

# 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:**

16 days

**Average daily spend:**

\$320/person

**Average annual paid time off:** 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.



# Germany

**Traveler gender:**

51% female, 49% male

**Average traveler age:**

43-45 years

**Average annual income:**

\$102,000

**Average party size:** 2  
(primarily couples)

**Average length of stay:**  
17 days

**Average daily spend:**  
\$300-\$350

**Average annual paid time off:** 35-44 days

**Travel preference:**  
Fly-drives (individual)

**Seeking:** Parks, scenery, soft adventure, culture

**Quirks of German travelers:**

German-speaking travelers appreciate anything “free” or “included” such as WiFi, coffee/tea, breakfast, complimentary happy hours, etc. Value for money remains important.

They like to sit outside whenever possible and prefer open-air dining options, as they are not used to air conditioning. German travelers plan and think in kilometers, not in miles. If giving directions or explaining distances, 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 are individual travelers who mostly experience the Great American West by car or motorhome. They think of the region as a place with wide-open spaces, authentic experiences, soft adventure, wildlife, 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 plenty of unique and world-famous sights as well as bucket-list attractions that can only be discovered here: bison herds, Native American culture (e.g. powwows), national and state parks, national monuments, memorials, scenic byways, ghost towns and so much more.

The region has small, charming, authentic American towns and friendly people, 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.



# 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.

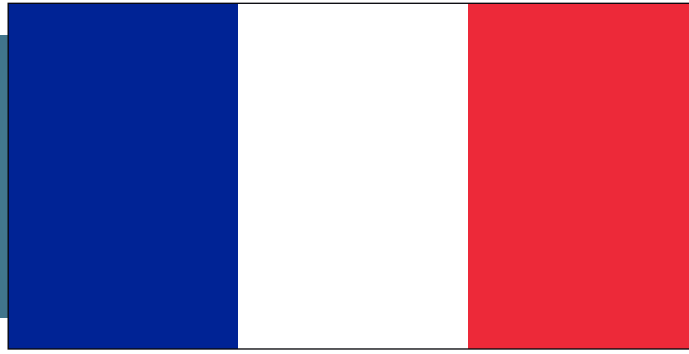
When planning, they are used to planning to be as economical as possible (for example, they might bring their own sandwich lunches, drinks and fruits), but once they are in their destination, they want the full experience and will spend their money.

**Perception of the GAW:**

The majority of Benelux visitors are individual travelers, traveling with an RV or car and staying a 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 can't be found in the Netherlands: ranches, cowboy lifestyle, Native American history, etc.

General travel trends are sustainability, farm-to-table dining, hiking and biking in nature, unique smaller accommodations such as bed-and-breakfasts and ranches, off-the-beaten-path travel and contact with locals.

All five states have the features that appeal to those trends, starting with the wide-open spaces and the room people have to feel free, active and adventurous. These are the core ingredients that contribute choosing for the Great American West over other U.S. destinations.



# France

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**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.



# Italy

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**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.

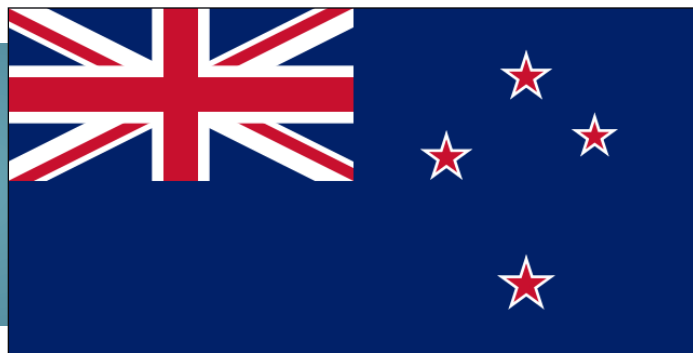
Italians love to dine late in the evening (as of 8 p.m.) and take full advantage of daylight to enjoy discovery and maximize vacation time, especially in the summer. They are extremely critical about Italian food in America since it is so different from the authentic food at home, and would rather experiment 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.



# Australia/New Zealand

## Traveler gender:

47% female, 53% male

## Average traveler age:

41-42 years old

## Average annual income:

\$50,000

## Average party size: 3

## Average length of stay:

19.3 days

## Average daily spend:

\$500+

## Average annual paid time off: 28 days

## Travel preference:

Fly, self-drive, small groups

## Seeking: Cultural/historic, nature, local lifestyles

## Quirks of Australian travelers:

Australians and Kiwis are used to having a hot breakfast included in the rate, tea-making facilities (electric jug or kettle in the room along with tea and ultra-high temperature milk and sugar) and would be keen to have an espresso coffee shop nearby or know where one is.

We prefer distance to be calculated in kilometers not miles, and we are used to driving on the left side of the road.

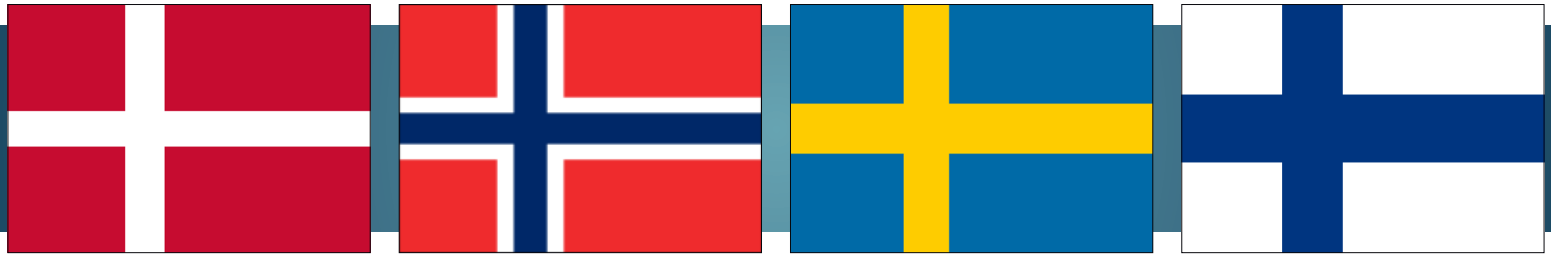
Both Australian and New Zealand travelers like to dine outdoors and take time over a meal – not rush. “Entrée” in Australian means “appetizer” and “main course” is the U.S. “entrée.” We prefer to order an alcoholic drink (beer, wine or cocktails) immediately once we are seated, before ordering food. We are interested in fine dining rather than fast food, and portions are generally smaller than in the U.S.

Most are not used to driving in snow/winter conditions.

Connectivity is important.

## Perception of the GAW:

Australians in general love the great outdoors, nature and outdoor adventure activities, and skiing/snowboarding. National parks and wildlife are big attractions. They also have a romantic idea of the authentic West gained from TV and movies over the years (right now, “Yellowstone” and “1883” series are huge hits in Australia) and are keen to sample this culture and meet the friendly locals. We are interested in Western/Native American history and culture, plus sustainability is important. We do not mind driving long distances.



# Nordics

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**Traveler gender:**

49% female, 51% male

**Average traveler age:**

30-70 years old

**Average annual income:**

\$95,693

**Average party size:** Couples  
or families with 2-3 kids

**Average length of stay:**  
14-20 days

**Average daily spend:**  
Not available

**Average annual paid  
time off:** 25-30 days plus  
10 bank holidays

**Travel preference:**  
Fly-drive, groups with leader

**Seeking:** Nature, active, soft  
adventure, culture, culinary

**Quirks of Nordic travelers:**

The Nordic countries represent the third-largest outbound travel market in Europe and spend more money than the average European tourist on food, accommodation and attractions while on holiday. The level of income is high, and a record high share of income is spent on travelling. Almost nowhere in the world do people travel abroad as often as Nordic tourists.

Although four different nationalities, the Nordic travelers have a lot in common. We love nature and being active, just as much as we love good food – preferably paired with a nice beverage. The more local these culinary delights get, the better. We also love bragging about culinary highlights on our Instagram accounts so our followers/friends don't miss that we are abroad.

We are all very concerned about the environment, and sustainable living is part of who we are. We know what we'd like to experience on our tour, but not everything will be booked in advance since we like staying a little flexible.

It is important to us to stay connected with friends and family while on holiday, and we might look for restaurant recommendations while traveling. Free WiFi at our accommodation and in restaurants is therefore something that we appreciate – or even expect. English is widely spoken, which makes it easy to interact with us while traveling. You will, however, experience that Danes might be more talkative than the Finns.

**Perception of the GAW:**

Although the U.S.A. is a frequently visited country among the Nordic travelers – even our top favorite long-haul destination – the Great American West is still rather new to us.

The characteristics of the region do, however, match our preferences: great nature and wildlife, the possibility to be active on our holiday, and the possibility to experience a lot of different things while traveling. We love a good roundtrip that would take us to the small, quirky towns; high mountains; calm waters – and everything in between.