

FY26 Q2 REPORT

October-December 2025

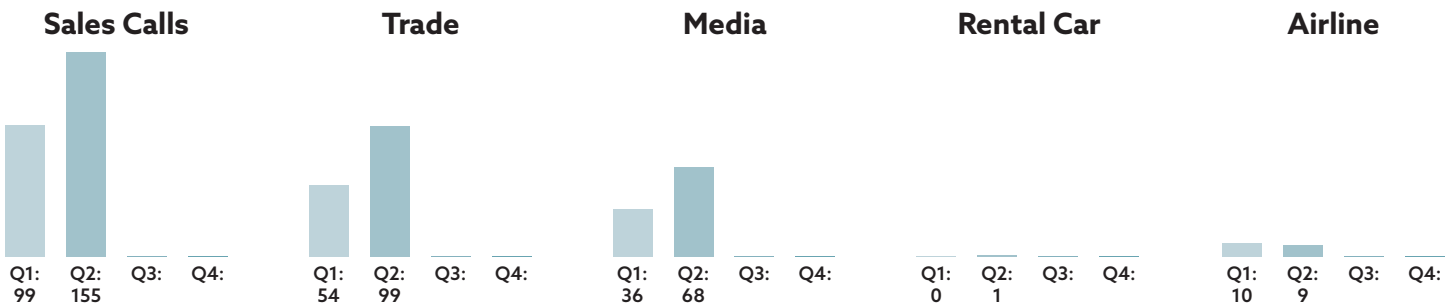


THE GREAT
AMERICAN WEST

IDAHO · NORTH DAKOTA
SOUTH DAKOTA · WYOMING

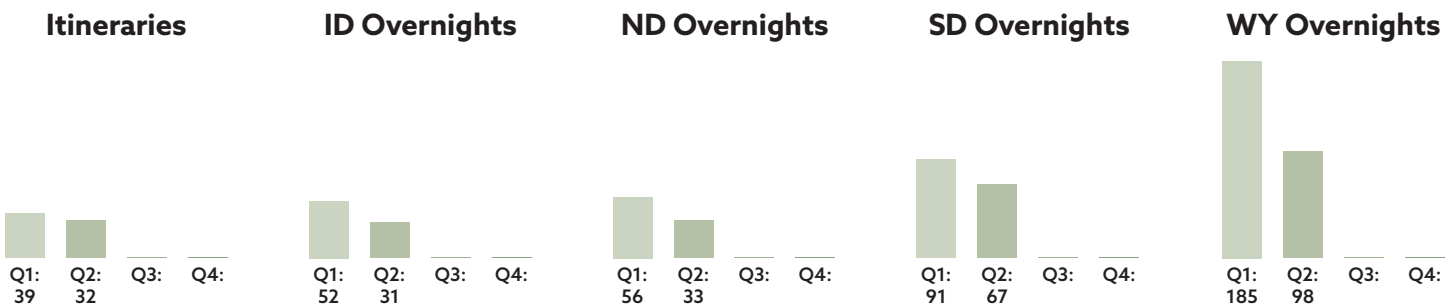
Meetings:

	Sales Calls	Trade Meetings	Media Meetings	Rental Car Meetings	Airline Meetings
UK	0	10	6	0	1
Germany	46	16	31	1	1
Benelux	15	8	7	0	0
France	31	20	5	0	2
Italy	11	3	3	0	1
Australia	45	38	6	0	1
Nordics	7	4	10	0	3
Total	155	99	68	1	9



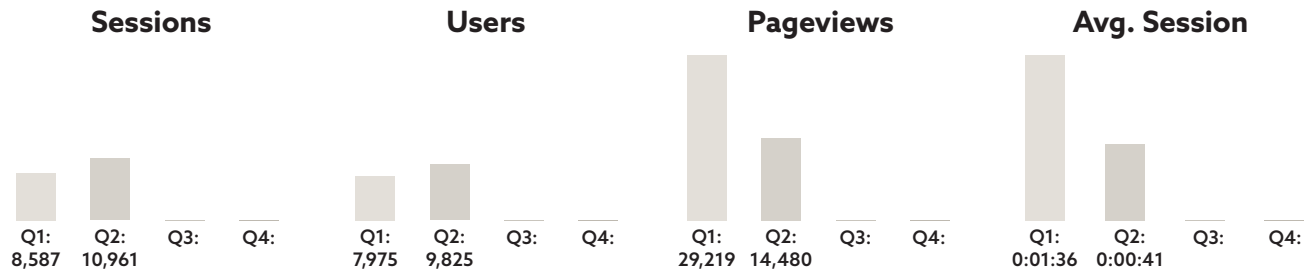
New Product:

	New Itineraries	Idaho Overnights	North Dakota Overnights	South Dakota Overnights	Wyoming Overnights
UK	7	17	13	23	33
Germany	6	12	11	16	23
Benelux	1	0	0	2	3
France	2	0	0	2	13
Italy	4	0	9	12	14
Australia	12	2	0	12	12
Nordics	0	0	0	0	0
Total	32	31	33	67	98



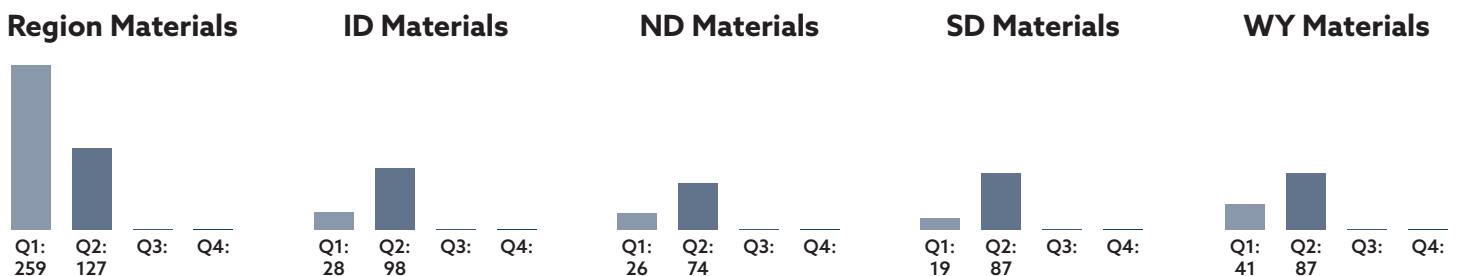
Websites:

	Sessions	Users	Pageviews	Avg. Session
.co	1,929	1,759	2,128	0:01:51
UK	667	584	831	0:00:11
Germany	1,318	1,213	2,103	0:00:39
Benelux	614	519	817	0:00:41
France	970	864	1,319	0:01:12
Italy	2,530	2,209	3,521	0:00:42
Australia	940	809	1,129	0:00:19
New Zealand	593	568	632	0:00:14
Nordics	1,400	1,300	2,000	0:00:24
Total	10,961	9,825	14,480	0:00:41



Digital Downloads:

	Region Materials	Idaho Materials	North Dakota Materials	South Dakota Materials	Wyoming Materials
.co	11	3	3	3	4
UK	6	9	8	14	8
Germany	11	4	9	14	12
Benelux	3	6	4	0	4
France	37	18	10	10	20
Italy	50	9	6	9	8
Australia	4	34	24	25	22
New Zealand	1	4	2	2	5
Nordics	4	11	8	10	4
Total	127	98	74	87	87



Q2 Quarterly Report – UK

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
0	10	6	0	1

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade Media and Events	Travel Weekly	Fenella Toby – UK Account Manager fenella.tobey@travelweekly.co.uk	<ul style="list-style-type: none"> Only print publication with circulation of 11,700 and readership of 24k+ Readership has doubled in the last year Features each week with one per week going forward. Banners – based on impressions included in package Incentives – competition website section promoting online trainings, FAM’s), can provide data on participation Event sponsorship i.e. Globes in Jan from £2k-30k (photobooths, food etc.) can assist with conferences/panel discussions with industry leaders Sustainability Summit –a half day event held in December focused on sustainability in the travel industry, bringing together travel companies, experts and stakeholders. Aspire Luxury Aspire Magazine is bi-monthly – advertorial, editorial, ad opportunities Luxury event – Aspire Escapes is taking place in June, £2800 for attendance. Leaders of Luxury – one day event held in London in June with a format of fireside chats with experts, travel trends and networking. Option for cover wrap or middle pull out section, Themed editions £20k Website – new software which allows better targeting and stats Solus emails – 5k database, sent twice a day, open rate of 30% <p><u>Action Points</u></p> <ul style="list-style-type: none"> Fenella to send more details on marketing and event campaign options to look through for FY27

Type	Company	Contact	Details
Trade media and Events	Travel Gossip	Jessica Simpson – Head of Partnerships jessica@travelgossip.co.uk	<p>Travel Gossip is the UK travel trade’s largest and most engaged agent-focused media platform, combining social media, digital content, live events, training, incentives and data-led insight to connect suppliers with travel agents at scale.</p> <ul style="list-style-type: none"> • UK’s largest and most active travel agent Facebook community • 34,000+ members, 16,000 posts, 75,000 comments, 178,000 reactions per year, 13,000+ daily email subscribers, Average email open rate: 68%, 3 million website page views per year, 11 million travel trade adverts delivered annually (80% YOY increase) • Travel Gossip run over 40 events a year and arrange bespoke events and intimate dinners • Virtual bootcamp are a good way of presenting the 4 states together with the agents, with video content that is evergreen. Bootcamps: 2,500 registered agents annually, 150,000+ video views • Discussed events and engagement that would be beneficial to the GAW <p><u>Action Points</u></p> <ul style="list-style-type: none"> • Based on what was discussed with the GAW, Travel Gossip will put together a bespoke proposal for FY27 • If we are planning a sales mission TG would also be able to assist with events
Trade	Hays Travel	Andy Pickering – Partner Marketing Manager Andy.Pickering@hays-travel.co.uk	<ul style="list-style-type: none"> • Hays Travel has 470 branches plus the recent acquisitions • Overall US tracking at +12% up due to the focus on Long-haul for the last 12 months. LH is +22% for 2025, with 40% of the LH business for USA. • NYC, Orlando and Vegas continue to be the volume drivers but continue to see growth for Deep South. • RV and Fly-drives are popular, and sees this as a growth area • Uses Rocky Mountain Travel • Hays Travel would like to be considered for IRU 2026. Aims to grow new products and itineraries • BUSA proposals have been distributed, and their contribution is included in the plans • Training webinars are recorded and live on their internal site for agents to view (2.5k agents)

Type	Company	Contact	Details
			<p><u>Action Points</u></p> <ul style="list-style-type: none"> • Andy to send more details on their training webinars • To send more details on IRU with a view to attend in 2026 and product growth
Trade	American Holidays	Mandy Mcglade – Product Manager Mandy.McGlade@americanaffair.com	<p>Meeting held to discuss GAW itineraries for American Holidays</p> <ul style="list-style-type: none"> • Objective: develop two new itineraries as part of the <i>Elements of the GAW</i> campaign • Reviewed the proposed four-state route in detail, going through each section of the itinerary • Presented new <i>Elements</i> branded swag to Mandy • Positive feedback received; swag to be considered for incentivising sales agents • Mandy confirmed they are unable to attend in 2026 due to scheduling constraints • Expressed interest in attending IRU in 2027 <p><u>Action Points</u></p> <ul style="list-style-type: none"> • Mandy to share the new itineraries once they are finalised
Airline	Delta Airlines	Kate Devereux – Sales Manager katie.devereux@delta.com	<p>Meeting with Delta touch base, and to discuss next steps of Sponsorship for IRU.</p> <ul style="list-style-type: none"> • Reviewed dates and the IRU overview • Went through the buyer list, including those who have already signed up or expressed interest • Kate also specified some travel companies that they don't work with due to their airline partnerships with BA • Kate outlined what they contributed to the past at IRU • Asked Delta to provide a high-res logo that is required for the sponsorship page of the website and URL. • Kate not able to let us know if she or her colleague will attend IRU but will know more in the New Year. <p><u>Action Points</u></p> <ul style="list-style-type: none"> • Delta confirmed agreement for 6 tickets for \$1,300 per person • Delta to send their logo • Follow up with confirmed Trade partners
Trade	ITC	Joy Woodside - Senior Product Manager Ski Joy.Woodside@itc-uk.com	<p>ITC is a UK-based luxury travel company, Specializing in bespoke, high-end holidays with a strong focus on personalized service and premium partnerships worldwide.</p>

Type	Company	Contact	Details
			<ul style="list-style-type: none"> • Joy is in her third year of working with the Ski program and is known as the “Ski Queen” due to her extensive industry experience. • European ski product has taken time to develop, but it is now in place, allowing the team to shift focus to North American ski product. • Inspiring Travel Company focuses on 5-star hotels, chalets, and residences. Receptives – Jonview • Private Club – UHNW clientele, high-value bookings; members typically call and book their nine holidays for the year. • Private Club magazine is published four times a year and features “what’s new” and inspiring content. • ITC is looking for a summary of the resorts, along with suggested hotels and experiences. <p><u>Action Points</u></p> <p>Recommended starting points: Jackson Hole and Grand Targhee in Wyoming, and Sun Valley in Idaho. Followed up with email, links.</p>
Trade	Bon Voyage	Theresa Wilson - Business Development Manager theresa.wilson@bon-voyage.co.uk	<ul style="list-style-type: none"> • Dirk is no longer working with them in product and marketing • Alan Wilson has officially stepped back from being MD • Theresa Wilson is now looking after tourist boards • Jessica has moved away from product and back into sales • Looking at digital focus and will be working on website migration in the spring • Expanding their product beyond USA (too expensive these days) have launched South America and likely to expand into middle east and Asia • Very open to marketing activity – if we have no funds – like the idea of us working with them on blogs from press trips.
Trade	Kuoni	Tom Waite, Product Manager – North America tom.waite@kuoni.co.uk	<ul style="list-style-type: none"> • Now looking to develop product– want to develop content on the website to give more structure • Product strategy is to advocate products that will sell rather than price point ... “Kuoni shares their recommendations” • B2B – 25% / B2C – 75% • USA still selling well, but Canada revenues are much higher • National Park fees are a worry

Type	Company	Contact	Details
			<ul style="list-style-type: none"> • Marketing – has new dedicated team of two ... Deep South piece coming out in FEB to run MAR to JUN • Training – very keen to run sessions. These usually fall on a Monday at 9:15am, and targets their homeworkers • They will run destination days at HQ – take over with DMO’s and partners as part of marketing plans ... these usually have a charge as they need to cover the costs of getting their staff in from across the country • Destinations expert team – will watch recorded content that is shared across the business
Trade	Stewart Travel (NATS & My Canada Trips)	Grahame Gorie, Marketing & Partnerships Manager grahamegorie@brooklyntravel.com	<ul style="list-style-type: none"> • NATs launched new website and will promote via a series of digital ads and SEO • New email system will go live with the rebrand • Brands will still have distinct product mix, but all contracting will be done jointly • Want to build to B2C side of NATS as stronger B2B • World Cup, they do have access to tickets but are not proactively promoting this. If people are buying holiday, they can offer tickets. Likely to focus on Scottish games and tap into ‘friendship trips’ and encourage them to travel and watch • Q2 is growing in importance – they are calling it the ‘goldilocks’ season and people tend to look & buy in the same season. Seeing some real growth here
Trade	Audley Travel	Meg White, senior product executive megan.white@audleytravel.com	<ul style="list-style-type: none"> • 2025 started strong with record bookings in Q1, however sales dropped in April which they put down to geo-political tensions. • They are now seeing a steady build in sales throughout Q3 and Q4. Client satisfaction is sitting at the highest it’s ever been and as a result they are placing a lot of focus on repeat business. • In 2026 they will begin a brand advertising strategy, adding 'Travel' back into their messaging instead of just 'Audley'. • They will be focusing on these products and trends in 2026 and beyond: <ul style="list-style-type: none"> ○ local expertise ○ cruise ○ duration of holidays and service.
Trade	American Sky	Kathryn Glover Brand & Partnerships Marketing Director kathryn.glover@tropicalskey.co.uk	<ul style="list-style-type: none"> • Overall, the USA will be around 20% down on arrivals, but enquiries and bookings are picking up for 2026 and into 2027 and they expect both years to be between flat and up 5%. They put this down to cost and strong competition from Asia and South Africa.

Type	Company	Contact	Details
			<ul style="list-style-type: none"> For their core audience of empty nesters, the USA is still affordable, but the family market is suffering. Booking patterns are fluctuating and are very unpredictable now. Their Irish market took longer to pick back up again after the pandemic but is now doing well and the USA leads the way among their brands. Across the UK and Ireland, they are placing more emphasis on direct-to-consumer marketing and will be attending Destinations London and Dublin Holiday World consumer shows. They are also running America themed, consumer events in both their Dublin and East Grinstead offices. American Sky are one of the CTA partners for Brand USA's American the Beautiful consumer campaign.
Media	Multiple	Multiple	KBC send out a monthly press release highlighting news from their clients. This quarter we have sent out information on TRPL opening which is proving of great interest to the media.
Media	Wanderlust	Jacqui Agate/ James Smith	KBC met with the Wanderlust team in December to discuss future opportunities for 2026 and beyond. NB: Jacqui also works for other publications and especially the Sunday Times. She is very interested in the opening of TRPL.
Media	Freelance	Claire Dodd	KBC spoke to Claire as part of a small media networking lunch. Claire has asked to be kept up to date on any key anniversaries and especially any indigenous news.
Media	Freelance	Mark Bailey	KBC spoke to Mark as part of a small media networking lunch. Mark is keen on long-distance cycling and would be keen to explore a cycling route through the GAW.
Media	Adventure.com	Meera Dattani	Jennette spoke to Meera with regards sending a journalist to experience the exciting riverways of ID. We agreed it needs to be an independent and experienced freelancer who would be up for the challenge.
Media	JRNY	Kav Dadfar	Jennette spoke to Kav re including news about ND and TRPL in the next issue of JRNY in 2026.
Media	ND Press Trip	Multiple	Jennette proposed a small group media trip to ND (and possibly SD) to capitalize on the exciting opening of the TRPL in the region this year, which is a great opportunity, and one in which the media have already shown interest. Jennette compiled a detailed costing sheet pulling together a few options to help ND with planning.

Trainings

Summary:

Trainings

People Trained

2

25

Significant Training Highlights:

Type	Company	Contact(s)	Details
Tour Operator	American Affair	Mandy Mcglade – Product Manager	Online training – trained 16 American Affair homeworkers. Focus on all 4 States
Tour Operator	Internet Traveller	Georgia Wiseman – Head of Product	Online training – trained 9 sales agents. Focus on all 4 States

New Product**Summary:**

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
7	17	13	23	33

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Freedom Destinations	Cowboy Country & Yellowstone Ranch Stay 14 Days Self-drive	RAP	JAC	Rapid City (2) – Deadwood (2) – Ranch at Ucross (2) – Cody (2) – Yellowstone NP (2) – Jackson (2)
Freedom Destinations	Wild West Frontiers Road Trip • View Itinerary	GEG	MSP	Coeur d’Alene (1) – Lewiston (1) – Boise (1) – Twin Falls (1) – Idaho Falls (1) – Jackson (1) – Yellowstone NP (1) – Cody (1) – Sheridan (1) – Deadwood (1) – Custer (1) – Rapid City (2) – Medora (1) – Minot (1) – Bismarck (1) – Fargo (1) – Sioux Falls (1) – Minneapolis
Freedom Destinations	Idaho & Wyoming • Circular Motorhome Itinerary • Yellowstone NP	SLC	SLC	SLC – City of Rocks (1) – Twin Falls (1) – Boise (2) – Sawtooth Mountains (1) – Lost River Range (1) – Yellowstone NP (3) – Jackson (2) – Bearlake (1) – SLC
Freedom Destinations	Drive The Dakotas • North & South Dakota Fly Drive Itinerary	RAP	RAP	Rapid City (1) – Deadwood (2) – Medora (2) – Bismarck (1) – Fargo (1) – Sioux Falls (1) – Pierre (1) – Wall (2) – Rapid City

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
The Internet Traveller	Trails of the Wild Frontier	DEN	SLC	Denver (4) – Cheyenne (1) – Rapid City (1) – Deadwood (1) – Buffalo (1) – Cody (2) – West Yellowstone (3) – Jackson Hole (2) – SLC (2)
American Affairs	Iconic Adventures in the Great American West American Affairs	GEG	MSP	Coeur d’Alene (1) – Lewiston (2) – McCall (1) – Ketchum (1) – Jackson (1) – Yellowstone NP (1) – Cody (1) – Sheridan (1) – Rapid City (2) – Medora (1) – Minot (1) – Bismarck (1) – Fargo (1) – Sioux Falls (1) – Minneapolis (1)
American Affairs	Cowboy Country by Motorhome Motorhome Holidays American Affairs	DEN	SLC	Denver (1) – Cheyenne (1) – Hot Springs (2) – Devils Tower (1) – Medora (2) – Sheridan (1) – Cody (1) – Yellowstone NP (2) – Grand Teton National Park (1) – Pocatello (1) – Twin Falls (1)

Website

Sessions	Users	Pageviews	Average Session
667 (+71%)	584 (+57%)	831 (-71%)	00:11 (-92%)

Misc.

DATE: Nov. 3rd, 2025

First Class Holidays Partner Update London – Overview Presentation

Rebrand & Structure

- Rebranded from *First Class Holidays* to **First Class Travel Group**
- Launching a new 12-month touring product and rail brand
- Brochure covers designed by local artist Joe Galino

Divisions and Brands

- **Knighton Reeve** – luxury concierge service
- Re-launch planned by **November 26**
- Major **homeworking division** launch underway
- **U.S. market** launch planned

Strategic Objectives

(from slide content)

- **Exceptional service**
- **Speed to market**, ideally driven through tech integration
- **Strong commercial agreements**, including overrides
- **Marketing support**
- **Dedicated Account Management**
- **Training when required**
- **Fam trip support**
- **Event support**

Focus Areas

Previous Focus:

- Enhancing the product range
- Building the service proposition

- Tech-enabled speed to market
- Integrating AI

Current Focus:

- Continue building product range
- Knighton Reeve re-launch
- Sales and marketing growth
- Travel Agent **B2B portal** – This will launch in stages with one destination as a trial
- USA new market launch

Training and Engagement

- **Training programme for Partners scheduled April – November**
- Internal engagement plan: “*How you can help us*” supports improved agent collaboration and product awareness

Technology & Product Development - Partnership with **Nezaza (Alex Farmer)**

- Work with OTAs, airlines and Tour Ops to create itineraries
- **TripBuilder** platform for dynamic packaging + tailor-made tour design, pulling in live availability and pricing, with the ability to email quotes. This also allows quotes to be easily amended. Quick Quote system supports faster responses and increased conversion rates.
- Testing with selected agencies/destinations for product refinement
- **AI competitive quote analysis** for real-time price matching – upload the quote from the competitor
- Enhanced **agent portal** for streamlined workflow
- **Speed to market** improvements for new product launches
- E-commerce expansion into **international markets**
- Improved end-to-end **traveller experience**

Marketing Initiatives

- **2nd Edition America** brochure (124 pages)
- Increased investment in **events** and **online marketing**
- Collaboration with **Designer Traveller**

Recognition

- Top 50 High Growth ranking (FCH)
- Featured in **Wanderlust** and **Travel Weekly Globes**

SOURCE: Travel Weekly

LINK: [Brits more confident than last year to travel overseas - News](#)

NEWS: Brits are more confident than last year to travel overseas

Confidence among Brits to travel overseas has risen for the second year running, driven mainly by younger travellers, according to Abta’s latest Travel Confidence Index.

The index now stands at 53, up six points in 2024 and 12 points since 2023. Confidence is highest among those booking with travel professionals (78) and package holidaymakers (80). The biggest increases were seen among 18–24-year-olds (+9 points) and 25–34-year-olds (+19 points), with the latter among the most confident overall. Families also showed stronger confidence, while those aged 45–64 dipped slightly, likely due to budget pressures. Over-65s remain the least confident but still improved year on year.

Key factors influencing confidence include having correct travel documents, protection if a company fails, clear pricing, and travel insurance.

Separately, research from MMGY shows Gen Z plans to spend the most on international travel and take the most holidays, with strong interest in group tours. UK travellers lead Europe in projected spend, and optimism remains high as people adjust plans rather than cancel trips. Sports tourism is also set to grow, with many Europeans, especially Gen Z, planning travel for the 2026 FIFA World Cup.

SOURCE: Travel Weekly

LINK: [UK-US market predicted to grow in 2025 and 2026 - News](#)

NEWS: The UK market to the US is expected to keep growing next year

The UK market to the US is expected to keep growing next year despite affordability concerns and perceptions about the US being less welcoming.

Oxford Economics reported that the UK is one of the few European markets defying a wider decline in travel to the US, with continued growth forecast for 2026.

Tourism Economics data, shared at Brand USA's Travel Week in London, showed total inbound travel to the US will fall 6.3% in 2025 (an improvement from an earlier 8.7% drop), before rebounding 3.7% in 2026 and returning to 2024 levels by 2027.

Affordability and US political tensions remain key concerns for Travellers.

US Department of Commerce figures show UK air arrivals up 2.1% year-on-year to 2.64 million by August, though some industry forecasts predict up to an 8% drop in 2026.

Oxford Economics' Martina Bozadzhieva said all major European markets should recover by 2026, with the UK, Spain, and Italy showing resilience.

New York's 2025 UK visitor forecast was revised from 1.19 million to 1.03 million — still below 2024's 1.06 million.

SOURCE: Travelmole

LINK: [Visit USA Association: US travel demand remains strong](#)

NEWS: Visit USA Association (UK) Reports Steady US Travel Bookings for Q3 2025

The Visit USA Association (UK) has released results from its Q3 2025 Market Barometer, showing strong and stable demand for US travel.

- Bookings: 67.5% of members report bookings above or on par with 2024; 48% say enquiries are also steady or higher.
- Cancellations: 96% report none.
- Top Destinations: Florida, New York, and Tennessee.
- Forward Outlook: 80% see 2026 bookings already above or matching last year.

Key drivers include reliability of US travel experiences, favorable exchange rates, and competitive airfares.

The Q4 barometer results will follow in early 2026.

Download the Visit USA Travel Planner at www.visitusa.org.uk/travelplanner.

SOURCE: Travel Weekly

LINK: [Dnata confirms plan to close Travel Republic and Netflights B2C brands - News](#)

NEWS: Dnata confirms plan to close Travel Republic and Netflights B2C brands

Dnata Travel Group has begun consulting staff at Travel Republic and Netflights after proposing to close both operations.

The move follows a review of its UK travel businesses, though its other brands, Gold Medal and Travelbag, are unaffected.

The company said no final decisions will be made until the consultation ends. Existing bookings remain valid, and customer service will continue as normal.

Dnata added it recognizes the personal impact on staff and will explore redeployment options and support measures.

Gold Medal and Travelbag will continue trading as part of Dnata Travel Group.

SOURCE: Travel Weekly

LINK: [Barrhead Travel named recommended travel partner for Scotland World Cup supporters - News](#)

NEWS: Barrhead Travel has been named Official Fan Travel Partner by the Scottish FA in the wake of the 2026 World Cup draw on Friday.

Barrhead Travel has been named Official Fan Travel Partner of the Scottish FA following Friday's 2026 World Cup draw. It will also serve as the recommended travel partner for the Scotland Supporters Club, offering ticket-inclusive packages, matchday experiences, and travel-only options for the Tartan Army.

Scotland will play Haiti and Morocco in Boston on June 14 and 19, then Brazil in Miami on June 24. England will face Croatia, Ghana and Panama, while Wales or Northern Ireland could meet Canada, Switzerland and Qatar if they qualify.

The World Cup will be hosted across the US, Canada and Mexico from June 11 to July 19, 2026. Barrhead Travel will support fans through webinars, guides and expert advice, with part of its investment going to Scottish FA grassroots programs.

Brand USA has also launched "America the Beautiful Game," a new online planning hub with AI-powered itineraries for fans exploring the US during the tournament. The UK Foreign Office has updated travel advice for supporters heading to North America, urging Travellers to plan ahead, check entry requirements and sign up for alerts.

SOURCE: Travel Weekly

LINK: [US immigration could ask tourists for up to five years of social media history - News](#)

NEWS: US immigration could ask tourists for up to five years of social media history

Tourists to the US, including those from the UK, may soon need to submit five years of social-media history under proposed changes to the Electronic System for Travel Authorization (Esta).

The US Customs and Border Protection outlined plans to make social-media details mandatory, move all applications to the mobile app, and require both a passport photo and a selfie to reduce fraud and poor-quality submissions.

The notice gives the public 60 days to comment on the proposed changes, which are being made to comply with an executive order from January of this year named 'Protecting the United States from Foreign Terrorists and Other National Security and Public Safety Threats'

DATE: Dec. 17th, 2025

SOURCE: Brand USA

Latest NTTO Figures

The UK remains the highest overseas arrivals to the U.S. for November 2025 as well as YTD. November 2025 arrivals showed a -16.72% percentage decrease from November 2019 and a -1.84% percentage decrease on November 2024 arrivals. YTD arrivals are -15.30% below 2019 YTD arrivals but are +0.94% above 2024 YTD arrivals.

Ireland saw a 6.15% decrease in arrivals in November 2025 compared to November 2024, and arrivals were 14.75% lower than in November 2019. Year-to-date arrivals showed a 6.00% decrease versus 2019, and a 0.25% decrease compared to 2024.

U.K.

Rank YTD 2025	2019 YTD	2024 YTD	2025 YTD	% Diff 19 vs 25 / 24 vs 25
1	4,414,282	3,704,224	3,738,962	-15.30%/+0.94%
Rank Nov-25	Nov-19	Nov-24	Nov-25	% Diff 19 vs 25 / 24 vs 25
1	353,227	299,676	294,151	-16.72%/-1.84%

IRELAND

Rank YTD 2025	2019 YTD	2024 YTD	2025 YTD	% Diff 19 vs 25 / 24 vs 25
16	480,049	452,376	451,243	-6.00%/-0.25%
Rank Nov-25	Nov-19	Nov-24	Nov-25	% Diff 19 vs 25 / 24 vs 25
18	46,481	42,224	39,626	-14.75%/-6.15%

Quarterly Report – Germany

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
46	16	31	1	1

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	Alamo	Mike Luetke Marketing Manager	Discussed cooperations with Mike. Provided us with a link where we can book Alamo rental cars at a reduced travel industry rate – also for media and trade fams.
Trade	Condor	Eva Zuehlke Marketing Manager	Met with Condor Nov 6 to discuss cooperations/activities in general.
Trade	CRD	Pia Hambrock COO	Met in their office in Hamburg. Discussed GAW product and held in-house training at CRD Dec 3, 2025. Trained a total of 12 staff members for 30 minutes about the GAW.
Trade	Windrose	Aline Gehl Teamlead America & Pacific	Luxury tour operator. Demand for travel to the USA remains at the high level of previous years. Classic destinations such as New York, New England, and Hawaii are particularly popular with customers at the moment. Stopovers in the cities of the West Coast are also in high demand. At the same time, they are seeing a clear trend toward lesser-known natural highlights: away from the classic routes, American national parks such as Yellowstone or the more “quiet” natural paradises of the West are becoming more popular with guests. They have responded to this by developing new private tours that allow guests to experience precisely these special regions. The clear travel motive remains decisive: unlimited possibilities and iconic highlights – from exclusive shopping trips in New York to luxurious beach getaways in Hawaii. It is precisely this diversity and exclusivity that luxury travelers particularly appreciate about the USA as a destination.
Trade	Argus Reisen	Dirk Buettner Owner	Number of bookings this year were a little lower than the previous year but demand for ranches and upscale trips was still high. Bookings and booking requests have picked up in fall. In total Argus had a good year. Some even were last-minute, but they've already received quite a few bookings for next year. Argus can't complain; it's been a very good year for them with lots of very high-priced inquiries.

Type	Company	Contact	Details
Trade	America Unlimited	Timo Kohlenberg	Overall, a 10% decrease in bookings to the US for this year. But are seeing an upturn in demand for travel to the USA. Nevertheless, it is clear that many people are still a little more cautious about booking than they were in the years before the pandemic. Their customers who have traveled are consistently pleasantly surprised: entering the country is easier than ever before – there are more staff, faster procedures, and everyone is very friendly. Once there, they find the US more relaxed and often less crowded than they expected, which makes traveling particularly enjoyable.
Trade	Canusa	Tilo Krause-Duenow	For the current year, Canusa is reporting a stable overall development in its North American business. Canada is performing particularly well. Although booking figures for the US declined slightly in the German source market in 2025, Canusa is closing the year slightly below the previous year's level. In addition, a trend toward shorter-term bookings was observed. Although the booking level for 2026 is currently still in negative territory, Canusa has been seeing stabilization for several months, with a significant increase in the rate of inquiries. Tilo mentioned that the political situation is having a greater impact on booking behavior this year than it did during Trump's first presidency. However, experience continues to count – wanderlust remains high. Travel is and remains apolitical. One advantage is that travel prices are generally falling. The stable exchange rate and price declines in the country itself make travel to the US very affordable at present. Canusa is optimistic about 2026 – with attractive prices, an expanded product portfolio, and a continuing desire to travel.
Trade	CRD	Pia Hambrock COO	Bookings for this year are behind last year, new bookings for the USA for 2026 are coming in but at a lower scale than in previous years. It can be seen that booking requests are picking up if no negative news are coming in for several weeks.
Trade	Knecht Reisen	Anja Maier Product Manager	Knecht Reisen held a North America Event November 27, 2025 in Zurich. They invited GAW to attend free of charge, as they wanted to have the GAW region present at the event. GAW had their own table to distribute maps and guides. Met with Anja Meier, Product Manager and trained 34 travel agents on the Great American West. Free of charge. Distribution of GAW Guides and Maps.
Trade	Dertour	Philipp Detmer	According to Dertour, there is currently a pronounced early booking phase, with travel agencies remaining the most popular booking channel. Last year, the average advance booking period for summer holidays rose by a total of eight days to 135 days before departure. A look at the early bird booking data shows that the most popular short- and medium-haul destinations for the coming summer remain Turkey, Spain, Greece, Egypt and Tunisia, while the Indian Ocean, Thailand, North America, the United Arab Emirates and the Caribbean remain the most popular long-haul

Type	Company	Contact	Details
			destinations. The popularity of long-haul travel is also continuing to grow. Almost one in five bookings is currently for a long-haul trip. Top long-haul destinations for summer 2026 (May-Oct 2026): 1. Indian Ocean 2. Thailand 3. North America 4. United Arab Emirates 5. Caribbean
Trade	America Unlimited	Annica Grosche	Sent IRU invitation for 2026, but Annica had to decline, as due to all the other “smaller” trade shows in the US, she is only able to attend every other year. Would like to join again in 2027.
Trade	Karawane Reisen	Petra Schurig Product Manager petra.schurig@karawane.de	Sent her an invitation to attend IRU 2026, which she happily accepted.
Trade	Go2Travel	Michael Boetschi Owner	Michael will attend IRU in Medora, his first time in North Dakota.
Trade	Argus Reisen	Manja Trietchen Chief Operating Officer / Product Manager	Manja is Dirk’s right hand in the company and will most likely take over the company once Dirk retires. Manja will attend IRU in Medora as her last trip to the region took place many years ago.
Trade	CRD	Patrick Schreiber Product Manager	Patrick started with CRD in 2025 (he previously worked for Meso Reisen before leaving the tourism industry and now coming back). He will attend IRU 2026. This will be his first time in the GAW.
Trade	Para Tours	Samuel Renggi Product Manager	Sent an invitation for IRU. Sam, PM North America, will attend.
Trade	T.r.u.e. America	Tamara Toemmers	Tamara attended 2 IRUs and would have loved to attend next year in Medora, but she has to decline as she is pregnant and won’t be able to travel in the first half of 2026.
Trade	Naar Reisen	Angela Gaza Product Manager	Angela is PM at the German office of Naar Reisen. She wanted to attend IRU in Medora but had to decline due to other commitments already.
Trade	USA-Reisen	Axel Mosel Product Manager	Would have loved to attend IRU but had to cancel due to personal commitments.
Trade	USA-Reisen-Experte	David Siemetzki	Would have loved to attend IRU 2026 but they have their own fam to the USA exactly during IRU dates.
Trade	Knecht Reisen	Anja Maier	Had to decline participation at IRU in Medora as she already had other travel commitments.

Type	Company	Contact	Details
Trade	America Unlimited	Tom Langlotz Marketing Manager	<p>Completed GAW Marketing Activities for FY26:</p> <ul style="list-style-type: none"> - Product Development (new 4-state fly drive): https://www.america-unlimited.de/reiseangebot/20-tage-west-usa-roadtrip-von-den-great-plains-zu-den-rockies-1204007/ - Social Media Campaign (FB + IG Takeover), Nov 3-7 - Top 5 video production incl. YouTube ad campaign, Nov 27 - B2C NL inclusion, sent to 5000+ travel agents Oct 8 - B2C Newsletter incl. GAW Product was sent out to 150,000 consumers (this deliverable was a free bonus). - All details are in the AU report which was sent to GAW states
Trade	Canusa	Nina Wulferding Marketing Manager nina.wulferding@canusa.de	<p>Completed GAW Marketing Activities for FY26:</p> <ul style="list-style-type: none"> - B2B E-Newsletter to 23,000 readers, Oct 21: https://info.canusa.de/u/archive/CVzqMRB7nfw4Al1MnK70A - Pinterest Week, 1487 impressions, Nov 3-7 - Podcast advertisement (free of charge for GAW) to promote one of Dirk Rohrbach's podcasts about the GAW region: - Detailed report was provided and sent to GAW
Trade	CRD	Marie Callsen Marketing Manager m.callsen@crd.de	<p>Finalized GAW Marketing activities for FY26:</p> <ul style="list-style-type: none"> - Product development: new 4-state fly drive tour was created https://www.crd.de/reisen/usa-mietwagenrundreise-badlands-und-bisons/ - Axolot Promotion and Axolot Banner for 4 weeks, Oct 13-Nov 13 - 1/3-page ad in B2B2C magazine „Meine Reise“, Oct 8 - GAW inclusion in 1 CRD B2C NL –Oct 25 - detailed report was provided and sent to GAW
Trade	Dertour	Laura Koenig Product Manager North America Laura.Koenig@dertouristik.com	<p>Completed GAW Marketing activities for FY26:</p> <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 - ComeCloser Current tip (incl. GAW flyer pdf), Oct 13 - DER Digital Signage Video, Oct 13-18 - held 30-minute GAW webinar for 51 travel agents. The webinar was recorded and was sent out in a B2B-NL and is available on their intranet. - detailed report was provided and sent to GAW
Trade	Faszination Fernweh	Manuela Duebler Owner	<p>We confirmed distribution of 400 GAW Guides at each of the 2 consumer shows, that Faszination Fernweh will attend with own booth:</p> <ol style="list-style-type: none"> 1. Consumer Show Vienna, Jan 15-18, 2026 (71,000 visitors in 2025, largest Austrian travel consumer show) 2. Free Munich: Feb 18-22, 2026 (120,000 visitors in 2025, second largest travel consumer show in Germany)

Type	Company	Contact	Details
Trade	TUI	Claudia Ehlen Senior PM	Met with Claudia in Hannover to discuss product, IRU participation (had to decline) and possible future marketing activities.
Trade	Explorer World of Travel	Sabine Besgen Team Lead Product Management	Sent an invitation for IRU. Had to decline as their North America Team is very small and they are not able to attend smaller trade shows.
Trade	Die Reisebotschafter	Dirk Zielinski	Invited him or someone from the team (e.g. Nora Saar who now works for them) to attend IRU 2026 but they had to decline.
Trade	Fairflight	Laura Thurm Marketing Manager	Scheduled a date for a GAW in-house-presentation for their product managers and sales staff in Wittenberg for Feb 23, 2026
Trade	Naar Reisen	Angela Gaza Product Manager	Held a 30-minute GAW webinar for 6 staff members on December 2, 2025. Focused on the itinerary https://greatamericanwest.de/routenvorschlaege-gaw/einzigartige-sehenswuerdigkeiten/ and on general highlights in the region as staff was not too familiar with GAW.
Trade	Diamir	Anna-Katharina Treppte North America Team	Is planning her vacation (with her family) to the GAW region (ID, WY, SD) in summer 2026. She will also use the trip to get more familiar with the region and look at some properties. We assisted her with routing suggestions, tips for highlights, accommodations and activities. We will stay in touch.
Trade	Enjoy America	Katharina Stehning Owner	German tour operator specializing in tailor-made North American journeys since 2012, with a special passion for the Great American West region. Katharina attended several IRUs before the pandemic. Among their guests are families, couples, singles of all ages—and a large number of pilots (as her husband is a private pilot and board member of a German aviation club). They are currently developing an exclusive, aviation-focused Idaho tour for their pilots and aviation-enthusiast clients – and had thus contacted ID directly. They are planning a scouting trip for July to do more research for this new tour and are also personally guiding an exclusive VIP group to EAA AirVenture Oshkosh right before. Idaho already provided them with contacts in Idaho's aviation industry and GAW Germany got in contact to see if we can be of further assistance.
Trade	Para Tours	Isabelle Huber	Finalized dates for GAW presentations at consumer shows/events: - Consumer Show Bern: January 23 - Canada Days Bern: March 2

Type	Company	Contact	Details
Trade	TBO Holidays	Ute Bernardi Business Development Manager	We were in contact with Ute who suggested that we hold a GAW webinar with them for their travel agents, free of charge. TBO Holidays supports travel agencies with services, e.g. by setting up destination trainings. Confirmed to hold a 30-minute GAW Webinar March 10 for their travel agent partners. Details TBD
Media	Various	Approx. 20 journalists	Sabrina hosted a small informal Media After Work Event in Munich in October at own costs – approx. 20 journalists attended. Included GAW as a new client in the follow-up emails.
Media	Freelancer	Svenja Conrad	General discussion.
Media	Freelancer	Detlef Berg	Discussed several options for his individual press trip to the GAW regions. Currently on hold since we are waiting for Detlef to get back to us with an update on TO support.
Media	Falstaff TRAVEL	Brand USA, Evelyn Dathe	Evelyn forwarded an image request from Falstaff TRAVEL – they are planning a winter story and were looking for imagery of Jackson Hole.
Media	Freelancer	Win Schumacher	General introduction of GAW.
Media	Freelancer	Helge Bendl	Helge's request for an individual winter press trip to Wyoming came via the tour operator Faszination Ski. Since the request was for Jackson Hole and Yellowstone only, we declined in consultation with RMI.
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 in touch with Harald beginning of 2026.
Media	ELLE/ELLE Spirit /ELLE Traveller	Meike Mai	General introduction of GAW.
Media	JALAG Verlag	Editorial Teams	JALAG includes merian, Robb Report, Der Feinschmecker, favorit. GAW introduction and general pitch.
Media	Freelancer	Yvonne Dewerne	General introduction of GAW.
Media	ADAC Reisemagazin	Heinrich Anders	General introduction of GAW.
Media	Men's Health	Marco Krahl	General introduction of GAW.

Trainings

Summary:

Trainings

People Trained

4

103

Significant Training Highlights:

Type	Company	Contact(s)	Details
Trade Trade – Product Manager	Knecht Reisen	Anja Maier	B2B Training as part of their North America Day. Trained 34 agents.
Trade – Product Manager	Naar Reisen	Angela Gaza Product Manager	Virtual 30-minute GAW Training for 6 staff members took place December 2, 2025.
Trade – Product Manager	Dertour	Laura Koenig Product Manager	Held a 30-minute presentation on the GAW for a total of 51 travel agents.
Trade – Product Mangers, sales staff	CRD	Pia Hambrock	December 3 rd held a 30-minute in-house training at the CRD headquartering Hamburg for 12 sales staff and product managers.
Trade – Travel agents	TBO Holidays	Ute Bernardi Business Development Manager	TBO Holidays supports travel agencies with services, e.g. by setting up destination trainings. Confirmed to hold a 30-minute GAW Webinar March 10 for their travel agent partners. Details TBD
Trade – Product Mangers, sales staff	Fairflight	Laura Thurm	Will hold a GAW in-house training at their office in Wittenberg on February 23, 2026.

New Product**Summary:**

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
6	12	11	16	23

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Para Tours	Heritage of the West & Native Cultures	SLC	DEN	Boise (1) – Wallace (1) – Salmon (1) – Montpelier (2) – Evanston (1) – Lander (1) – Sheridan (1) – Deadwood (2) – Rapid City (1) – Pierre (1) – Bismarck (1) – Medora (1) – Minot (1) – Devils Lake (2) – Jamestown (1) – Sioux Falls (1) – Custer (1) – Casper (1) – Cheyenne (1) – DEN (1)

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Para Tours	Hidden Gems & Unique Sights	GEG	MSP	Coeur d'Alene (1) – Lewiston (2) – Boise (2) – Twin Falls (2) – Jackson (1) – YNP (2) – Cody (1) – Sheridan (1) – Deadwood (1) – Custer (1) – Rapid City (1) – Medora (2) – Minot (1) – Bismarck (1) – Fargo (1) – Sioux Falls (2)
Trendtours	Naturwunder USA: Rocky Mounains & Wildwest-Romantik	DEN	DEN	DEN (1) – Jackson (1) – Cody (1) – Deadwood (1) – Rapid City (1) – Cheyenne (1) – DEN (1)
Thobareisen	Cowboys und die Rocky Mountains	DEN	DEN	DEN (1) – Cheyenne (1) – Rapid City (2) – Sheridan (1) - Cody (1) – Jackson (1) – Rock Springs (1) - DEN (1)
Thobareisen	Quer durch die USA	SFO	NYC	Jackson (1) – Cody (1) – Rapid City (1) – Sioux Falls (1)
Thobareisen	Winter-Abenteuer im Yellowstone	BZN	BZN	Jackson (2)

Website

Sessions	Users	Pageviews	Average Session
1,318 (+55%)	1,213 (+59%)	2,103 (-38%)	00:39 (-57%)

Misc.

- Wrote and sent out a news pitch to trade media about 2026 news/highlights
- Provided input and information about trade and media appointments at Brand USA Travel Week in October for GAW state representatives
- Confirmed the following tour operators including pre- or post fams for IRU 2026:
 1. Argus Reisen, Manja Trietschen – ND Post-Fam (Medora to MSP)
 2. CRD, Patrick Schreiber – WY Post-Fam
 3. Go2Travel, Michael Boetschi – ND Pre-Fam
 4. Karawane Reisen, Petra Schurig – ND Post-Fam (Medora to Fargo)
 5. Para Tours, Samuel Renggli – WY Post-Fam

Quarterly Report – Benelux

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
15	8	7	0	0

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	ITG Companies	Fons Smeets, Commercial Marketing Consultant	<p>The International Travel Group (ITG) is a Dutch travel company and represents 2 companies: ExperienceTravel focuses on the high-end market in the Netherlands and Belgium. Travelworld focuses on the middle plus market and offers flexible packages to long haul destinations.</p> <ul style="list-style-type: none"> - Fons says that the US and Canada continue to be two of their strongest long-haul destinations, consistently ranking among the top ten most popular regions for both their brands. He notes that he would like to explore how joint marketing collaborations could increase visibility for these destinations, with the shared goal of stimulating both traveler numbers and overall spending. - He shares that in the U.S., the Southwest (California, Utah, Arizona) remains popular, followed by Florida, the Rockies, and New York. - The U.S. represents approximately 4.5% of ExperienceTravel's business and 11.5% for Travelworld.
Trade	Odysseus Active Holidays	Kris Remacle, Product & Contracting Manager Noord-Amerika	<p>We met with Kris to learn more about Odysseus's expansion. They are a well-established tour operator but only started offering the USA since January 2024. Kris was hired to set up the new product, after 14 years of experience at USA Travel. Odysseus is known for high-end luxury travel and cruises. They are expanding with a new brand Globy in 2026. This brand will focus on 4-star hotels, glamping options and (outdoor) experiences. With bookings being down for the USA, they see this as a chance to focus more on product development and the new brand. He thinks the higher price for an annual parks pass is reasonable.</p> <p>Globy will offer product from all the regions in the USA. They are also working on French translations to be able to serve the French speaking part of Belgium.</p> <p>GAW: https://www.odysseus.be/circuits-hotels/the-ultimate-wild-wild-west/</p>
Trade	Exciting West	Line Vandenabeele	<p>As of October 1st, they have partnered with Birger van Langenhove, who recently launched his platform States of Wonder, focusing on the USA, but mostly the lesser-</p>

Type	Company	Contact	Details
			known areas within the country. He only does tailor-made travel itineraries and doesn't have example itineraries on his website.
Trade	Tioga Tours	Paul Backer	<p>Tioga Tours has entered a strategic partnership with 819 Capital Partners. Founder Paul Backer remains involved as minority shareholder and continues to lead the company. The investment strengthens Tioga's capabilities in marketing, digitalization, and AI, supporting its plans to expand beyond North America while maintaining its tailor-made service approach. This partnership reinforces Tioga's position as a leading specialist in customized hotel and RV travel.</p> <p>We spoke with Paul during one of the consumer shows, and he let us know that normally US bookings make up 80% of their bookings vs 20% Canada, this has now shifted to 55% USA and 45% Canada – a significant change.</p>
Trade	WRC Reizen	Jón Jonker	<p>We visited WRC Reizen and met with Jón Jonkr, product manager. The company exists for almost 40 years and their main focus for the USA is RV trips. The company is owned by Outsight Travel / Rama Tours (specialized in Asia and South America). They are looking to improve their USA product, by focusing not only on RV but also fly-drives. We have offered to help him with improving their existing product, either by adding nights or add-ons. If needed, we can work with them to create more itineraries.</p> <p>Also, they currently work with Travalco, but feel somewhat limited in what they offer, also making them feel limited in how they can be different to their competitors. We introduced them to more specialized DMC's like ReyRoyal and RMHT, where they can find more specialized products and differentiate their offerings.</p>
Trade	FRAM	Sofie Van den Driessche	<p>FRAM, one of France's most established tour operators, is expanding into the Benelux market. The company will launch in Belgium in 2026, followed by the Netherlands, with Sofie Van den Driessche appointed as Managing Director for the region. Van den Driessche has worked in management positions at major players in the Belgian market for more than twenty years and was General Manager of TUI Belgium from 2020 to 2024.</p> <p>The expansion includes a locally adapted product offering, with a strong focus on escorted tours and package travel (NY, FL and the West Coast). The strategy is designed to align with the preferences of Belgian and Dutch travelers while building strong partnerships with local retail and distribution channels. They will offer both B2C as B2B.</p>
Trade	Style in Travel	Birgitte Bosma	<p>Style in Travel have launched a new campaign that focuses on the World Cup locations where the Netherlands will play. These are Dallas, Houston and Kansas City. As these locations are relatively close to each other, with a couple</p>

Type	Company	Contact	Details
			of days in between the games, there is a good chance that Dutch people will travel to the USA for it.
Trade	Joker Reizen	Ludwig Verbruggen	We have been in contact with Ludwig for the upcoming sales mission. We will be at their office on Tuesday March 17 for a breakfast meeting with their Product Managers followed by a general training with their complete USA team.
Media	Hey!USA	Sebastiaan Klijnen	Update Co-op: the second set of articles have been published, and the individual state pages: Wild West Wyoming Craters of the Moon Winter in the GAW SD ND WY ID They will send us a full report with all the ROI at the end of the co-op.
Media	Freelance	Gijs Hardeman	The second article of Gijs and Vincent their trip has been published in SOUL magazine in the winter edition. PDF sent. Reach 15,000 AVE \$12,000
Media	Hearst	Helen Kuipers	Helen will, together with photographer Esther Quelle, take Bas and Kees their places for the Nat Geo Traveler fam to Idaho. We are in contact with the journalist / RMI about the fam.
Media	Reisinspiratietips.nl	Kelly Aarts	Kelly, founder of Reisinspiratietips.nl, runs a growing travel platform that shares everything from local getaways in the Netherlands to inspiring international adventures. The website has been active for about a year and a half, and Kelly has already built a strong social media presence, reaching around 200,000 monthly views on TikTok and steadily expanding her audience. While advertising is not yet a focus, she is eager to stay informed about press trips and media opportunities.
Media	Meridian Travel/ RonReizen –	Harald Kolkman / Ron Peereboom Voller	In December 2025, travel magazine RonReizen and De Mooiste Rondreizen (published by Meridian Travel), will join forces under the title De Mooiste Rondreizen. The magazine will be published four times per year. This collaboration aligns with Klap Media's broader strategy to integrate content, television, and travel offerings, expanding visibility beyond broadcast through increased retail presence and inclusion in Meridian Travel's online shop. For Meridian Travel, the partnership strengthens its portfolio by linking a leading travel publication to a nationally broadcast RTL4 travel program, creating broader reach and new editorial perspectives.
Media	Soul Media	Arno Weel	Arno Weel manages several titles under the same publishing group, each with its own editor-in-chief. Their flagship publication <i>Soul</i> is distributed through Betapress and reaches roughly 6,000 subscribers. It is published

Type	Company	Contact	Details
			twice a year, surfing in summer and skiing in winter. The group also produces <i>Up/Down</i> magazine (mountain biking, six issues per year), an <i>E-bike</i> magazine, and a road cycling magazine.
Media	Expedition Anywhere	Sascha van Zonsbeek and Jos Ensing	<p>Sascha and Jos teamed up and now manage a high-quality travel platform run by three freelance writers. The site focuses on authentic, first-hand travel stories with original photography and has been active for three years. It does not feature advertorials and relies entirely on organic traffic. Their Dutch-speaking audience, primarily from the Netherlands, aged 25–55, mainly female readership, shows strong engagement and consistent growth.</p> <p>They collaborate with partners through editorial and photography projects and are active on Instagram and their website. Sascha is planning a trip next year from Las Vegas to Yellowstone and Salt Lake City.</p>

Trainings

Summary:

# Trainings	# People Trained
2	37

Significant Training Highlights:

Type	Company	Contact(s)	Details
Trade	Visit USA Belgium	N/A	On October 14 th we trained 25 agents during the Visit USA Belgium Workshop about updates of the region and to answer any questions the agents had.
Trade	Connections	Sarah Vandermaerssen	We stayed an overnight in Belgium after the Visit USA Workshop to give agent trainings at their office. In total 10 agents were present and also Zenobia and Sarah (Product Managers USA).

New Product

Summary:

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
1	0	0	2	3

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Odysseus	The Ultimate Wild West	DEN	PHX	Denver (2), Cheyenne (1), Rapid City (2), Cody (2), West Yellowstone (2), Jackson Hole (2)

Website

Sessions	Users	Pageviews	Average Session
614 (-0.8%)	519 (-14%)	817 (-4.5%)	0:41 (-72.1)

Misc.

- **Visit USA**
 - **Visit USA NL.** We delivered content for the newsletter and [blog](#), we highlighted winter activities in the region (Reach 2,000, AVE \$500).
 - **Visit USA NL General Assembly:** No changes in the board, they are launching a new campaign in 2026, Bucket List USA this will be an online campaign focusing on consumers spreading short videos of highlights in the USA.
 - **Visit USA BE.** We delivered content for the [October newsletter](#) with theme 'Native American culture in the GAW' and for the [December newsletter](#) with theme "Christmas decorations and Winter activities"
 - **Visit USA BE General Assembly:** Before the USA Workshop took place we attended the General Assembly where we were updated on the past and future events, newsletters, webinars and board changes. The biggest update is the change of the president. The board now is:
 - Charlotte Tenot (President)
 - Olivier Dewitt (Vice President)
 - Ludwig Verbruggen
 - Pieter Demuynck
 - Leentje de Leeuw
 - Rianne van der Linden
 - Geert Raes
 - Yolande Aelvoet
 - Olivier Vanderbroucke (Replacing his wife Elke)
 - Sara Vandermaesen
 - Alexander Vanryckeghem
 - Sebastiaan Klijnen
 - Dewi van Akker (New Board Member)
- **News release.** We shared the update about YNP winter with the trade.
- **Translations.** We translated the two new GAW itineraries.
- **Joker Reisbeurs.** On Oct 19 we participated in the Joker Reisbeurs as part of our co-op. Although the presence of USA partners was high, we did see a stronger interest for Canada than the USA amongst the consumers. The total attendance was lower than previous years. We also had less conversations at the booth. However, the presentation "Rockies and Yellowstone" given by the Joker staff was well attended (55 persons) and the clients that did come to our booth were already planning a trip to the region. All the trips we spoke about with clients were for a duration of three weeks. Several for 2026 (most in June and Sept.) but also some for 2027 and even 2028.
- **IRU 2026 Medora.** Due to the popularity to attend the show from our market, we decided not to send out a general invitation to all the tour operators this year but to reach out to the ones that had to be put on the waiting list last year. All these have confirmed their attendance and we already have 9 interested tour operators from both the Netherlands and Belgium. So far confirmed and signed up:
 - Edwin van Delden - Travel2Amerika
 - Marlon Beuperthuy - Le Beau Reizen
 - Frederique du Bois - Joker Reizen

- Thijs Boogaard - Aeroglobe
- Lieze Lattré - Exciting West

Quarterly Report – France

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
31	20	5	0	2

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	Cercle des Voyages	Anthony Enault – Product Manager antony@cercledesvoyages.com	<p>Despite the overall decline in travel to the United States, the U.S. remains the number one destination for Cercle des Voyages, one of our top partners. Anthony has recently expanded his product portfolio and is now fully focused on product development.</p> <p>He is also planning an internal fam trip for four to five U.S. sales agents in early October 2026, with a specific focus on Idaho and Wyoming. The fam form is currently being finalized and will be shared with RMI shortly.</p> <p>Overall, Anthony remains confident about the upcoming high season, with sales expected to start on a positive note from January 2026.</p>
Trade	Evasions USA (now <i>Les Grandes Evasions</i>)	Manon ChereI – Product Manager manon@evasionsusa.com	<p>Evasions USA becomes Les Grandes Évasions</p> <p>Evasions USA, long focused on U.S. travel, has officially rebranded as Les Grandes Évasions, signaling a strategic expansion beyond the United States. While the U.S. remains at the core of their expertise, the agency now offers tailor-made journeys to eleven destinations worldwide, including Canada, Japan, South Korea, Tahiti, Australia, New Zealand, Peru, Argentina, Mexico, and Brazil.</p> <p>Manon continues to serve as the USA-Canada product manager, while new product managers have been appointed to oversee the company’s other destinations. We provide her regularly with updates on the GAW and the wider U.S. market. Additionally, we have suggested organizing a training session for the U.S. team in the coming weeks to ensure all staff are fully equipped to promote the GAW, with the date currently being finalized.</p>

Type	Company	Contact	Details
Trade	Les Maisons du Voyage	Nadège Ruiz-Brousseau – Product Manager nruizbrousseau@lesmaisonsduvoyage.com	<p>Les Maisons du Voyage have recently strengthened their U.S. travel team to support sales growth, following several staff changes. Three senior team members remain in place, while three junior staff have been rehired to reinforce the team.</p> <p>To ensure everyone is fully up-to-date and prepared to promote the GAW effectively, a one-hour training session has been scheduled for January 27, 2026, at Nadège’s request.</p> <p>An invitation to participate in IRU Medora was extended; however, due to a scheduling conflict, attendance was not possible this year. She expressed interest in participating in the event in 2027.</p>
Trade	Visiteurs	Roxane Vergught – Marketing Director rvergught@visiteurs.com	<p>As part of a FY26 co-op, a 15-day banner was prominently featured on the trade website, highlighting the two itineraries included in their current program and directing traffic to dedicated content about The Great American West.</p> <p>In addition, a newsletter was sent to their professional contact database, under the theme “Top 5 Reasons to Discover the Great American West”</p> <p>The campaign delivered solid results: the B2B banner received 1,836 visits and 303 clicks, while the newsletter achieved an open rate of 38.9% and a click-through rate of 3.7%. These metrics demonstrate strong engagement from travel professionals and reinforce the GAW’s visibility within the trade market.</p>
Trade	Backroads Voyages	Nadège Peccavet – U.S. Specialist & Agency Director Nadege@backroads.fr	<p>Delphine and Nadège shared an update on the agency’s upcoming move to the Opéra district in January. They reported a slight decrease in overall bookings to the United States; however, the average booking value has significantly increased.</p> <p>The agency continues to work with a strong base of repeater travelers who trust their expertise, ensuring that overall performance remains solid.</p> <p>We also took the opportunity to review their current GAW programs on their website.</p>
Trade	Directours	Emilie Canu – U.S. Specialist emilie@directours.com	<p>An update was shared that the U.S. team has been reduced from five to two dedicated specialists. Despite the smaller team, demand for the Western United States remains strong, and a review of family-focused itineraries was conducted to better align with client expectations.</p>

Type	Company	Contact	Details
			Emilie has expressed interest in discovering the region on an upcoming individual fam trip and will be in touch soon to confirm her available dates.
Trade	Périer Voyages	Cédric Pinaud – CEO cedric@perier-voyages.com	<p>First contact was established with the Périer Voyages network in Normandy, a highly established group of travel agencies that sells worldwide destinations and specializes in tailor-made travel.</p> <p>Discussions focused on introducing the GAW and exploring opportunities to strengthen its presence within their U.S. offering. Plans are currently underway to organize a training session in early 2026 for all 11 agencies, bringing together around 50 travel agents to enhance product knowledge and support future promotion of the destination.</p>
Trade	Amplitudes	Clémence Robert – Product Manager clemence.robert@amplitudes.com	<p>Clémence has reported a growing number of client inquiries regarding the GAW and is looking to update her existing program to expand it with additional stops and activities.</p> <p>She is particularly interested in companies offering private guided tours, ideally with French-speaking guides, although she is aware that this can be challenging to arrange. We have provided her with several contacts for companies that were present at the most recent IRU, including Yellowstone Safari, which can accommodate requests for French-speaking guides. These updates reflect increasing interest from clients and ongoing efforts to enhance the quality and customization of travel experiences in the GAW.</p> <p>She had also expressed interest in participating in IRU Medora, but the French delegation had already reached full capacity. She will be given priority for the next IRU in Idaho in 2027.</p>
Trade	Les Ateliers du Voyage	Bertrand Julliard – Product Manager Bertrand.Julliard@atlv.fr	<p>As part of one of our FY26 co-op initiatives, Bertrand has developed a special 12-page brochure showcasing all Great American West programs.</p> <p>This brochure was distributed during the travel consumer shows in Colmar in November, providing attendees with a comprehensive overview of the region and its offerings.</p> <p>In addition, a dedicated GAW newsletter was sent out to their entire contact database on October 24, further promoting the destination and reinforcing visibility among key travel audiences.</p>

Type	Company	Contact	Details
Trade	Califun	Julien Couradeau – COO julien@cali-fun.com	A meeting was held in October to review the various activities available on the booking platform. Julien expressed a high interest in participating in IRU to help expand the product offering in the region.
Media	Carnets d'Ailleurs	Jean Paul Moulin	French magazine co-founded by Jean-Paul Moulin and illustrator Joël Alessandra, dedicated to the art of travel through drawing and watercolor. The publication emphasizes a "slow travel" philosophy, encouraging readers to explore the world through illustrations. Each issue features thematic dossiers that blend evocative illustrations with personal narratives, offering an intimate glimpse into various destinations. Subject of interest: <i>Our region as a travel destination in general, with a focus on natural wonders, major cultural attractions and monuments. Would be interested in visiting Wyoming and Idaho or South Dakota either in September 2026 or May/June 2027.</i>

Trainings

Summary:

Trainings

People Trained

3

29

Significant Training Highlights:

Type	Company	Contact(s)	Details
Trade	Voyamar	Manon Renaux	Presentation of the GAW during a one-hour session attended by eight travel agents.
Trade	Marco Vasco	Florence Cusset	Two-hour training session on the four states. 17 U.S specialists attended it.
Trade	Sélectour Voyages Montpellier	Fabrice Dugas	One-hour training session for Fabrice and his team (three in total).

New Product

Summary:

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
2	0	0	2	13

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Terres D'aventure	Rocheuses et Rodéo	DEN	SLC	Denver (2) – Cheyenne (1) – Custer State Park (1) – Rapid City (1) – Buffalo (1) – Cody (1) – Yellowstone NP (3) – Jackson (2)
Comptoir des Voyages	Mission Parcs Nationaux	SLC	LAS	SLC (1) – Yellowstone NP (3) – Grand Teton NP (2)

Website

Sessions	Users	Pageviews	Average Session
970 (-16%)	864 (-24%)	1,319 (-67%)	01:12 (+11%)

Misc.

- IRU 2026 in Medora, North Dakota: The French delegation will be composed of:
 - Nora Gherras _ Angèle (Not attending a fam)
 - Bertrand Juilliard – Les Ateliers du Voyage (SD West River Post-Fam; May 2-5)
 - Thibault Loubatier – Terre d'Escales (ND to MN Post-Fam; May 2-6)
 - Julien Couradeau – Califun (WY Post-Fam; May 2-6)
 - Anthony Enault – Cercle des Voyages (ND Pre-Fam ; April 24-28)
- TV program aired on France 3 on December 10, with a replay available on FranceTV.fr, following a TV production stay (Bonne Compagnie) in August 2024 at TA Ranch, Wyoming. Full audience figures, including both linear and digital numbers, will be shared shortly. They've been asked. The good news is that there will also be additional broadcasts on France TV as the rights have been secured for three years, meaning the program can be re-aired anytime during that period.
- Destination USA: Issue 19 of *Destination USA*, published in October, highlights the most beautiful U.S. national parks. Featured parks include Yellowstone (4 pages), Grand Teton National Park (Double page), and Badlands National Park (double page)
 - Copies: 75,000
 - AVE: \$25,000
- Consumer Travel Show Colmar (November 7-9): The show welcomed 18,000 visitors this year. While attendance was slightly lower than last year, we received solid inquiries, demonstrating strong engagement and concrete interest from attendees.
- VisitUSA Seminars in Le Havre and Montpellier :
 - Le Havre – November 25

- Nine exhibitors and 28 visitors – while the visitor turnout was modest compared to the number of exhibitors, the quality of interactions was excellent.
 - Montpellier – December 9
 - Eight exhibitors – 44 visitors (high quality and very engaged).
- [A newsletter was distributed by Visit USA](#) to its database on November 17.
 - 66,100+ contacts (trade & consumers)
 - The content focused on the “Off the Beaten Path” theme in the GAW was written by GAW France and provided to Visit USA for distribution.

French Market update (Q2):

From January 1 to November 30, 2025, the United States welcomed 1,458,336 French visitors, representing a 6.9% decline compared to the previous year. France ranks third among European source markets and ninth globally. – Source: NTTO U.S. arrivals

The final quarter of 2025 confirmed a cautious yet evolving travel landscape in France. While overall sales through French travel agencies declined slightly in October (-2.5% year over year), long-haul travel was more impacted, with U.S. bookings down by approximately 10%.

This contraction in volume was partially offset by a continued increase in average booking value (+3-5%), reflecting travelers’ preference for higher-quality, more meaningful experiences. Throughout 2025, French travelers have largely favored medium-haul destinations within Europe and the Mediterranean, driven by budget awareness and perceived ease of travel.

Nevertheless, U.S. visitation trends show signs of resilience: between January and September 2025, nearly 1.2 million French travelers visited the United States, a level comparable to 2023, despite a 6.3% decline versus 2024.

Since summer, tourism professionals have reported a renewed wave of last-minute bookings, supported by a more favorable euro-dollar exchange rate, increased air capacity and competitive pricing, and sustained destination marketing efforts highlighting the diversity of U.S. experiences (NTTO).

In December, bookings softened again amid geopolitical tensions, stricter border controls, and evolving traveler perceptions of long-haul travel. French travelers increasingly prioritize destinations perceived as safe, welcoming, and offering nature-based, open-space experiences. Demand is shifting toward immersive, sustainable journeys that combine urban and rural discovery, often using rail transportation. Looking ahead to 2026, Japan has emerged as a strong competitor, with adventure and cultural travel up by nearly 30%, underscoring the importance of safety, accessibility, and experiential depth in future destination positioning.

Quarterly Report – Italy

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
11	3	3	0	1

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	Alidays United Airlines	Giuseppe Gerevini, Alidays Destination Manager Stefania Scherillo, Alidays Commercial Director Alessia Dottori, Alidays Junior Event Coordinator Christian Josso, United Account Manager	<ul style="list-style-type: none"> • Organized one mini roadshow featuring four different Italian regions, addressed to 20 selected travel agents in each location: <ul style="list-style-type: none"> ○ November 17: Milan at Alidays offices ○ November 18: presentation and lunch in Bologna and evening presentation and dinner in Scandicci (Florence) ○ November 19: evening presentation in Rome • Attendance: 79 including travel agents, Alidays local sales managers and Alidays commercial director and junior event coordinator • Three presentations: one by GAW Italy (Annalisa Mereghetti) describing the highlights of the region and the four states, one by Alidays (Giuseppe Gerevini) focusing on the topics in the four states and selection of accommodations, and one by United Airlines (Christian Josso) focusing on flights to the region, direct flight Rome-Denver and United services. In each venue the local Alidays sales manager welcomed the travel agents, introduced GAW Italy and United and did a presentation of Alidays focusing on ALYDA - AI by Alidays. • Distribution of GAW maps, state guides in Italian language, GAW flyer with QR code to download the new IT guide and branded gifts (note pads and shopper) • Excellent organization of the event by Alidays team. Extraordinary connection among the partners who genuinely love their work, the destination, and human interaction, key elements of a successful partnership. Great curiosity and interest perceived among agents. This formula (destination training to a targeted selection of agents) offered the best solution for achieving successful results. Partnering with an airline company brings significant added value, and having Christian, who has extensive knowledge of the GAW region, has been a tremendous help.

Type	Company	Contact	Details
Trade	NAAR Bespoke Travel	<p>Erica Melegari, Product Manager USA</p> <p>Daniela Piccolo, Marketing Department</p> <p>Isabella Campora, Marketing Department</p>	<p>Co-op marketing activities update:</p> <ul style="list-style-type: none"> • One B2B presentation/event addressed to 40 agents in Northwest Italy in February. • Two trade newsletters to be sent to 2,000 targeted agents with two itineraries in GAW region • Four Facebook posts in November/December 2025 • Four Instagram posts in November/December 2025 <p>Gaia Crespi, Marketing Manager left Naar.</p> <p>Erica registered at IRU 2026 Medora (ND pre-fam).</p> <ul style="list-style-type: none"> • December 4: Our office has been invited to attend the celebration of 30th anniversary of Naar Bespoke Travel in Milan, where the tour operator brought together the entire industry, including representatives from various partners, both trade and media. Olga Mazzoni attended while the tour operator presented the development, the investments, the business plan for the next five years. Present in seven countries with operations in Milan (headquarter), Rome, Naples, Paris, Brussels, Frankfurt and recently in Zurich, the tour operator replicates the bespoke model: tailor-made trips supported by a proprietary technological platform with annual investments of 2% of turnover – aiming for 100 million euros in turnover in 2026, of which 20% from abroad, and double digit growth of international divisions over the next five years, up to a 50/50 balance between Italy and foreign markets. Naar will close 2025 with a turnover of approximately 80 million euros, 70 million euros of which will come from Italy. Sponsors of the conference: Brand USA and Europe Assistance. • As of November 1, 2025, the new headquarters in Zurich were inaugurated, aiming to strengthen the brand's presence in key European markets.
Trade	CREO	Luigi Leone, Director of Product	<ul style="list-style-type: none"> • Call with Luigi: the new 2026 trading year started with a positive trend, recording growth compared to the same period of the previous year. They are continuing to invest in both technology and people. In recent months they have added three new resources and today they have 39 employees and collaborators. Diverse and sophisticated itineraries, to attract an audience attentive to quality and value. Creo thus relaunches programming “CREO <i>accompanies you</i>”, a product line that is enjoying growing success

Type	Company	Contact	Details
			<p>among customers. These are custom-built routes, but with a finite and fixed price. Inside customers will find essential experiences together with a small group of travelers, the tour leader and local guides. Creo strongly wants to limit the number of participants to ensure that everyone can live the experience to the fullest, in an authentic and shared way.</p> <p>Luigi registered for IRU 2026 Medora (ND post-fam).</p>
Trade	Kel12	Stefano Gnerucci, U.S. Specialist stefano.gnerucci@kel12.com	<ul style="list-style-type: none"> • New group tour in ND-SD developed by Stefano who will be the escort on behalf of KEL 12. Dates: September 16-30 Itinerary: MSPB (2) – Fargo (1) – Bismarck (1) – New Town (1) – Medora (1) – Dickinson (1) – Deadwood (1) – Rapid City (3) including Buffalo Roundup event – Chamberlain (1) – Sioux Falls (1) – MSP • KEL 12 will propose again the group tour featuring Wyoming Yellowstone and Montana launched last year and planned dates for August 2-18, 2026. • KEL 12 invited our office to their series of in-person presentations focused on USA called “Parole in Viaggio” in different cities. The Calendar of the planned B2C evening conferences is available online. Olga has been invited to attend these promotional events and talk about the region. Events will be broadcasted on Facebook to reach a larger audience. Those with Olga Mazzoni attending are confirmed as follows: <ul style="list-style-type: none"> ○ January 15, Milan at Palazzo Castiglioni ○ February 19, Rome at Sina Bernini Bristol Hotel ○ March 5, Firenze at Museo degli Innocenti • Stefano registered for IRU 2026 Medora (WY post-fam). He is truly interested in developing winter tours in Wyoming, including Jackson
Trade	TheWilderness Society	Max Evangelista, Owner info@thewildernesssociety.it	<ul style="list-style-type: none"> • The Wilderness Society is a small “boutique tour operator” focused on tailor-made, wilderness, wildlife photography, FITs and small groups. Massimo was planning to attend IRU in 2020 but canceled his attendance in winter 2019 due to familiar problems. • Massimo launched a new self-tour featuring Wyoming called Wyoming Adventure for Families and already confirmed 10 people on this self-tour, for the following dates: August 9-23, 2026. (confirmed with RMHTours) • Itinerary: SLC (2) – Moran (3) – Yellowstone overnight at Lake Yellowstone (4) – Cody (1) – Ranch at UCross in Clearmont (3) – Rock Springs (1) – SLC

Type	Company	Contact	Details
Trade	Frigerio Viaggi The Travel Expert	Ms. Stefania Cannizzo, Coordinator Frigerio Viaggi Max Fabbri, U.S. Travel Specialist m.fabbri@thetravelexpert.it	<ul style="list-style-type: none"> • Frigerio Viaggi: travel company with three branch offices in the Lombardy region (two offices in Milan) owned by a private family directly involved in all operations. The Frigerio Viaggi group is an important leading player in the Italian Travel panorama, counting on a team of over 200 dedicated people, and operate through six owned companies, supported by a network of approx. 90 affiliated travel agencies, called The Travel Expert. The Travel Expert (together with Frigerio Viaggi srl) stands as the leading company in the market of travel consultants. It is recognized as Italy's foremost multichannel travel agency network based on volume, expertise, and professional tools. They provide our Personal Travel Experts with access to the widest range of products under the most advantageous purchasing conditions, advanced technology, and continuous training. • November 28: Meeting with Max Fabbri (U.S. travel specialist) in our office and talked about the GAW region. Max is willing to organize B2B in-house trade trainings addressed to his colleague in Milan scheduled in February 2026, dates TBC. (follow-up in January 2026)
Trade	Go4Sea	Mr. Tommaso Valenzano, General Manager tommaso@go4sea.com	<ul style="list-style-type: none"> • GO4SEA: Tour Operator (Bari). Newly enrolled member at VisitUSA; have contacted the company to elaborate packages and itineraries for the USA, and have offered assistance, know-how and materials.
Media	Simonasacri.com	Simona Sacrifici	<ul style="list-style-type: none"> • Simona published four articles as outcome of Idaho press trip: <ul style="list-style-type: none"> ○ Travel itinerary in Idaho: a very long and detailed reportage about her experience in Idaho ○ Article about Nez Perce ○ Ernest Hemingway: a literature itinerary in Ketchum & Sun Valley ○ Craters of the Moon NM <p>Articles launched on her social networks as well.</p> <ul style="list-style-type: none"> • Podcast about Idaho and article about Boise will be published in January 2026
Media	Brand USA	Daniela Solito, journalist	<p>Journalist Daniela Solito published an article about SD on Repubblica.it/viaggi as outcome of Brand USA fam (South Dakota): users: +15 Mil. - Value \$10,000.</p>

Type	Company	Contact	Details
Media	SD Buffalo Round Up press fam	Ornella D'Alessio, freelance journalist	<ul style="list-style-type: none"> • Meeting with Ornella who still remembers her trip to South Dakota as one of the most exciting experiences she's had. Ornella published two articles about her experience in South Dakota as outcome the of Buffalo Roundup group press fam: <ul style="list-style-type: none"> ○ One page published in daily newspaper IL MESSAGGERO - October 23 issue. Readership: 670,500 - Circulation: 60,840 copies - Value: \$10,000. ○ Five pages of reportage published on IO DONNA weekly printed and online feminine magazine. Circulation: 250,000 copies - Value: \$25,000.
Media	DOVE VIAGGI travel magazine	Anna Scarano, journalist	Anna, freelance journalist, requested info about volcanic and geothermal hot springs in GAW region. We sent info and images about Idaho. Will follow up in January.
Media		Amanda Ronzoni, journalist	Follow up with journalist Amanda about the South Dakota & MSPB press fam in June. Nat Geo decided to postpone the reportage, and she is working with other media.
Media		North Dakota group press trip	<p>Proposed a group press fam in North Dakota for September 2026. We would invite four Italian media to discover the rugged beauty of North Dakota's Badlands while diving into its history at the new Theodore Roosevelt National Library celebrating the past and its ties to one of America's most prominent historical figures and the rich history & cultural heritage (Native American). The four media professionals are highly regarded within the Italian media arena and are specifically interested to develop new stories about North Dakota and Denver as a gateway (focus on art, culture, neighborhoods, sustainability, outdoor).</p> <p>Media involved in this project:</p> <ul style="list-style-type: none"> • Marco Berchi, LaStampa.it • Simona Sacrifizi, travel writer • Eugenio Bersani, Latitudes Trave Magazine • Barbara Gallucci, Touring magazine

Type	Company	Contact	Details
Trade	Go2West by EKO LTD srl	Raffaello Butori, Executive Director raffaello@go2west.org	Raffaello published online section with USA tours including one featuring MSP – SD – ND: https://www.go2west.org/tour/ILMINNESOTAILEDAKOTA : MSP (2) – Fargo (2) – Medora (2) – Deadwood 82) – Rapid City (2) – Chamberlain (1) – Sioux Falls (1) – MSP (1)
Trade	GOING	Ivana Di Stasio, Booking Supervisor & Product Development Manager USA, Canada, Mexico ivana.distasio@going.it	Ivana registered at IRU 2026 Medora (ND post-fam). She is very excited to be part of the Italian delegation as she would like to improve her knowledge about the region and tours featuring the GAW.
Trade	Castiglione Viaggi	Simona Savigni	Follow up with Simona who Annalisa met at Alidays roadshow in Bologna in November. She sent a full report about her experience in Wyoming.
Media	“Running Scenery” by Icarus SKY TV	Mr. Paolo Venturini paolo@paoloventurini.it	Sent the press fam form request for “Running Scenery”, the TV program inside Icarus Ultra run by the ultrarunner Paolo. Trip will be June 1-11, 2026, and includes three days in Denver and the rest of the days exploring South Dakota focusing on the Centennial trail and Black Hills attractions. Crew will be composed of three people and Alidays tour operator will sponsor the airline ticket of Paolo Venturini. Revised the fam form adjusting the travel itinerary with domestic flight DEN-RAP and sent to RMI.

Trainings

Summary:

# Trainings	# People Trained
1	79

Significant Training Highlights:

Type	Company	Contact(s)	Details
Trade Alidays GAW roadshow	Alidays	Giuseppe Gerevini	Organized a mini-GAW roadshow in four different Italian cities and ran training presentations about the region. Attendees: 79 including travel agents and Alidays local sales managers and Alidays team

New Product

Summary:

Total # New Itineraries	# ID Overnights	# ND Overnights	# SD Overnights	# WY Overnights
4	0	9	12	14

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
KEL 12	The Dakotas: discovering North & South Dakota group tour	MSP	MSP	Arrival MSP (2) – Fargo (1) – Bismarck (1) – New Town (1) – Medora (1) – Dickinson (1) – Deadwood (1) – Rapid City (3) including Buffalo Roundup event – Chamberlain (1) – Sioux Falls (1) – Depart: MSP
THE WILDERNESS SOCIETY	Wyoming Adventure for Families self tour	SLC	SLC	Arrival SLC (2) – Moran (3) – Yellowstone overnight at Lake Yellowstone (4) – Cody (1) – Ranch at UCross in Clearmont (3) – Rock Springs (1) – Depart: SLC
GO2WEST	Minnesota & Dakotas highlights	MSP	MSP	Arrival MSP (2) – Fargo (2) – Medora (2) – Deadwood (2) – Rapid City (2) – Chamberlain (1) – Sioux Falls (1) – MSP (1) – Depart: MSP
GUINNESS TRAVEL	Yellowstone & Great Parks escorted tour	SLC	LAS	Arrival SLC (1): Yellowstone NP overnight in West YNP – Jackson (1) – Rock Springs (1) – Moab – Kayenta – Grand Canyon – Depart: LAS

Website

Sessions	Users	Page views	Average Session
2,530 (+1%)	2,209 (+ 0.73%)	3,521 (-40%)	00:42 (-38%)

Misc.

- Market Outlook:** Destinations - United States, Japan and Thailand were the most popular travel destinations for Italians in 2025. This research is from Airalo, eSim's global marketplace with over 20 million users. Looking forward to Christmas 2025, Airalo has identified some of the most popular destinations among Italian travelers, based on the eSim package purchase trends observed in December 2023 and 2024: among these, the Maldives (+128.96%),

Tanzania (+136.45%), Vietnam (+202.64%), the Philippines (+147.08%) and Sri Lanka are growing, with a good +362.76% climbs to the top step of the podium in terms of increasing demand. This dynamic suggests that what captivates Italian travelers is the search for a favorable climate and the opportunity to enjoy different experiences from the traditional ones. Not only a snapshot of the year at the end but also trends for 2026. In fact, according to Airalo data, Sri Lanka, Tunisia, Peru, South Korea and Colombia are the most popular destinations for those looking for authentic experiences.

- **USA:** *“The United States could require tourists from dozens of countries to have their social media profiles as a condition of obtaining the ESTA and entering the US. The measure under study was submitted by the CBD, Customs and Border Protection, and published in the Federal Register. In point 3 of the ‘proposals’, it states “in order to comply with Executive Order 14161 of January 2025 (Protection of the United States from Foreign Terrorists and Other Threats to National and Public Security), CBP is adding social media as a mandatory data item for an ESTA application. The data section will require ESTA applicants to provide their social media from the last 5 years”. There will now be until February 9th for comments from citizens and organizations. The Washington Post says the rule will apply to all tourists who can visit the United States for 90 days as part of the ESTA program, which will evaluate the history of the last 5 years and, most importantly, that this could cause problems for the 2026 FIFA World Cup. What is certain is that the initiative, which would be part of Donald Trump’s immigration crackdown, would be yet another blow to the tourism sector since he returned to the White House.”* Source Travel Trade Gazette, Italy – December 11, 2025.
- **Increase National Park fees:** recent U.S. National Park fee increases, effective January 1, 2026, are causing confusion among industry and growing operational challenges related to the pricing structure and recent changes affecting U.S. National Parks annual passes. These changes are creating uncertainty among Italian tour operators and travel agencies, particularly in relation to:
 - Advance pricing and quotation stability
 - Applicability of annual or multi-park passes for group travel
 - Operational procedures for escorted tours, including group leaders, guides and drivers
 - Clear differentiation between individual travelers and organized groups

Tour operators work with long lead times and fixed-price packages. Any lack of clarity or sudden changes in access costs to National Parks directly impact product planning, pricing transparency, and traveler confidence. Visit USA Italy Association requested that US receptives provide an official written clarification outlining current pricing policies for National Parks passes relevant to international markets, specific procedures and requirements for escorted and group tours, rules regarding annual passes, group access, and any limitations or exclusions, any upcoming changes already planned that the trade should be aware of. This would allow Visit USA Italy to communicate accurate and consistent information to the Italian travel trade, helping to avoid misunderstandings and to maintain confidence in U.S. travel products.

- **Sent out official invitation to IRU 2026 to the following trade partners:**
 - Erica Melegari of NAAR (ND Pre-Fam)
 - Luigi Leone of CREO (ND to Fargo Post-Fam)
 - Alessandra Pisoni of VOLONLINE, Christian Paveri/USA Dept. registered on behalf of Volonline (ND Pre-Fam)
 - Stefano Gnerucci of KEL12 (Wyoming Post-Fam)
 - Ivana Di Stasio of GOING (ND to Fargo Post-Fam)
 - Olga Mazzoni and Annalisa Mereghetti of GAW Italy will attend Summit and IRU
- **Showcase USA ITA February 28 - March 1 Milan:** GAW participation has been confirmed, and the quoted amount has been paid. Confirmed VUSA Forum organized by Visit USA Association on February 27, addressed to travel agents.
- **News Releases:** sent out the following news:
 - October 20: Winter in Idaho and summer preview: 3,740 delivered – 26.13% open rate
 - October 23: Best in Travel Lonely Planet - Best Nat Geo North Dakota: 3,716 delivered – 27.48% open rate
 - October 27: Wyoming App by Travel Stories: 3,716 delivered – 28.63% open rate
 - November 17: Theodore Roosevelt Legacy in North Dakota, Wyoming, South Dakota: 3,724 delivered – 25.06% open rate
 - November 27: South Dakota Chef’s semifinalist of James Beard: 3,861 delivered – 24.92% open rate
 - December 1: Winter sleigh rides in Idaho: 3,810 delivered – 25.69% open rate
 - December 12: Yellowstone National Park’s winter season begins December 15, 2025: 3,256 delivered – 31.97% open rate

- December 15: North Dakota state fair in Minot: 3,826 delivered – 27.23 % open rate

Quarterly Report – Australia/New Zealand

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
45	38	6	0	1

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	Tripadeal	Teige O’Sullivan – Senior Business Development Manager	Intro meeting. Feature 2 tours with ID (Wallace) with talks of a 2027 extended program (Yellowstone via MT access) over 1000 pax per annum visiting. Sent IRU Details to follow up.
Trade	Qantas Hotels	Ned Curtis – Loyalty Manager	Intro meeting. Hotels only but with Viator being added for day tours by 2026. Hotels fed via Expedia. Options to offer marketing solutions via Qantas FF Database (9mil +) based on a Tiered pricing model \$50k-\$200k.
Trade	Chris Watson Travel	Chris Watson – Managing Director	Intro meeting. CW Travel has a large USA business of group escorts to US. Floated IRU and provided their lead product manager Melanie to be the attendee. Has a sizeable Line Dancing community as well behind him if that opens any conversation.
Trade	Brand USA	Lexie Milatis – Trade Manager	Intro meeting. Supports GAW as a hidden gem. Will look at possible fam support.
Trade	Infinity Holidays	Nicholas Hawksley	Intro and opportunity call. Still feature GAW on page and are in USA Campaign Feb/Mar 2026. Training booked.
Trade	Entire Travel Group	Sam Treby	Looking to expand into USA in 2026. Leverage is the Canyon Spirit Train as their only stand-alone USA option at present.

Type	Company	Contact	Details
Trade	Adventure World	Kristy Prince and Zoe Winks	Introduction call to Adventure World. How they work, who they use, and best ways to establish training and updates.
Trade	Hop Around Travel	Charmaine Hawke	Introduction and coordination of GAW Experience.
Trade	Armstrong Collective	Hannah Taylor and Tony Soden	Introduction of Canyon Spirit and Yellowstone additions.
Trade	Dealsaway	Jon Tindley	USA Currently super flat at present but are still surfacing products on site to showcase the region to market. GAW Product showcased via a Fly/Drive schedule.
Trade	Luxury Escapes	Jodie Collins	Introduction to team Marketing and Product procurement. Curating 2026 meeting update in Jan/Feb.
Trade	Flight Centre Travel Group	Tim Holden	GAW performance update provided to reflect 1 July meeting date.
Media	Freelance Writer	Narelle Bouveng	Met with freelance journalist Narelle Bouveng to discuss potential story ideas.
Media	Travel Today	Bridget Kelly	Trade Media update to promote benefits of GAW to NZ Trade.

Type	Company	Contact	Details
Media	Freelance Writer	Ash Jurberg	Liaised with Ash to explore luxury experiences and discover what's new in the GAW for 2026.
Media	Freelance Writer	Bonita Grima	Spoke with Bonita about story ideas and potential FAM.
Media	Freelance Writer	Julie Miller	Met with Julie to discuss story ideas on food and wine.
Media	Freelance Writer	Carrie Hutchinson	Liaised with Carrie Hutchinson regarding story ideas. Story angles include the region's Western heritage, national parks and natural landmarks, Native American culture, outdoor adventure opportunities, presidential history.

Trainings

Summary: Creation of the 4 core base webinars to share with Consortia Intranets, as well as providing wholesale reservations teams for updates for new team members

Trainings

People Trained

3

80

Significant Training Highlights:

Type	Company	Contact(s)	Details
New Webinar	Linkd Tourism	NA	Much of Q2 has been spent developing and seeing approval on a series of new webinars and training materials for usage throughout 2026. Once approved, we will start using these assets for training from Q3 onwards.

New Product

Summary:

Total # New Itineraries # ID Overnights # ND Overnights # SD Overnights # WY Overnights

12 2 0 12 12

New Product Highlights:

Company	Itinerary Name (Online, Print)	Entry Airport	Exit Airport	Route Details
Infinity Holidays	Rocky Mountains and the Great Plains	DEN	DEN	DEN (1), Rock Springs (1), Yellowstone NP (1), Medora (1), Rapid City (1), Hot Springs (1), DEN (1)
Infinity Holidays	Geological Wonders	SLC	SLC	SLC (1), Jackson Hole (1), West Yellowstone (2), Twin Falls (1), SLC (1)

Website

Sessions AU	Users AU	Pageviews AU	Average Session AU
940 (+80%)	809 (+54%)	1,129 (-60%)	00:19 (-81%)
Sessions NZ	Users NZ	Pageviews NZ	Average Session NZ
593 (+72%)	568 (+44%)	632 (-86%)	00:14 (-90%)

Misc.

- Our first Trade eDM was sent delivering positive response positive across ANZ
- Interviews with Trade Publications requested ‘Tabs on Travel’ NZ – 2 Dec 25 booked
- Interviews with Travel Reporters requested (TBC with RMI before confirming)
- New OTA seller featuring GAW ‘Wakeuphere’
- IRU – Expression of Interest sent out to key opportunity partners
 - Tim Holden – FCTG (Awaiting response)
 - Paula Watson – House of Travel (Awaiting response)
 - Holly Miller – Intrepid (Awaiting response)
 - Chris Watson – Chris Watson Travel (Awaiting response)
 - Teige O’Sullivan – Tripadeal – Declined due to IPW and time away from office
 - Karryn Pappenfus – Adventure Destinations – (Awaiting response)
 - Jodie Collins – Luxury Escapes – Declined due to IPW and time away from office
 - Nic Hawksley – Infinity Holidays – Declined due to IPW and time away from office
 - Jordan Carpenter – Helloworld/Viva Holidays – Declined due to IPW and time away from the office

- Kristy Prince – Adventure World – Declined. May not be at IPW, but preference is Rendezvous Canada
- Completed audit of the local GAW websites to update product listings.
- Attended the Visit USA New Zealand Regional Roadshows across Queenstown, Dunedin and Wellington – Good Turn out with Agents from a far reach attending. Charmaine Hawke from Wellington (Hop Around Travel) winning our GAW Experience.
- Registered for the Brand USA B2B Event in February 2026.
- Commenced work with our partner Travel USA for the upcoming co-op marketing campaign scheduled for Q3.
- Media Pitch: Luxury Experiences – New Zealand Herald
Provided information and assets for the New Zealand Herald article titled “Why These Luxury Experiences Are Worth a Trip to the USA on Their Own,” featuring 6–7 high-end experiences across the United States.
- Media Pitch: Collaborated with Brand USA to provide "What's New in 2026" content updates for The Great American West, including information about the upcoming Theodore Roosevelt Presidential Library in North Dakota.
- Had strong initial interest from media from introduction outreach. Working on a couple of potential media fam leads for pre/post IPW with RMI team.

Quarterly Report – Nordics

Meetings

Summary:

# Sales Calls	# Trade Meetings	# Media Meetings	# Rental Car Meetings	# Airline Meetings
7	4	10	0	3

Significant Meeting Highlights:

Type	Company	Contact	Details
Trade	Stjernegaard	Stine Meinertsen, Product Manager sm@stjernegaard.dk	Currently not able to set time aside for trainings or product development as they have other priorities.
Airline	KLM/AirFrance/Delta	Christian Dottorini, Key Account Manager, christian.dottorini@klm.com	Meeting has been held with Chrisitan Dottorini for an update on the current development on sales for travels to the U.S. Sales are still slower than usual but over the past weeks there has been a positive development. Further, we reached out to Christian to suggest a co-hosted event during our sales mission, which was confirmed and that took place as part of the mission.
Trade	Cowboyreiser	Ann & Christian Hammer-Bolsted, Owners	Dialogue with Cowboyreiser regarding IRU to which they initially have said “yes” to. Follow-up has been done but with no success – we’re still waiting for their confirmation.
Trade	Rolfs Flyg & Buss	Emma Rönnberg, Product Manager Daniel Nordlander, Head of product	Ongoing dialogue with both Emma and Daniel. Emma is the new product manager for U.S. trips (Rolfs only do group tours) and will create a new trip that includes 2-3 of our states. Itinerary development meeting scheduled for January 20.
Airline	Icelandair	Marina Isabegovic Scott, Account Manager Sweden, marinais@icelandair.is	We have suggested to do joint webinars to reach the Swedish travel trade which we will discuss further. Next meeting planned to take place in Q1 2026.
Airline	Icelandair	Rebecca Tärnström, Account Manager Norway, rebeccat@icelandair.is	Bi-monthly update calls with Icelandair. Rebecca is interested in arranging a fam trip together with us. We will discuss this more properly in the new year and look at opportunities. Rebecca also confirmed the possibility of getting sponsored flights for a Norwegian tour operator for IRU.

Type	Company	Contact	Details
Trade	Swanson's Travels	Tommy Swanson, General Manager, tommy.swanson@swansons.se	Catch-up with Tommy who would like to see us at their travel show in Stockholm in February. Demand is still limited but with a slight increase compared to the last months.
Media	Mondo, Finland	Pekka Hiltunen, Editor in chief	Pekka is interested in going on a press trip with a photographer to Idaho in the summer. We are currently filling out the FAM form.
Media	Finansavisen / Kapital Reise, Norway	Oliver Orskaug, journalist	Discussing press trip opportunities and story angles. He is particularly interested in angles concerning trains.
Media	Euroman / Gastro, Denmark	Kristoffer Dahy, editor	Kristoffer is interested in press trips to USA where he can combine multiple states. He is editor for two magazines. Euroman which is a men's magazine, and Gastro which is a gastronomy magazine.
Media	Brand Ambassador, Denmark	Pelle Hvenegaard, brand ambassador	Ongoing dialogue about our brand ambassador activity. Unfortunately, we had to turn it down, as we could not find a trade partner.
Media	Dagens PS, Sweden	Viggo Cavling, Travel editor	Interested in press trips. Dagens PS launched a travel section in June which has been very successful with more than two million reads already during July.
Media	Premium Magazine	Camilla Almqvist, journalist	Discussing opportunities for press trips in 2026 and brainstorming story angles. Camilla is interested in visiting USA.
Media	Jyllands-Posten, Denmark	Tom Nørregaard, editor	Discussing story angles and press trip opportunities.
Media	Nordjyske / Dansk Autocamper, Denmark	Michael Christiansen, freelance	Discussing story angles and press trip opportunities.
Media	Politiken, Denmark	Louise Alkjær, freelance	Louise loves USA and has been plenty of times. She is interested in going on press trips.
Media	Kapital Reise / Way2Go, Norway	Bjørn Moholdt, freelance	Bjørn is personally very interested in visiting USA but finds it hard to sell stories because of the political climate.

Type	Company	Contact	Details
Media	Denmark, Sweden	NA	Distributing three media pitches in our Related newsletter to editor about: <ul style="list-style-type: none"> - Ice fishing in North Dakota - Stargazing in Wyoming - Farm experiences in South Dakota The newsletter is distributed to about 70 editors and journalists.

Trainings

Summary: Unfortunately, most of our partners are not doing sales trainings at the moment, and those who have been interested were trained during the sales mission.

# Trainings	# People Trained
0	0

New Product

Summary: No new products this quarter

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

Website

Sessions	Users	Pageviews	Average Session
1,400 (+514%)	1,300 (+21%)	2,000 (-26%)	00:24 (-81%)

Misc.

- Brand Ambassador project: As we could not get support from a tour operator to collaborate with Pelle Hvenegaard, we are now in dialogue with a Norwegian brand ambassador Ingeborg Sol Fure, who is interested.
- As our sales mission took place in this quarter, most of our dialogues with the trade had a focus on securing trainings or attendance at workshops and events during the mission, and all training sessions were “saved” for the mission (as the partners preferred to have trainings directly with the state representatives).

FY26 Q2 REPORT

October-December 2025



QUESTIONS?

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