <p>We also discussed sales trainings and Brigitte would rather prefer a webinar than a visit to the office. Hanna in dialogue with Brigitte.</p>
Trade	BENNS/MyPlanet	Hans Mørup Johansen, Manager, hamo@benns.dk	<p>Meeting held with Hans. The demand for travels to U.S. is still limited but there are still requests coming in.</p> <p>We decided to wait on a sales training until the mission, and Hans wants us to visit all Benns and MyPlanet offices, if time allows. Hanna is in the process of confirming all visits.</p>
Airline	Icelandair	Rebecca Tärnström, Account Manager, rebeccat@icelandair.is	<p>Meeting held with Rebecca to discuss how we can work together. She confirmed that Icelandair will support our social get-together in Oslo in December.</p>
Trade	Sembo	Jacob Nordendahl, Head of Destination Development & Partnerships	<p>Sembo has a new contact for partnerships: Jacob Nordendahl. We know Jacob well from previous tasks. Hanna has met with Jacob to re-introduce the GAW and see how we can work together going forward. We are currently adding product to Sembo.se</p>

Type	Company	Contact	Details
Trade	Saxentours	Crister Brunegård, Owner	They have a group trip to our region in 2026 that is selling well. The same trip can now be booked by FITs. Saxentours now also includes a number of itineraries for motorhomes – including parts of GAW. They will attend our workshop in Gothenburg.
Trade	Unike Reiser	Katharina Wiig, Product Manager, katharina@unikereiser.no	Requests for the USA is very limited, only a handful requests per month compared to the same amount per week in «normal times». Katharina is now part of the Norwegian Discover America committee.
Trade	Swanson's Travels	Tommy Swanson, General Manager, tommy.swanson@swansons.se	We've been in dialogue with Tommy, who still reports of low demand for the U.S. They have increased their communication about travels to Canada, the Caribbean, and cruises but travels to the U.S. still remain their core business. We have confirmed to support Swanson's with an ad in their new catalogue.
Trade	Nyhavn Rejser	David Rosborg Larsen, Senior Travel Advisor, david.larsen@nyhavn.dk	We've met with David, who attended our fam trip with Icelandair in 2023. There is a slight increase in request for the U.S., which is very positive. Once the articles from the current media fam trips are published, we hope for an increase in demand among their clients.
Trade	USA Rejser	Christian W. Willumsen, Marketing & Product Manager, chw@usarejser.dk	We've been in ongoing dialogue with Christian due to the campaign that is currently running. We have worked with Christian to develop a new route that is now online. A second route was also developed but isn't online yet.
Media	Politiken/Ritzau/REJSER/Kristeligt Dagblad, Denmark	Jens Henrik Nybo, freelance for Tier 1 Media	Jens Henrik visited Denver, Wyoming, Idaho and Salt Lake City in September on a press trip. He reported that he had an amazing trip and will keep us updated on the publication time of the articles.
Media	Vi Menn/Villmarksliv, Norway	Mats Ulshagen, Editor	Mats visited North Dakota and South Dakota in August/September and had an amazing trip. He is currently writing his articles, and we are helping him collect images and support with extra information.
Media	Berlingske, Denmark	Mads Clausager, freelance for Tier 1 Media	Mads took part in the 2025 Buffalo Roundup press trip. He reported that he had a wonderful trip and will let us know when the article is scheduled for publication.

Type	Company	Contact	Details
Media	Brand Ambassador, Denmark	Pelle Hvenegaard, Brand Ambassador	Meeting to discuss the setup of our FY26 Approved Marketing Activity: Collaboration with Brand Ambassador. Pelle is interested in visiting with his wife and child in the beginning of April 2026.
Media	Berlingske, Denmark	Lise Klock, Editor	Discussing opportunities for press trips in 2026. Berlingske typically publishes two USA-themed travel supplements each year.
Media	Café/King, Sweden	Joel Ågren	Discussing opportunities for press trips in 2026. Joel is very interested in the USA.
Media	Rejsespejder, Denmark	Mike Dejworek, Owner	<p>Rejsespejder has a travel magazine section but primarily writes about great offers for flights and hotels around the world.</p> <p>We discussed the opportunities for press trips, for them to have content for both their travel magazine as well as inspiration to share with their readers, when they share great offers to USA.</p>
Media	Radio Vagabond, Denmark	Palle Bo, Podcaster	Palle has his own travel podcast where he shares inspiring stories from destinations and interviewing locals. We discussed opportunities for press trips.
Media	Matka, Finland	Maria Niemi, Editor	Discussing press trip opportunities for 2026. Maria is interested in covering U.S. destinations in their magazine.
Media	Denmark, Norway, Sweden, Finland		<p>Distributing two media pitches in our Related newsletter to editor about:</p> <ol style="list-style-type: none"> 1. Trailing of the Sheep Festival in Idaho 2. Powwow Festival in North Dakota <p>The newsletter is distributed to about 120 editors and journalists.</p>

Trainings

Summary: Unfortunately, most of our partners are not doing sales trainings at the moment, and those who are interested would like to wait until the sales mission.

# Trainings	# People Trained
0	0

Significant Training Highlights:

Type	Company	Contact(s)	Details
N/A	N/A	N/A	N/A

New Product

Summary:

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
4	5	0	6	22

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Albatros Travel Finland	On the Road USA	New York	LAX	Group trip across the USA with overnight stays in: Sioux Falls (1) – Rapid City (1) – Cheyenne (1)
Saxentours	National parks extravaganza	SFO	DEN	Motorhome itinerary with visits to many of the iconic national parks in Western USA and the Mid-West. The itinerary goes through: Jackson (1) – GTNP (1) – YNP (1) – Cody (1) – Buffalo (1) – Devils Tower – Spearfish (1) – Custer State Park (1) – Cheyenne (1)
Saxentours	Cowboy Country	DEN	DEN	Motorhome loop itinerary that can either start in Denver, Bozeman or Billings. Includes overnight stays at camping grounds in: YNP (1) – GTNP (1) – Lander (1) – Laramie (1) – Wind Cave NP (1) – Mount Rushmore (1) – Devils Tower (1)
USA Rejser	Det ægte vesten/ The Real West	SLC	DEN	17 days in the Western part of our region. Overnights in: Boise (1) – Wallace (1) – Salmon (1) – Idaho Falls (1) – Cody (1) – Casper (1) – Cheyenne (1) – Denver (1)

Website

Sessions	Users	Pageviews	Average Session
338 (+13%)	419 (+21%)	2,700 (+3.8%)	2:09 (-12%)

Misc.

- Collaboration with Brand Ambassador activity: Pelle Hvenegaard is interested in visiting the states with his wife and child. Ideally, they would like four days in each state at the beginning of April. They will do a minimum of two posts from each state and one podcast episode from each state. We are in dialogue with FDM to see if they can support us.
- We are currently coordinating the sales mission where we will do a lot of trainings with main partners in the different regions we are visiting.

FY26 Q1 REPORT

July-September 2026



QUESTIONS?

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