Insights for a Successful Summer

Key takeaways from GetYourGuide's biannual *Travel Experience Trend Tracker*

GET YOUR GUIDE

Hello, we are **GetYourGuide.**

We're on a mission to help attractions, experience providers, and destinations connect with engaged travelers around the world.

We focus solely on the travel experiences vertical.

About this research

The Travel Experiences Trend Tracker focuses on the in-destination travel experiences industry. It includes the following data sources:

- **Online quantitative survey** (n=6k+)
- **AI natural language analysis** (14k+ responses)
- **GetYourGuide platform data** (100M+ visitors / month)

UK
n=1,006

France
n=1,052

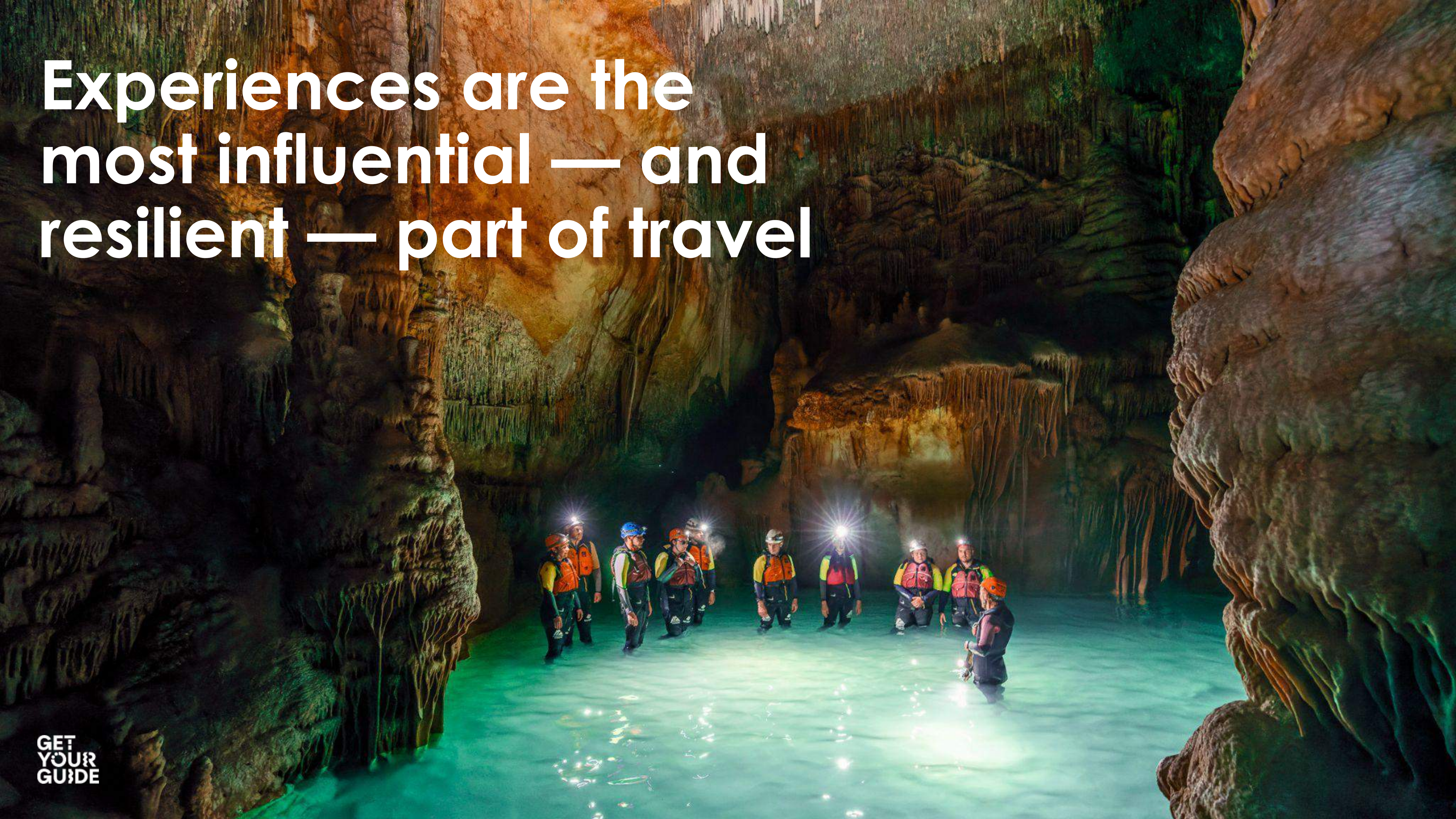
Italy
n=1,056

Spain
n=1,068

Germany
n=1,003

USA
n=1,071

Experiences are the most influential — and resilient — part of travel

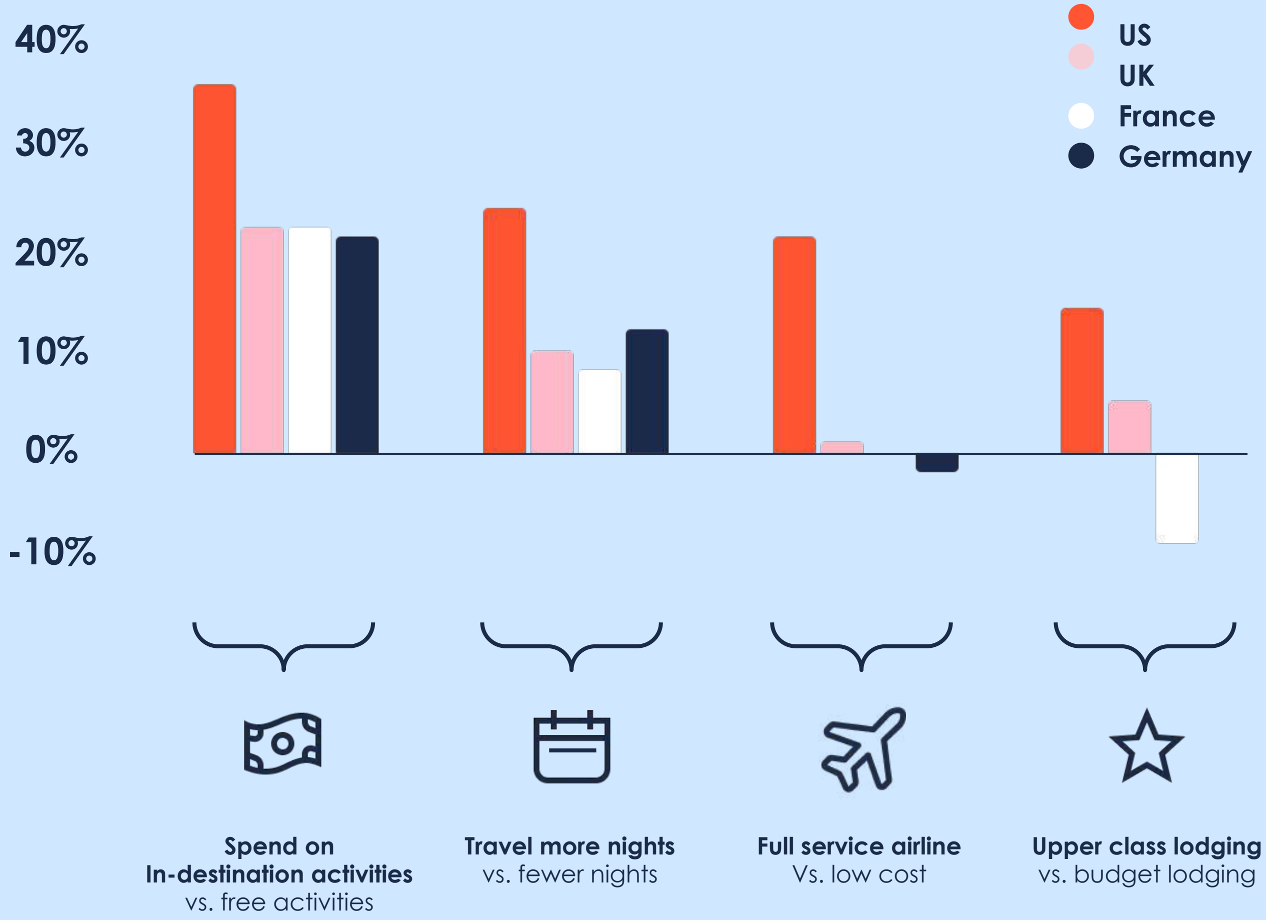


GET YOUR GUIDE

Experiences are the most resilient travel vertical

In-destination experiences are amongst the areas where consumers are least willing to cut spending

Travel activities, want to do more/less
(Net intent)

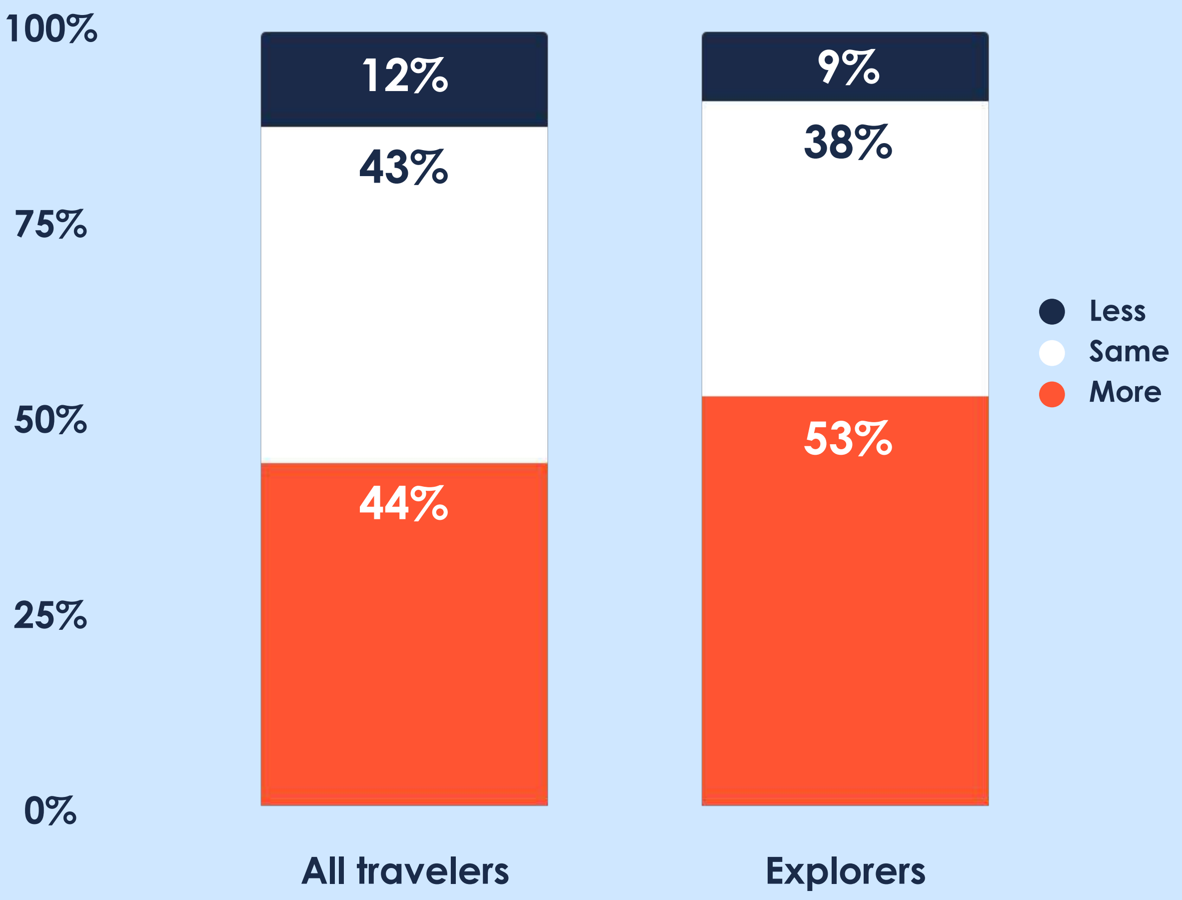


[1] Source: Proprietary GetYourGuide survey Feb24 (N=6256)

Experiences are the most resilient travel vertical

Almost ½ of travelers plan to spend *more* on experiences this year

Evolution of future travel budgets for travel activities



[1] Source: Proprietary GetYourGuide survey Feb24 (N=6256)

01

Where to go, what to do: How and when we decide

INSIGHT 1

Drivers and constraints: How people decide

4 distinct sources of inspiration for picking a destination

Practicalities influence trip *type* — they constrain choice.

For comparable destinations, experiences *drive* consideration — they have emotional pull.

Influences of past travel destination in order of importance

All markets, open ended-responses

1st	Practicalities
2nd	Experiences
3rd	Family & friends recommended
4th	Media

[1] Source: Proprietary GetYourGuide survey Feb24 (N=6256)

INSIGHT 1

Drivers and constraints: How people decide

- **Understand your destination competitor set**: Which cities/regions compare (e.g. size, weather, landscape)? How can you differentiate? Are you offering what's popular?
- **Influence destination perception**: Attracting off-peak visitation is a long-term game

Influences of past travel destination in order of importance

All markets, open ended-responses

1st	Practicalities
2nd	Experiences
3rd	Family & friends recommended
4th	Media

[1] Source: Proprietary GetYourGuide survey Feb24 (N=6256)

INSIGHT 2

Events are year-round drawcards

Sporting, performance, music events and festivals were the driver of 1 in 4 trips according to 2024 Arival research (*The Power of Events*, Q1)

Booking trends around significant sporting and music events

All markets, 2023

July	Strongest summer month on record, breaking August peak trend	**Formula 1 Grand Prix** Budapest, **July** 2023
+75%	increase in NR / tour in **September** — highest NR per tour in 2023	**Rugby World Cup** Marseille, **September** 2023
542%	**March** tickets sales YOY	**Taylor Swift concert** Singapore, **March** 2023
24%	of all 2023 tickets Sold in **April**	**Coachella festival** Palm Springs, **April** 2023

GET YOUR GUIDE

INSIGHT 2

Events are year-round drawcards

- **Market your experiences around large events**, especially when they're first announced
- **Engage in experience campaigning** to encourage travelers to extend their stay

Booking trends around significant sporting and music events

All markets, 2023

July	Strongest summer month on record, breaking August peak trend	**Formula 1 Grand Prix**	Budapest, **July** 2023
+75%	increase in NR / tour in **September** — highest NR per tour in 2023	**Rugby World Cup**	Marseille, **September** 2023
542%	**March** tickets sales YOY	**Taylor Swift concert**	Singapore, **March** 2023
24%	of all 2023 tickets Sold in **April**	**Coachella festival**	Palm Springs, **April** 2023

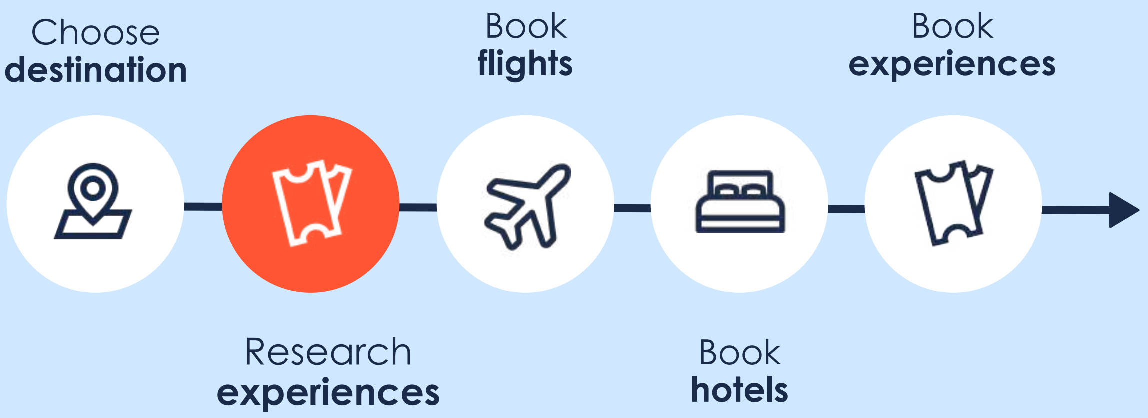
GET YOUR GUIDE

Activity planning comes before flights and hotels

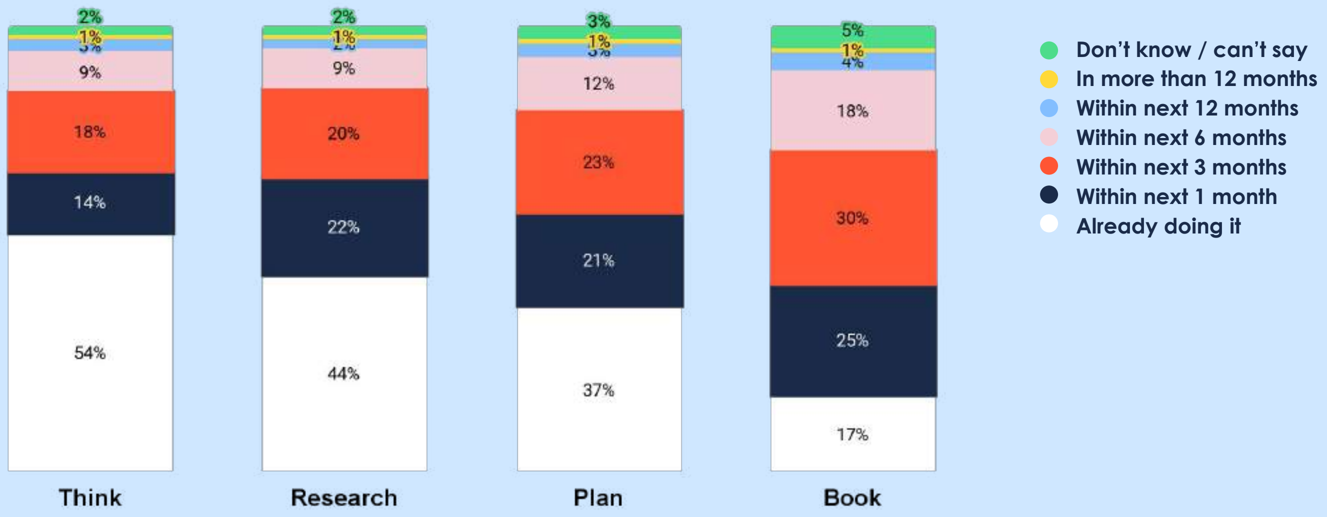
Only once customers have done activity research will they start to book flights and hotels.

The planning happens up to ¼ year in advance.

Travelers' decision flow



Inspiration to booking: Timings



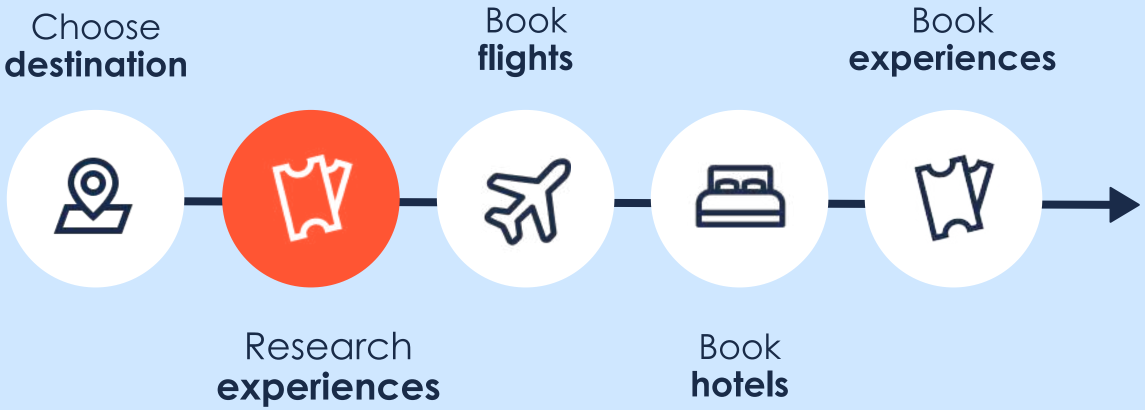
GET YOUR GUIDE

INSIGHT 3

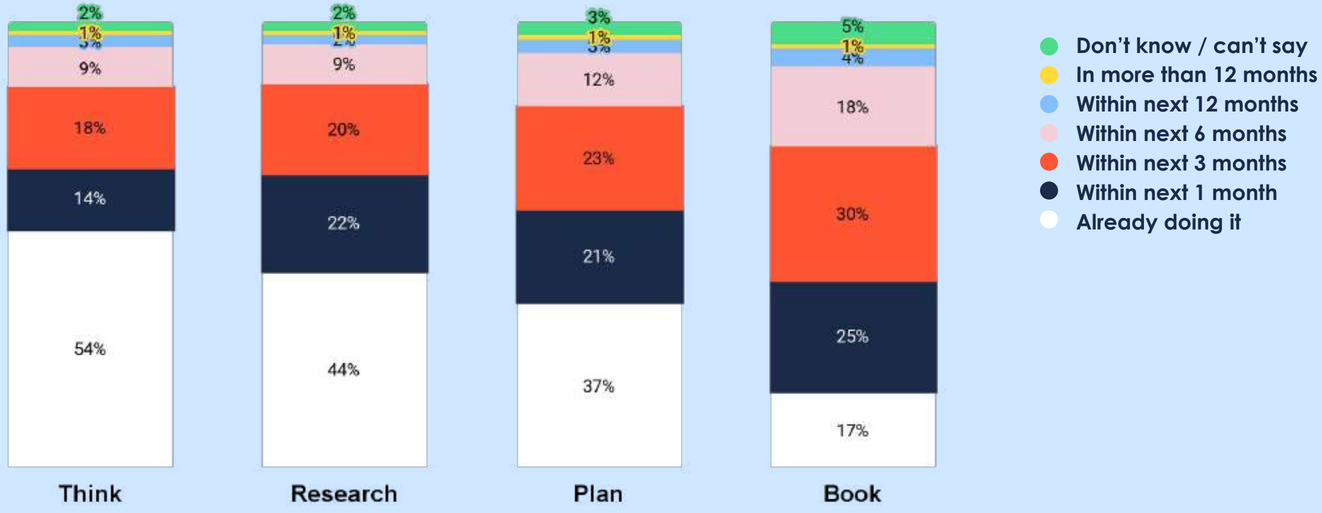
Activity planning comes before flights and hotels

- **Drive consideration** and ensure you're **top of mind** when they're ready to book
- **Encourage advanced purchase** by uploading all inventory as early as possible

Travelers' decision flow



Inspiration to booking: Timings



INSIGHT 3

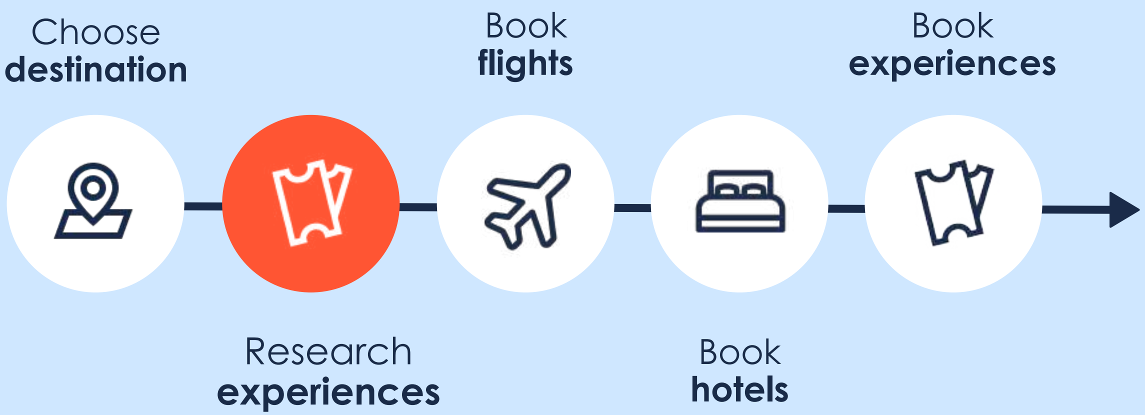
Activity planning comes before flights and hotels

Amplify marketing when traveler research begins:

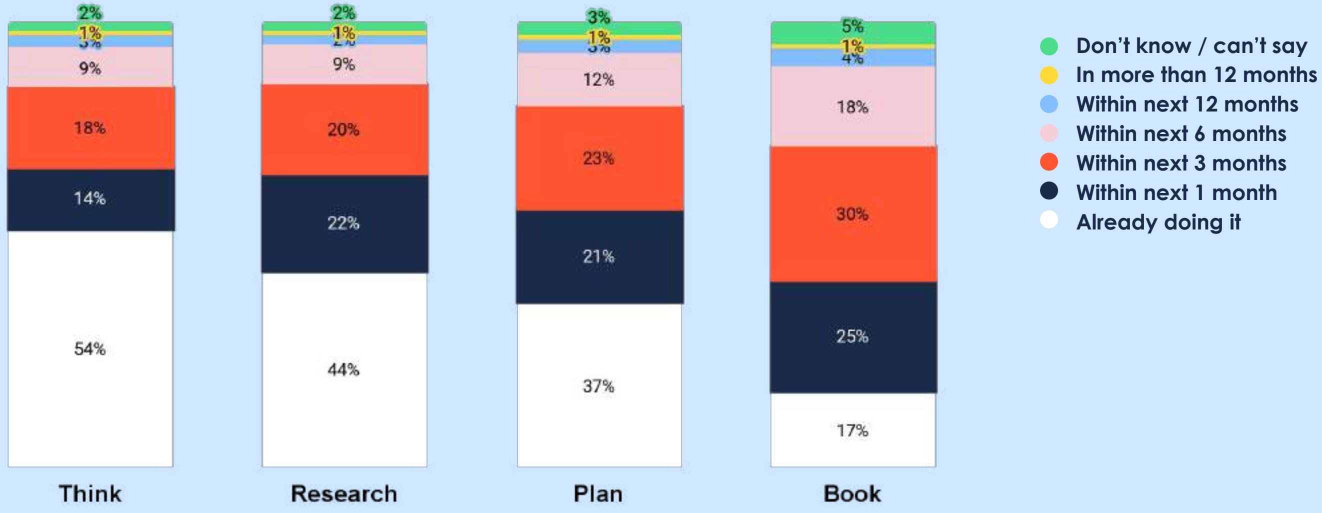
- *Summer vacation = April start*
- *Holiday period = October start*
- *Spring/Easter = January start*

GET YOUR GUIDE

Travelers' decision flow



Inspiration to booking: Timings



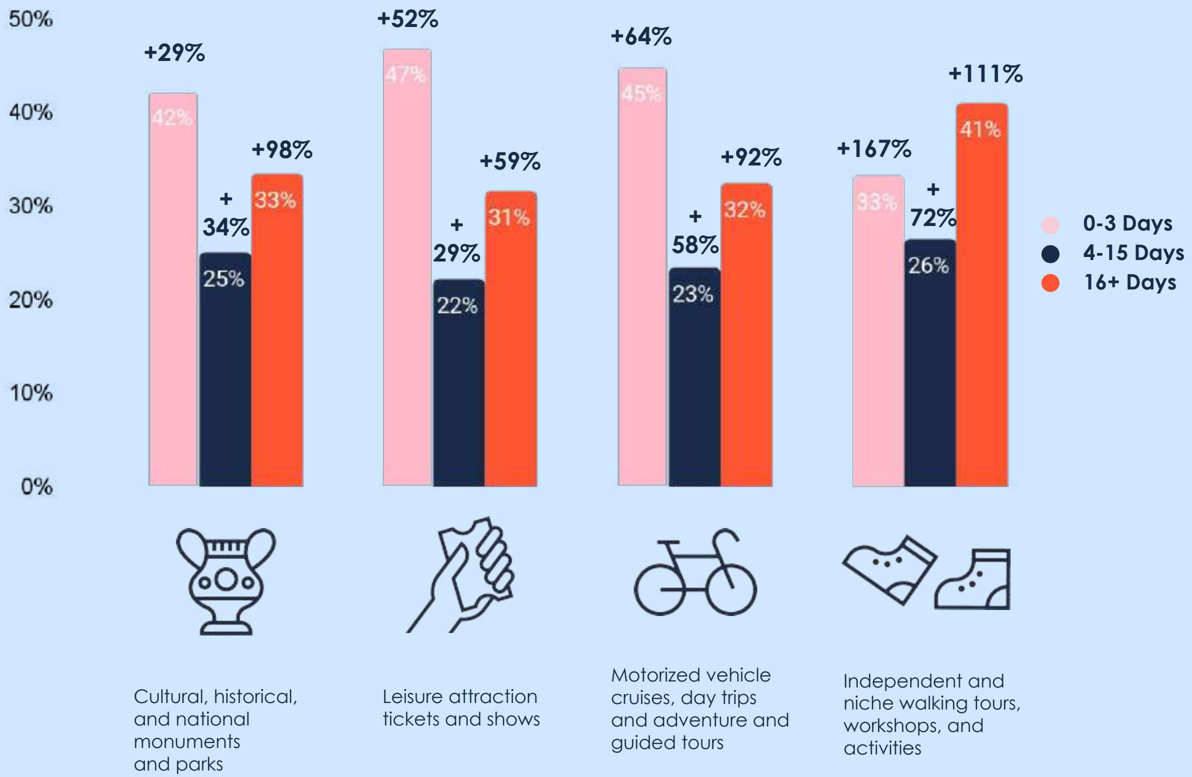
INSIGHT 4

Way ahead or last-minute

- Bookings 1-3 days in advance were still most common
- But bookings 16+ days in advance had strongest growth YoY for (almost) all experience types

Days to conduction by activity type

P12M Oct23



Source: GetYourGuide booking data P12M Oct23

INSIGHT 4

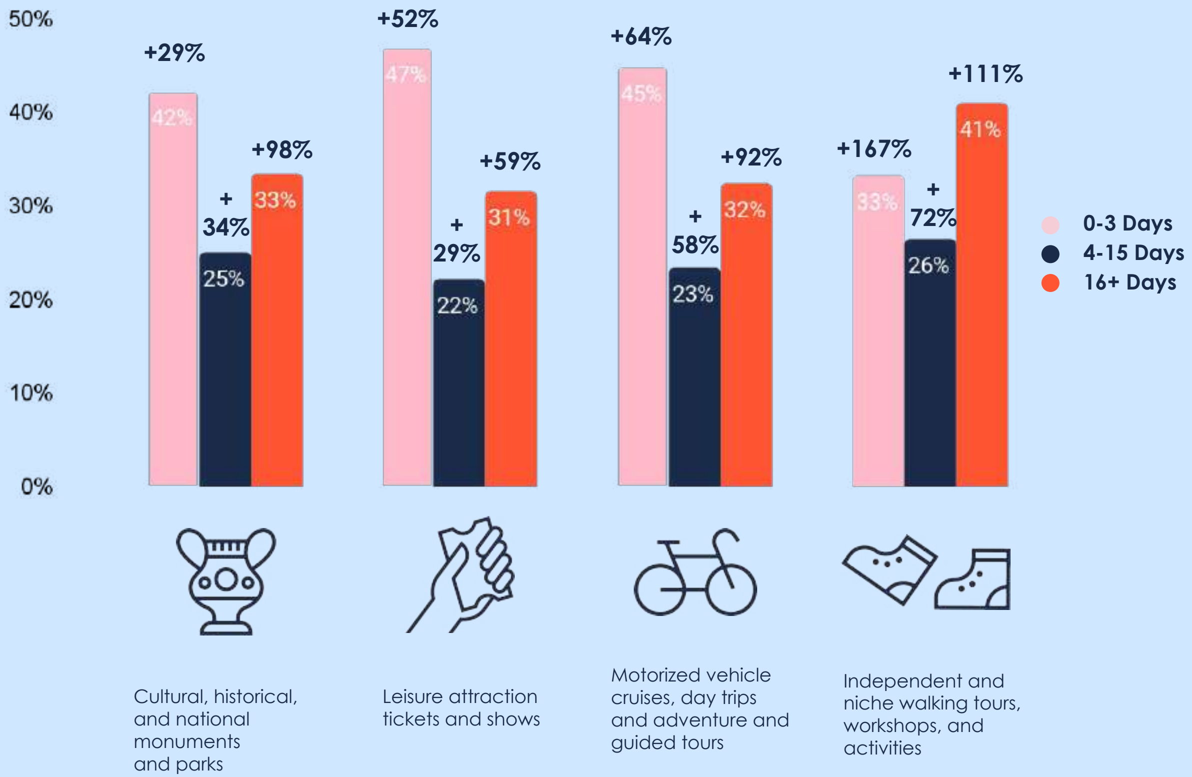
Way ahead or last-minute

Capture as much early demand as possible by **ensuring availability is up-to-date well in advance**

Use Restechs and API software to **automatically update pricing and last-minute availability**

Days to conduction per Supplier Segment

P12M Oct23



Source: GetYourGuide booking data P12M Oct23

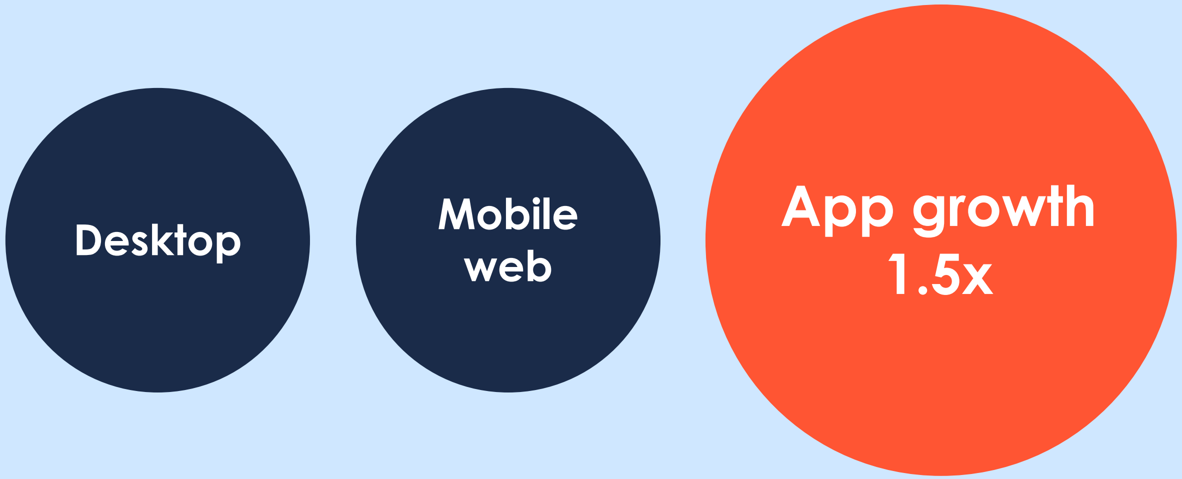
BONUS!

Apps are the fastest growing channel in our industry

The trend is getting more significant as convenience becomes more important

App growth vs. other devices, all GetYourGuide tickets

P12M Oct23



Source: GetYourGuide booking data P12M Oct23

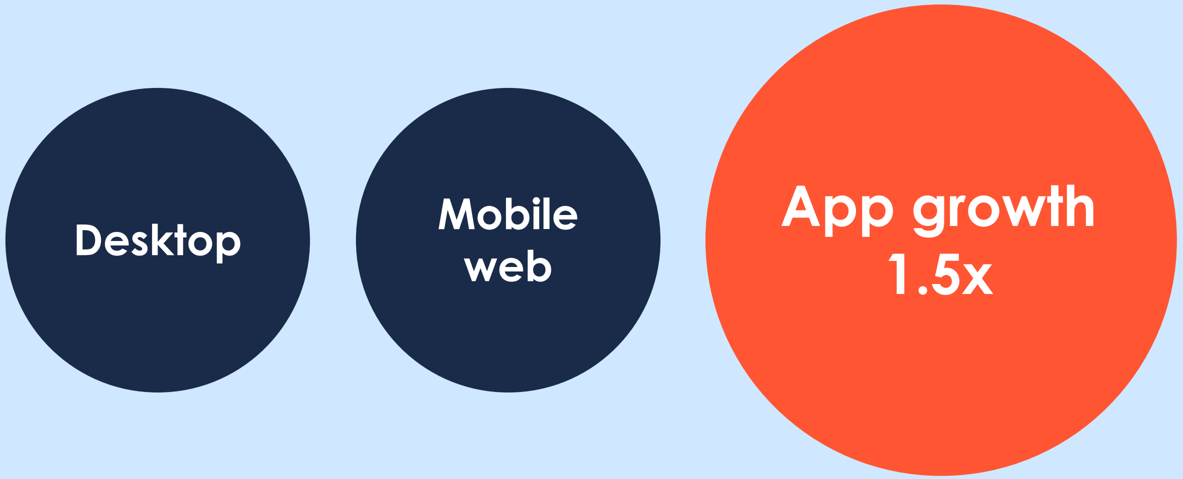
BONUS!

Apps are the fastest growing channel in our industry

- Turn casual mobile browsing into booking with a seamless app experience
- Employ mobile ticketing by using a Restech
- Lean on OTA apps as brands of choice for on-the-go bookings, and wishlisting pre-trip

App growth vs. other devices, all GetYourGuide tickets

P12M Oct23



Source: GetYourGuide booking data P12M Oct23

02

Who are the most important travelers?

INSIGHT 5

Understanding Explorers' value

The travelers who go on the most trips and spend the most money on experiences are the most valuable audience for Experience Creators.

We call these travelers "Explorers".

They're also most likely to book online.

The Explorer persona

4+ **Number trips planned in 2024**, vs. 2.8 for the average traveler

53% plan to **spend more or much more on travel activities vs. past trips, + 9pts vs. average**

+8 ppts More likely consider the "amount of things to do" when choosing a place

1.7x More likely to **book online than offline** vs. the average traveler

Travel activities done in the past 12 months (top 5)

57% Cultural monuments, museums or galleries **+9ppts**

52% Guided city tours **+4ppts**

48% Leisure attraction tickets **+5ppts**

37% Theme parks **+5ppts**

34% Bus and boat tours **+9ppts**

GET YOUR GUIDE

INSIGHT 6

The Explorer profile

They want to be immersed in the local way of life

They prefer to visit new places instead of places they already know

They find research fun, and an important part of the trip

They go on vacations to discover and explore new things

Source: Proprietary GetYourGuide survey Feb24 (N=6256)

Top 3 drivers for booking a travel experience

1. I can manage my booking online
2. It lets me experience something unique
3. I can reschedule if my plans change

Source: Proprietary survey Oct23 (N=6277)

BONUS!

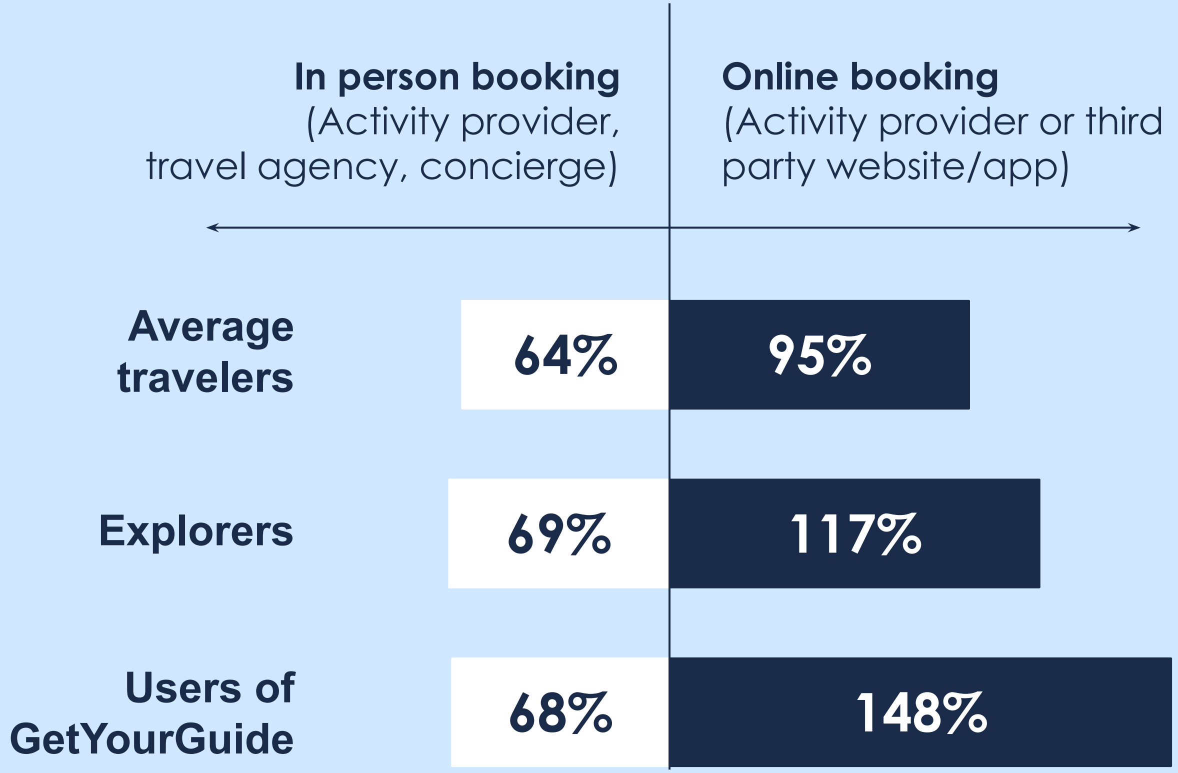
Digital channels are growing the pie

Different cohorts book online more frequently than others. By diversifying distribution, you're actively targeting different cohorts of people, whom you may otherwise miss with a narrow distribution strategy.

GET YOUR GUIDE

Past booking channels

Per segment



[1] Source: Proprietary GetYourGuide survey Feb24 (N=6256)

Appeal to Explorers

- **Highlight the unique, authentic aspects of your tour** to appeal to the Explorer traveler cohort
- **When possible, increase personal recommendations** — this will that highlight the unique, natural, culinary, and cultural parts of your product
- **Think about a diverse distribution strategy** to target an OTA-affine audience
- **Connect visitors to other tours / activities** that might interest them: Your community is your strength
- Enable **flexible booking and cancellation** policies

GET YOUR GUIDE

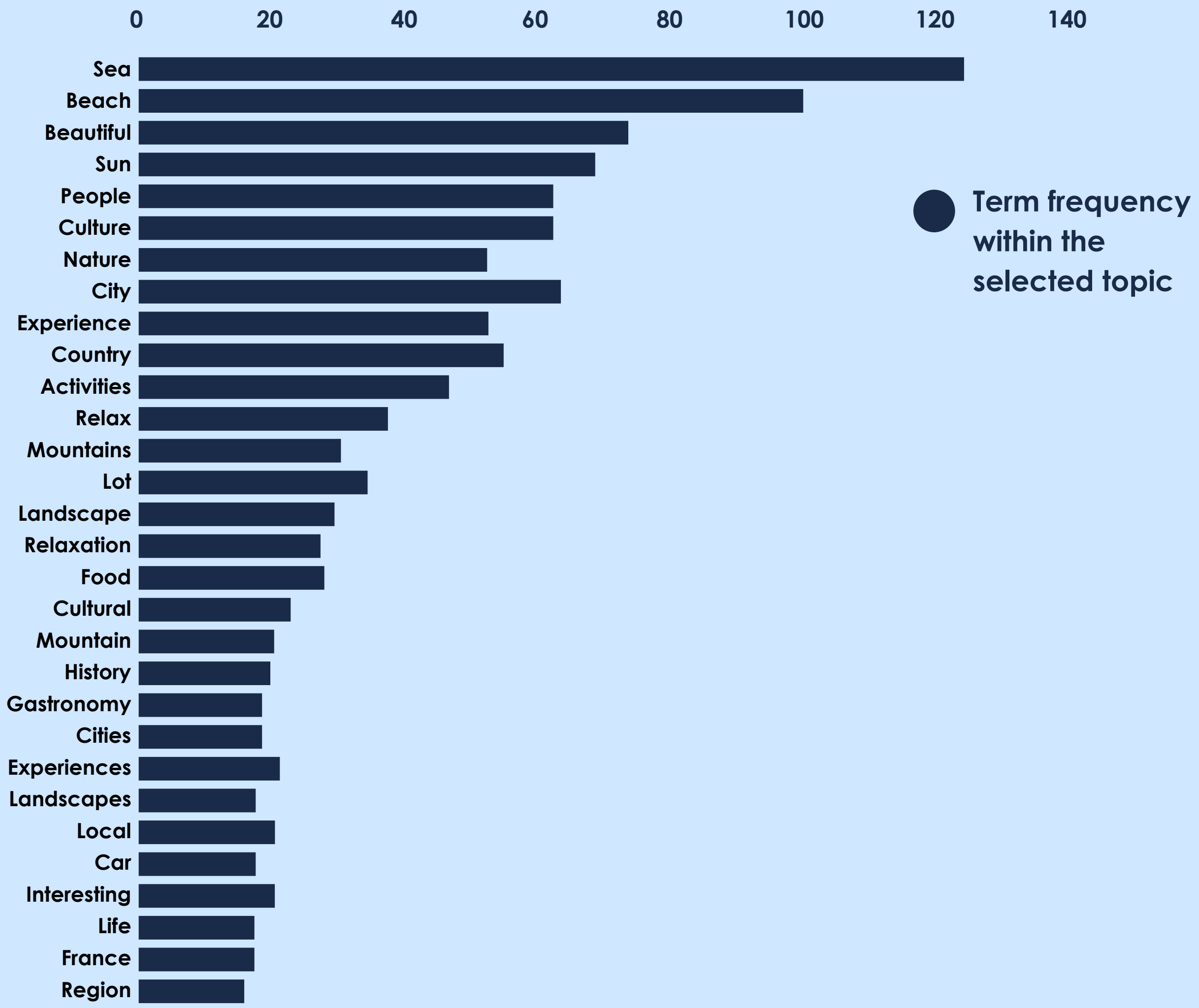
What's trending?

Trending: Waterfronts, culture, nature, and food

Analysing natural language responses, we see 4 overarching desires regarding "things to do": **Waterfronts, Culture, Nature, Food.**

Top relevant terms for "things to do"

All respondents



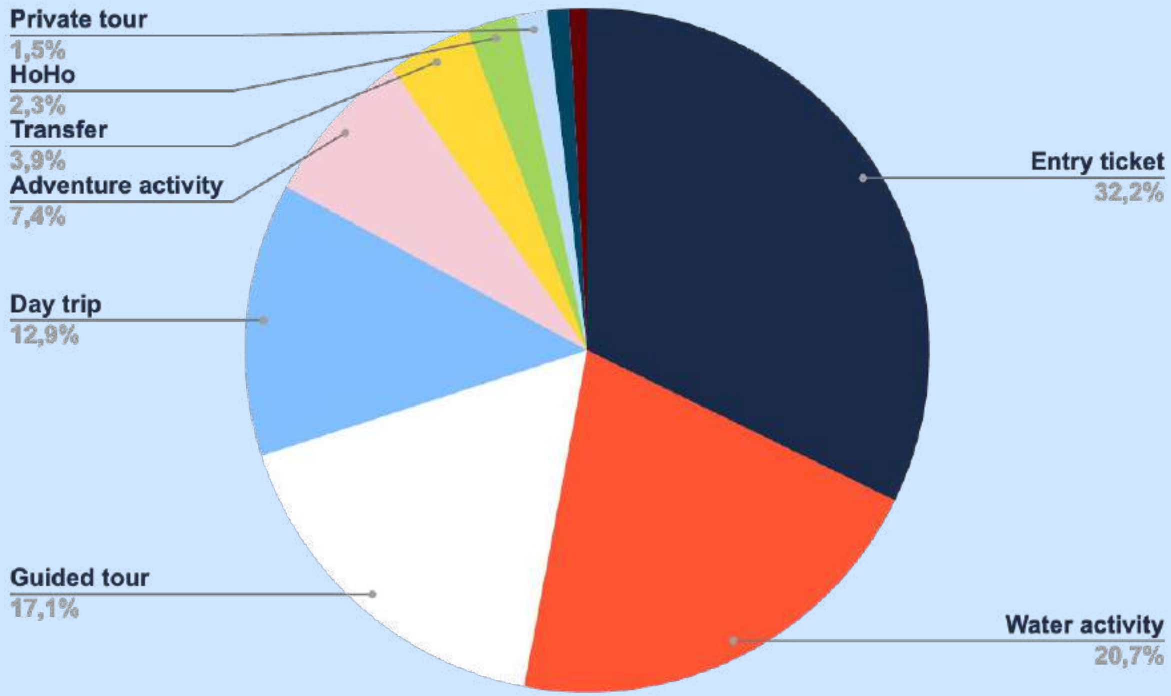
[1] Source: Proprietary GetYourGuide survey Feb24 (N=6256)

INSIGHT 7

Categories: What's most popular with EU travelers?

Attractions and theme parks, water activities, and guided tours in general (including walking tours and guided tours of top sights) are most booked

Breakdown of tickets sold by category
European source markets, 2023



Source: GetYourGuide booking data P12M Oct23

Categories: What's grown most, YoY?

Workshops, private tours, and "adventure activities" (helicopter rides, outdoor activities, ATV tours, etc.) are growing fastest

YoY growth per category

European source market, P3M (23vs24)

Source: GetYourGuide booking data P12M Oct23

GET YOUR GUIDE

INSIGHT 7

Categories: What's grown most, YoY?

Intimate, immersive, and private tours are speaking to travelers' needs — can you adapt to enable smaller groups or more immersive experience?

YoY growth per category

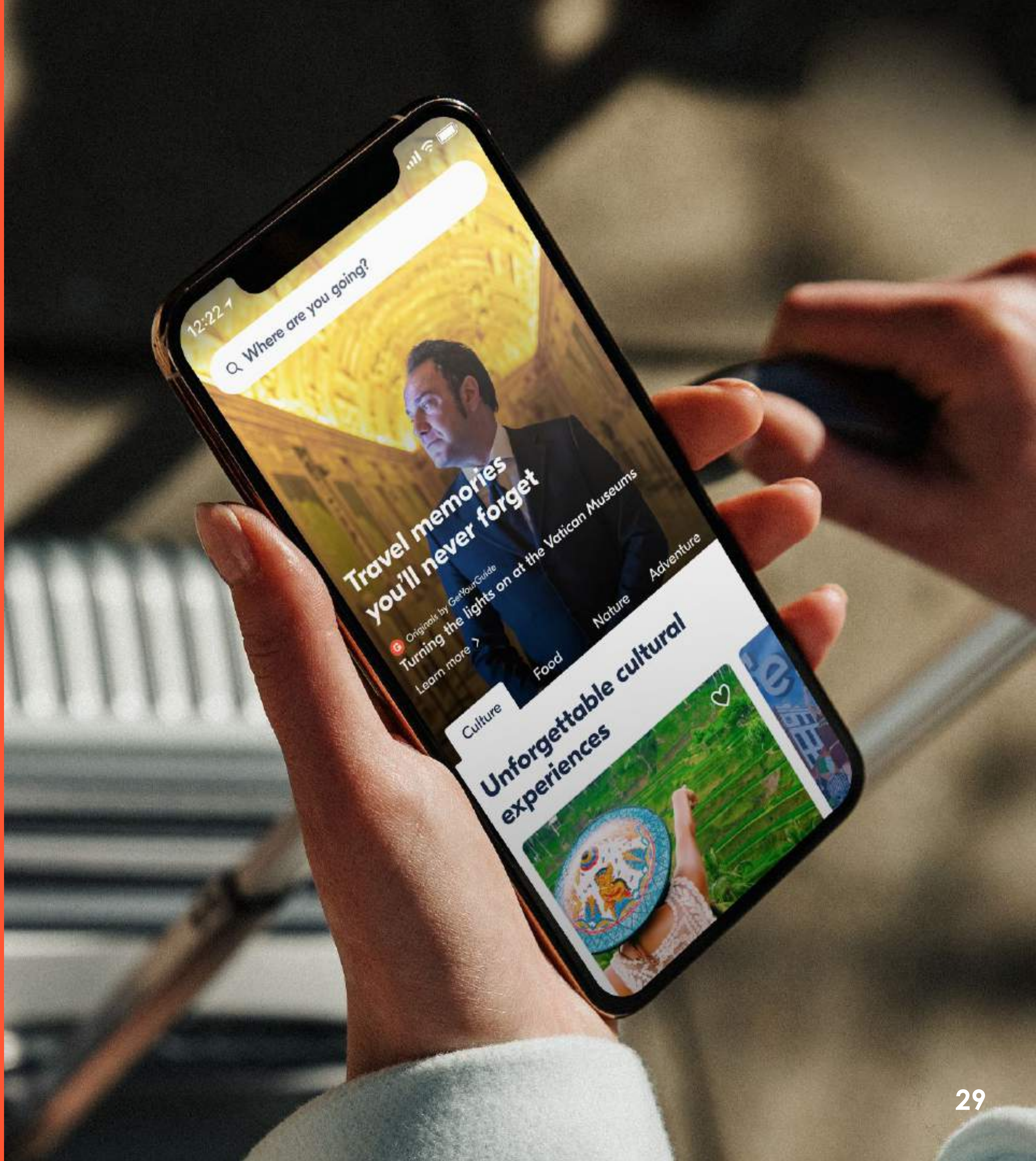
European source market, P3M (23vs24)

Source: GetYourGuide booking data P12M Oct23

Experiences are the first and last thing we consider for our trips.

Research and planning lays the foundations for bookings when they're in-destination.

To drive and capture demand, start marketing experiences, and start early.



Anna Cashman
B2B Brand & Insights Lead
linkedin.com/in/cashmananna/

GET YOUR GUIDE