Fiscal Year 2024

ANNUAL REPORT

Great American West

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

IDAHO TOURISM

Table of Contents

03 INTRODUCTION

Executive Summary 03
Program Overview 04
Budget & Recovery Overview 05
Return on Investment 06
Estimated Visitor Spend 07
Estimated Rooms Booked 08

09 TRADE

Tour Operators Offering Product 09
Overnights Offered 10
New Product 11
Trade Fams 12

13 MEDIA

Press Trips 13
Earned Media Coverage 14

15 DIGITAL

Social Media 15
Website 16
Digital Downloads 17
Newsletter 18

19 YEAR IN REVIEW

FY24 Timeline 19

Executive Summary

Dear Great American West stakeholders,

As we close out another fiscal year of significant milestones and achievements, we're proud to take a moment to share in our collective success with you all.

In our second full fiscal year of welcoming international visitation since 2019, we continued to reinforce our position as a major destination for global tourism while remaining steadfast in upholding our commitment to driving global visitation and spend for the region. By capturing growth in the number of travel trade selling (+2%) and booking (+14%) the region, we were able to help bring in $140 million in estimated visitor spend (+30.5%) to our destinations – a 76:1 return on investment (+28%) for the cooperative program.

Between our collaborative efforts and strategic initiatives, we're still on track to achieving our three-year goals across seven overseas markets by FY26:

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.

In the following report, you'll find a high-level breakdown of our efforts and key performance indicators, but there are a few callouts to note:

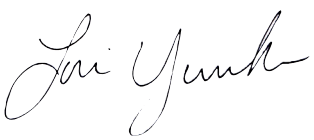
- 537 tour operators offered room nights in the region (+2%), showing continued demand for increased visitation to our destinations.
- 171 new regional itineraries featuring 1,654 overnights in the region were offered (+8%), providing increased accessibility for travelers to book us for their next trip.
- You all helped to welcome 66 trade professionals (+50%) and 25 media professionals (+14%) to the region on 59 fam tours (+16%) and 20 press trips (+18%), driving an increase in consumer awareness of the experiences possible within this region.
- We generated a value of $15 billion in earned media coverage, reaching over 1.8 billion readers, further providing essential information and inspiration to potential travelers.
- Significant growth in webpage views (+50%) across our in-market websites indicated the steady demand for visitation to the Great American West.

Over the past year, we formed new partnerships with the travel trade and media, launching 18 co-branded campaigns, attending seven key consumer shows and executing two successful sales missions to the German- and Italian-speaking markets, all to enhance travelers' awareness, perception and consideration of visiting the Great American West.

Our 29th annual International Roundup event sold out on both the buyer and supplier sides for the first time since 2019. The show attracted 74 regional destinations, attractions and hoteliers, and 48 international tour operators, inbound tour operators and airlines to Casper, Wyoming. We were fortunate to have critical tourism advocates for the region attend the event, including Wyoming Governor Mark Gordon and several representatives of the state legislature.

Our gratitude belongs to each of you – our Great American West fam – for all that you do to help drive the success of this cooperative program and to welcome international visitors to this spectacular corner of the world. We appreciate your partnership and support and look forward to another bright year ahead.

With great appreciation,



Lori Yunker,
RMI VP of Marketing



Kim Snape,
RMI Director of Global Programs

About the Program

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:

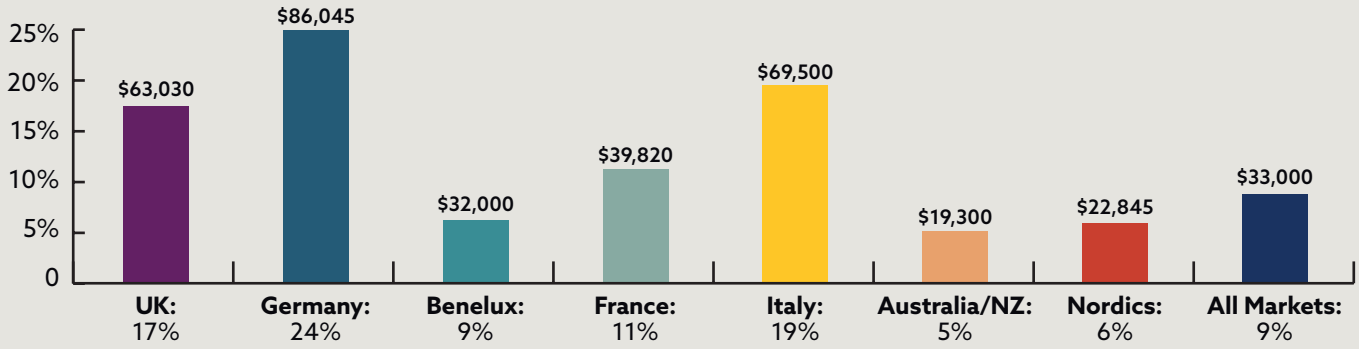
The Great American West provides inspiration and expertise through relevant, engaging content for travelers who seek adventure and prefer the region because we are home to America's most epic icons of nature.

The Great American West Cooperative & Supporting Partners

Budget & Recovery Overview

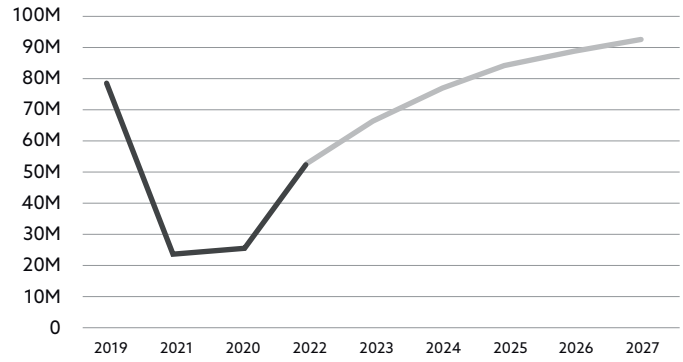
FY24 Budget Allocations (Total Budget: $365,540*)

**Beginning GAW FY24 Budget: $335,000 | FY23 Surplus: $25,540 | Denver Italian Mission Fee: $5,000*



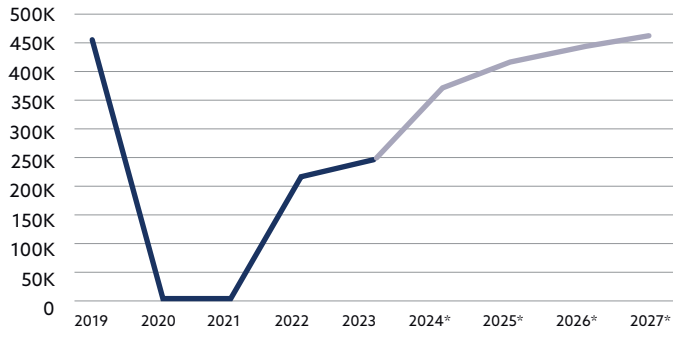
Recovery Forecast

ARRIVALS (US TRAVEL)



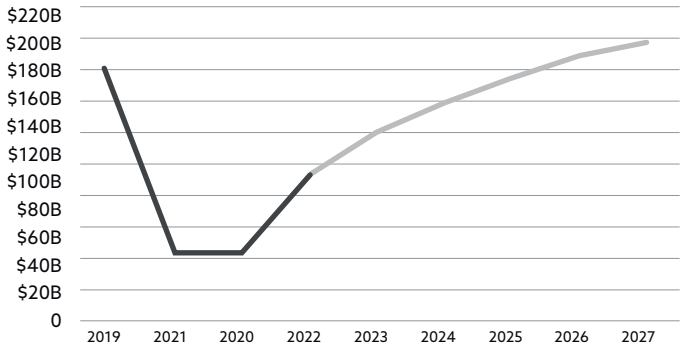
**US Travel forecasts last updated January 2024*

EST. ROOMS BOOKED (GAW)



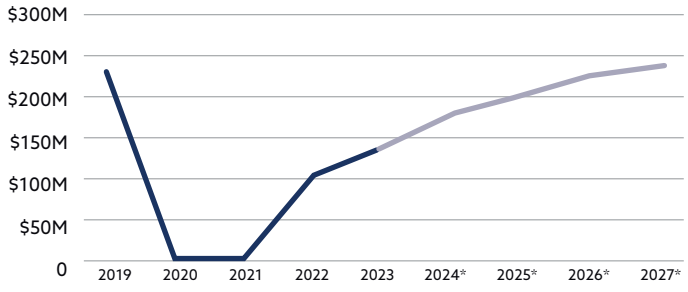
**Forecasted rate is based on 2023 RMI TRIP Report™ data and assumes the GAW is 17% behind US Travel's "% of 2019" predictions for 2022 (the most recent year this data was available).*

SPENDING (US TRAVEL)



**US Travel forecasts last updated January 2024*

EST. VISITOR SPEND (GAW)



**Forecasted rate is based on 2023 RMI TRIP Report™ data and assumes the GAW is 9% behind US Travel's "% of 2019" predictions. **US Travel has not released "% of 2019" estimates for 2028; these figures follow 2024 RMI TRIP Report™ data and assume a 9% recovery rate over the previous year.*

Return on Investment

Great American West

76:1 ▲ +28% YOY



FY23: 60:1

$1 = $$$$$$$$$$$$
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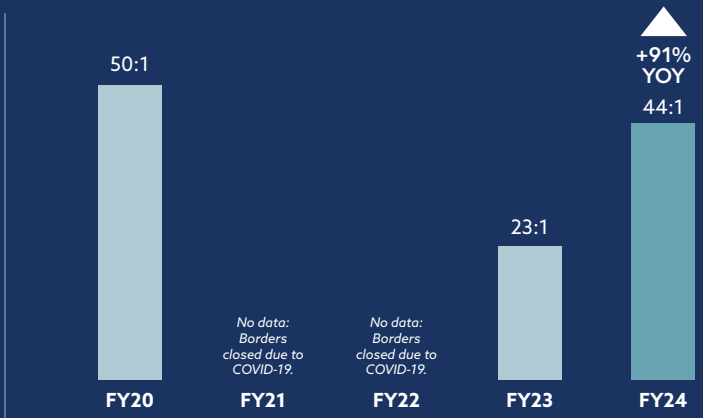
FY24: 76:1

$1 = $$$$$$$$$$$$
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Idaho

44:1 ▲ +91% YOY





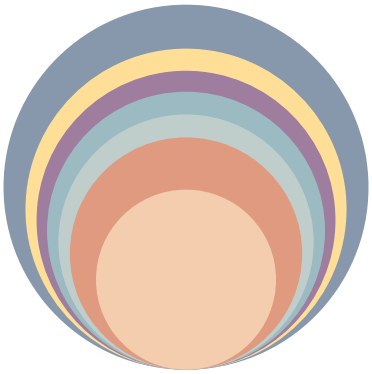
Based on a $1.6 million regional investment and $140.2 million estimated visitor spend.

Estimated Spend

Great American West

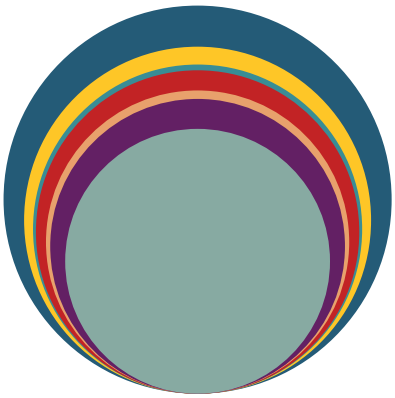
$140.2M ▲ +31% YOY

FY23: $107,396,749



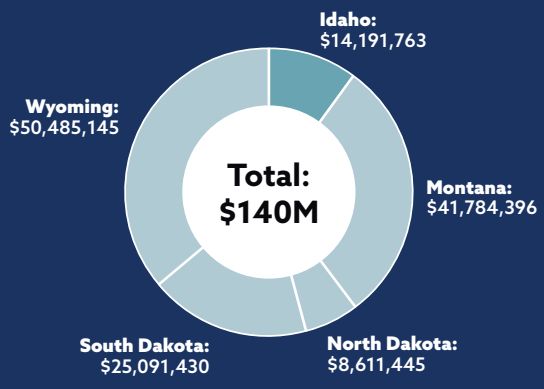
- **Germany:** $25,806,140
- **Italy:** $19,966,185
- **UK:** $17,305,540
- **Benelux:** $14,968,500
- **France:** $12,621,110
- **Nordics:** $10,450,638
- **Australia:** $6,278,636

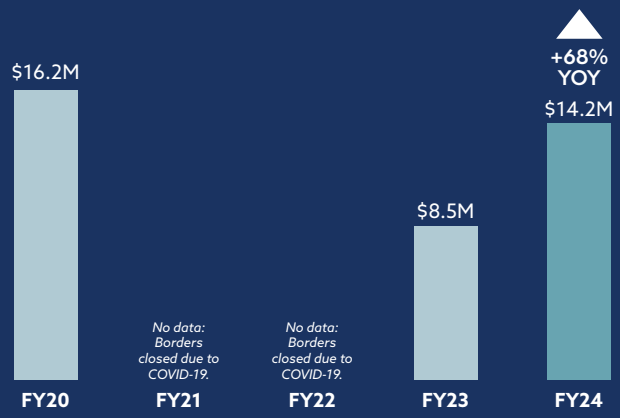
FY24: $140,164,179



- **Germany:** $28,763,774
- **Italy:** $22,994,577
- **Benelux:** $20,565,954
- **Nordics:** $20,295,180
- **Australia:** $17,560,481
- **UK:** $16,591,364
- **France:** $13,392,849

Idaho





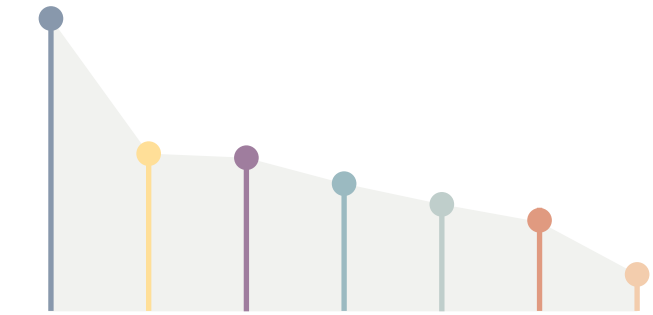
Source: 2024 RMI TRIP Report™

Estimated Rooms Booked

Great American West

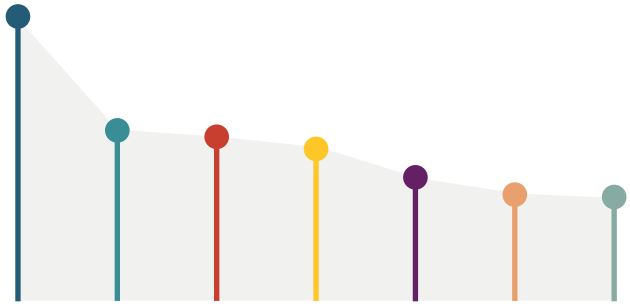
249,393 ▲ +14.5% YOY

FY23: 217,848



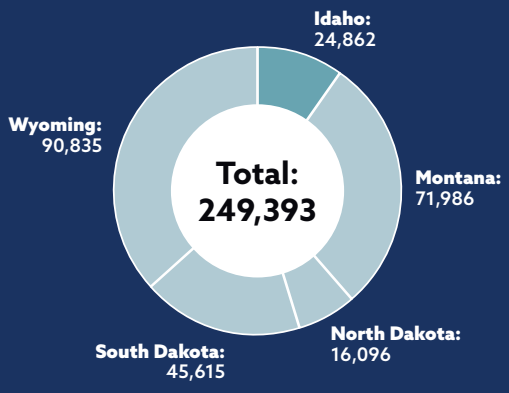
Germany: 65,332 | Italy: 34,845 | UK: 34,820 | Benelux: 29,937 | France: 23,158 | Nordics: 20,214 | Australia: 9,542

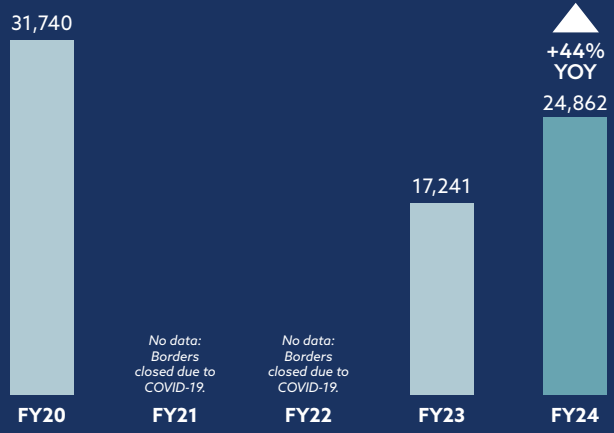
FY24: 249,393



Germany: 62,803 | Benelux: 39,474 | Nordics: 37,035 | Italy: 33,471 | UK: 29,522 | Australia: 23,957 | France: 23,131

Idaho





Source: 2024 RMI TRIP Report™

TOs Selling Us

Great American West

537 ▲ +2% YOY

FY23: 527



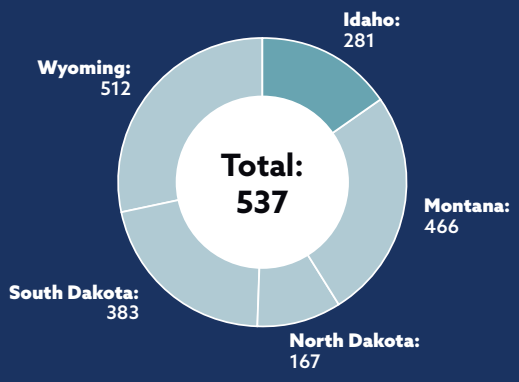
Germany: 115 | UK: 90 | Italy: 89 | France: 74 | Benelux: 70 | Nordics: 48 | Australia: 41

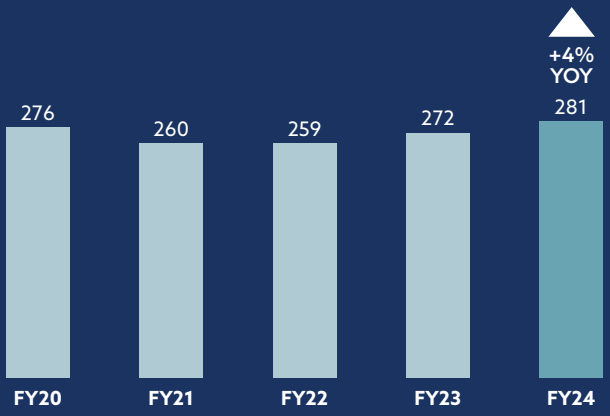
FY24: 537



Germany: 119 | UK: 95 | Italy: 85 | France: 76 | Benelux: 71 | Nordics: 50 | Australia: 41

Idaho



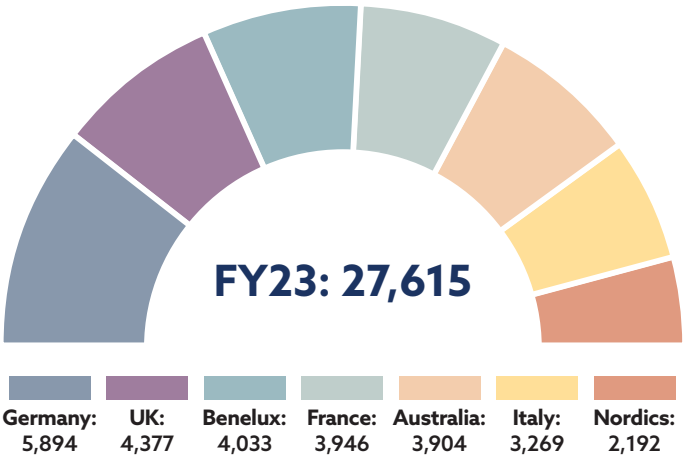


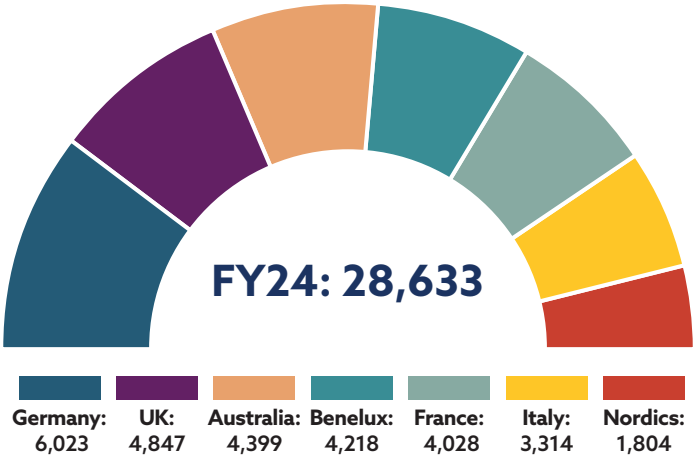
Source: 2024 RMI TRIP Report™

Overnights Offered

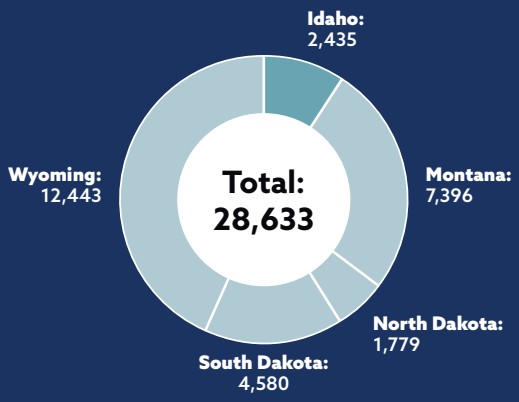
Great American West

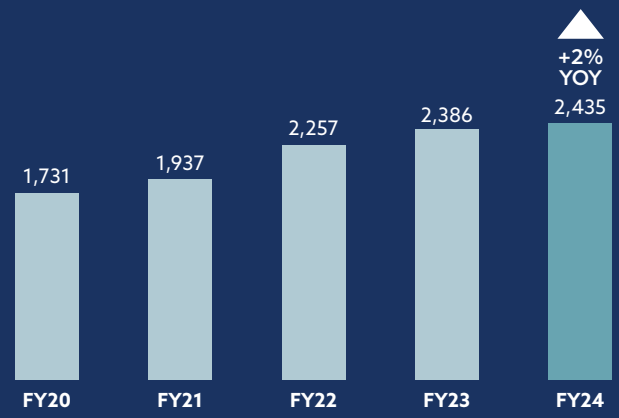
28,633 ▲ +4% YOY





Idaho





Source: 2024 RMI TRIP Report™

New Product

Great American West

NEW ITINERARIES

171 −24% YOY

NEW OVERNIGHTS

1,654 +8% YOY

FY23 OVERNIGHTS: 1,533

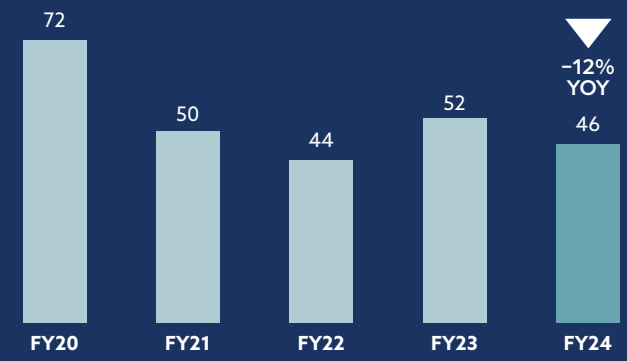
- **Italy:** 370
- **UK:** 318
- **Germany:** 220
- **Nordics:** 211
- **Benelux:** 201
- **France:** 154
- **Australia:** 59

FY24 OVERNIGHTS: 1,654

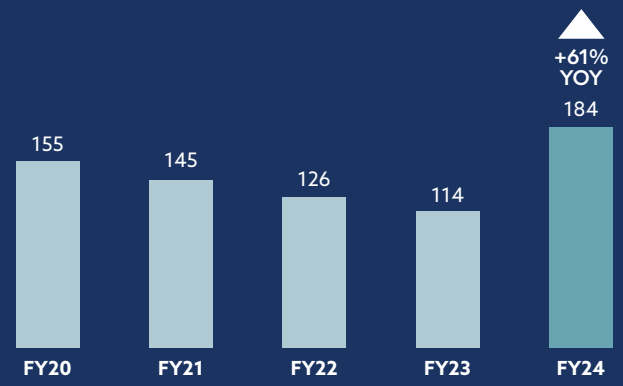
- **Italy:** 620
- **Germany:** 273
- **UK:** 255
- **Benelux:** 223
- **France:** 191
- **Nordics:** 70
- **Australia:** 20

Idaho

NEW ITINERARIES



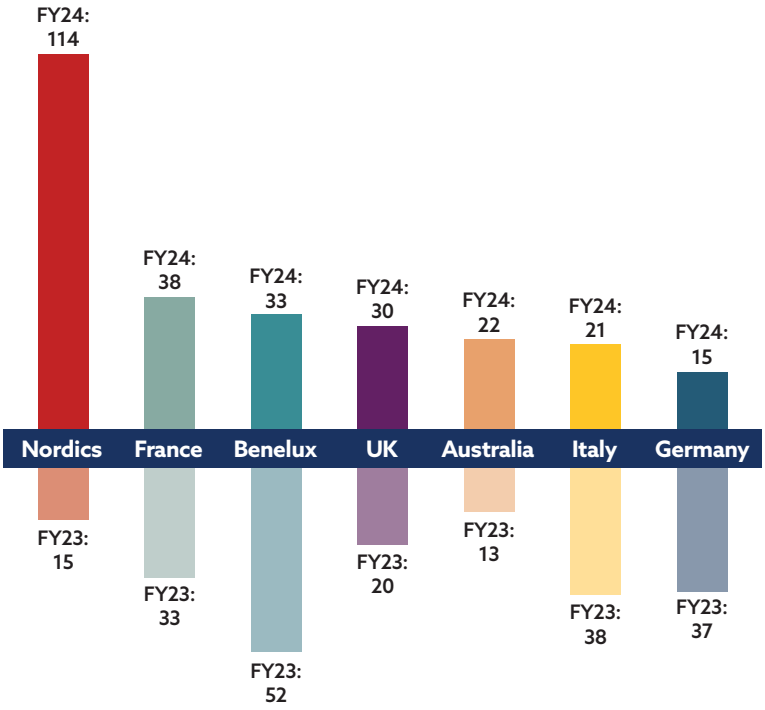
NEW OVERNIGHTS



Trade Fams

Great American West

TRADE OVERNIGHTS



TRADE FAMS

59 ▲ +16% YOY

PROFESSIONALS HOSTED

66 ▲ +50% YOY

TRADE OVERNIGHTS

280 ▲ +36% YOY

Idaho

TRADE OVERNIGHTS

9 ▼ -93% YOY

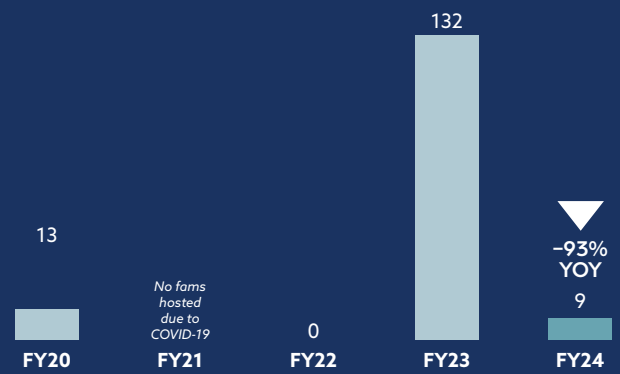
TRADE FAMS

3 ▼ -94% YOY

PROS HOSTED

3 ▼ -94% YOY

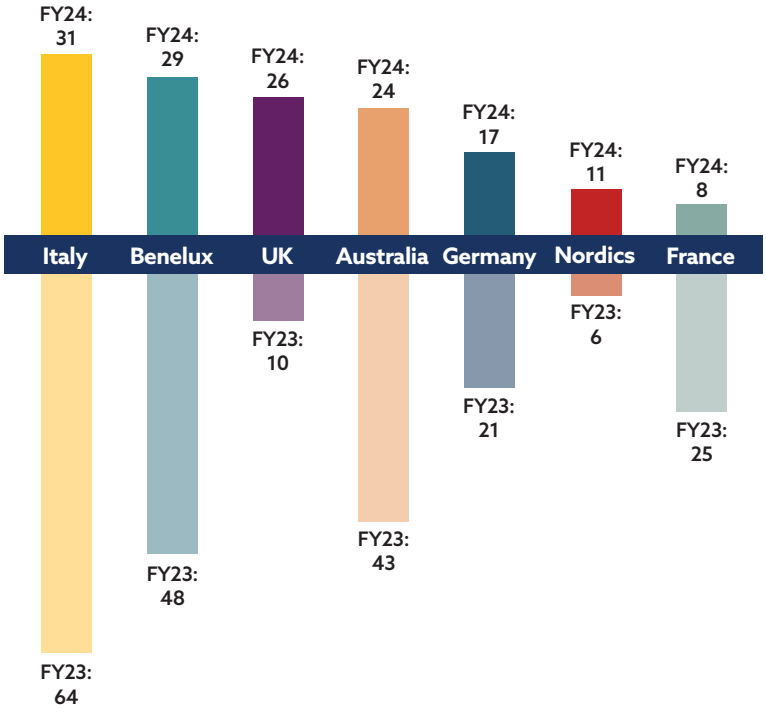
TRADE OVERNIGHTS



Press Trips

Great American West

MEDIA OVERNIGHTS



PRESS TRIPS

20 ▲ +18% YOY

PROFESSIONALS HOSTED

25 ▲ 14% YOY

MEDIA OVERNIGHTS

146 ▼ −10% YOY

Idaho

PRESS OVERNIGHTS

25 ▼ −38% YOY

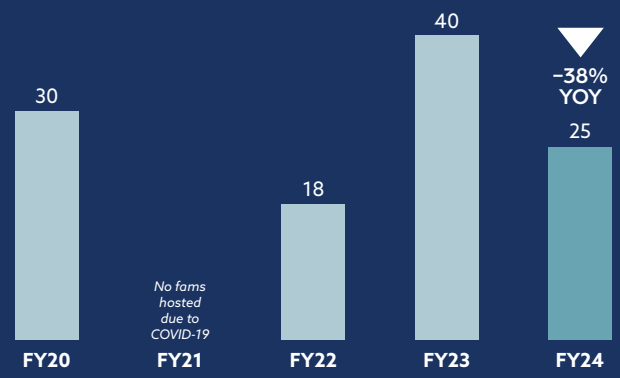
PRESS TRIPS

6 = YOY

PROS HOSTED

8 ▼ −27% YOY

PRESS OVERNIGHTS



Earned Media Coverage

Great American West

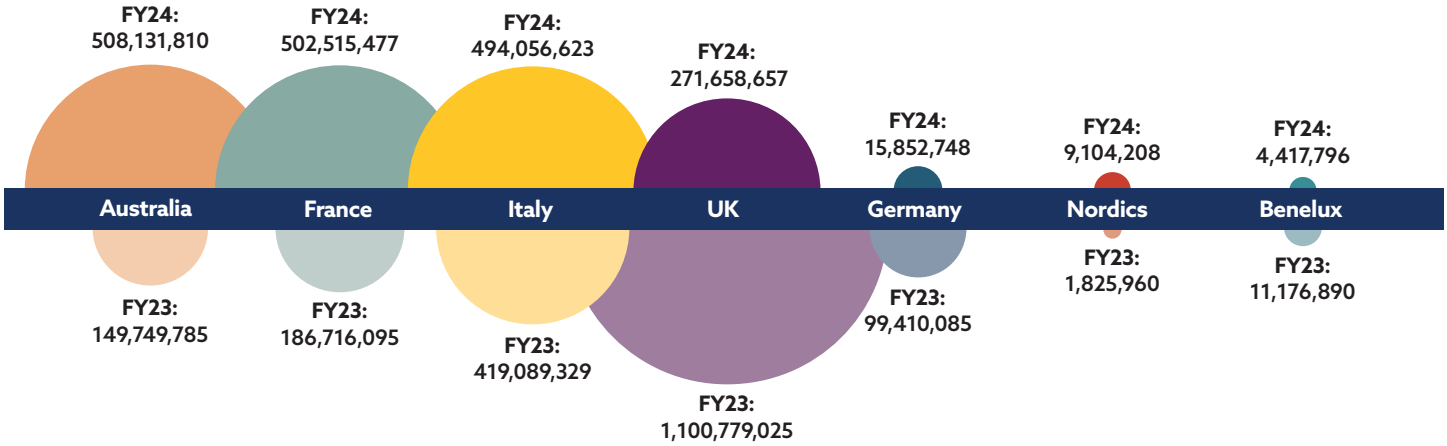
ARTICLES

393 −23% YOY

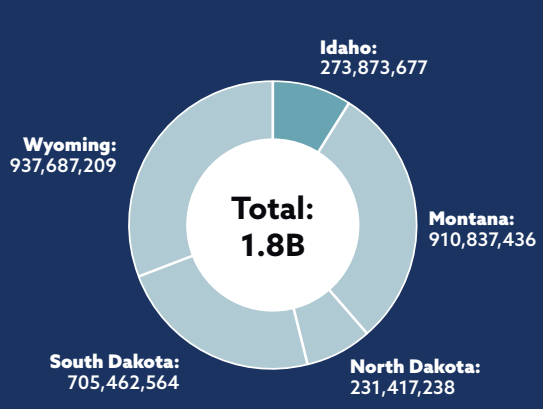
REACH

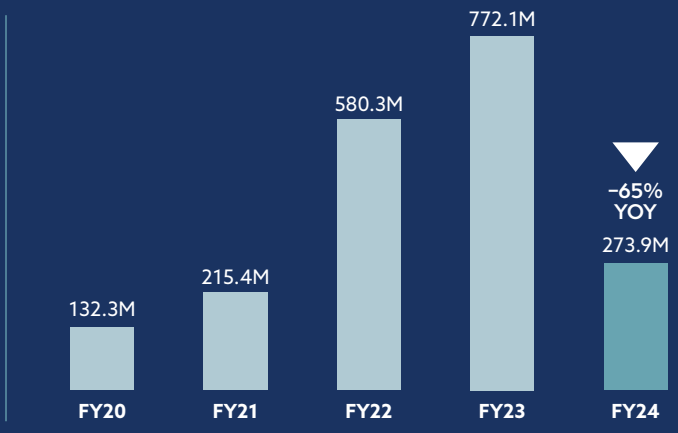
1.8B −8% YOY

EARNED MEDIA REACH: FY23: 1,968,747,169 | FY24: 1,805,737,319



Idaho (Earned Media Reach)

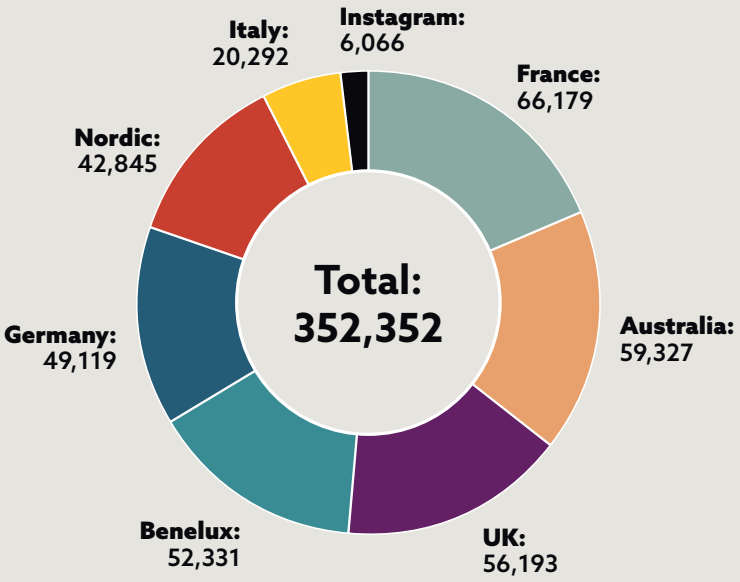




Social Media

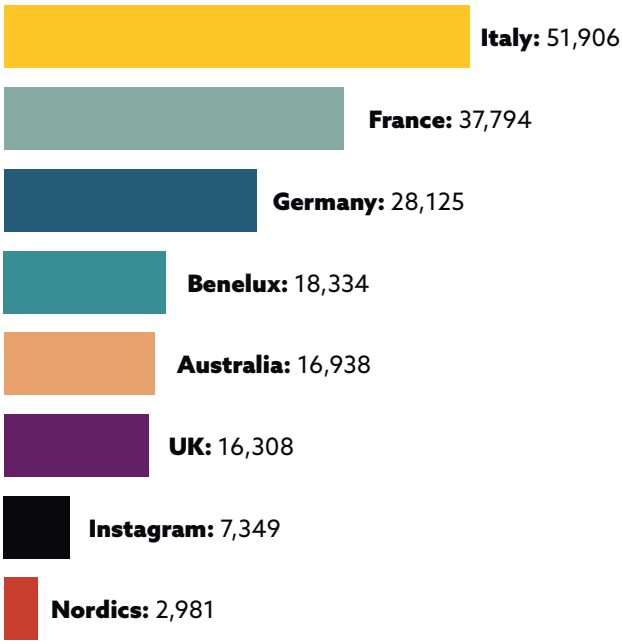
Engagements

352K −26% YOY



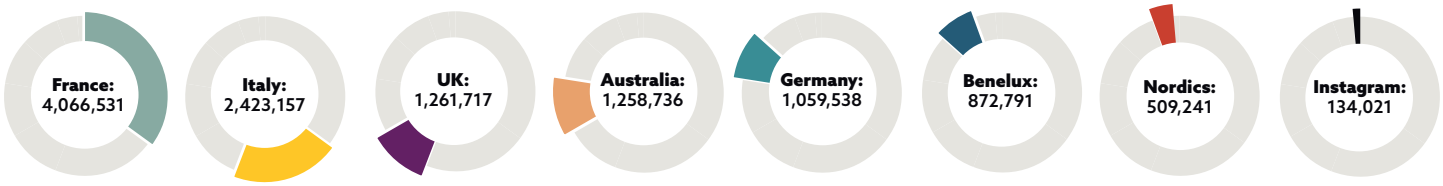
Followers

179K +8% YOY



Reach

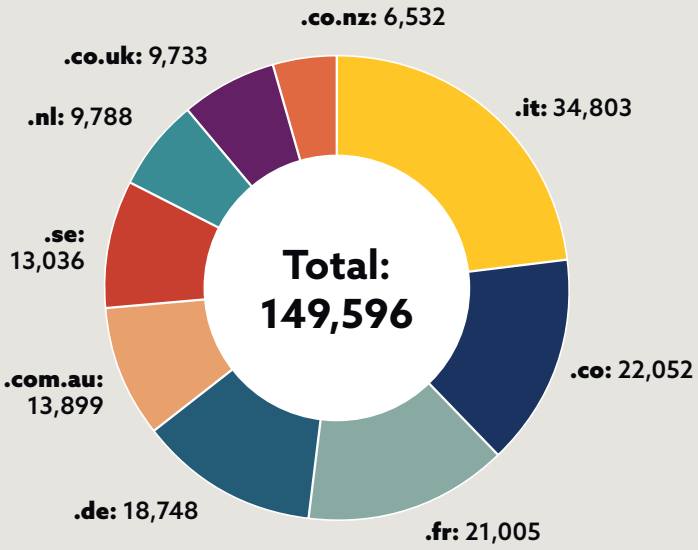
11,585,732 −31% YOY



Website

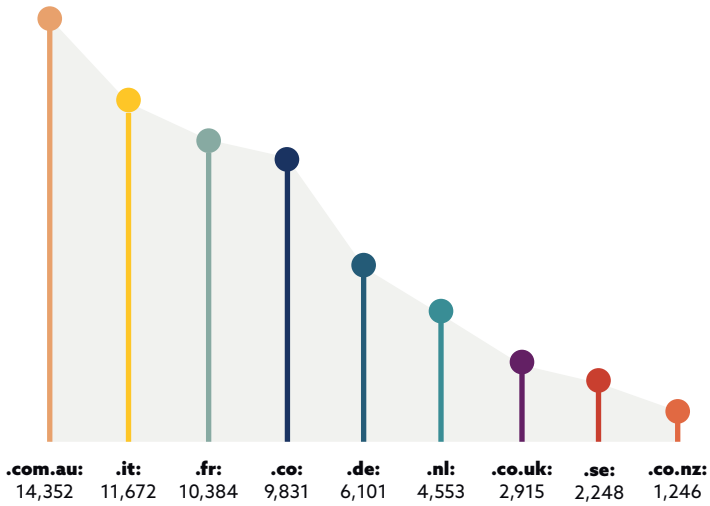
Pageviews

149K ▲ +50% YOY

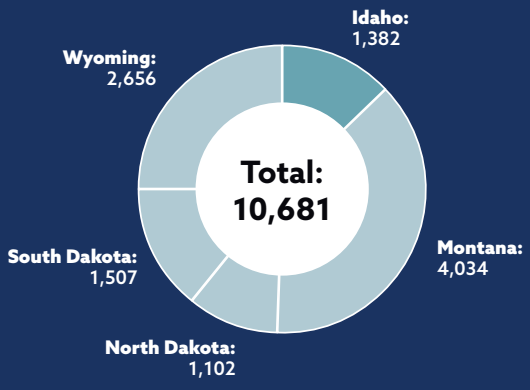


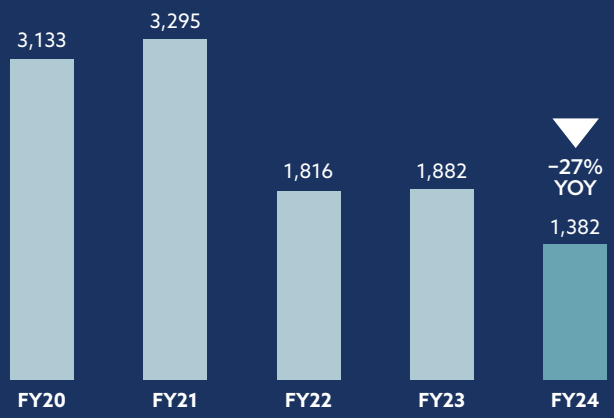
Users

53.5K ▼ −12% YOY



Idaho (Pageviews)

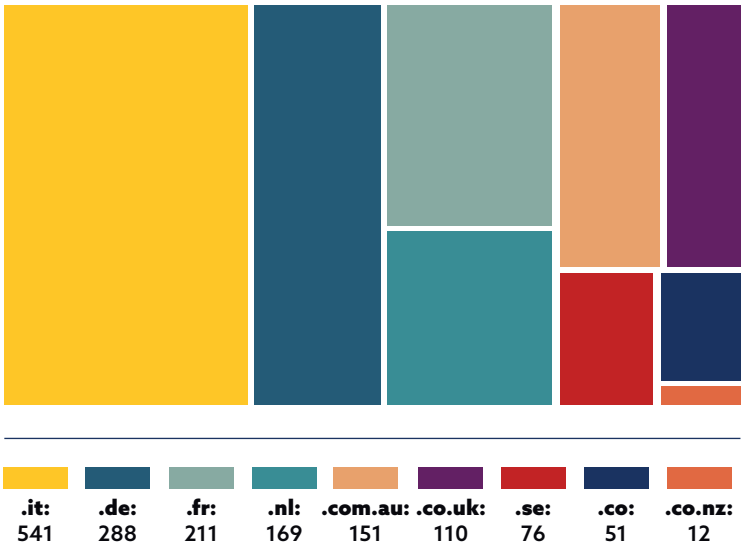




Digital Downloads

GAW Guide

1,609 −5% YOY



.it:	.de:	.fr:	.nl:	.com.au:	.co.uk:	.se:	.co:	.co.nz:
541	288	211	169	151	110	76	51	12

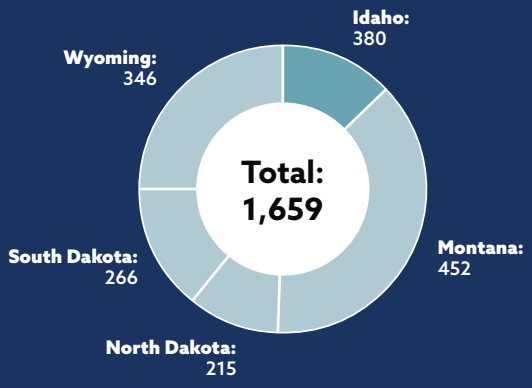
Regional Map

20 −88% YOY

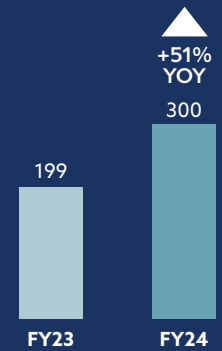


- .it: 17
- .co.uk: 3
- .de: 0
- .nl: 0
- .fr: 0
- .com.au: 0
- .co.nz: 0
- .se: 0
- .co: 0

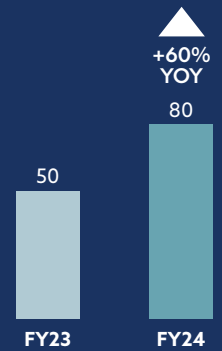
Idaho



STATE GUIDES



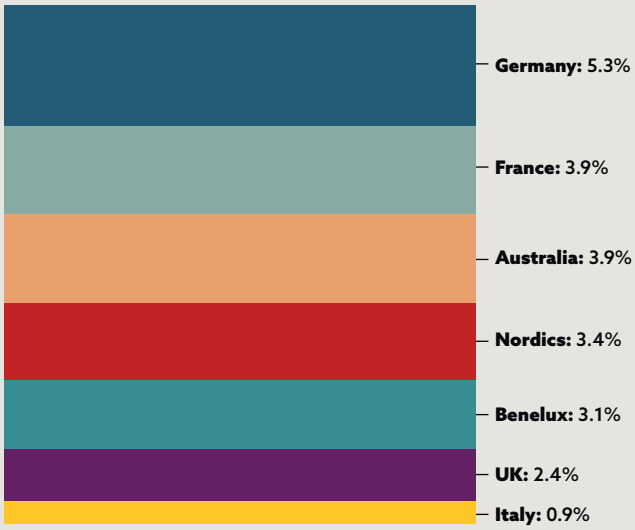
WHAT'S NEW SHEETS



Newsletter

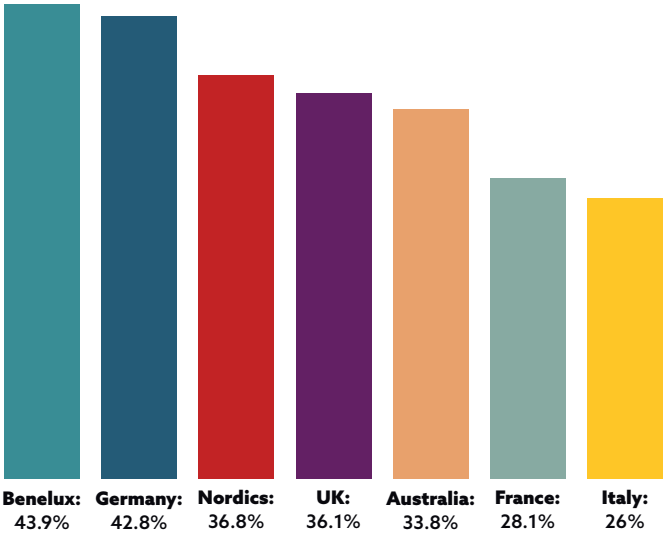
Average Click Rate

3.2% −47% YOY



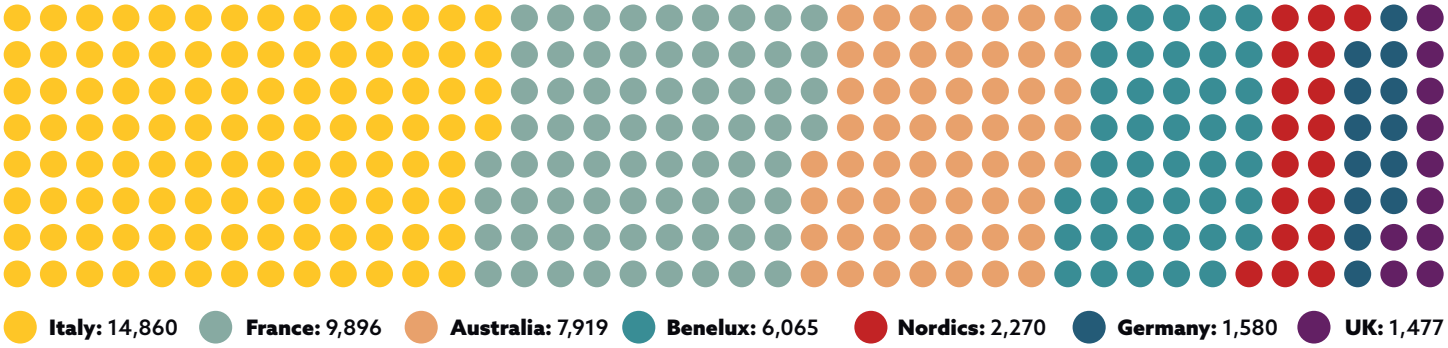
Average Open Rate

35% +7% YOY



Contacts

44,067 +7% YOY



FY24 In Review

JULY 2023

July 1 — Fiscal Year 2024 Begins

AUGUST 2023

Aug. 19-22 — ESTO (Savannah, GA)

SEPTEMBER 2023

Sept. 25-28 — Discover America Roadshow (Stockholm, Oslo, Gothenburg, Malmo)

OCTOBER 2023

Oct. 16-18 — ICORT (Lewiston)
Oct. 16-19 — Brand USA Travel Week (London)
Oct. 24-26 — WY Fall Summit (Yellowstone National Park)

NOVEMBER 2023

Nov. 5-9 — Italy Sales Mission (Milan, Modena, Vicenza)

DECEMBER 2023

Dec. 7 — GAW Mid-Year Meeting (Salt Lake City)

JANUARY 2024

Feb. 1-4 — Destinations Consumer Show (Manchester, UK)
Jan. 11-14 — Vakantiebeurs (Utrecht, Netherlands)
Jan. 17-19 — SD Governor's Conference (Pierre)

FEBRUARY 2024

Feb. 22 — Visit USA Expos & Brand USA B2B Day (Sydney, Autralia)
Feb. 25-26 — WY Governor's Conference (Cheyenne)

MARCH 2024

March 8-10 — Consumer Travel Show (Lyon, France)
March 16-23 — Germany Sales Mission (Dresden, Hannover, Hamburg, Berlin)

APRIL 2024

April 8-10 — ND Governor's Conference (Fargo)
April 14-16 — MT Governor's Conference (Missoula)
April 18-19 — GAW Summit Meeting (Casper, WY)
April 19-23 — International Roundup (Casper, WY)

MAY 2024

May 3-7 — IPW (Los Angeles)

JUNE 2024

June 30 — Fiscal Year 2024 Ends

ANNUAL REPORT

Fiscal Year 2024

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