

Fiscal Year 2024

ANNUAL REPORT

Great American West



THE GREAT
AMERICAN WEST

IDAHO · MONTANA · WYOMING
NORTH DAKOTA · SOUTH DAKOTA



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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:

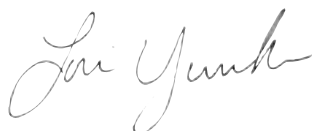
- 537 tour operators offered room nights in the region (+2%), showing continued demand for increased visitation to our destinations.
- 171 new regional itineraries featuring 1,654 overnights in the region were offered (+8%), providing increased accessibility for travelers to book us for their next trip.
- 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.

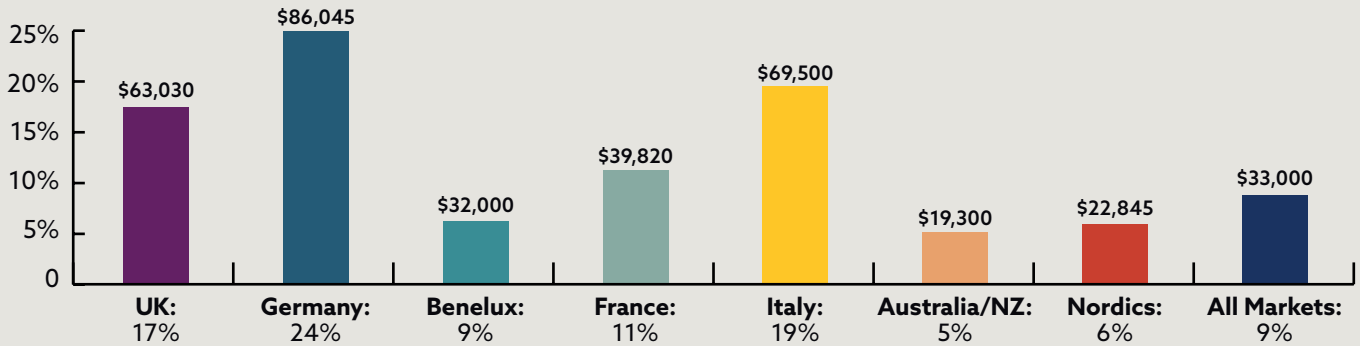
The Great American West Cooperative & Supporting Partners



Budget & Recovery Overview

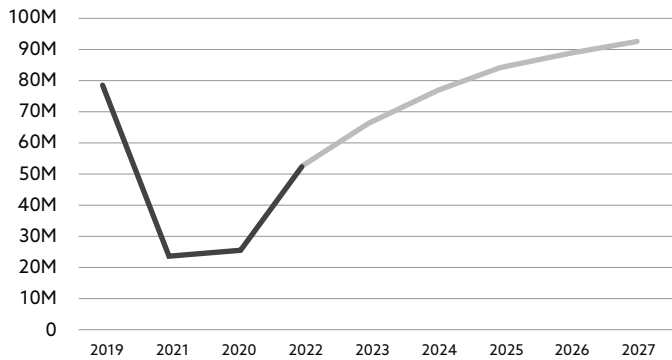
FY24 Budget Allocations (Total Budget: \$365,540*)

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



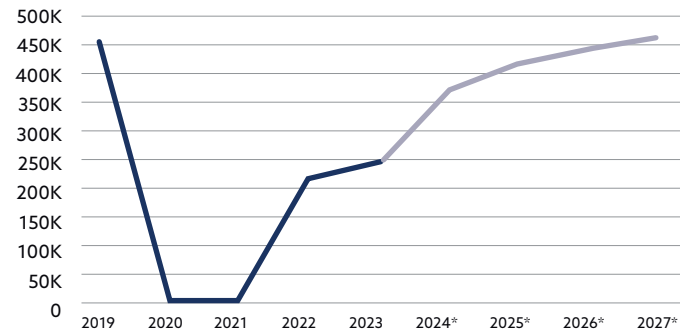
Recovery Forecast

ARRIVALS (US TRAVEL)



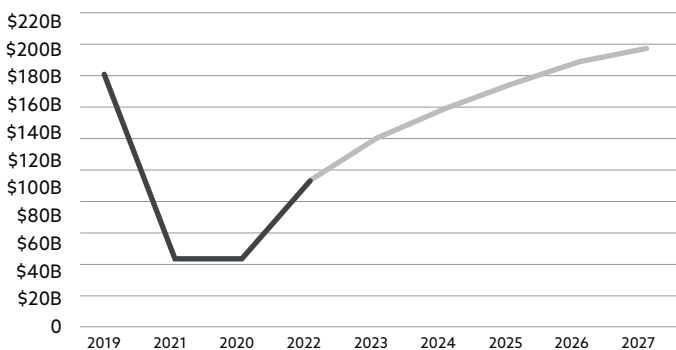
*US Travel forecasts last updated January 2024

EST. ROOMS BOOKED (GAW)



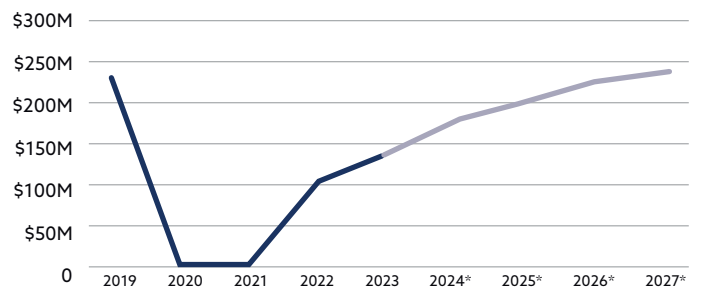
*Forecasted rate is based on 2023 RMI TRIP Report™ data and assumes the GAW is 17% behind US Travel's "% of 2019" predictions for 2022 (the most recent year this data was available).

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

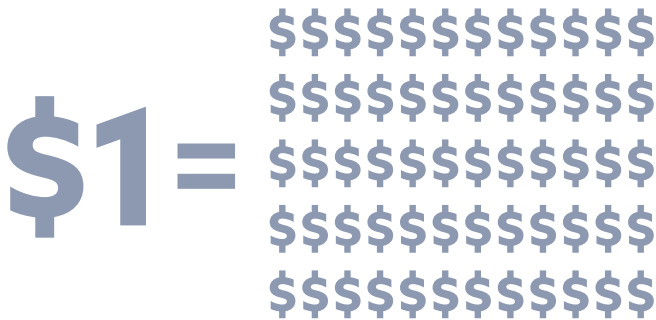
76:1

▲
+28%
YOY



FY23: 60:1

FY24: 76:1



Wyoming

155:1

▲
+26%
YOY



329:1



FY20

No data:
Borders
closed due to
COVID-19.

FY21

No data:
Borders
closed due to
COVID-19.

FY22

123:1



FY23

▲
+91%
YOY

155:1



FY24

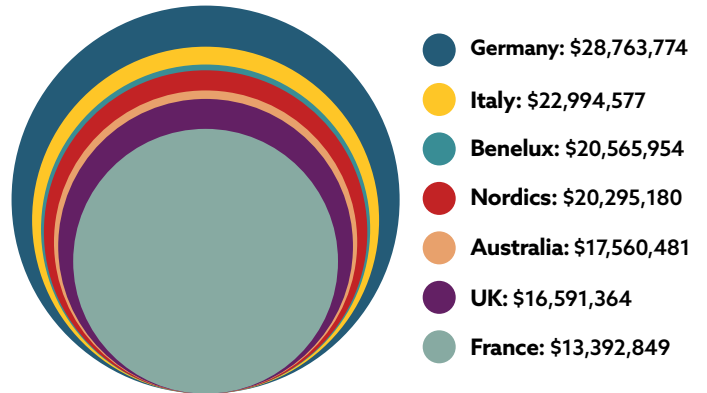
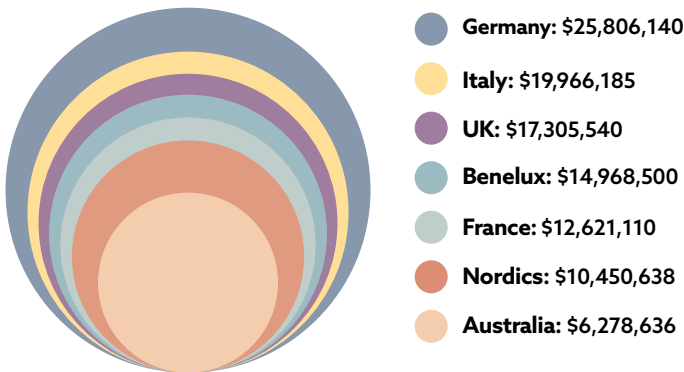
Estimated Spend

Great American West

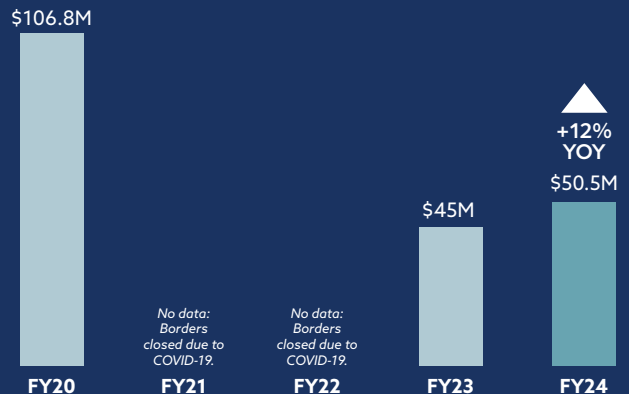
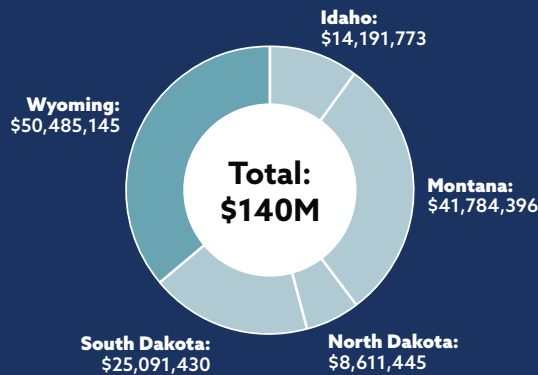
\$140.2M  **+31% YOY** 

FY23: \$107,396,749

FY24: \$140,164,179



Wyoming



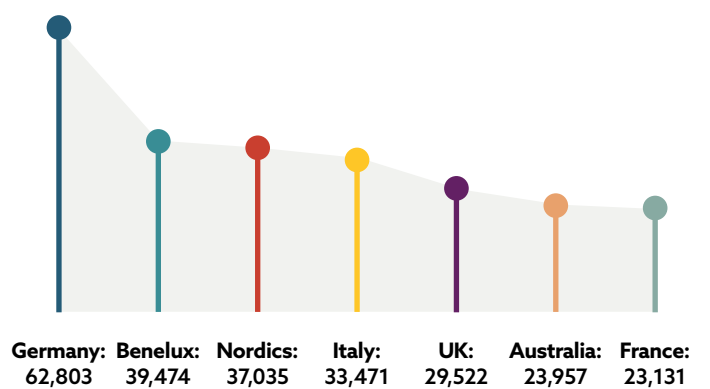
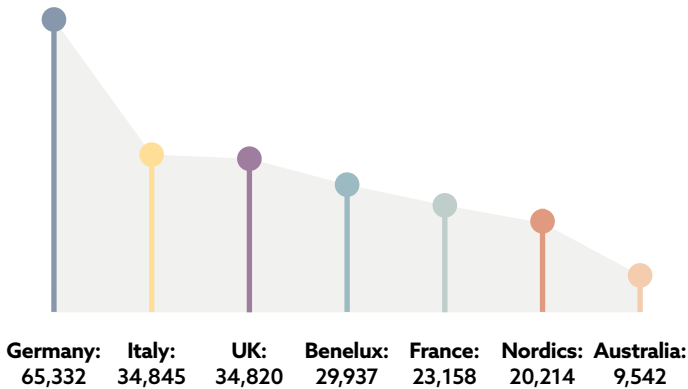
Estimated Rooms Booked

Great American West

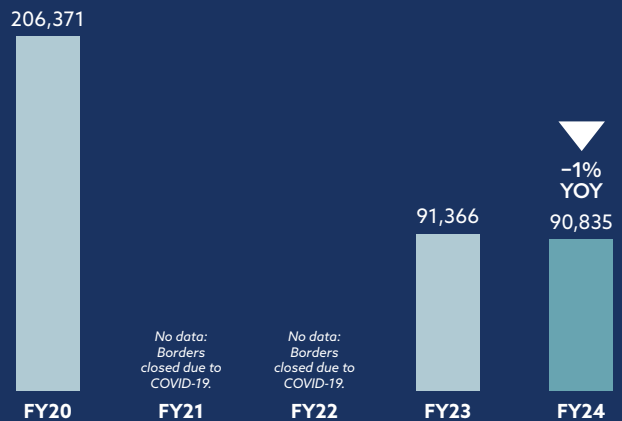
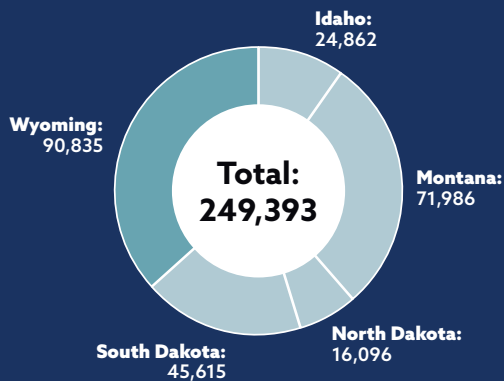
249,393  **+14.5%**
YOY 

FY23: 217,848

FY24: 249,393



Wyoming



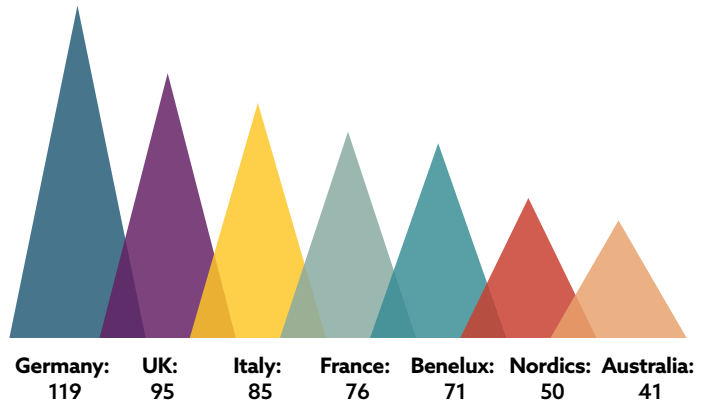
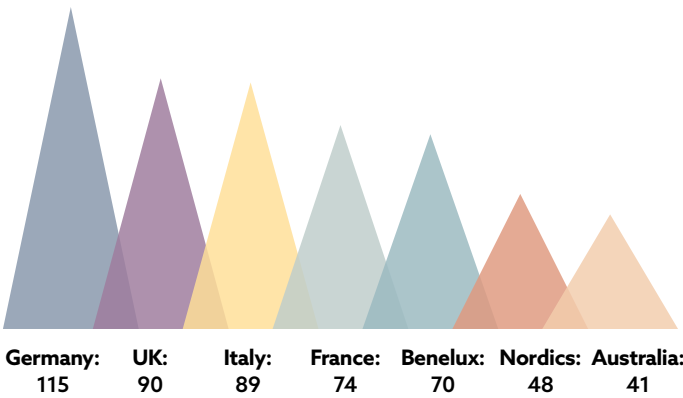
TOs Selling Us

Great American West

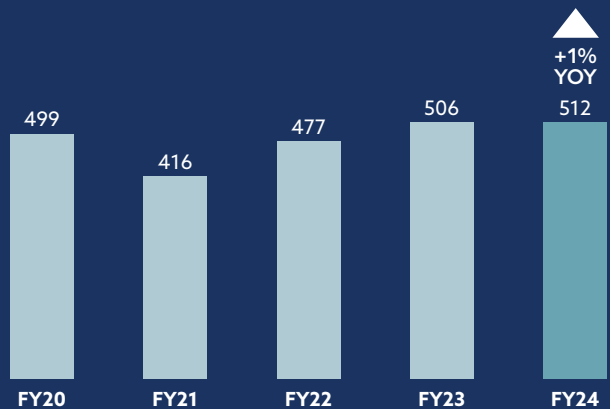
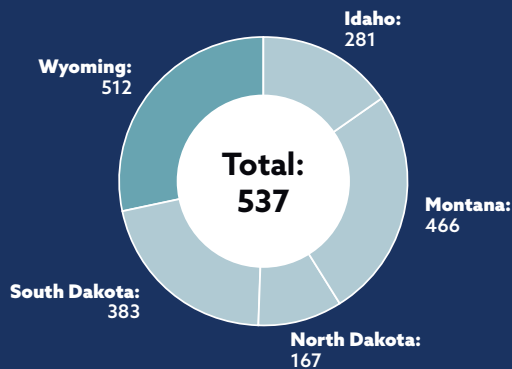
537  **+2% YOY** 

FY23: 527

FY24: 537



Wyoming

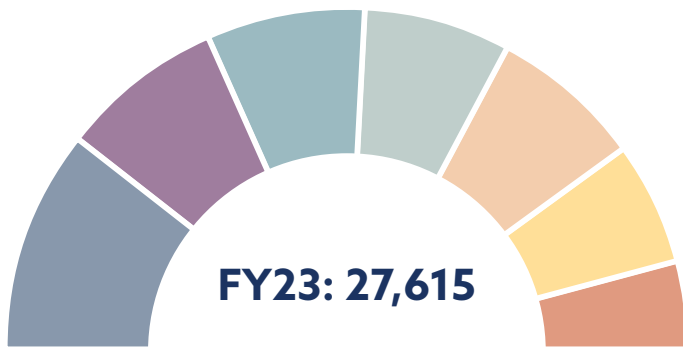


Overnights Offered

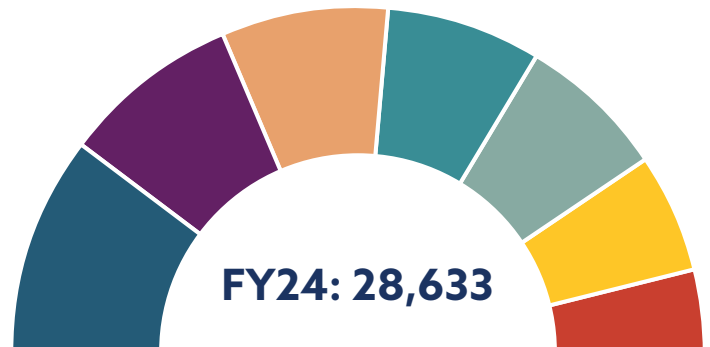
Great American West

28,633

▲
+4%
YOY

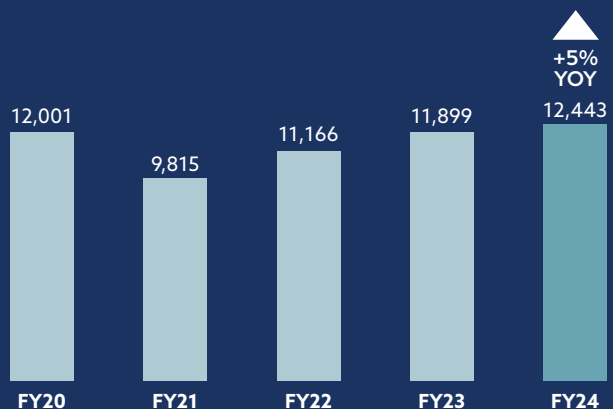
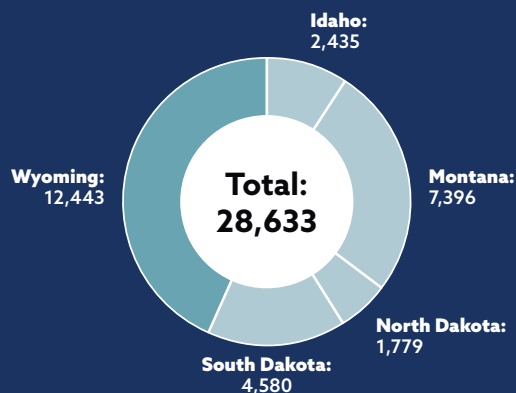


Germany:	UK:	Benelux:	France:	Australia:	Italy:	Nordics:
5,894	4,377	4,033	3,946	3,904	3,269	2,192



Germany:	UK:	Australia:	Benelux:	France:	Italy:	Nordics:
6,023	4,847	4,399	4,218	4,028	3,314	1,804

Wyoming



New Product

Great American West

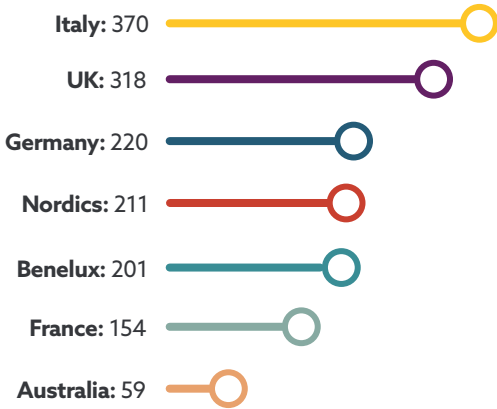
NEW ITINERARIES



NEW OVERNIGHTS



FY23 OVERNIGHTS: 1,533

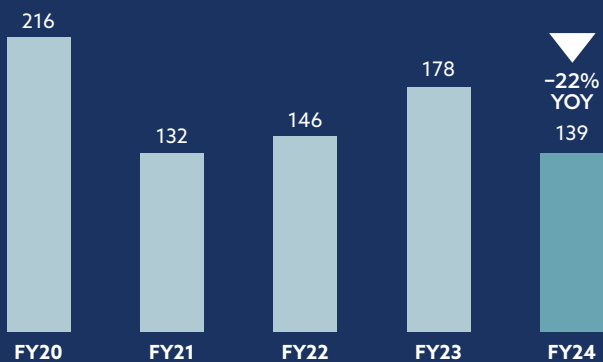


FY24 OVERNIGHTS: 1,654

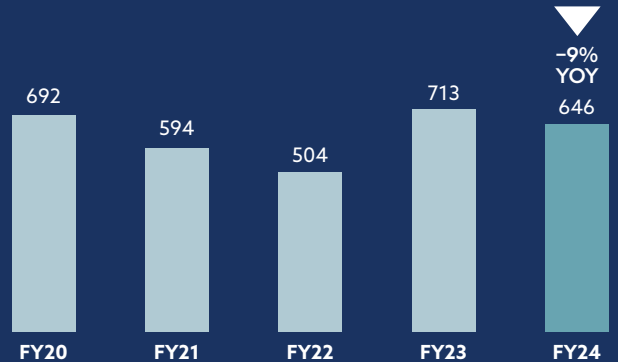


Wyoming

NEW ITINERARIES



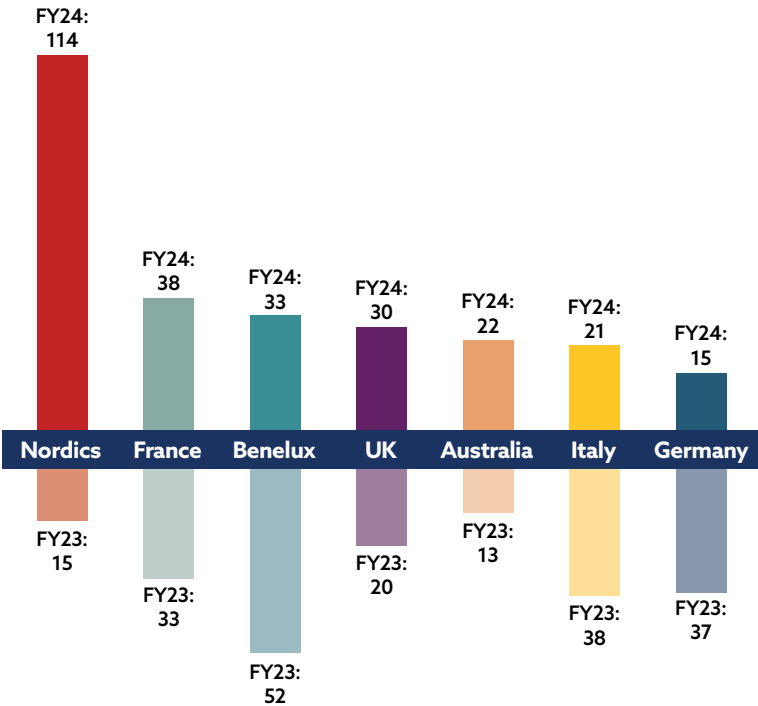
NEW OVERNIGHTS



Trade Fams

Great American West

TRADE OVERNIGHTS



TRADE FAMS



PROFESSIONALS HOSTED



TRADE OVERNIGHTS



Wyoming

TRADE OVERNIGHTS



TRADE FAMS



PROS HOSTED



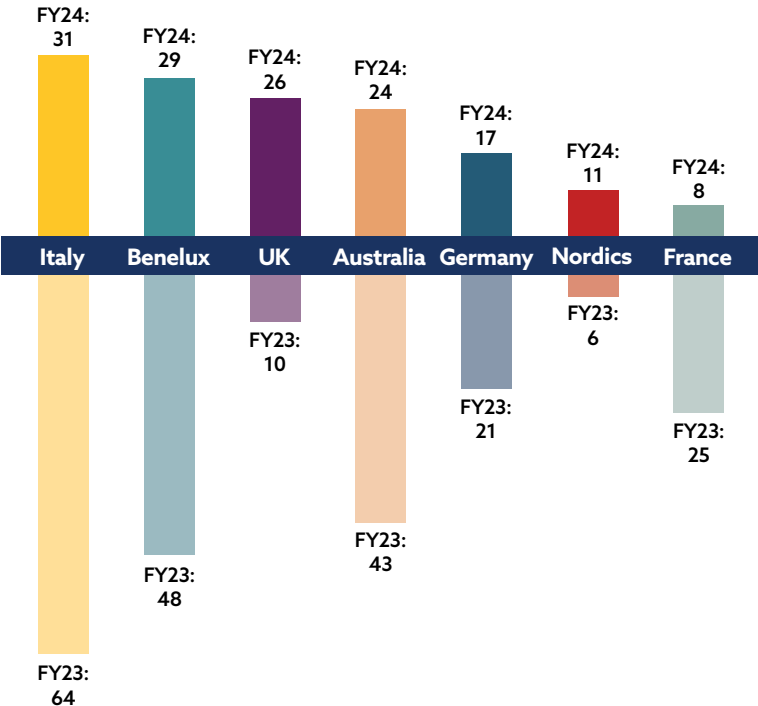
TRADE OVERNIGHTS



Press Trips

Great American West

MEDIA OVERNIGHTS



PRESS TRIPS



PROFESSIONALS HOSTED



MEDIA OVERNIGHTS



Wyoming

PRESS OVERNIGHTS



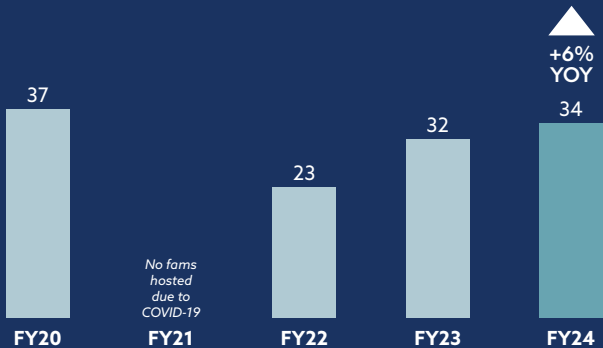
PRESS TRIPS



PROS HOSTED



PRESS OVERNIGHTS



Earned Media Coverage

Great American West

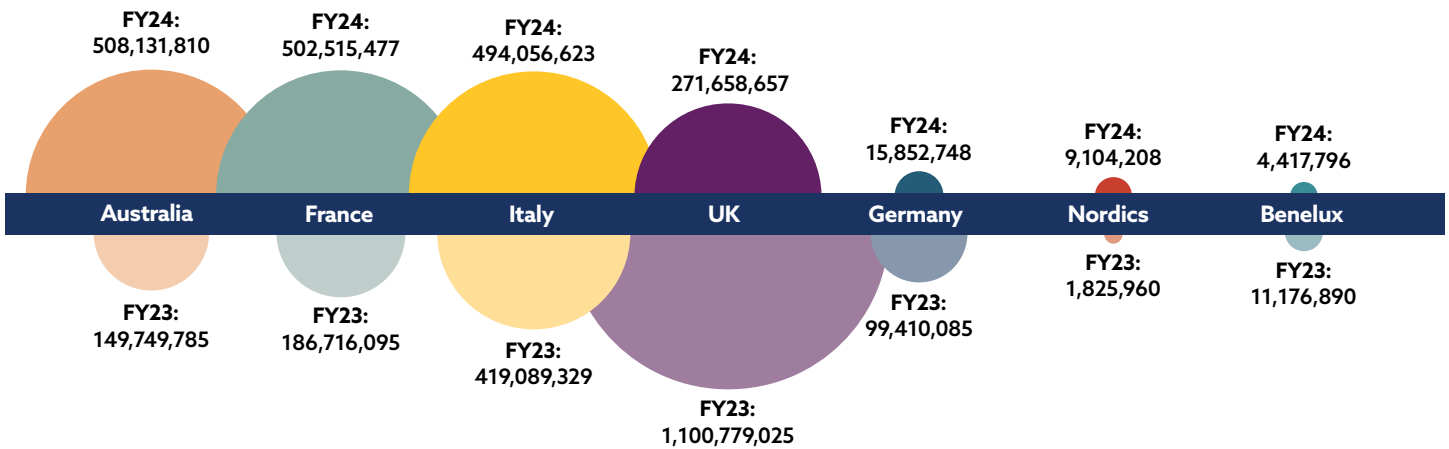
ARTICLES

393 -23%
YOY 

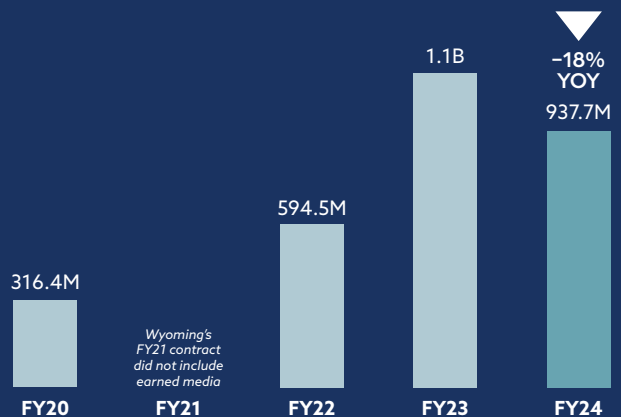
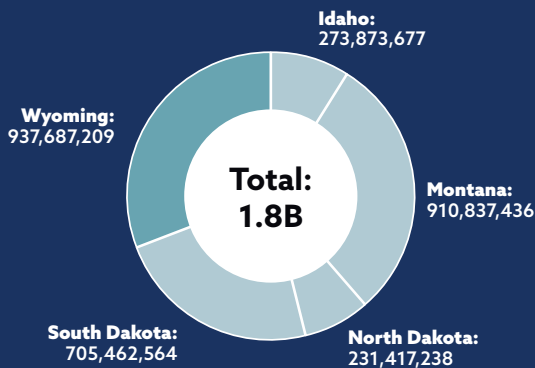
REACH

1.8B -8%
YOY 

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



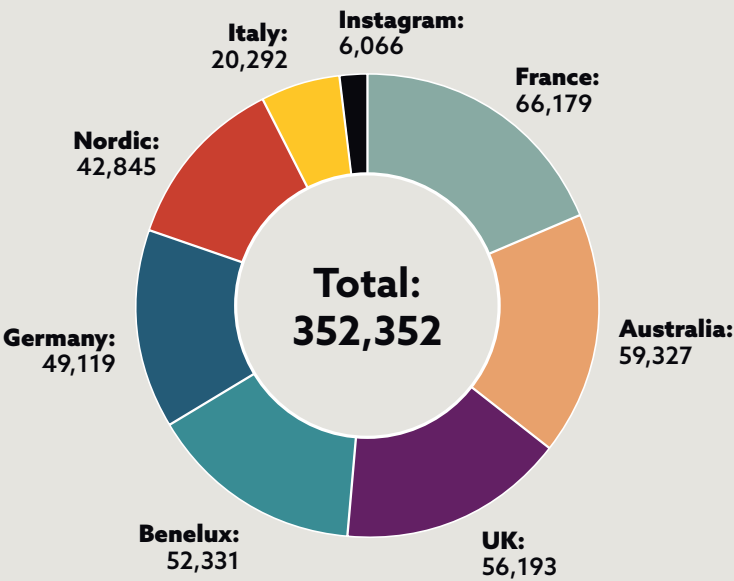
Wyoming (Earned Media Reach)



Social Media

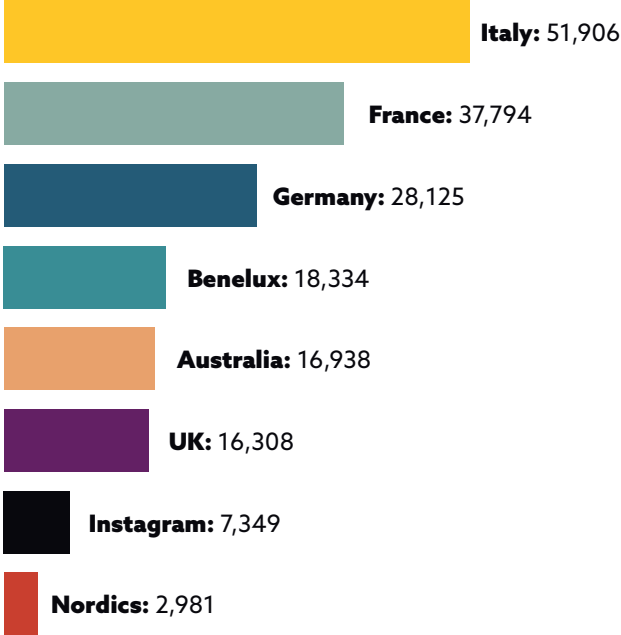
Engagements

352K -26%
YOY 



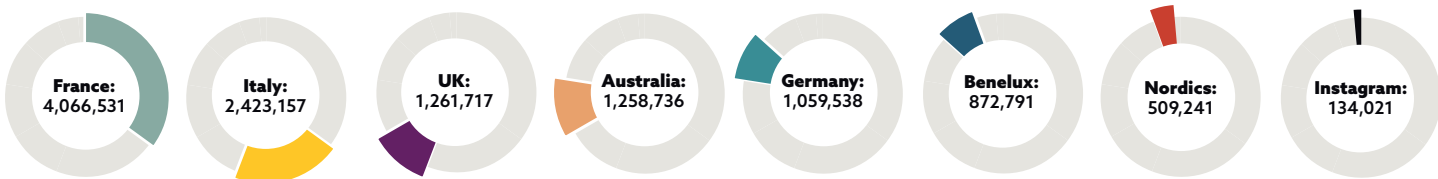
Followers

179K +8%
YOY 



Reach

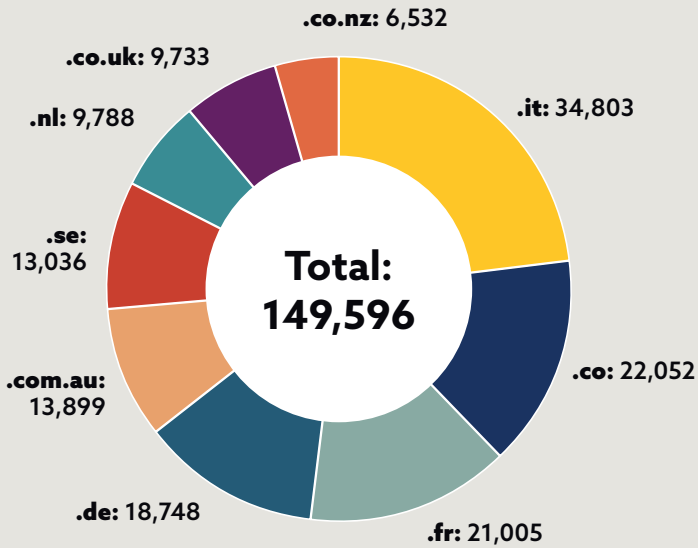
11,585,732 -31%
YOY 



Website

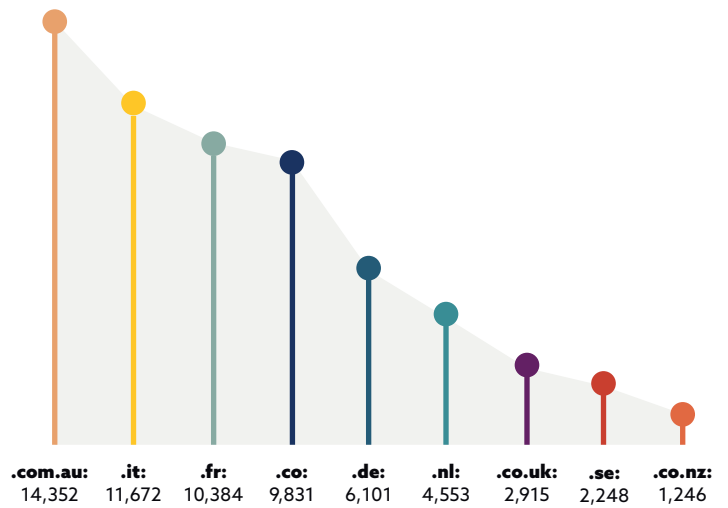
Pageviews

149K  **+50% YOY** 

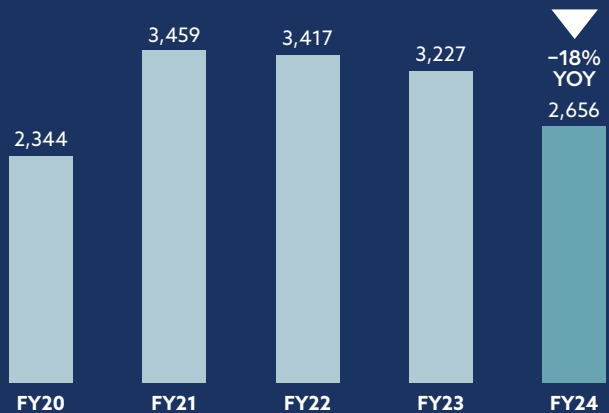
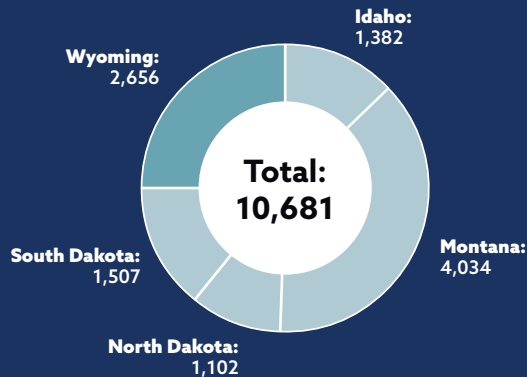


Users

53.5K  **-12% YOY** 



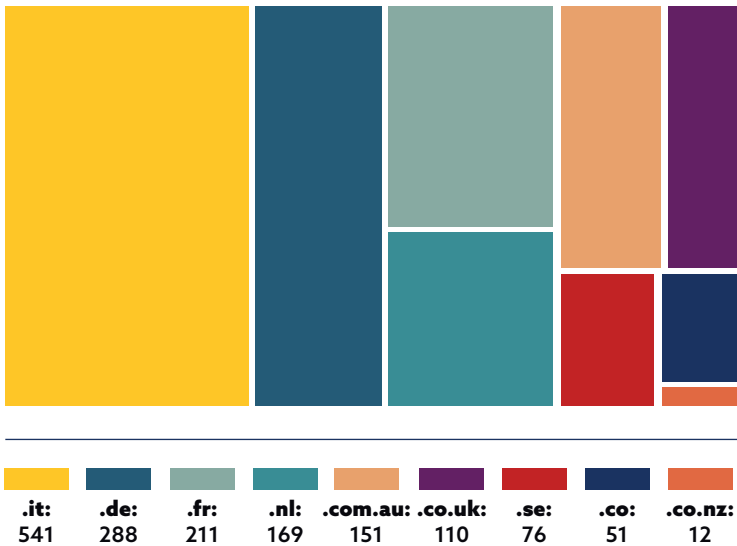
Wyoming (Pageviews)



Digital Downloads

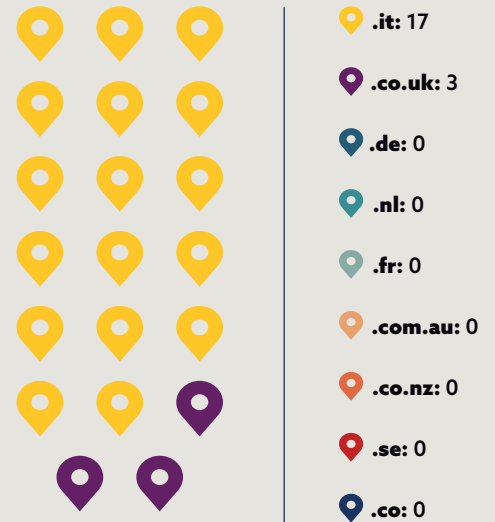
GAW Guide

1,609 ^{-5% YOY} 

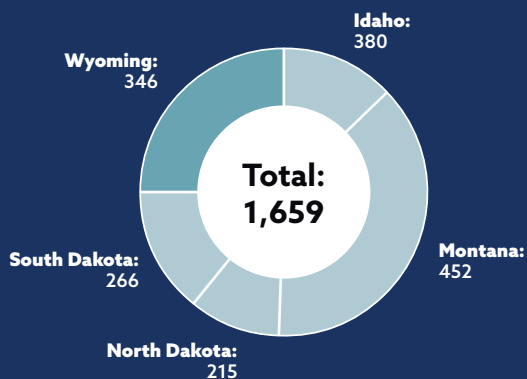


Regional Map

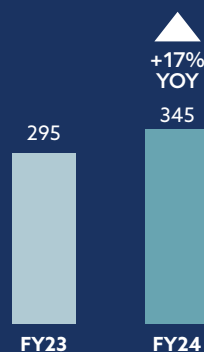
20 ^{-88% YOY} 



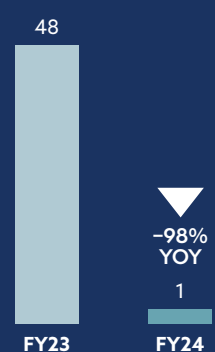
Wyoming



STATE GUIDES



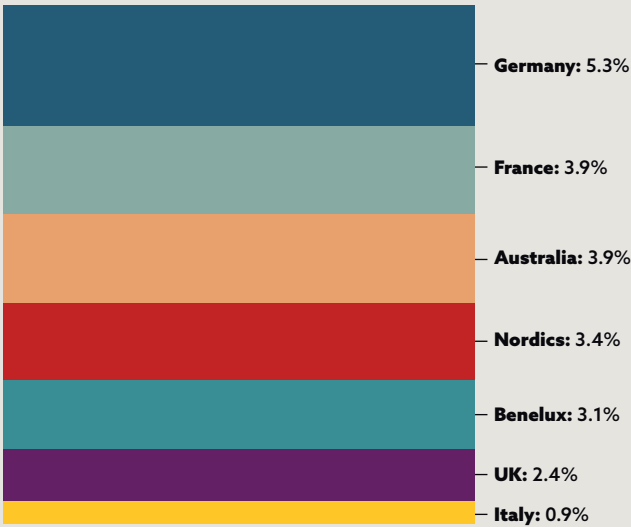
WHAT'S NEW SHEETS



Newsletter

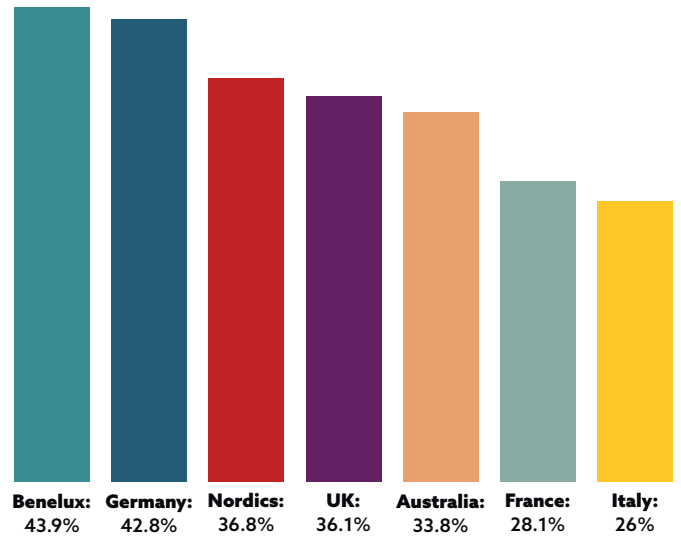
Average Click Rate

3.2% -47%
YOY 



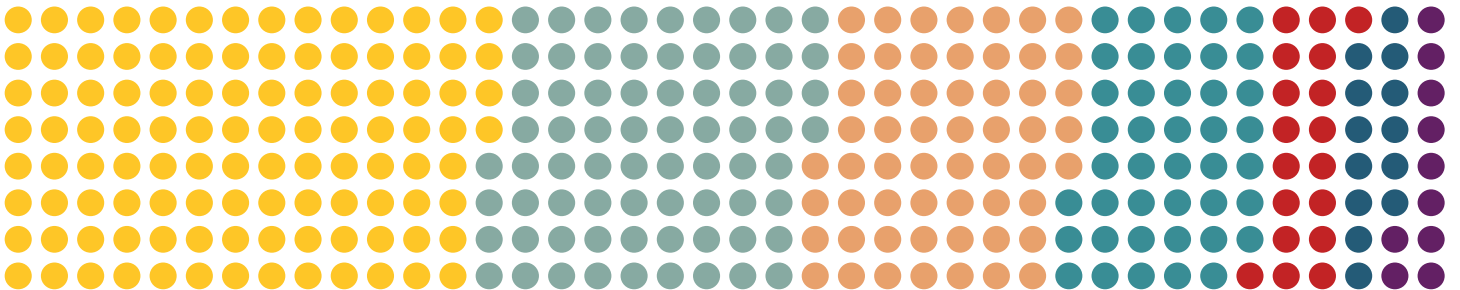
Average Open Rate

35% +7%
YOY 



Contacts

44,067 +7%
YOY 



● Italy: 14,860 ● France: 9,896 ● Australia: 7,919 ● Benelux: 6,065 ● Nordics: 2,270 ● Germany: 1,580 ● UK: 1,477

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, Australia)
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

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