

Produced on Behalf of Wyoming Office of Tourism

Produced by RMI on August 25, 2025

2025 RMI TRIP REPORT™



THE GREAT
AMERICAN WEST
IDAHO • NORTH DAKOTA
SOUTH DAKOTA • WYOMING



International Travel Data

2025 Product Audit & 2024 Booking Report

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Introduction

Executive Summary

Dear Great American West Stakeholders,

Welcome to the 2025 RMI TRIP Report™. Produced exclusively for the Great American West Cooperative Program by RMI, it offers proprietary insights into key international tourism markets for the states of Idaho, North Dakota, South Dakota and Wyoming.

The report includes 2025 state-, city- and property-specific product information and the 2024 estimated room nights booked and visitor spend. Countries surveyed include: Australia & New Zealand, Benelux (Belgium, Netherlands and Luxembourg), France, German-speaking (Germany, Austria and Switzerland), Italy, Nordics (Sweden, Finland, Denmark and Norway) and UK & Ireland.

Regional results for 2025:

- ▶ Nine new tour operators (+1.7%) offered region product
- ▶ Overnights offered increased 1,007 (+4.74)
- ▶ Room nights booked dipped slightly by 1.5%, mainly due to a reduction in reporting from two key operators in the Benelux and Australia & New Zealand markets. Otherwise, bookings would be up 1.7%.
- ▶ Estimated spend grew by 2.2%
- ▶ Best reporting sample size we've ever received with 31% of operators reporting booking data

Wyoming results for 2025:

- ▶ 15 new tour operators (+3%)
- ▶ 537 new overnights (+4%)
- ▶ 1,642 more room nights booked (+2%)
- ▶ A \$2.85 million increase in visitor spending (+5%)
- ▶ Largest growth in room nights booked: Germany, UK, France
- ▶ Declines in room nights booked: Benelux, Italy, Nordics
- ▶ Australia remained flat
- ▶ Top tour operators for room nights booked and spend for Wyoming:
 - CANUSA - Germany
 - Trailfinders - UK
 - Argus Reisen - Germany

Using the RMI TRIP Report™, you can easily identify who sells GAW state itineraries; compare markets by travel category; conduct advanced reporting for each state, city and property; pinpoint opportunities for itinerary growth; increase productivity of meetings with international trade; determine B2B ROI; improve marketing success; and engage region stakeholders on the importance of international visitation to their destination.

With best regards,



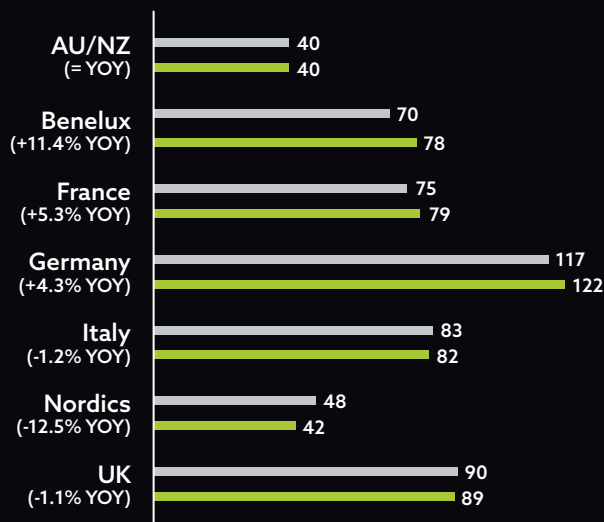
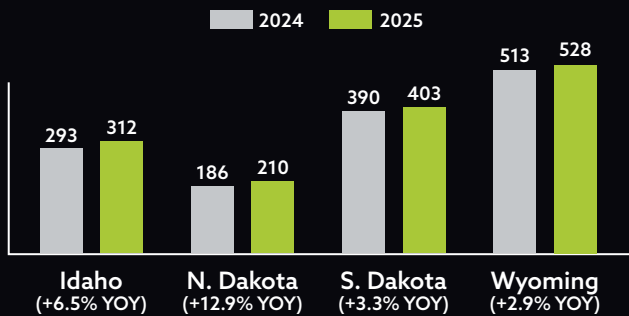
Mathias Jung, Owner & CEO, RMI



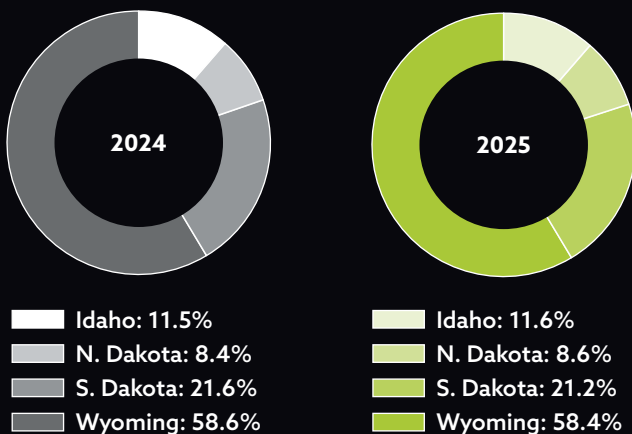
Evan Thompson, Data Manager

By The Numbers: Product

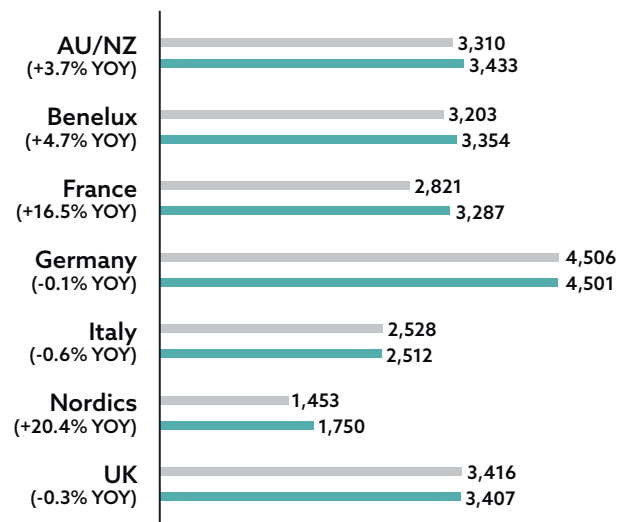
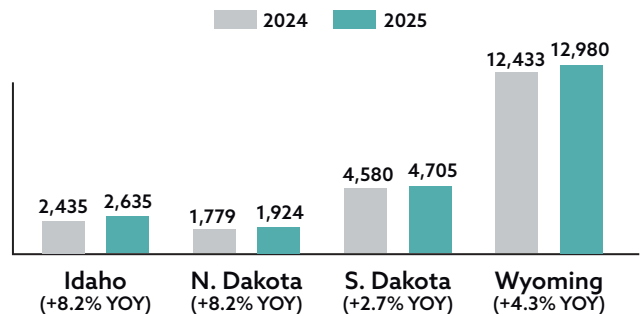
2025 TOs Offering Overnights: 532 (+1.7% YOY)



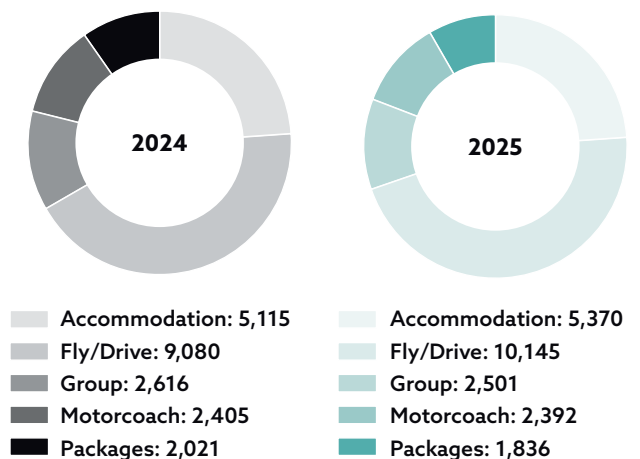
2025 State Market Share



2025 Overnights Offered: 22,244 (+4.74% YOY)

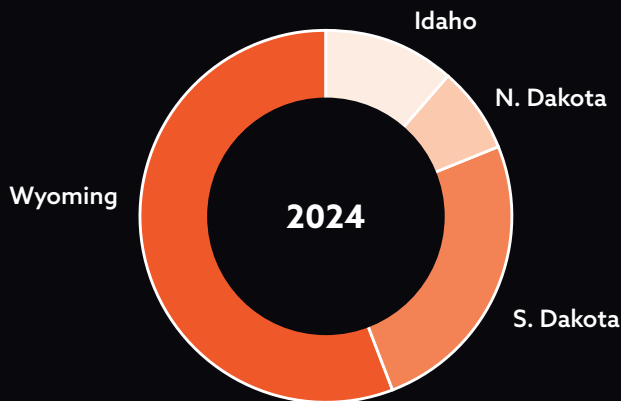
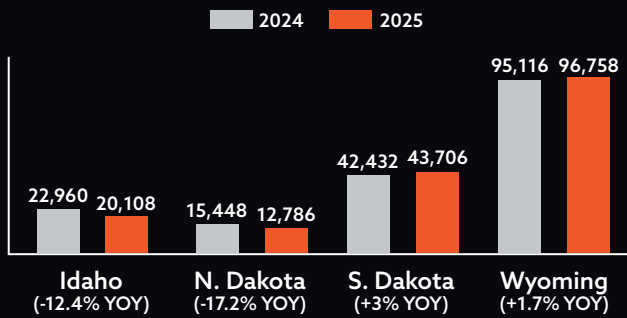


By Product Category

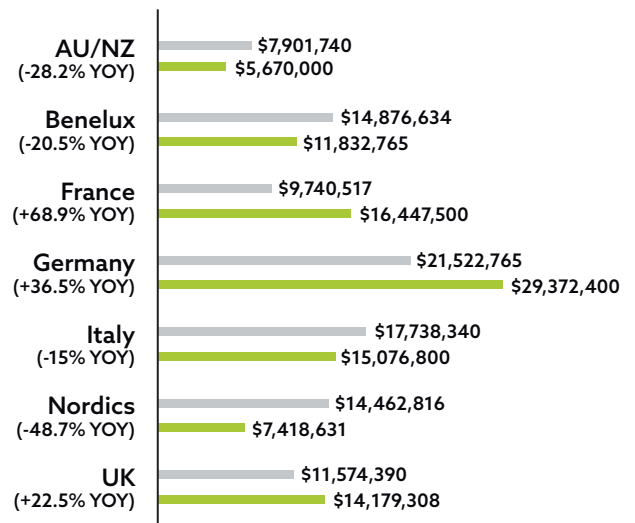
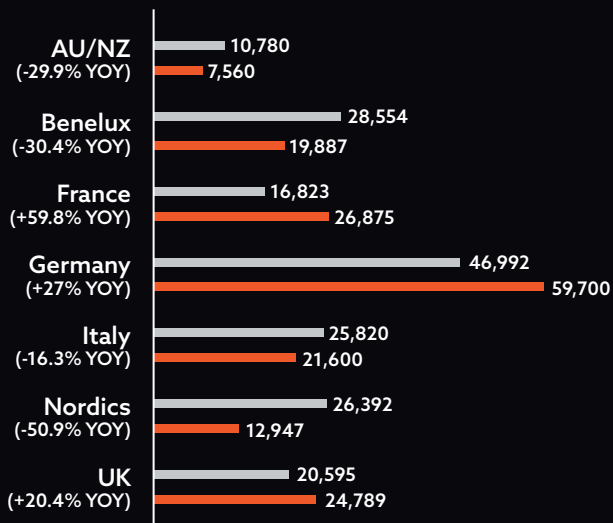
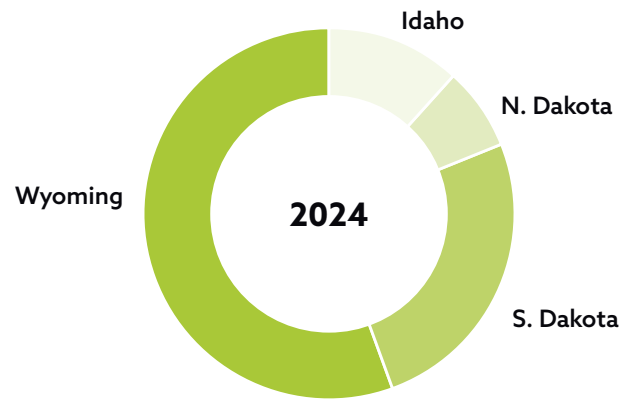
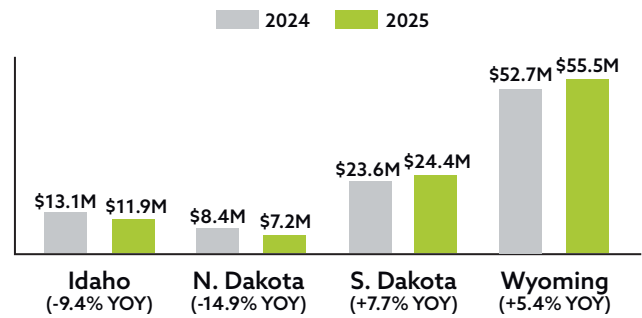


By The Numbers: Bookings

2024 Est. Rooms Booked: 173,358 (-1.5% YOY)



2024 Est. Visitor Spend: \$99,997,404 (+2.2% YOY)



Region Reports

Region Totals

REPORT DESCRIPTION

- The **Region Totals** report gives a status update of your destination in select overseas markets, including the following metrics:
- **Tour Operators Offering Overnights:** The number of tour operators offering itinerary overnight product.
 - **Total Overnights:** The number of itinerary overnight product available for sale.
 - **Tour Operators Reporting Room Nights Booked:** The number of tour operators supplying room nights booked data.
 - **Market Percentage Providing Booking Data:** The percentage of tour operators offering overnights that supplied room nights booked data.
 - **Total Estimated Room Nights Booked:** The extrapolated total estimated room nights booked.
 - **Total Estimated Visitor Spending:** The extrapolated total estimated visitor spending.



RMI TRIP Report™ Region Totals

Region Totals

Tour Operators Offering Overnights	532
Total Overnights	22,244
Tour Operators Reporting Room Nights Booked	166
Market Percentage Providing Booking Data	31%
Total Estimated Room Nights Booked	173,358
Total Estimated Visitor Spending	\$99,997,404

State Totals



RMI TRIP Report™ State Totals

State	TOs	ON	ON %	Reported	Reported %	Est RN	EstRN %	Spending
Idaho	312	2,635	12%	131	24%	20,108	12%	\$11,886,619
North Dakota	210	1,924	9%	119	22%	12,786	7%	\$7,157,204
South Dakota	403	4,705	21%	150	27%	43,706	25%	\$25,428,301
Wyoming	528	12,980	58%	163	30%	96,758	56%	\$55,525,280

REPORT DESCRIPTION

The **State Totals** report breaks down information by state, showing the number of tour operators selling product, the number of overnights offered and state overnight market share. This includes the following metrics:

- **State:** The state reported.
- **TOs:** The number of tour operators selling product by state.
- **ON:** The number of itinerary overnight product available for sale.
- **Reported:** The number of tour operators supplying room nights booked data.
- **Reported %:** The percentage of tour operators offering overnights who supplied room nights booked data.
- **Est RN:** The extrapolated total estimated room nights booked.
- **Est RN %:** Market share of room nights booked.
- **Spending:** The extrapolated total estimated visitor spending.

**Estimated room nights and all visitor spend calculations are proprietary models derived by RMI. [Data collected and reported by the National Travel & Tourism Office](#) provides data for total arrivals, total travel receipts excluding airfare, median length of stay in the U.S. and mean travel party size, which is used in these calculations. See [Index](#) for further information.*

2025 TRIP Market By State

Germany	122	2,667	9,943	0.286885	34,656	\$492	\$17,050,752
Italy	80	1,446	4,248	0.317073	13,398	\$698	\$9,351,804
Nordic	42	740	1,606	0.428571	3,749	\$573	\$2,148,177
UK	89	2,264	4,876	0.292135	16,690	\$572	\$9,546,680
Totals	528	12,980	29,521		96,758		\$55,525,280
Grand Totals	1,454	22,244	53,640		173,358		\$99,997,404

Market Totals



RMI TRIP Report™ Market Totals

Market	TOs	ON	Reporting	Reported %	Est RN	Est RN %	Spending
Australia	40	3,433	11	28%	7,560	4%	\$5,670,000
Benelux	78	3,354	26	33%	19,887	11%	\$11,832,765
France	79	3,287	24	30%	26,875	16%	\$16,447,500
Germany	122	4,501	35	29%	59,700	34%	\$29,372,400
Italy	82	2,512	26	32%	21,600	12%	\$15,076,800
Nordic	42	1,750	18	43%	12,947	7%	\$7,418,631
UK	89	3,407	26	29%	24,789	14%	\$14,179,308

REPORT DESCRIPTION

The **Market Totals** report provides a summary product audit and booking report by selected markets. This includes the following metrics:

- **Market:** The market reported.
- **TOs:** The number of tour operators offering itinerary overnight product.
- **ON:** The number of itinerary overnight product available for sale.
- **Reporting:** The number of tour operators supplying room nights booked data.
- **Reported %:** The percentage of tour operators offering overnights who supplied room nights booked data.
- **Est RN:** The extrapolated total estimated room nights booked.
- **Est RN %:** Market share of room nights booked.
- **Spending:** The extrapolated total estimated visitor spending.

Produced by:



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