

united kingdom & ireland

Traveler gender:
50% female, 50% male

Average traveler age:
55-plus years

Average annual income:
\$70,000

Average party size:
2 (primarily couples)

Average length of stay:
14 days

Average daily spend:
\$320/person

Average annual paid time off: 16-20 days

Travel preference:
Fly-drive by car or RV

Seeking: National parks, wildlife, scenery & culture

Quirks of UK travelers:

British and Irish travelers love to boast about their holidays to their friends and family, sharing photos, experiences and anecdotes to anyone who will listen. The Great American West has a great deal to boast about, which makes it an even more appealing destination.

Evening meals are generally taken around 7:30 p.m. If they are not happy about something, they will say so. By American standards, the British and Irish are poor tippers – usually between 10% and 12%, and only for good service. They are obsessed with the weather!

Most importantly, UK and Irish people love a cup of tea and often bring their own tea bags. To make a proper cup of tea, the water must be boiling and it is drunk with fresh, cold milk.

Perception of the GAW:

The Great American West is a bucket-list destination for UK and Irish travelers. It is seen as the rugged and authentic America. With a wide variety of activities and experiences including national parks, scenery, wilderness, wildlife and culture, the GAW is a natural fit for the British and Irish.

They have a sense of adventure, whether that is hitting the open road behind the wheel of an RV or 4WD or taking the children to experience life on a ranch! They will challenge themselves beyond their natural comfort zone either on foot or two wheels, by horseback or on the water.

Wildlife is always a big draw to any overseas destination. Despite having a considerable history in their own countries, discovering the local heritage and culture is also hugely important while on holiday. Western heritage and Native American culture offer travelers the opportunity to learn something new and expand their horizons.

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germany

Traveler gender:

51% female, 49% male

Average traveler age:

40-45 years

Average annual income:

\$97,000

Average party size: 2.2

Average length of stay:

17 days

Average daily spend:

\$230-\$300

Average annual paid time off: 35-44 days

Travel preference:

Fly-drives and motorcycle

Seeking: Scenery, icons, soft adventure, culture

Quirks of German travelers:

German travelers appreciate anything "free" or "included," such as wifi, coffee/tea, breakfast, happy hours, etc. Value for money remains important.

They like to sit outside whenever possible, and prefer open-air dining options. German travelers plan and think in kilometers, not miles. If giving directions or explaining distance, it is better to provide the driving time instead of miles or kilometers.

They still love printed brochures and maps and continue to request them in large numbers.

Perception of the Great American West:

Germans think of the Great American West as a place with wide-open spaces, authentic experiences, soft adventure and a great mix of world-famous sights and attractions with hidden-gems, away from mass tourism, to discover!

The GAW region is perceived as pristine, safe and with so much open space away from all the hustle and bustle. There are unique and world-famous sights that can only be discovered here: bison herds, Badlands, powwows and Native American culture.

There are plenty of bucket-list attractions: National and state parks, national monuments, etc. (Yellowstone, Theodore Roosevelt National Park, the Badlands, Glacier National Park, Mount Rushmore, Craters of the Moon, Devils Tower, Going-to-the-Sun Road, etc.)

The region has small, charming, authentic American towns, and is known to display the essence of authentic cowboy life with ranch vacations and horseback adventures.

There is plenty of soft adventure within unspoiled nature, like rafting, mountain biking or zip lining.

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benelux

Traveler gender:
46% female, 54% male

Average traveler age:
39-44 years

Average annual income:
\$107,000

Average party size: 3

Average length of stay:
18 days

Average daily spend:
\$487

Average annual paid time off: 25 days

Travel preference:
Individual, fly-drive

Seeking: Parks, adventure, ranches, Native culture

Quirks of Benelux travelers:

Travel is perceived as a right rather than a privilege, so the Dutch will always travel. Benelux travelers are very used to doing road trips in Europe, where they take their trailers out and drive.

When planning, they are used to planning to be as economical as possible (for example, they might bring their own sandwich lunches, drinks and fruits), but once they are in their destination, they want the full experience and will spend their money.

Perception of the GAW:

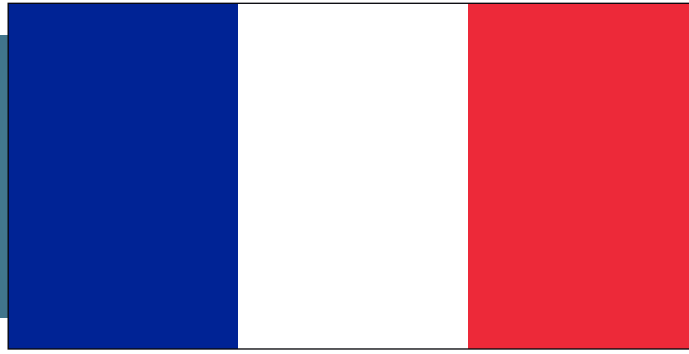
The majority Benelux visitors are individual travelers, traveling with an RV or car and staying maximum of two nights in one place. They will look for nature, natural wonders, national parks and wildlife. They are very interested in lifestyles that we don't have: ranches, cowboy lifestyle, Native American history, etc.

General travel trends are sustainability, farm-to-table dining, hiking and biking in nature, unique smaller accommodations like bed-and-breakfasts and ranches, off-the-beaten-path travel and contact with locals. These trends will only be emphasized when travel picks up again.

All five states have the features that appeal to those trends, of course starting with the wide-open spaces, the lack of cities and the room people have to feel safe and free. These are ingredients that will contribute to a choice for the Great American West over other U.S. destinations.

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france

Traveler gender:

52% female, 48% male

Average traveler age:

35-49 years

Average annual income:

\$59,420

Average party size: 4-6
(families with 2-4 kids)

Average length of stay:
17 days

Average daily spend:
\$481

**Average annual paid
time off:** 28 days

Travel preference:
Fly-drive (individual)

Seeking: Parks, cowboy &
Native culture, uniqueness

Quirks of French travelers:

French travelers expect a breakfast at their hotel, as it is standard in Europe. Free wifi is also very appreciated, knowing that 90% of French travelers stay connected during their vacation. The French also like to be able to watch a French TV channel in the hotel room when available.

When it comes to dining, they usually have their dinner between 7 p.m. and 8 p.m. and don't like to be rushed; for example, the French are a bit shocked when they are given the check while they're still working on their plate.

Finally, they don't like to have their glass of water filled with ice cubes, no matter the temperature outside.

Perception of the GAW:

The Great American West is still seen as a very secure and welcoming destination.

The region is identified as a destination that offers natural social distancing, wide-open spaces, pristine air, etc., which are major assets for the post-COVID traveler.

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italy

Traveler gender:

51% female, 49% male

Average traveler age:

40-60 years old

Average annual income:

\$60,000

Average party size: Families of 4, couples, small groups

Average length of stay: 15 days

Average daily spend: \$150

Average annual paid time off: 26 days

Travel preference: Fly-drive, small groups

Seeking: Native & Western, outdoors, food/drink

Quirks of Italian travelers:

Italians are curious and sentimental. The typical Italian traveler is laid back and a bit of a romantic. Vacation and travel are top of mind for Italians, whatever it takes. There is enthusiasm for the outside world, but the GAW would be a third or fourth trip to America.

Italians love to dine late in the evening (as of 8 p.m.) and take full advantage of daylight to enjoy discovery and maximize vacation time, especially in the summer. They are extremely critical about Italian food in America since it is so different from the authentic food at home, and would rather experiment with true American food, and possibly avoid cold pasta mixed in the same plate with other food. They are definitely not passionate about American coffee.

Italians love dancing and are big followers of line dancing, if and when available. American movies have been always a major driver to visit the USA. The "Yellowstone" TV series has recorded around 1 million Italian viewers each episode, inspiring many Italians to future travels.

Perception of the GAW:

Italians see the Great American West as a land of nature and abundant wilderness, open spaces and stunning landscapes. They expect authentic Native American and Western heritage galore!

The lure of freedom, an unbridled vacation, room to explore, a wide choice of activities and profusion of wildlife draw Italians to the region. They see the GAW as an outspoken America, not fanciful and yet still able to amaze everyone.

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