THE GREAT
AMERICAN WEST
IDAHO · MONTANA · WYOMING
NORTH DAKOTA · SOUTH DAKOTA

FY23 ANNUAL REPORT

GREAT AMERICAN WEST & STATE OF IDAHO

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Executive Summary

Dear Great American West stakeholders,

Another fiscal year has drawn to a close, and we are feeling grateful. For the first time since 2019, we experienced a full fiscal year of international visitation – quite the milestone since the devastating COVID-19 pandemic shook the world. These past four years have challenged us to be agile and adapt to an ever-shifting industry while remaining committed to bringing the greatest value possible to our stakeholders.

The road to rebounding travel can be seen in this year's growth in travel trade selling the region (+7%) and new itineraries being sold (+15%), and also in our ability to collect a healthy sample size of booking figures (23%) for the first time since 2019. Every small win like this keeps us on track to achieving our newly established three-year goals across seven overseas markets:

GOAL #1:

Increase trade and consumer engagement with the Great American West brand in targeted markets by 2% by FY25.

GOAL #2:

Increase global visitation and spending for the five-state region in targeted markets by 3% by FY25.

GOAL #3:

Ensure 20% sample size for tour operators reporting booking data.

US Travel predicts international traveler arrivals and spending will fully recover to 2019 levels by 2025 and 2026 respectively (source). The Great American West region is currently projected to follow closely to national recovery, with a forecast of reaching 2019 levels in estimated room nights booked by 2025 and estimated visitor spend in 2027 (source: 2023 RMI TRIP Report).

We know we're busy welcoming back visitors from across the globe, and we're seeing some impressive statistics that indicate the best is yet to come:

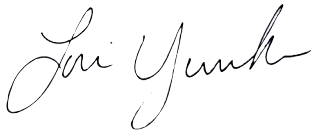
- 225 new regional itineraries
- 27,737 overnights offered in the region – surpassing pre-COVID numbers
- Substantial year-over-year increases in hosted trade (+467%) and media professionals (+41%)
- Nearly $2 billion in earned media coverage

The 2023 International Roundup tradeshow in Boise, Idaho, hosted a fully sold-out show on the buyer side, bringing in 36 travel trade professionals and reinforcing the fact that the GAW's product offerings remain in high demand among consumers in our target markets. While supplier turnout remained low for the second year in a row – highlighting the continued need for supplier re-education on the importance of diversifying target audiences to include international travelers – those who attended the show were highly engaged and surveyed positively about the event's value in their marketing efforts.

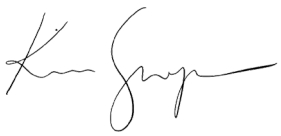
We may remain in a period of recovery, but the horizon is looking bright. The Great American West cooperative remains dedicated to providing growth and value to all stakeholders, while setting industry standards for an effective cooperative marketing program.

Thank you to the Great American West family for your continued confidence in this cooperative program. We are grateful for each and every one of you, and look forward to another successful year.

With warm regards,



Lori Yunker, RMI VP of Marketing



Kim Snape, RMI Director of Global Programs

Overview

The Great American West is the brand for the international marketing efforts of the state tourism offices of Idaho, Montana, North Dakota, South Dakota and Wyoming. Collectively, the cooperative markets to both travel trade (tour operators, travel agents) and consumers through advertising and public relations efforts.

Individually, each state office works with its industry partners to raise awareness of its state and the region as a whole through the promotion of products and travel destinations. The GAW contracts with RMI to help coordinate their united efforts in seven international markets, including the United Kingdom, Germany, Benelux, France, Italy, Australia/New Zealand and the Nordics. For more information about the GAW, visit GreatAmericanWest.co.

VISION
The Great American West will inspire international travelers to visit the region by establishing and enhancing trade and consumer recognition of the unique, authentic experiences of the region.

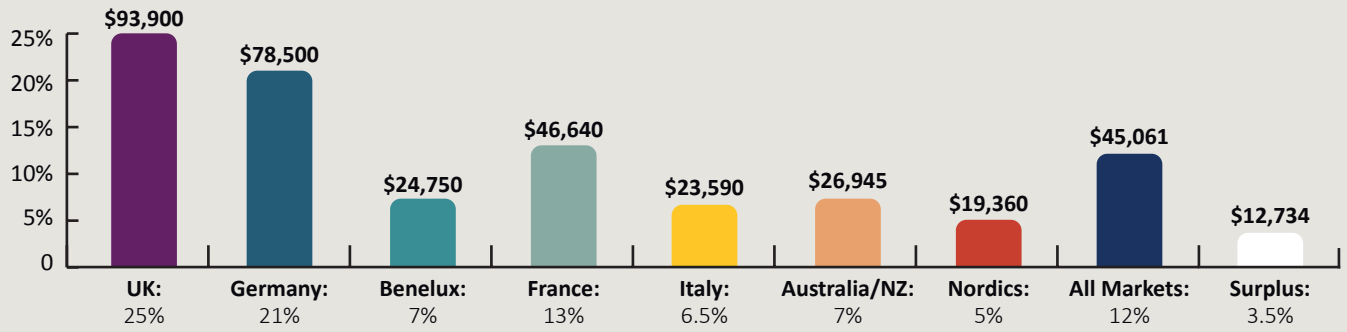
MISSION
The Great American West drives visitation and spend from international travelers by harnessing the collaborative potential of the region through creative alignment and co-operative marketing programs that leverage economies of scale.

VALUE
The Great American West provides inspiration and expertise through relevant, engaging content for travelers who seek adventure and prefer the region because we are home to America's most epic icons of nature.

The Great American West Cooperative & Supporting Partners

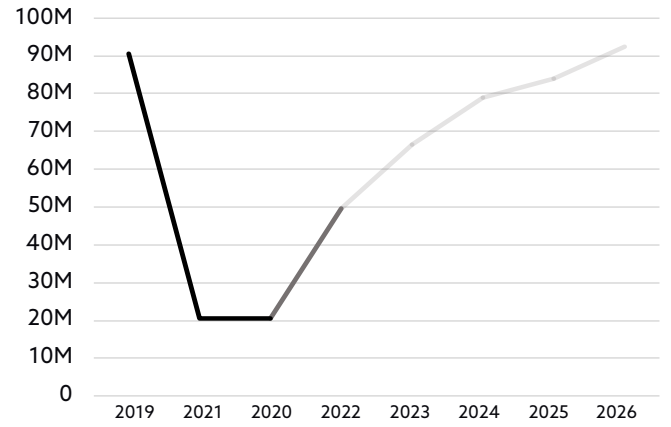
Budget & Recovery Overview

FY23 Budget Allocations (Total Budget: $371,480)

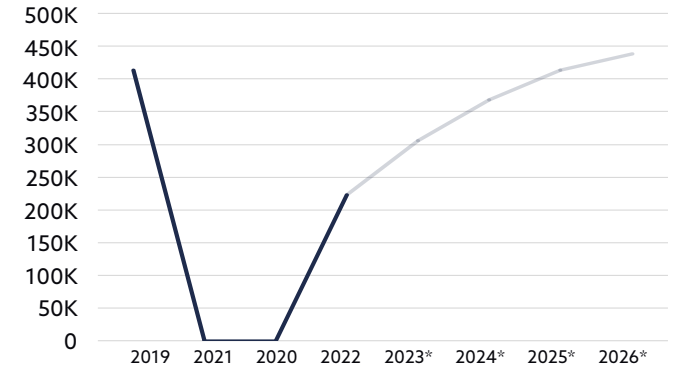


Recovery Forecast

ARRIVALS (US TRAVEL)

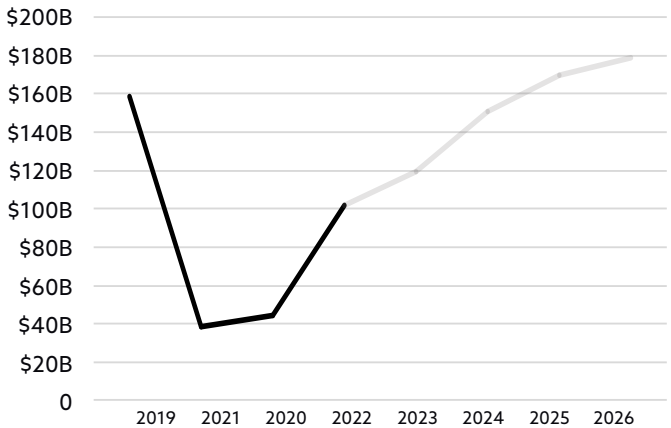


EST. ROOMS BOOKED (GAW)

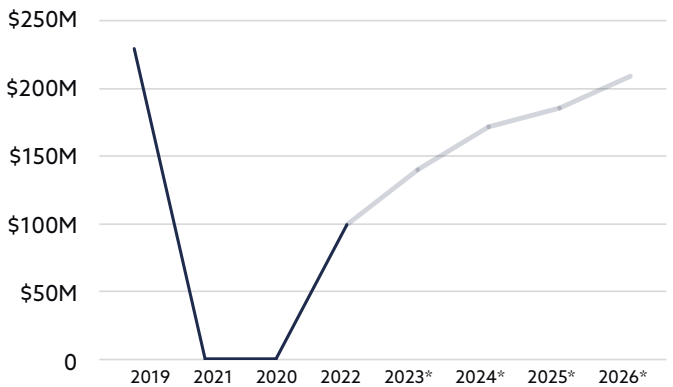


**Forecasted rate is based on the 2023 RMI TRIP Report and assumes the GAW is 10% behind US Travel's "% of 2019" predictions*

SPENDING (US TRAVEL)



EST. VISITOR SPEND (GAW)



**Forecasted rate is based on the 2023 RMI TRIP Report and assumes the GAW is 12% behind US Travel's "% of 2019" predictions.*

ROI: Idaho

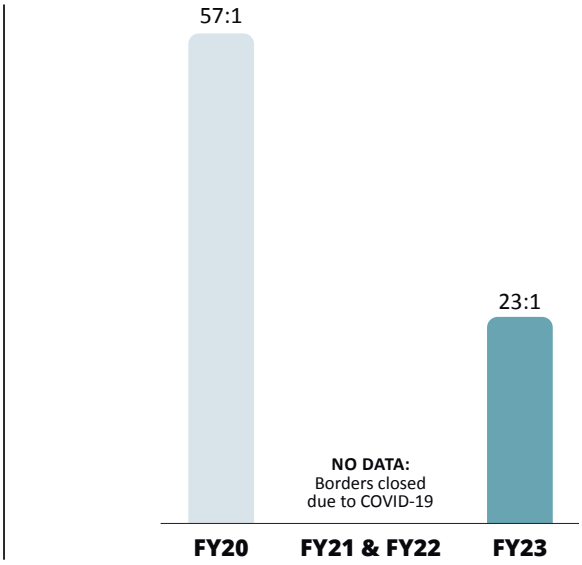
23:1

41% OF 2019

For every $1 spent with the Great American West cooperative, the state of Idaho received an 23:1 return on investment. That's down from a 57:1 ROI in FY20, the last year this data was collected.

Based on a $1.6 million regional investment and $99.4 million estimated visitor spend.





Note: All ROI calculations are proprietary models derived by RMI. International tourism trade partners provided the data included in this report exclusively to RMI on behalf of the state tourism departments of Idaho, Montana, North Dakota, South Dakota and Wyoming. Source: 2023 RMI TRIP Report.

INSIGHTS

Economies of scale with maximum return. Cooperative marketing and pooling of resources lower each state's individual investment, while stretching each dollar further and allowing for more markets targeted and additional activities executed. Efforts are streamlined allowing for workflow efficiencies. Capitalizing on complimentary product offerings helps capture and expand destination awareness, stretching ROI for all member states to the benefit of all.

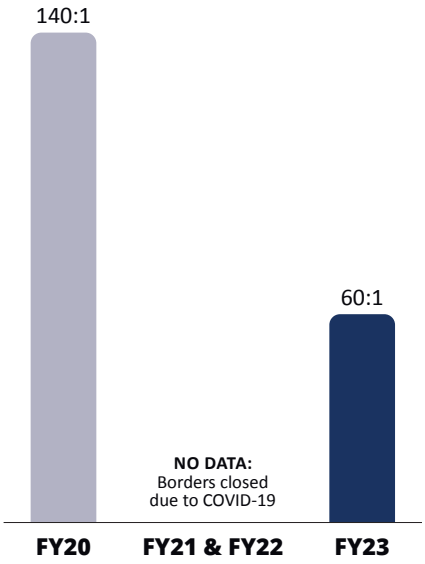
ROI: Region

60:1 43% OF 2019

For every $1 spent with the Great American West cooperative, the five states received a $60 return on investment. That's down from a 140:1 ROI in FY20, the last year this data was collected.

Based on a $1.6 million regional investment and $99.4 million estimated visitor spend.





Note: All ROI calculations are proprietary models derived by RMI. International tourism trade partners provided the data included in this report exclusively to RMI on behalf of the state tourism departments of Idaho, Montana, North Dakota, South Dakota and Wyoming. Source: 2023 RMI TRIP Report.

INSIGHTS

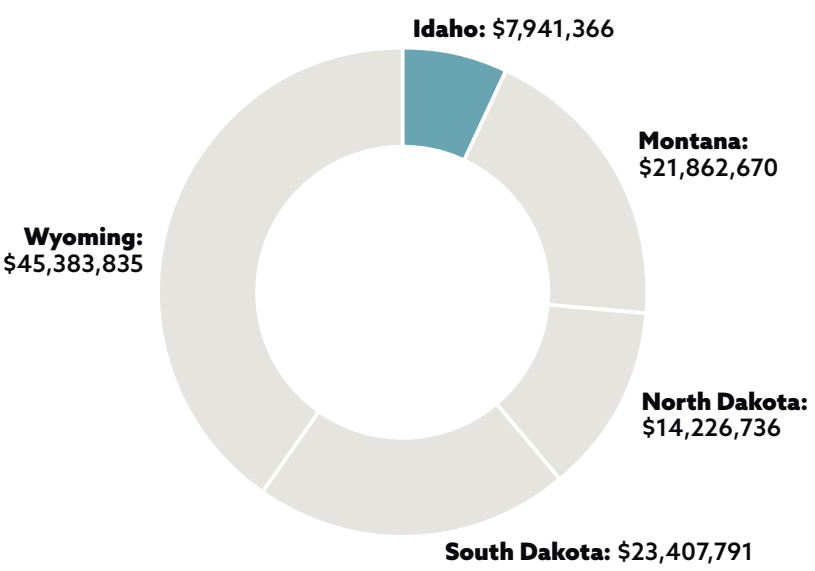
Positive ROI during a recovery time period. FY23 is the first full year of international visitation since the borders closed due to the COVID-19 pandemic and we endured two years of zero or very limited international visitation. While ROI is showing a decrease from FY20 and the last full year of international travel, we are still very encouraged by this healthy ROI figure. A 60:1 ROI figure indicates that recovery rates are solid and travelers are returning to our region. We are confident this figure will continue to rise and should exceed 2019 numbers again by 2027.

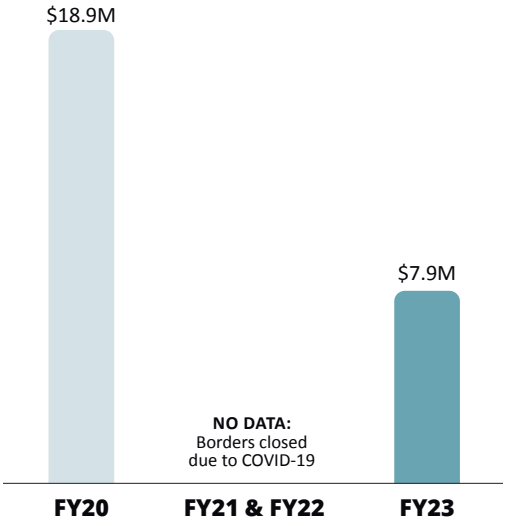
Est. Spend: Idaho

$7.94M 42% OF 2019

Travelers who visited Idaho from its seven markets spent an estimated $7,941,366 in FY23. That's down from an estimated $18,929,166 in FY20, the last year this data was collected.

All ROI calculations are proprietary models derived by RMI. Source: 2023 RMI TRIP Report.





INSIGHTS

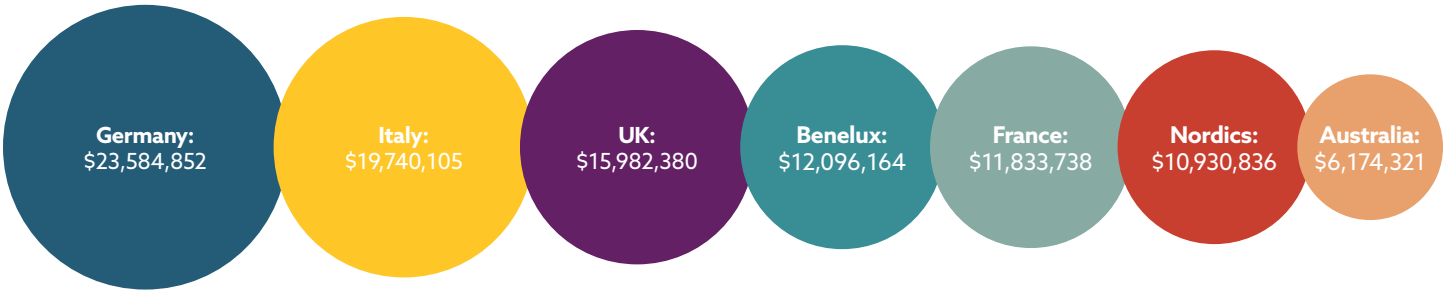
Tourism continues to show its resilience. Revised TRIP Report data for 2022 shows that estimated visitor spending is at 43% of 2019, meaning almost half of pre-pandemic spending numbers are recovered for the region. Based on U.S. Travel's newly released forecasts, the region is expected to reach $236 million in estimated visitor spend or 103% of 2019 marks by 2026 or 2027. Average daily spend for all GAW source markets exceed $400 per day, making the international visitor a lucrative market segment across the board.

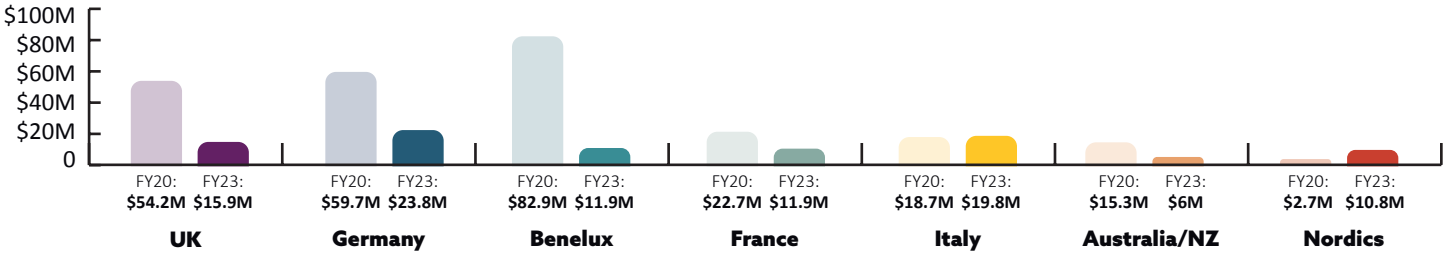
Est. Spend: Region

$99.4M 43% OF 2019

Travelers who visited the GAW spent an estimated $99,415,939 in FY23. That's down from an estimated $229,427,226 in FY20, the last year this data was collected.

All ROI calculations are proprietary models derived by RMI. Source: 2023 RMI TRIP Report.





INSIGHTS

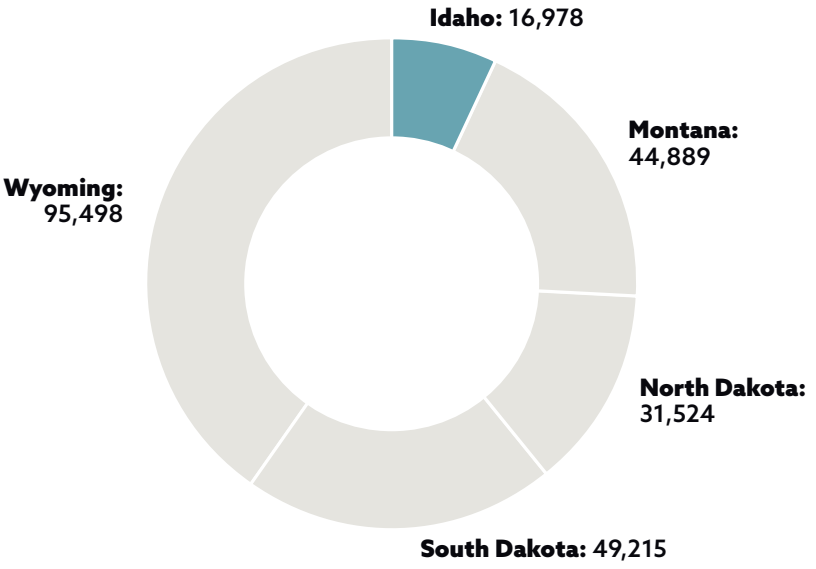
Spending trends will be one to watch. As we continue to work our way back to pre-COVID numbers, spending trends will be an area to watch closely. The phenomenon of "revenge travel" saw travelers spending more money on trips after saving up during the pandemic and being deprived of travel experiences. This is expected to dissipate in 2024 and spending habits should return to more normal rates, but the added challenge of high inflation worldwide could continue to impact actual spending figures.

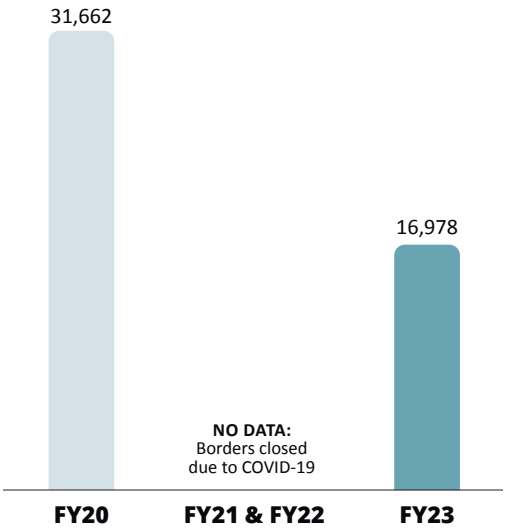
Est. Rooms Booked: Idaho

16,978 54% OF 2019

Tourism trade clients booked an estimated 16,978 rooms in Idaho with major tour wholesalers and operators in FY23. That's down from an estimated 31,662 rooms booked in FY20, the last year this data was collected.

All ROI calculations are proprietary models derived by RMI. Source: 2023 RMI TRIP Report.





INSIGHTS

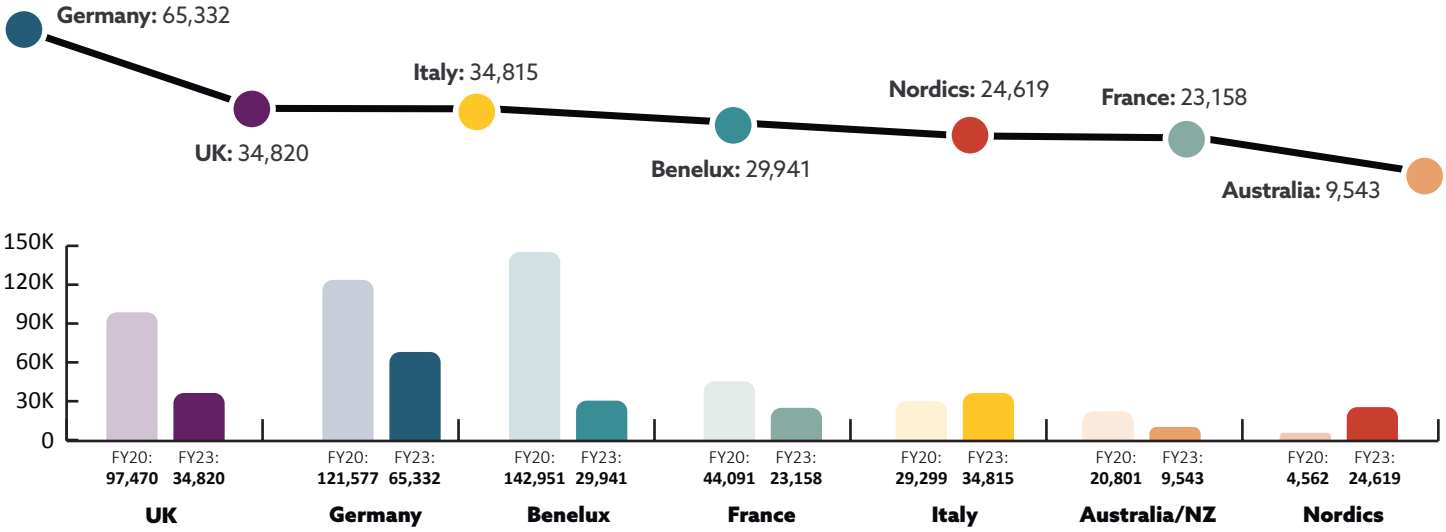
Recovery is on the way, but we have work to do. Halfway through 2023, US Travel reports that international overseas markets are 72% recovered compared to 2019, with Top 15 inbound markets United Kingdom (78%), Germany (84%), France (82%), Italy (81%) and Australia (70%) leading the way in recovery. Further recovery is expected to occur, but barriers remain, including economic factors such as high inflation and rising oil prices translating into higher transport and accommodations costs. Cost, perceived safety, distance and length of travel were all cited as top deterrents to visiting the USA, according to US Travel.

Est. Rooms Booked: Region

223,264 54% OF 2019

In FY23, travelers booked an estimated 223,264 rooms in the region with major tour wholesalers and operators. That's down from an estimated 412,971 rooms in FY20, the last year this data was collected.

All ROI calculations are proprietary models derived by RMI. Source: 2023 RMI TRIP Report.



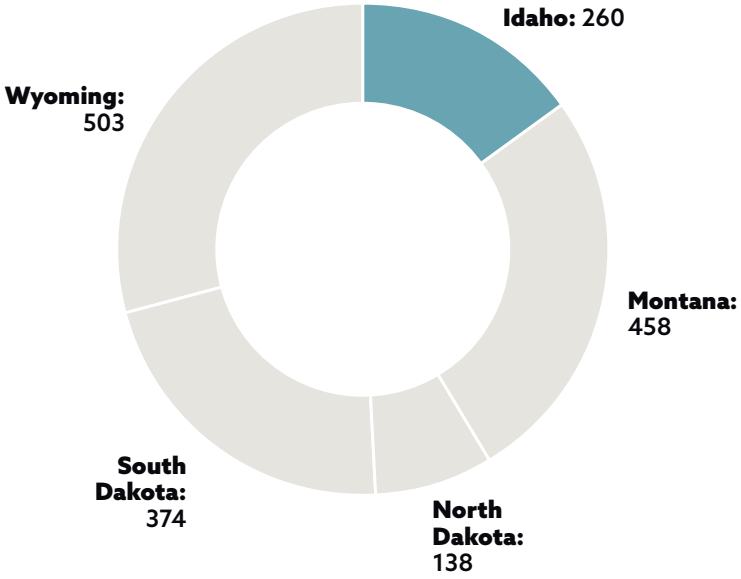
INSIGHTS

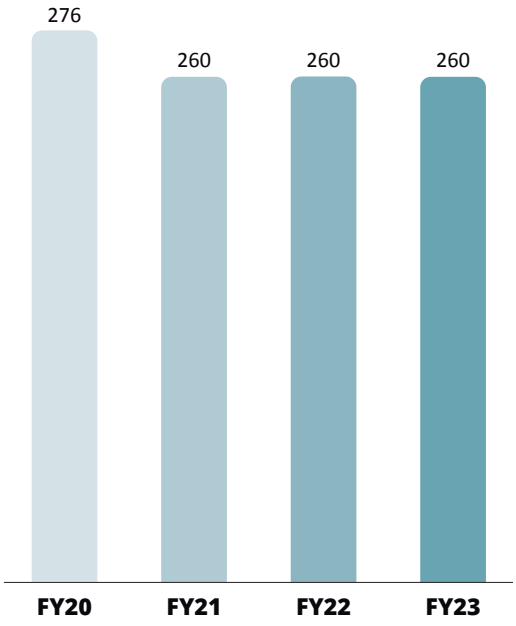
Booking doesn't look the same today. The pandemic caused changes in the travel trade landscape across the globe, with workforce shortages, business closures and limited product availability. As recovery begins, those challenges remain in some capacities, and we have seen tour operators struggle to book itineraries in traditional ways. Due to suppliers dropping ITO contracts during the pandemic, rooms and activities can be harder to find, and TOs are resulting to using multiple avenues to book one trip – ITOs, OTAs, bed banks or even direct. It will be important to educate suppliers about reinstating ITO contracts to ensure our region remains easily bookable.

TOs Selling Idaho

260 = YOY

In FY23, 260 tour operators offered overnights in Idaho. That's consistent with the COVID years – 260 in both FY22 and FY21 – and a small drop from pre-COVID (276 in FY20). *Source: 2023 RMI TRIP Report*





Note: The Great American West was not active in the Australian and Nordic markets in FY21 due to budget cuts stemming from the COVID-19 global pandemic.

INSIGHTS

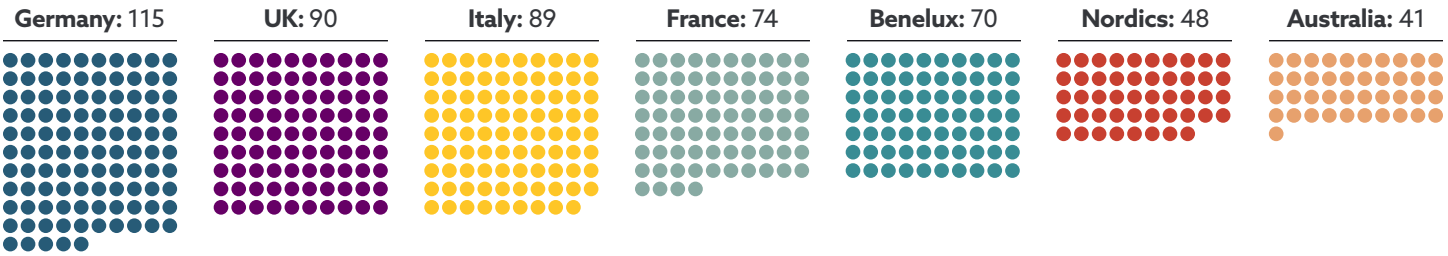
We have what they want: The increase in TOs offering Idaho product reinforces that the Great American West region is the ideal getaway for post-pandemic travelers. We continue to offer wide-open spaces, natural wonders, smaller crowds and a safer travel experience.

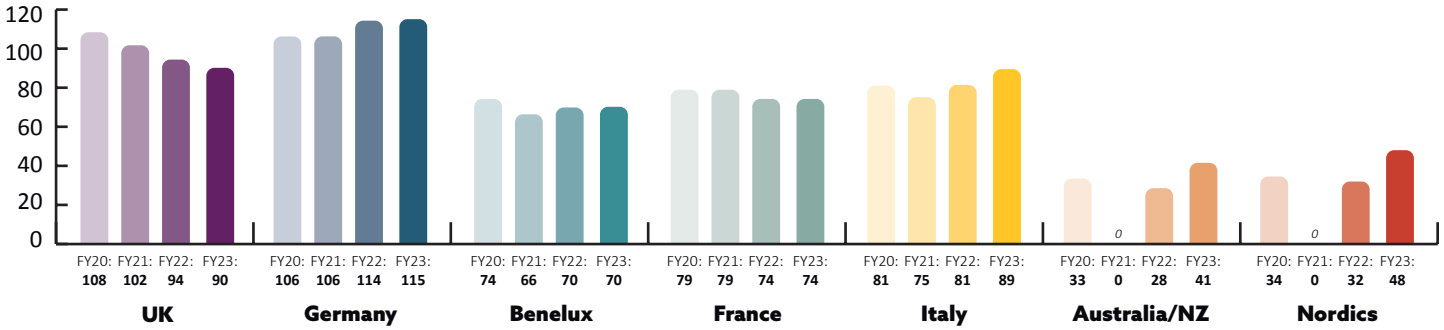
TOs Selling the Region

527 ▲ +7% YOY

In FY23, 527 tour operators offered overnights in the Great American West. That's a steady climb from the COVID years – 493 in FY22 and 486 in FY21 – and even higher than pre-COVID (515 in FY20).

Source: 2023 RMI TRIP Report





Note: The Great American West was not active in the Australian and Nordic markets in FY21 due to budget cuts stemming from the COVID-19 global pandemic.

INSIGHTS

1. **More product on the shelf.** Tour operators can see the GAW appeals to post-COVID travelers, with 34 new operators now selling the region.

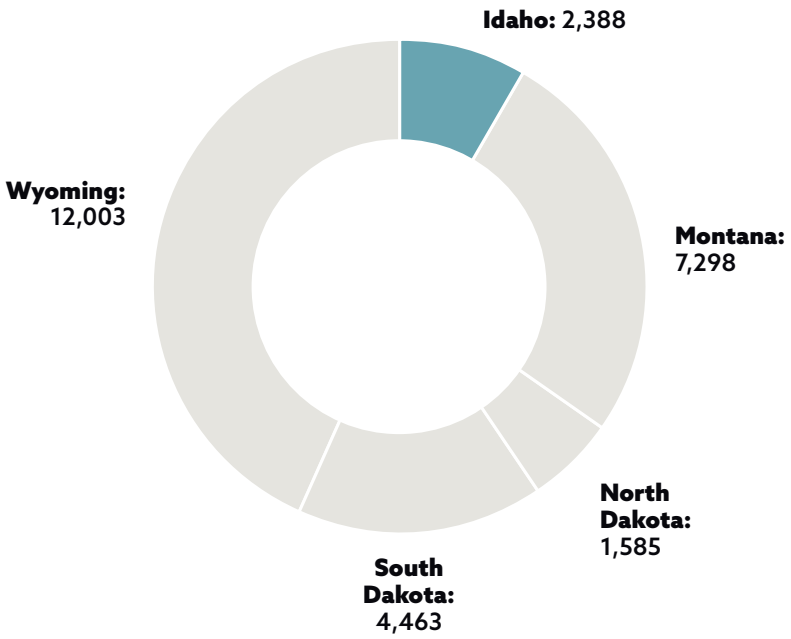
2. **More product = faster recovery.** More available product will drive a stronger recovery rate for the region, and help us meet expectations of post-COVID visitation numbers by 2026.

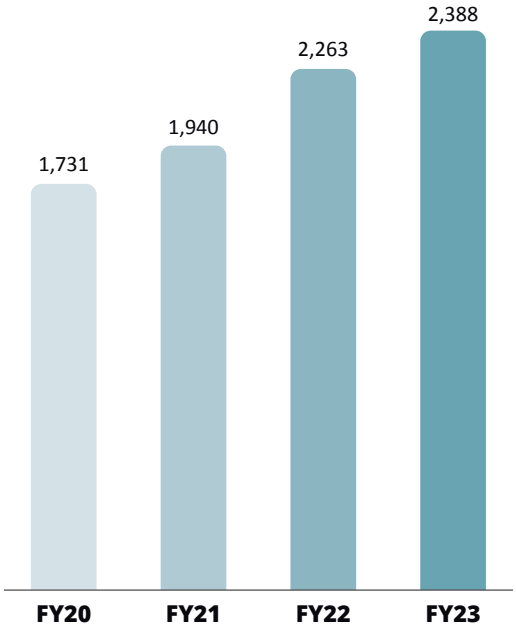
Overnights Offered: Idaho

2,388 ▲ +5.5% YOY

A total of 2,388 Idaho overnights were offered in FY23. That's even higher than pre-COVID (1,731 in FY20).

Source: 2023 RMI TRIP Report





Note: The Great American West was not active in the Australian and Nordic markets in FY21 due to budget cuts stemming from the COVID-19 global pandemic.

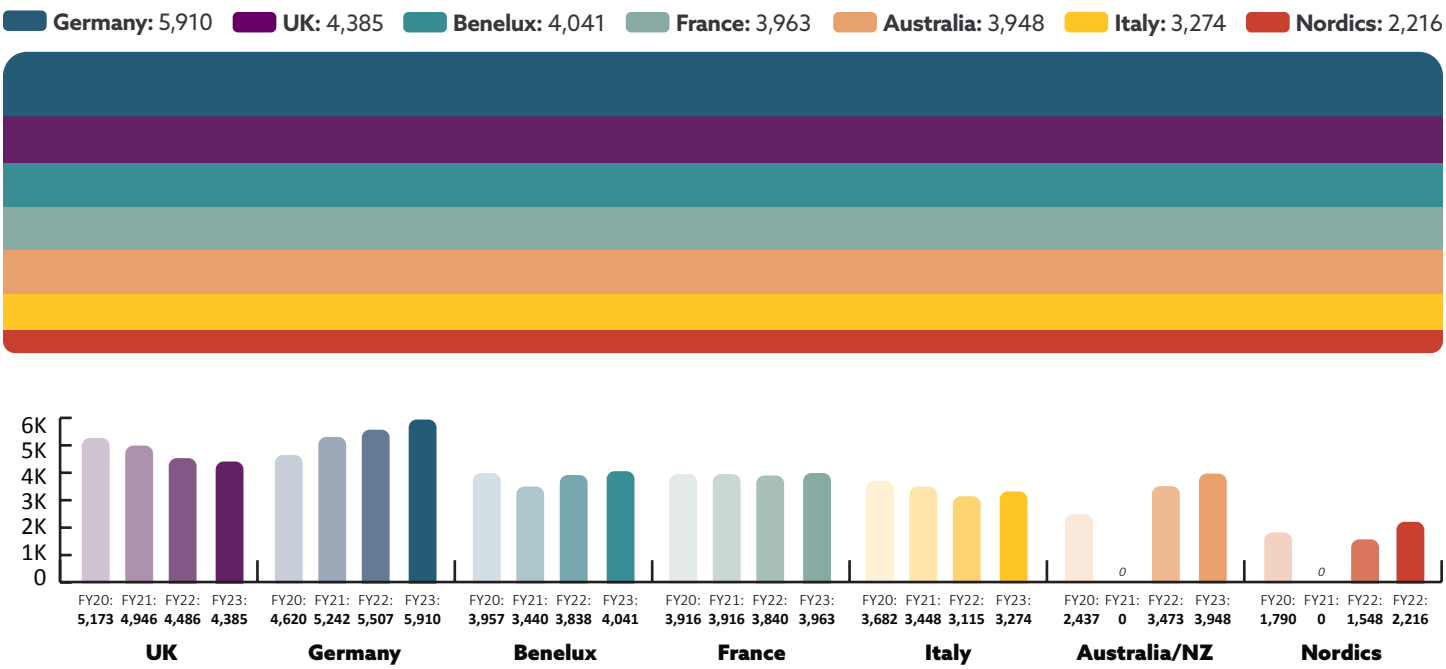
INSIGHTS

Top cities: 53 Idaho communities (up from 47 in FY22) are offered by international tour operators across the GAW program, with Boise (117), Idaho Falls (104) and Twin Falls (95) receiving the most overnights offered.

Overnights Offered: Region

27,737 ▲ +7.5% YOY

A total of 27,737 overnights were offered in the region in FY23. That's up from 25,800 in FY22, and even tops pre-COVID (25,575 in FY20). *Source: 2023 RMI TRIP Report*



Note: The Great American West was not active in the Australian and Nordic markets in FY21 due to budget cuts stemming from the COVID-19 global pandemic.

INSIGHTS

1. **Past the pandemic curse.** Overnights offered for the region have already surpassed pre-pandemic numbers. The region saw 25,575 overnights offered in 2020, and we are well past that benchmark.

2. **GAW support is strong.** Every market saw overnight growth for the GAW aside from the UK, indicating strong support for our five-state region and faith that we provide what travelers are seeking.

New Product: Region

NEW ITINERARIES

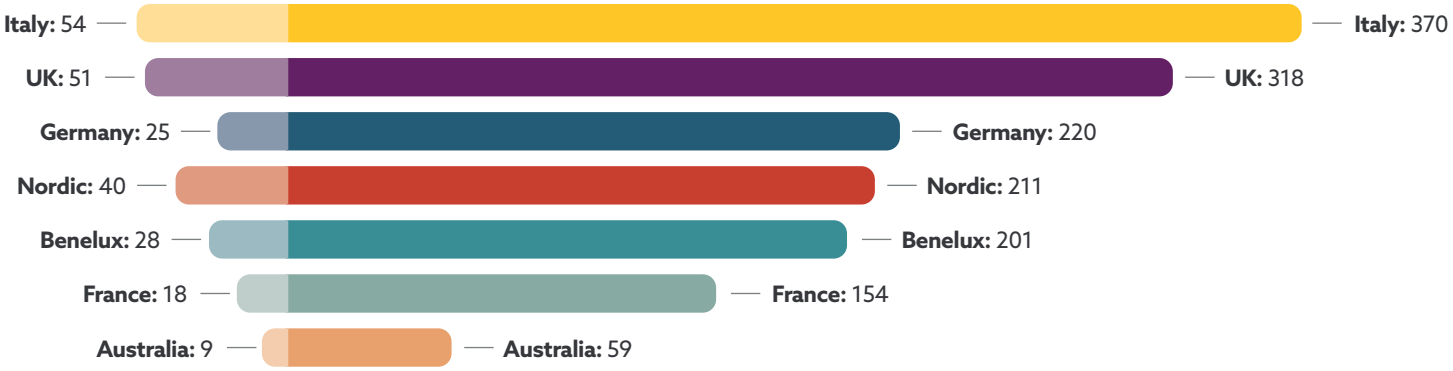
225 ▲ +15% YOY

NEW OVERNIGHTS

1,533 ▲ +1.4% YOY

The seven overseas markets added 225 regional itineraries and 1,533 overnights to their product offerings in FY23. *(5 itineraries [2.5%] did not include overnight data, so this metric is higher than reported.)*

NEW ITINERARIES | NEW OVERNIGHTS



Idaho

ITINERARIES

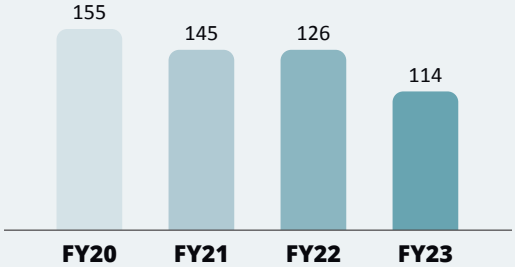
52 ▲ +18% YOY

OVERNIGHTS

114 ▼ −9.5% YOY

In FY23, GAW markets added 52 Idaho itineraries and 114 Idaho overnights to their product listings.

OVERNIGHTS



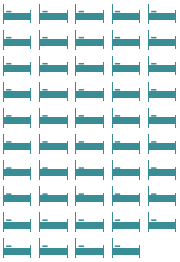
Trade Fams: Region

FAMS	PROFESSIONALS	OVERNIGHTS
51 ▲ +467% YOY	44 ▼ −18.5% YOY	206 ▬ = YOY

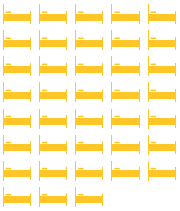
With borders open for the entire fiscal year for the first time since pre-COVID, the Great American West region saw 51 trade fams, 44 professionals hosted and 206 overnights in the five states in FY23.

OVERNIGHTS

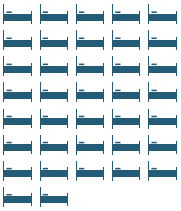
Benelux: 49



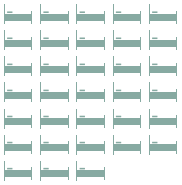
Italy: 38



Germany: 37



France: 33



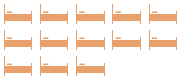
UK: 20



Nordics: 15



Australia: 13



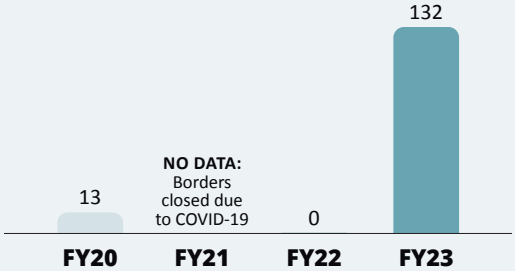
Idaho

FAMS	PROFESSIONALS	OVERNIGHTS
49	43	132

49 trade fams brought 43 trade professionals and 132 overnights hosted to Idaho in FY23.

Note: Year-over-year data is not available because there were no Idaho trade fams in FY22.

OVERNIGHTS



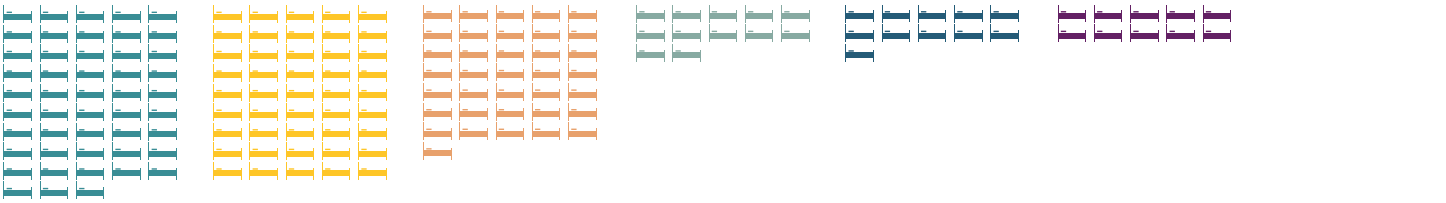
Press Trips: Region

TRIPS	PROFESSIONALS	OVERNIGHTS
17 ▲ +41.7% YOY	22 ■ = YOY	162 ▲ +35 YOY

With borders open for the entire fiscal year for the first time since pre-COVID, the GAW saw 17 press trips, 22 professionals hosted and 162 overnights in the region in FY23. Those are significant hikes in trips and overnights from FY22.

OVERNIGHTS

Benelux: 48 | **Italy:** 45 | **Australia:** 36 | **France:** 12 | **Germany:** 11 | **UK:** 10 | **Nordics:** 0

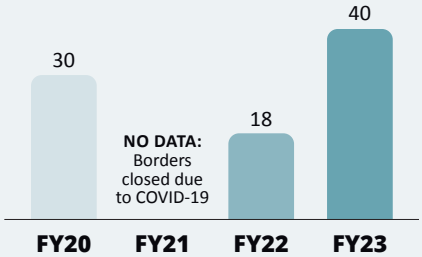


Idaho

TRIPS	PROFESSIONALS	OVERNIGHTS
6 ▲ +20% YOY	11 ▲ +37.5% YOY	40 ▲ +122% YOY

The seven GAW markets brought 6 press trips, 11 journalists and 40 overnights hosted to Idaho in FY23.

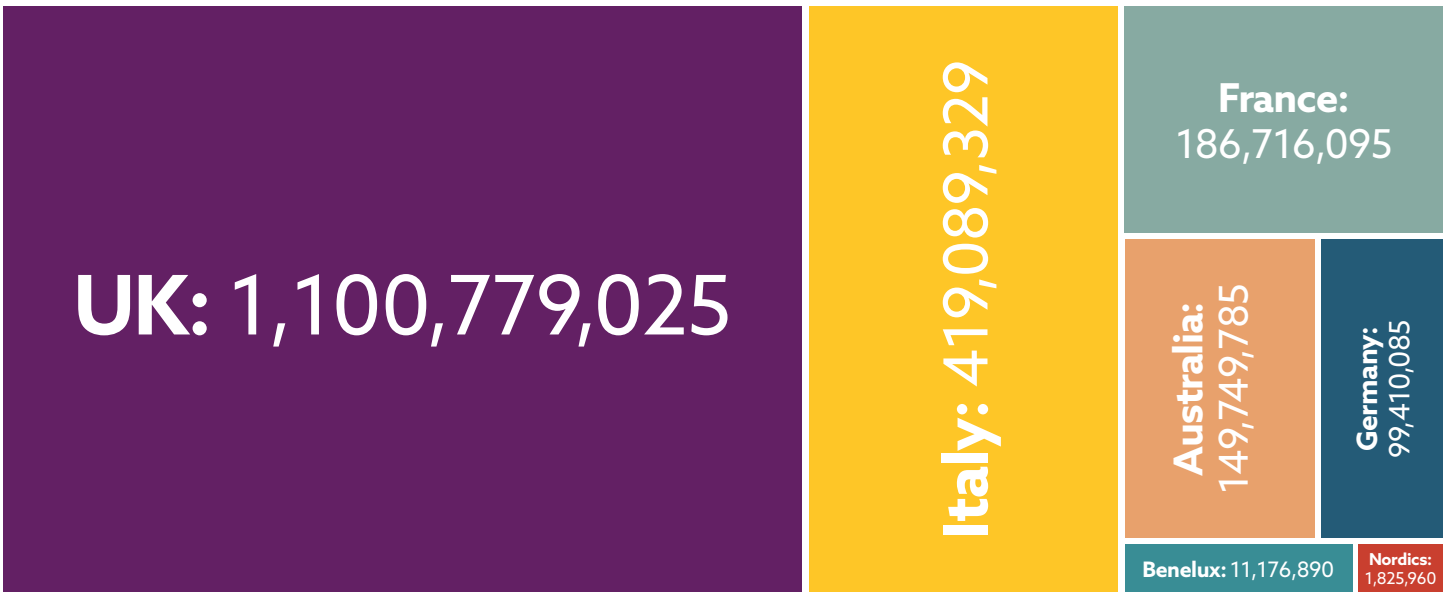
OVERNIGHTS



Earned Media Reach: Region

1.9B ▲ +189% YOY

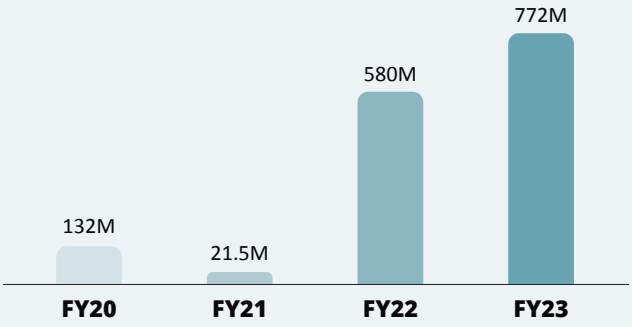
In FY23, the Great American West region reached 1,968,747,169 readers through 512 published articles with an ad value equivalency (AVE) of $21,975,146.



Idaho

772M ▲ +33% YOY

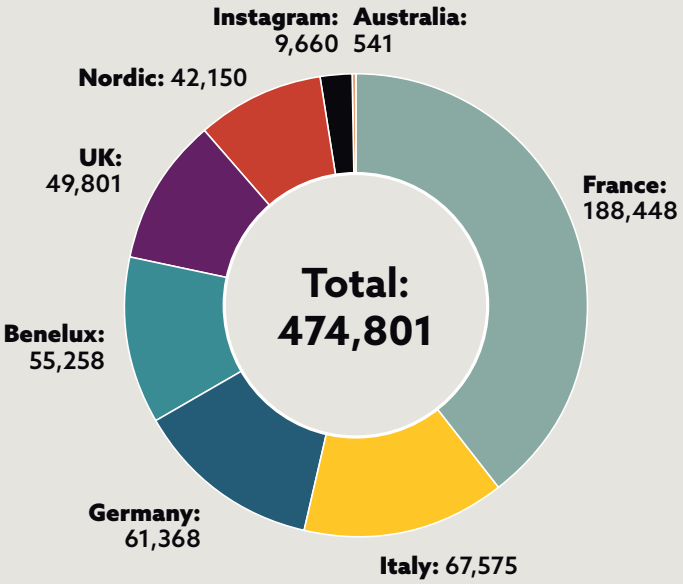
In FY23, the state of Idaho reached 772,120,566 readers through 351 published articles with an AVE of $8,873,433.07.



Social Media: Region

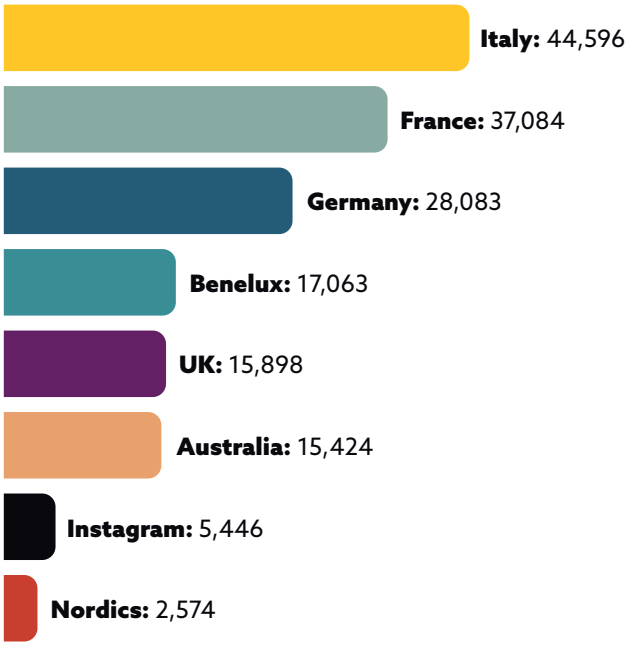
Engagements

474K −50% YOY



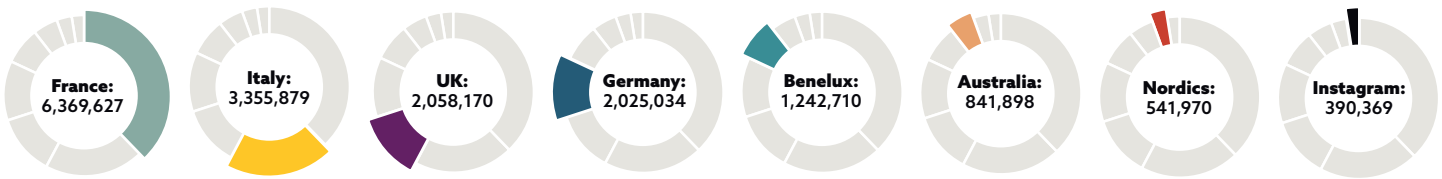
Followers

166K +11% YOY



Reach

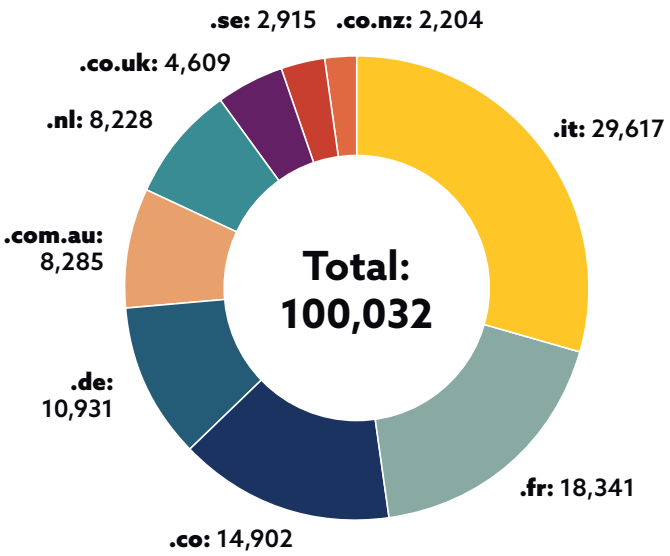
16,825,657 −18% YOY



Website: Region

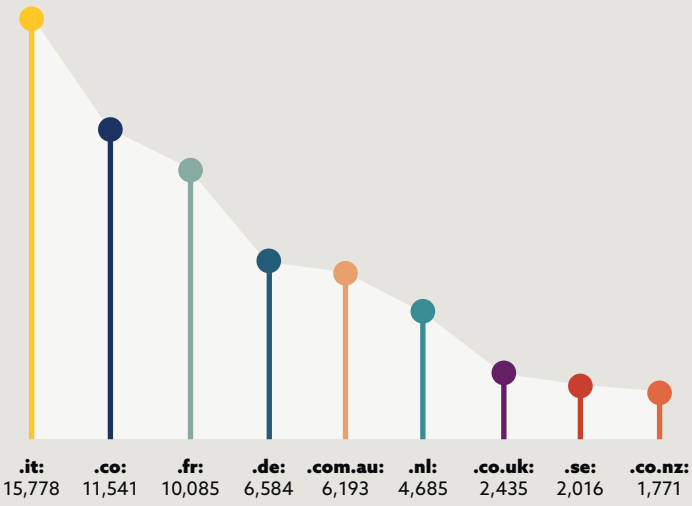
Pageviews

100K ▲ +0.4% YOY



Users

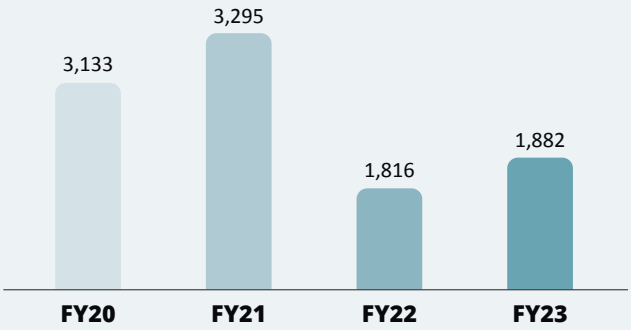
61,088 ▼ −1.5% YOY



Idaho

1,882 ▲ +3.6% YOY

In FY23, web users across the world generated 1,882 pageviews on eight in-market Idaho landing pages.



Digital Downloads: Region

GAW Guide

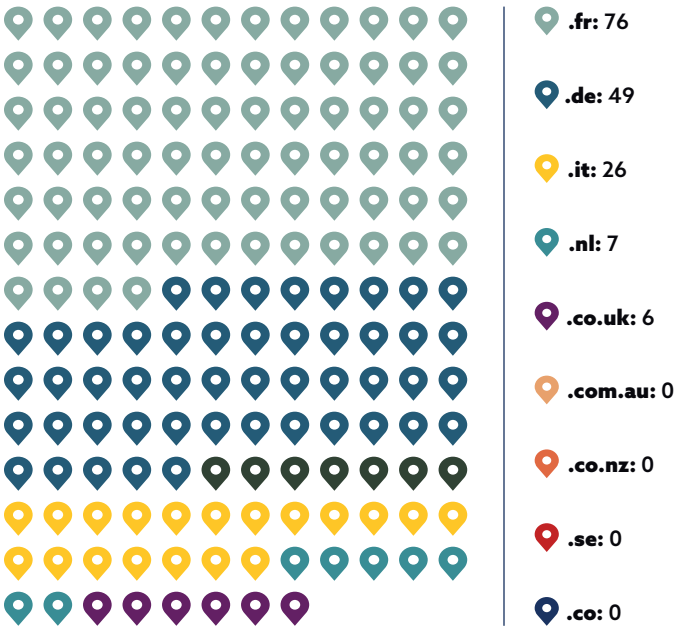
1,687 −33% YOY



.it:	.fr:	.de:	.co:	.nl:	.co.uk:	.com.au:	.se:	.co.nz:
612	399	242	121	120	85	81	21	6

Regional Map

164 +73% YOY



Idaho

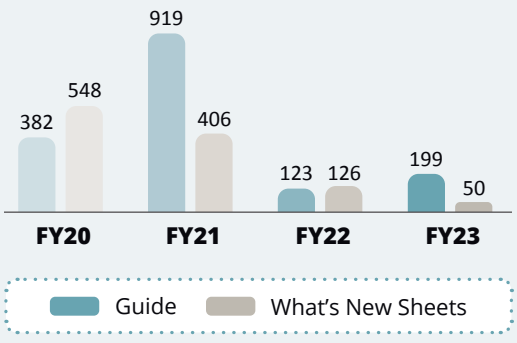
GUIDE

199 +61.8% YOY

WHAT'S NEW SHEETS

50 −60% YOY

Users from nine in-market websites downloaded 249 Idaho materials in FY23. That's up from 149 in FY22.

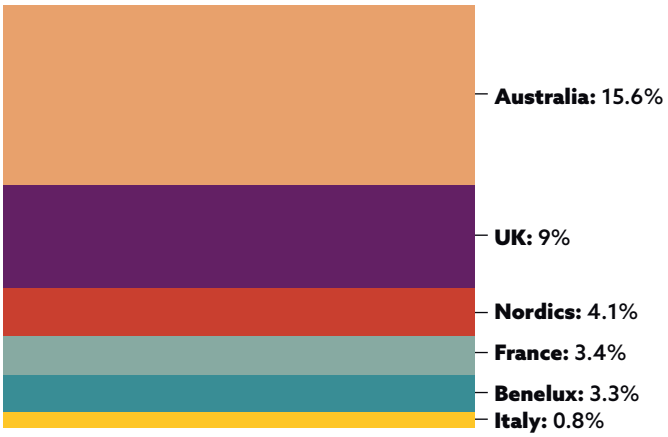


Newsletter

Average Click Rate

Note: Germany does not track this data

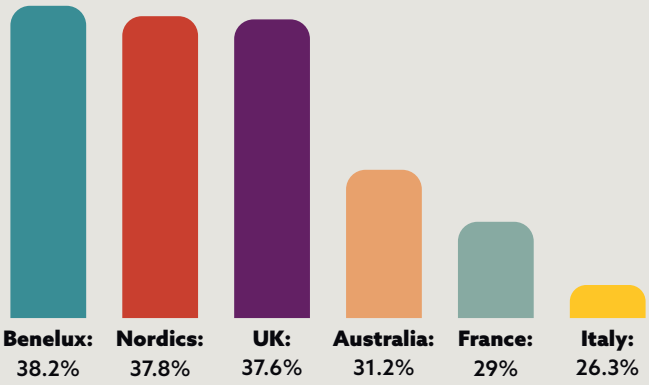
6.1% ▲ +116% YOY



Average Open Rate

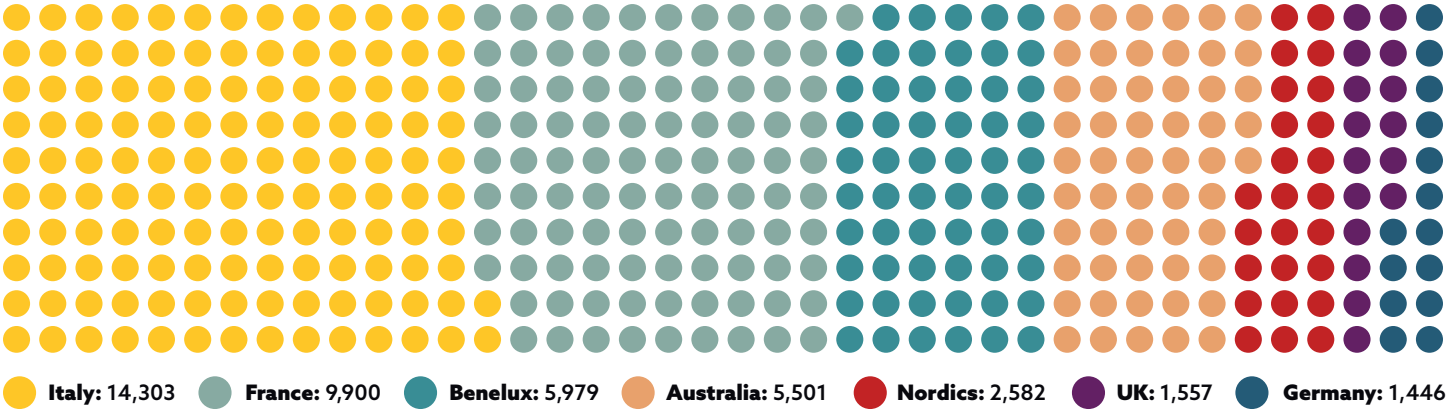
Note: Germany does not track this data

33% ▲ +14% YOY



Contacts

41,268 ▲ +3.9% YOY



FY23 In Review

Start of FY23: July 1, 2022.

Mid-Year Meeting: Nov. 15. Boise, Idaho.

Parisian Metro Campaign: Nov. 16-29. GAW ad placed across 60 metro stations in Paris; 26 confirmed bookings / 312 overnights through booking partner Cercle des Voyages).

07 08 09 10 11 12

ICORT: Oct. 17-19. Twin Falls, Idaho.

UK Sales Mission: Dec. 3-9. London, UK. Met with 74 trade, airline, receptive & media professionals.

Visit USA Trade Workshop: Dec. 14. Florence, Italy. Met with 34 travel agencies & tour operators.

Wyoming Governor's Conference on Tourism: Jan. 29-31. Cheyenne, Wyoming.

South Dakota Governor's Conference on Tourism: Jan. 17-19. Pierre, South Dakota.

01

German and Benelux Sales Mission: March 18-24. Zurich, Switzerland; Amsterdam & Maarssen, Netherlands. Met with 79 trade & media.

FDM USA Day & Swanson's America Day: March 26. Copenhagen, Denmark, & Osby, Sweden. Standing-room-only presentation and distribution of hundreds of GAW materials.

03

North Dakota Travel Industry Conference: May 15-17. Bismarck, North Dakota.

IPW: May 20-24. San Antonio, Texas.

05

02

Visit USA Australia Expos: Feb. 20-22. Brisbane, Melbourne & Sydney, Australia. Trained 600-plus agents & met with 21 key operators & wholesalers.

04

GAW Summit Meeting & IRU: April 20-26. Boise, Idaho.

Montana Governor's Conference on Tourism: April 23-25. Helena, Montana.

06

End of FY23: June 30, 2023.

FY23 ANNUAL REPORT

GREAT AMERICAN WEST
& STATE OF IDAHO

