Beyond Paris: GetYourGuide and the new geography of French tourism

March 2026

Preface

As Regional Manager for GetYourGuide in France, I see firsthand how the way people travel is evolving - and how expectations are shifting toward experiences that are more meaningful, more local, and more sustainable.

Tourism in France is undergoing significant transformations, shaped by national strategies and by new practices driven by actors across the ecosystem - from destinations and cultural institutions to local entrepreneurs. Across the sector, there is a shared ambition to strengthen territorial attractiveness, create long-term value, and ensure sustainability. A central challenge within this transition is achieving a more balanced distribution of visitors. While the public conversation often focuses on overtourism, the reality is frequently one of uneven tourism flows: pressure concentrates on a few iconic hotspots, while many places remain outside the main tourism dynamics. Supporting travel beyond the most visited destinations is therefore essential - not only to relieve overcrowded urban centers and fragile natural sites, but also to foster economic activity and opportunity in less-visited areas.

In this context, digital platforms like GetYourGuide can play a strategic role that goes beyond facilitating bookings. By increasing the visibility of local offers and making them discoverable for travelers, we can help channel demand toward a wider range of destinations and experiences. This extends to the diverse tapestry of local heritage — including heritage sites, traditional practices, local crafts, and community celebrations — helping travelers connect with what makes each place distinct, and enabling local experience providers to reach audiences they might not otherwise access. This is particularly important for small businesses, from artisanal workshops and specialist guides to local gastronomy, boat tours, and niche cultural activities, that are often high in quality yet fragmented in how they reach international audiences.

This report explores how GetYourGuide contributes to France's visitor economy by connecting travelers with experiences that bring them closer to local culture, while supporting a more resilient and inclusive tourism model. By aligning the preferences of travelers seeking authentic, off-the-beaten-track moments with the richness of France's local supply, we aim to help tourism deliver benefits more fairly - for communities, for creators, and for the destinations that make France extraordinary. As the most visited country in the world, France's global appeal offers a unique opportunity to spread these benefits beyond the traditional hotspots, ensuring that lesser-known places and local experience providers can also thrive.

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Introduction

Tourism in France experiences significant transformations, driven both by national strategies and by emerging practices led by key actors at the local, national, and international levels. Territorial attractiveness, long-term value creation, and sustainability represent shared objectives across the sector. A central issue in this evolution is the need for a more balanced geographical distribution of visitors, in the re-edition of the classic and historical confrontation between Paris/Île-de-France versus the rest of the country. While overtourism often dominates public debate, the reality is often an uneven distribution of tourists and the exclusion of several non-destinations from tourism dynamics. By encouraging travel beyond the most visited destinations, the sector seeks to reduce pressure on overcrowded urban centers and natural sites, while supporting economic activity in less-visited areas. Circular economy principles, a fairer distribution of impacts, and the empowerment of local actors are crucial for the resilience and sustainability of the sector.

In this context, digital intermediation platforms such as GetYourGuide can play a strategic role. Their function goes beyond simply facilitating transactions or pushing attractions. They can increase the visibility of local tourism offers; they can support a new generation of young entrepreneurs of "authenticity", capable of proposing experiences that enhance all the assets of local territories and they can enable a wider territorial distribution of tourism flows. By supporting local practices — such as artisanal workshops, specialized tour guides, local gastronomic initiatives, boat tours — in accessing the tourism market, these platforms contribute to restructuring and diversifying the tourism value chain. This digital integration helps align the preferences of specific segments of tourists, who seek experiences off the beaten track, with a local supply that is often fragmented.

These dynamics, encouraged by national policies and supported by digital infrastructures, contribute to strengthening what sector stakeholders and the media increasingly refer to as “proximity tourism” (tourisme de proximité). By enriching the experience of both international and domestic visitors, they may also influence local economic contributions and the length of stay. This approach helps to shift from a model focused mainly on visitor volumes and international arrivals, toward a more comprehensive analysis of tourism impacts. It considers local experiences, the plurality of actors involved, and the direct and indirect benefits generated for local communities.
This report examines these developments and provides an evidence-based assessment of the ongoing evolution of tourism in France, based on the specific case and user data of GetYourGuide.

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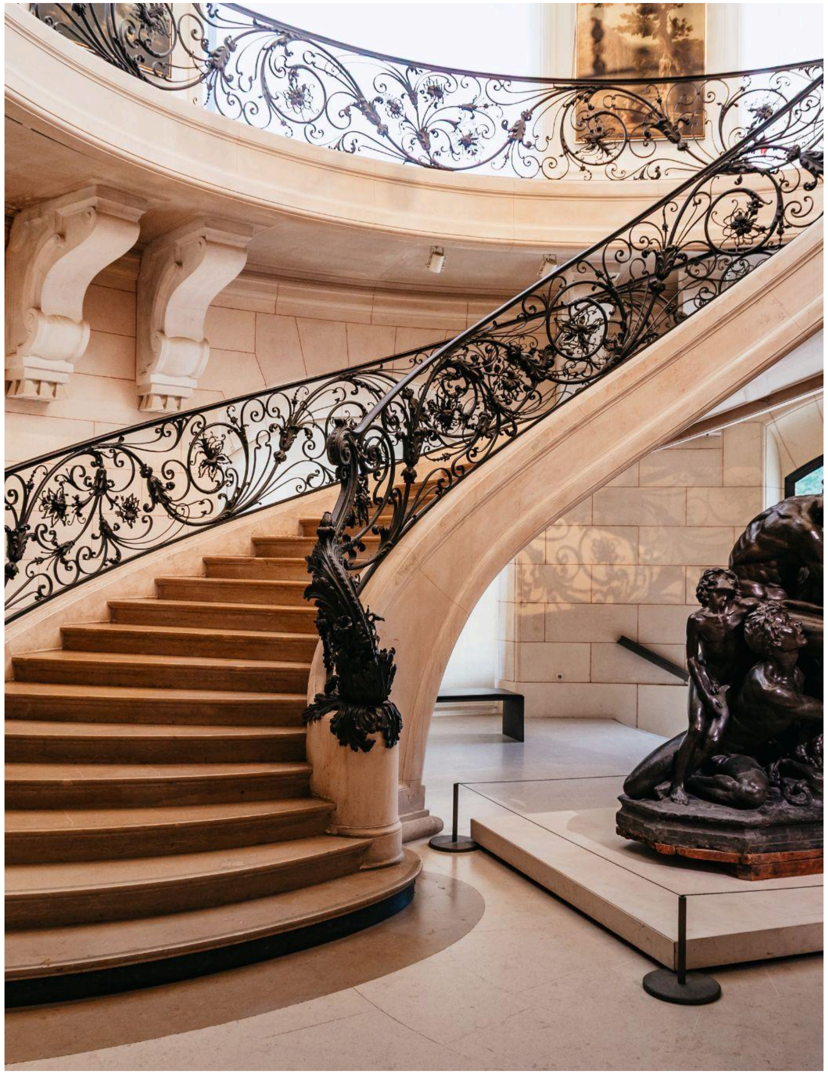
Synopsis and methodology

This report examines the role of GetYourGuide in France through an evidence-based approach that integrates data analysis with survey research. The study is structured into two sections.

Section 1 presents a comprehensive profile of GetYourGuide's audience in France. This first section analyses the company's dataset from January 2024 to December 2025, comprising 132,644,312 data cells, and incorporates findings from a targeted survey conducted in January 2026. The survey was sent to a total of 55,751 individuals, with a click-through rate (CTR) of 2.45%. Out of the 1,850 responses received, 150 responses were excluded from the sample because respondents experienced GetYourGuide offer in the area they reside in, making them unfit for the economic impact calculation. Consequently, the final sample consisted of 1,700 respondents, offering insights into travellers' socio-demographic characteristics, motivations, behaviours, and spending patterns.

Section 2 presents the analytical framework used to evaluate GetYourGuide's economic impact in France. Drawing on input–output methodology and data from national accounts (Institut national de la statistique et des études économiques - INSEE, Eurostat), it details how international GetYourGuide customer spending in France generates direct, indirect, and induced effects on the French economy.



Highlights of the research

Based on 1,700 interviews, representing 4,428 travellers (1,007 French and 3,421 internationals), the research identifies a high-value tourist segment characterised by a strong interest in authentic experiences and a clear willingness to invest both time and financial resources in exploring France's cultural offer. The average length of stay is six days, almost three times longer than the two-night average reported by institutional sources. Spending patterns reinforce the premium profile of this segment: average daily expenditure per capita among international GetYourGuide respondents amounts to €455, up to four times higher than figures reported in previous national surveys *(VisitParis: €114; ATOUT France: €114–€180, depending on the traveller's country of origin)*. Overall, these findings underscore the significant economic potential associated with this demand segment.

Almost 30% of respondents spend more than two weeks away from home. Moreover, 27% of participants declared that GetYourGuide experience played a major role in their trip planning, with 4% lengthening their stay specifically thanks to GetYourGuide. Additionally, 23% chose to visit the destination because of the GetYourGuide offer.

Examining data collected between January 2024 and December 2025 - amounting to a total of 2,883,572 bookings and 46 variables - GetYourGuide customers' purchases are shown to span a vast territorial area, covering 90% of French departments (87 out of 96).

Major urban destinations are not necessarily those generating the highest average spending per transaction. Among the top ten municipalities ranked by average transaction value, the highest figures are recorded in small destinations: seven out of ten have less than 15,000 inhabitants, and the second-ranked municipality counts fewer than 300 residents.

During the examined period, Entrance Tickets remained the leading category, accounting for over 39% of total bookings and increasing by 23% in 2025. At the same time, Adventure Tours, Shows and Events, and Workshops recorded growth rates exceeding 40%, while Walking Tours more than doubled year-on-year.

The economic impact analysis shows that each euro spent locally by GetYourGuide's international customers generated €1.75 in the French economy in 2025. Specifically, expenses generated from international tourists who bought GetYourGuide experiences in 2025 in France contributed a total economic impact of €5.6 billion euros. This contribution played a significant role in sustaining growth and strengthening the resilience of tourism-related economies throughout the French territory.

French tourism industry: state of the art

Tourism in France has shown strong resilience despite economic crises. Representing around 8% of the country's GDP[1], the industry continued to expand in 2025, especially in Paris, on the Mediterranean and Atlantic coastlines, and in mountain areas. France remains a top attraction for nearby visitors, particularly from Germany, Netherlands, Belgium and the UK. At the same time, it also maintains strong long-haul flows, notably from North America.

Domestic tourism

Regarding the domestic market, in the aftermath of Covid-19, France has registered a shift toward proximity, sustainability, and more meaningful forms of travel. The pandemic accelerated existing trends such as sustainable tourism, second-home use, proximity-tourism, and hybrid lifestyles combining work and leisure. This emphasizes the need to move beyond purely quantitative growth models and instead adopt experiential, ecosystem-based approaches that involve local communities, protect environmental and social balances, and create economic, symbolic, and cultural value.

Atout France Strategic Roadmap 2025

Atout France, France's national tourism agency , has defined the priorities following the conclusion of the Plan Destination France and the success of the Paris 2024 Olympic and Paralympic Games. After a strong 2024, marked by 100 million international visitors and €71 billion in international receipts, the strategy focuses on three pillars:

1. To continue and strengthen initiatives and projects undertaken as part of the Destination France plan and the Paris 2024 Olympic Games to enhance the competitiveness of tourism offerings and the attractiveness of the destination.
2. To build on achievements by continuing to promote French tourism in a responsible, inclusive and innovative manner.
3. To strengthen investment and performance in France, in the face of extremely fierce international competition.Key actions include reinforcing data tools, supporting innovation and investment, promoting priority sectors (business tourism, gastronomy, culture, mountain tourism, etc.), leveraging major international events, and intensifying promotion across priority markets.

[1] Atout France – France Tourisme Observation. (2025). *A record year for French tourism in 2024 thanks to the growth of international receipts and the strength of the domestic market.* Press release. January 21, 2025.

GetYourGuide as an ally

In this context, digital platforms such as GetYourGuide can act as strategic partners by enhancing destination visibility and supporting the distribution of flows. Beyond increasing demand, GetYourGuide can contribute to a better spatial and temporal distribution of tourists by promoting under-recognized destinations, off-season activities, through place-based strategies.

1.

GetYourGuide's customers profile in France

This study opens with an in-depth analysis of GetYourGuide customers who purchased experiences in France between 2024 and 2025. Understanding their origins, motivations, preferences and spending habits is essential to grasp the dynamics of international demand and its implications for French destinations.

1.1.Research syllabus and sources

Firstly, to outline the profile of GetYourGuide customers in France, Formules analyzed the GetYourGuide dataset examining data collected between January 2024 and December 2025, summing up to a total of 2,883,572 bookings and 46 variables (132,644,312 data cells). The analysis has been conducted through multiple SQL queries to generate descriptive statistics on the Databricks platform.

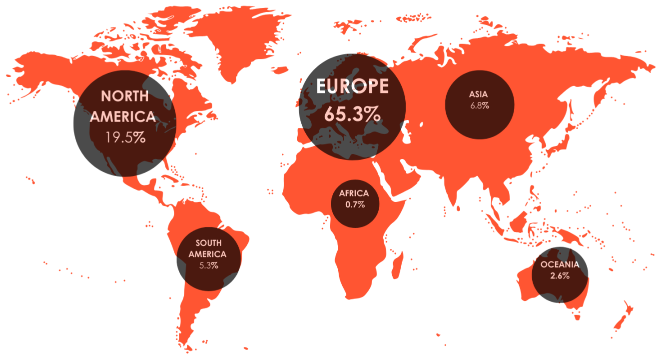
Secondly, in January 2026, GetYourGuide and Formules administered a questionnaire to customers who booked a GetYourGuide experience in France between December 1st 2025 and January 31st, 2026. The survey outlined the profile of GetYourGuide tourists, their stays and their expenditure patterns. It was sent to 55,751 individuals, with a click-through rate (CTR) of 2.45%. With 1,850 responses collected, the response rate was 3.3%. Nonetheless, 150 questionnaires were excluded due to incompleteness.

1.2. The experiential visitor: profiles and expenditure models

Visitors

GetYourGuide's clients in France come from all over the globe with a prevalence from Europe (65,3%) and North America (19,5%).

Chart 1. *GetYourGuide's customers provenance: continents*



Source: formules elaboration on GetYourGuide data

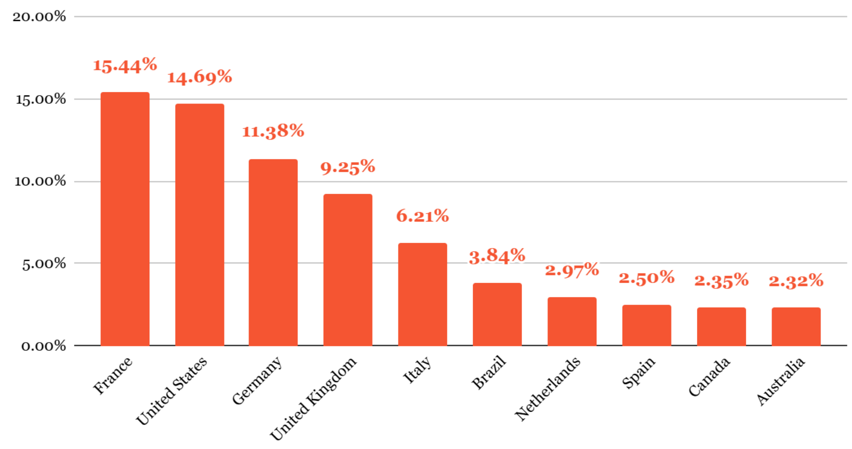
An in-depth analysis of customer demographics in relation to bookings can be found in Table 1, which lists the top 10 countries by number of bookings in 2024 and 2025, and in Table 2, which identifies the top 10 countries by total number of tickets. Since a single booking may include multiple tickets, the number of tickets per booking provides a more accurate indicator of the actual number of people who purchased a GetYourGuide experience.

Table 1. *Bookings in France, country of provenance*

Bookings per country of provenance			
Country	N° bookings 2024	N° bookings 2025	Δ 2024-2025
United States	200,950	224,605	11.77%
France	160,487	257,788	60.63%
Germany	139,930	180,133	28.73%
Britain	117,400	157,509	34.16%
Italy	77,433	101,106	30.57%
Brazil	52,972	65,695	24.02%
Netherlands	34,279	46,128	34.57%
Spain	29,890	38,558	29.00%
Australia	33,330	41,799	25.41%
Canada	28,802	43,988	52.73%

Source: formules elaboration on GetYourGuide data

Chart 2. *Tickets in France, country of provenance (2024 and 2025)*



Source: formules elaboration on GetYourGuide data

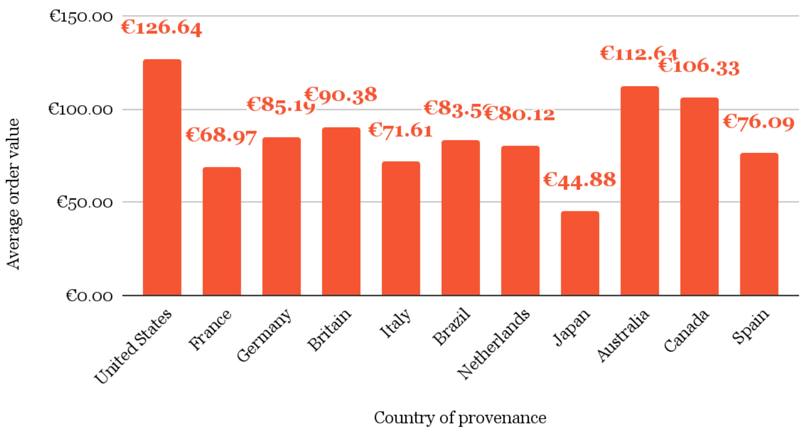
The comparison reveals significant differences. The United States and France occupy the top two positions in terms of both total bookings (in both years) and total tickets, suggesting that GetYourGuide's customer base combines a strong international dimension with a significant regional component, represented by French customers. The remaining 8 countries almost maintain the same order in both rankings.

The percentage change in the total number of visitors per country between 2024 and 2025 is particularly significant. The top ten countries record an increase in visitor numbers, but this positive trend also extends to the top twenty. The most significant year-on-year growth is recorded in France (+60,6%)

and Canada (+52,7%). Overall, the number of visitors from the top twenty countries grew by more than 30% between 2024 and 2025.

After analysing customer origin, the focus shifts to the average order value. Before calculating the average order value per country of provenance, some actions have been taken in order to have a representative dataset (excluding the outliers[2]).

Chart 3. *Average booking value for the 10 countries with the highest number of bookings (2024–2025)*

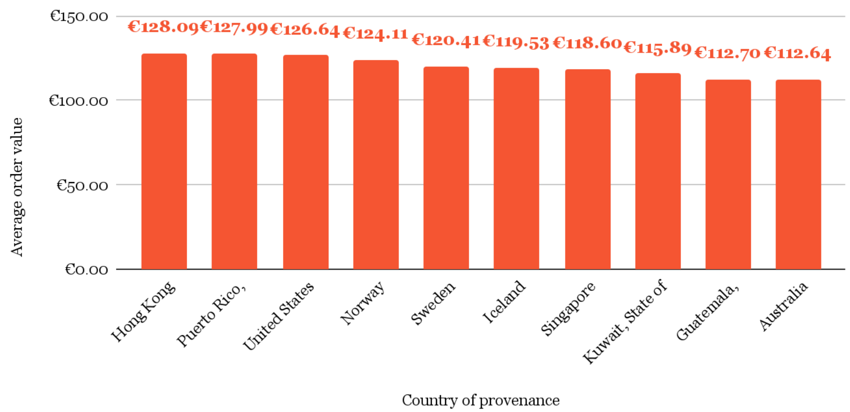


Source: formules elaboration on GetYourGuide data

[2] Through the interquartile range method, defined as follows: the interquartile range (IQR) is calculated through the difference between the third quartile of the dataset (Q3) and the first one (Q1). Then, a lower and an upper limits were defined as Q1-1.5 x IQR and Q3+1.5 x IQR. The dataset, now amounting to 2,681,175 bookings, excluded spurious data, totaling to approximately 202.000 values. The same methodology is applied for each single analysis considering the average order value.

The United States remains at the top of the rankings, boasting average orders of €126.64, almost doubling French customers (€68.97). The analysis has been further expanded to identify the countries with the highest average order value overall (only those with at least 1,000 bookings have been included to ensure a representative sample). Chart 4 shows a significantly different geographical distribution.

Chart 4. *Average booking value for the 10 highest-spending countries (2024–2025)*



Source: formules elaboration on GetYourGuide data

Top spenders come from Central America and Southeast Asia, with Hong Kong leading the way with average orders of €128.09, followed by Puerto Rico (€127.99) and the United States (€126.64) Hence, *Europeans make more bookings, but their average transaction is lower; conversely, travelers from*

Asia and South America purchase fewer bookings, but their expenditure is substantially higher.

Examining the number of tickets included in a single transaction, countries with higher average spending also tend to have a slightly greater number of tickets per booking. Conversely, nations with the highest booking volumes typically display lower averages. For instance, in the USA, the average transaction typically involves 2.5 tickets, whereas in the Philippines or Puerto Rico, this average rises to nearly 3 tickets (2.8).

Subsequently, customer preferences within tour categories have been assessed. All experiences are classified into 12 standard categories, including an 'Other' category that encompasses unique or unconventional experiences that do not fit within the primary classifications. Table 3 displays the percentage share of each tour category relative to total bookings made in 2024 and 2025.

Table 2. *Total number of bookings per tour category per year*

Bookings per tour category per year			
Tour category	2024	2025	Var. %
Entrance Tickets	467,479	576,838	23.39%
Boat Tours	319,304	430,168	34.72%
Walking Tours	55,649	113,852	104.59%
Attraction Tours	89,747	112,033	24.83%
Bus Tours	58,001	74,924	29.18%
Day Trips	56,136	69,877	24.48%
Shows And Events	23,827	40,227	68.83%
Other	33,790	29,340	-13.17%
Adventure Tours	19,496	28,080	44.03%
Workshops	19,432	27,503	41.53%
City Cards	8,288	6,124	-26.11%

Source: formules elaboration on GetYourGuide data

In both 2024 and 2025, Entrance Tickets are the most popular type of experience, representing over 39% of total bookings, experiencing an increase of 23.39% in 2025. Notably, Adventure Tours, Show and Events and Workshops record a significant surge in popularity, with bookings increasing by more than 40% between 2024 and 2025. Walking Tours more than doubled the bookings in just one year, rising from 55,000 to more than 113,000. Day trips represent 4,6% of the market in 2025.

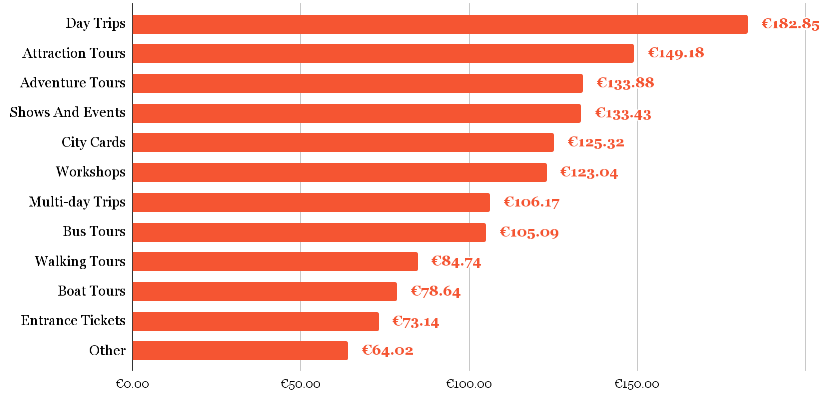
Delving into day-trip experiences, although visitors mainly stay in Paris, the city often serves as a base for exploring surrounding destinations. Thanks to its central role in the national transport network and the wide availability of connections, Paris functions as a major departure hub for tours across the country. In particular, the high-speed rail system *(TGV)* enables rapid travel within France, making it possible to reach several major cities within just a few hours (around 2 hours to Bordeaux, less than 2 hours to Lyon, and about 4 hours to Marseille). Chart 5 illustrates the main high-speed railway connections across France.

Chart 5. *High speed railways in France*

Source: thetrainline.com

Lastly, the average price per tour category is analysed, showing some interesting spending patterns (Chart 6).

Chart 6. *Average price per tour category (2025)*



Source: formules elaboration on GetYourGuide data

Data highlights that Day Trips represent the most expensive tour category, with an average price of almost €182.85, followed by Attraction Tours (€149.18). Regardless of the ranking, these average order values reflect bookings with a consistently high average spend, never lower than €60.

A total of 2.8 million bookings are associated with a booking ID in both 2024 and 2025, which, along with the transaction number, identifies the account responsible for the reservation. The analysis of booking IDs revealed that 25% of GetYourGuide users book more than one experience in France in the past 30 months, a clear indicator of sustained engagement and customer retention.

Table 3. *Number of bookings per single booking ID (2024-2025)*

Amount of bookings per single ID		
Number of bookings	Single ID	%
1	1,496,604	74.45%
2	323,772	16.11%
3	109,138	5.43%
4	44,552	2.22%
5	36,278	1.79%

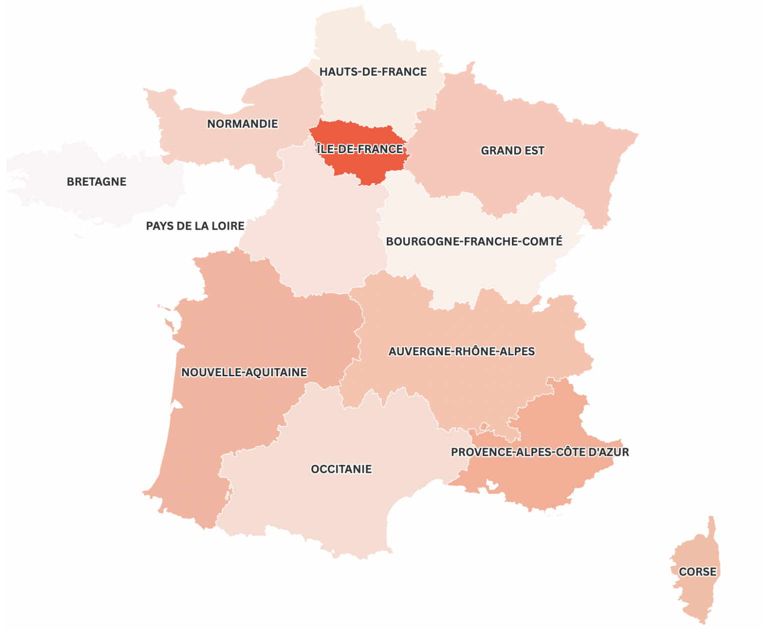
Source: formules elaboration on GetYourGuide data.

In terms of *booking window* (defined as the time-span between the booking date and the actual date of the experience booked), between 2024 and 2025 there is a slight difference of 1 day in terms of average booking window, going from 17.6 days for 2024 to 18.8 in 2025.

Venues

Chart 7 displays the distribution of GetYourGuide experiences in French regions between January 2024 and December 2025, considering the total number of bookings (red regions are the ones registering the highest values).
The visual evidence is unequivocal: GetYourGuide shows a well-spread presence across the national territory. This widespread geographical coverage reflects the platform's capacity to diversify tourist demand beyond the traditionally oversaturated hotspots, facilitating access to a broader range of destinations. It also highlights the growing appeal of less crowded destinations, indicating a positive trend towards more sustainable and balanced tourism models across France.
The prevalence of bookings is concentrated in Île-de-France (80% of the bookings in 2024 and 2025), followed by Provence-Alpes-Côte d'Azur (7%) and Nouvelle-Aquitaine (3.7%).

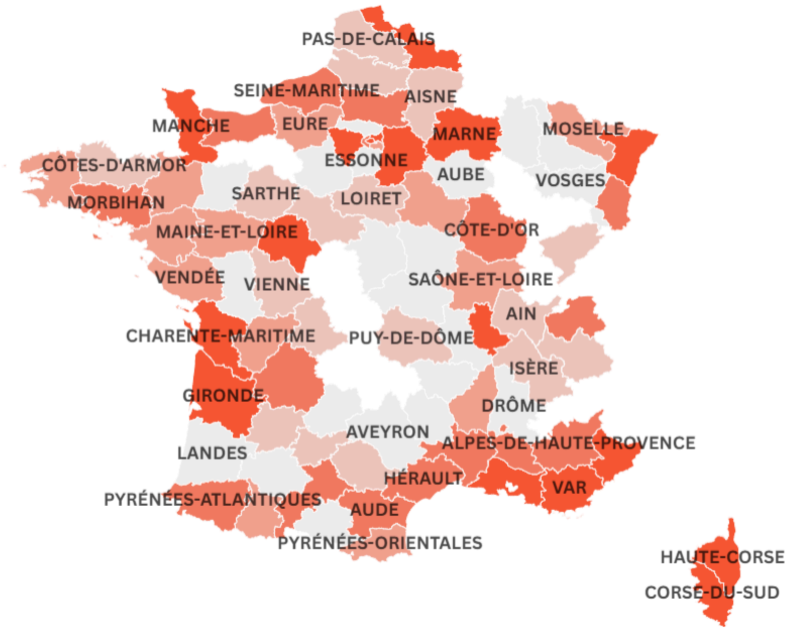
Chart 7. *French* regions hosting GetYourGuide meeting points *(2024-2025)*



Source: formules elaboration on GetYourGuide data

A more in-depth examination focuses on departments rather than regions. Currently, 87 departments host GetYourGuide meeting points out of 96 (excluding overseas French territories), accounting for nearly 90% of all French departments (Chart 8). This reaffirms the concept of a multifaceted geography, where regions hosting a significant number of GetYourGuide experiences are distributed throughout the country.

Chart 8. *French* departments hosting GetYourGuide meeting points *(2024-2025)*

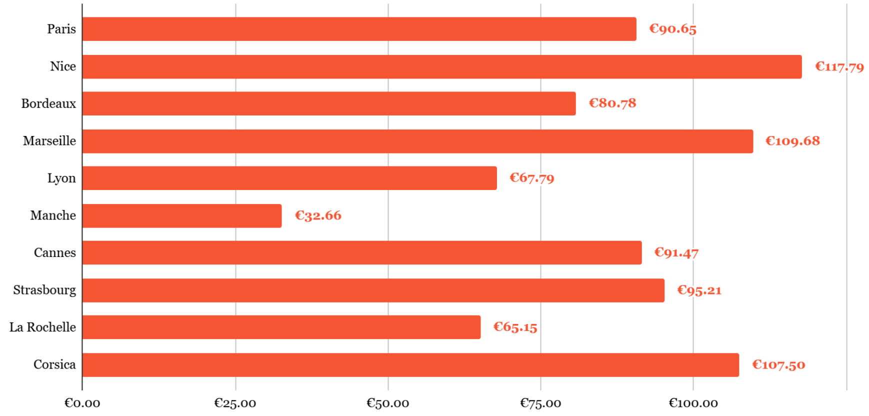


Source: formules elaboration on GetYourGuide data

Tackling order values, Nice leads the ranking with an average order value of €117.79, followed by Marseille (€109.68) and Corsica (€107.50, the area is considered as a whole). Other high-ranking destinations include the city of Strasbourg (€95.21) and Cannes (€91.47). Notably, Paris, which hosts the greatest majority of bookings, ranks 6th in the average order value ranking. This might be due to the fact that Paris offers an exceptionally wide range of experiences priced under €10, giving visitors a large variety of low-cost options. Moreover, the analysis of the average order (booking) value by city shown in Chart 9 suggests that the most frequently purchased experiences in Paris typically fall within the €30–€60 range. In contrast, cities such as Nice, Marseille, or Strasbourg tend to show higher average booking values (from €50 through €200), suggesting a different purchasing behavior and positioning of experiences.

To provide a more comprehensive analysis of destinations, Chart 9 was complemented with Table 4, which presents the top 10 destinations ranked by average order value. This ranking includes only destinations with a minimum threshold of 1,000 bookings. As a result, destinations' average order values are evaluated both in terms of popularity (Chart 9, top 10 destinations by total number of bookings) and average order value itself.

Chart 9. *Top 10 destinations by total bookings (2024–2025)*



Source: formules elaboration on GetYourGuide data

Table 4. *Top 10 destinations by average order value (2024–2025)*

Top 10 destinations by average order value	
Primary location	AVG order value
Bayeux	€248.55
Saint-Laurent-sur-Mer	€215.72
Chamonix-Mont-Blanc	€205.88
Porto-Vecchio	€178.07
Beaulieu-sur-Mer	€176.23
Epernay	€165.44
Hyères	€150.82
Avignon	€144.64
Bonifacio	€144.42
Calvi	€141.88

Source: formules elaboration on GetYourGuide data

These top 10 destinations represent major touristic attractions in France: Bayeux being home of the famous tapestry, Saint-Laurent-Sur-Mer as one of the closest French municipalities to Omaha Beach, in Normandy; or Chamonix-Mont-Blanc, the iconic mountain destination of France. Nonetheless, even considering transport links, these destinations are located in remote areas. Major urban attractions in France are not therefore necessarily where the highest average spending per transaction occurs. Instead, the highest average spending is recorded in places with few inhabitants, such as Saint-Laurent-sur-Mer, which has less than 250 residents, leveraging their unique history or natural beauty to connect with specific visitor groups. Above all, it highlights the ability of platforms like GetYourGuide to drive incremental demand and distribute visitors across the country.

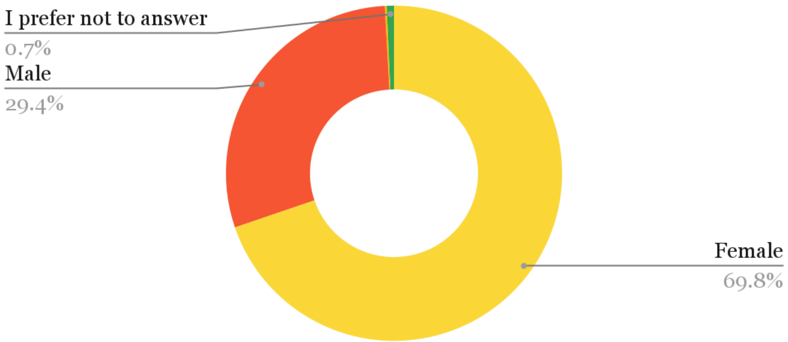
1.3. Insights from foreign GetYourGuide visitors in France

Sample Description

The survey has reached 1,700 respondents, out of which 380 French citizens, and 1,320 international, who bought a GetYourGuide experience in France between December 1st and January 31st, 2026. 150 responses have been excluded from the initial sample (made of 1,850 responses collected) analysis because they concern French residents who purchased experiences in their municipality of residence. The survey was sent to over 55,000 email addresses and recorded a CTR of 2.45%.

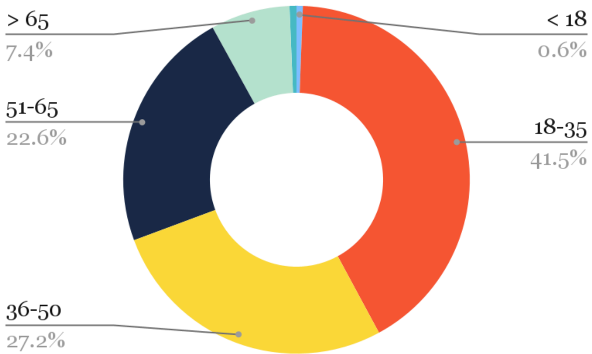
Dealing with the socio-demographic characteristics of the sample, 29.4% of respondents are male and 70% female (Chart 10), while a small percentage (0.7%) prefers not to disclose their gender. The majority of respondents, more than 40%, belong to the 18–35 group, followed by 36-50 (27%) and 51-65 (22%) (Chart 11).

Chart 10. *Gender*



Source: formules elaboration. The remaining 0.2% refers to those who declare having other gender identity.

Chart 11. *Age*



Source: formules elaboration. The remaining 0.6% refers to those who prefer not to answer.

Regarding the country of residence, Table 5 illustrates the respondents' countries of origin. Beside French customers (380), Italian ones are the first market in terms of responses collected (27%), followed by UK (22%), Germany (14%), and USA (9%) tourists.

Table 5. *Top 10 countries of provenance (France excluded)*

Country	Respondents	%
Italy	359	27.11%
United Kingdom	294	22.21%
Germany	185	13.97%
United States of America	123	9.29%
Netherlands	47	3.55%
Belgium	38	2.87%
Ireland	31	2.34%
Switzerland	23	1.74%
Austria	22	1.66%
Canada	22	1.66%
Others	180	13.6%

Source: formules elaboration.

Table 6 compares the data just presented with the whole GetYourGuide dataset for 2024 and 2025.
The data collected through the survey underscore the relevance of neighbouring European markets, such as Italy, UK, Germany, and Netherlands, which are less represented in

the GetYourGuide dataset. On the other hand, the GetYourGuide dataset shows a prevalence of extra-Europe countries such as Australia, Japan, Canada, Mexico and South Korea not surveyed.

Table 6. *Top 10 countries of provenance - comparison*

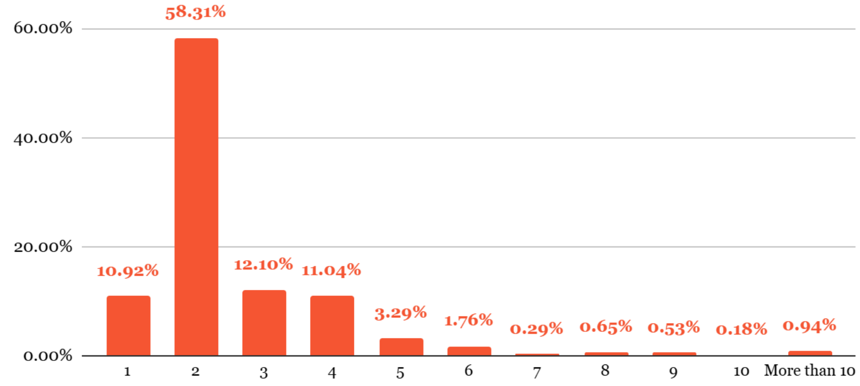
Country	GetYourGuide Survey	GetYourGuide dataset
Italy	27.11%	6.19%
United Kingdom	22.21%	-
Germany	13.97%	11.10%
United States of America	9.29%	14.76%
Netherlands	3.55%	2.79%
Belgium	2.87%	-
Ireland	2.34%	-
Switzerland	1.74%	-
Austria	1.66%	-
Canada	1.66%	2.52%

Source: formules elaboration on GetYourGuide data.

Stay analysis

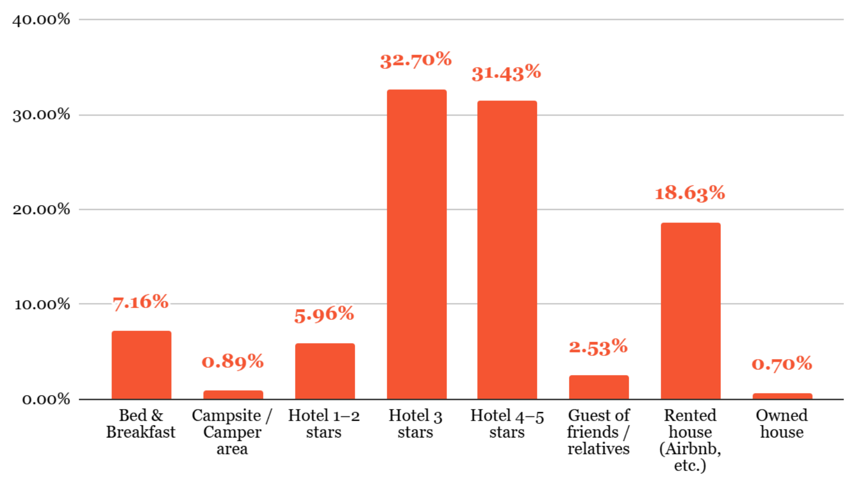
Most respondents travel as a couple (58%), followed by groups of three (12.1%) or four (10.4%) people, while 10% prefer to travel alone (Chart 12). Considering all travel groups, the survey reflects the travel behaviour of a total of 4,428 individuals.

Chart 12. *Travel group size*



Source: formules elaboration

Chart 13. *Main place of stay*



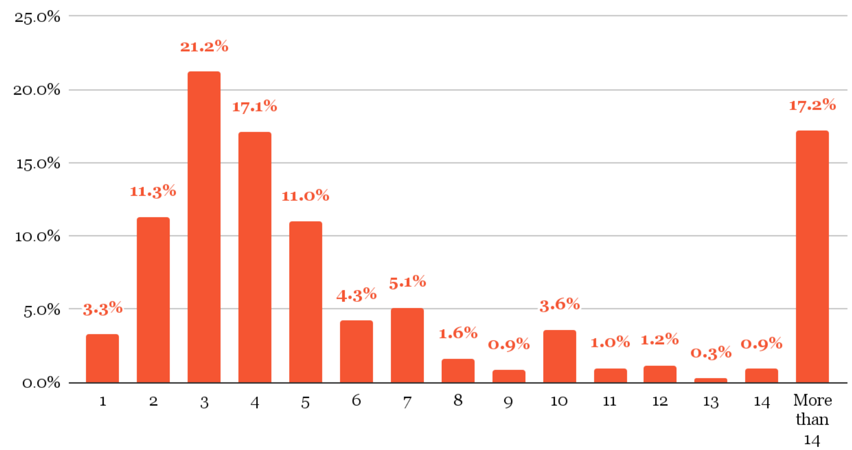
Source: formules elaboration

Regarding accommodation choices (Chart 13), the most popular options are hotels from 3 stars up, chosen by 32.7% of respondents. This trend is in contrast with data from the Italian case study (2025)[3], where the most common accommodation options were rental properties (33%). Less frequently chosen are 1–2 star hotels (2,5%), staying with friends or relatives (0,8%), and campsites or camper areas (0,4%).

[3]*Driving sustainable tourism: GetYourGuide's impact in Italy*. 2025. https://www.getyourguide.supply/reports/sustainability-impact-italy-2025

The data illustrate a wide range of trip lengths among respondents: short stays are relatively uncommon, with only 3% of participants staying for one night and 11% staying for two nights. A particularly salient finding is that the number of respondents reported spending over 14 nights away from their usual residence is greater than 17%.

Chart 14. *Length of stay*



Source: formules elaboration

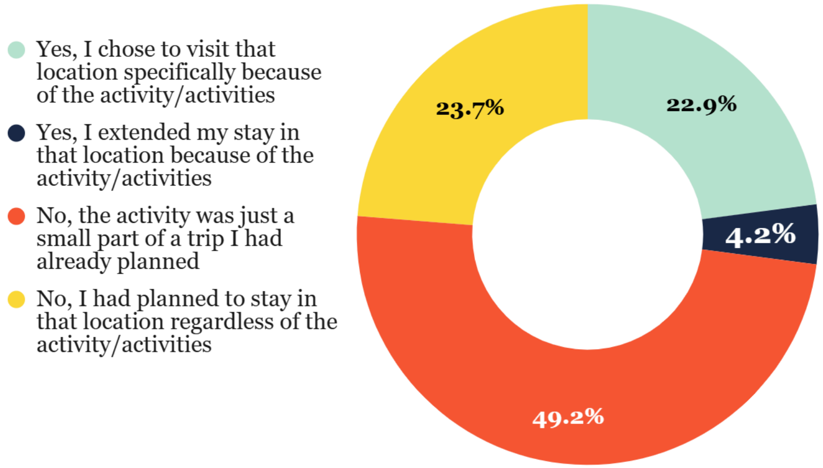
This indicates that France is mainly a long-stay destination, drawing travellers seeking in-depth, immersive experiences. Mid-length stays are also prevalent, with peaks at 3 nights (21.2%), 4 nights (17.1%), and 5 nights (11%). With a relatively high number of extended stays, it's clear that France often acts as a base for exploring the surrounding regions or as part

of a multi-destination trip. Examining French customers only, it can be observed that 14% purchased a GetYourGuide experience for a day-trip, while 20% stayed away for more than 14 days, exceeding the percentage of the entire sample.
A closer analysis of the average length of stay according to the age of respondent shows, surprisingly, a strong homogeneity of data. By contrast, greater variation emerges when considering country of origin: visitors travelling from more distant markets—such as the United States or Brazil—tend to stay significantly longer, thereby generating higher overall value added per trip.

The influence of GetYourGuide on stays

27% of the respondents stated that the GetYourGuide experience was a key reason for choosing to visit the location.
Moreover, when respondents were asked whether GetYourGuide influenced their decision to extend their stay in France or include an overnight stop, 23% reported that the activity influenced their travel behaviour (Chart 15). Specifically, 4% extended their stay thanks to the GetYourGuide activity. On the other hand, half of the sample stated the GetYourGuide activity was only a small part of an already planned trip, and 23.7% had intended to stay in the location regardless of the activity.

Chart 15. *GetYourGuide's influence on stays*

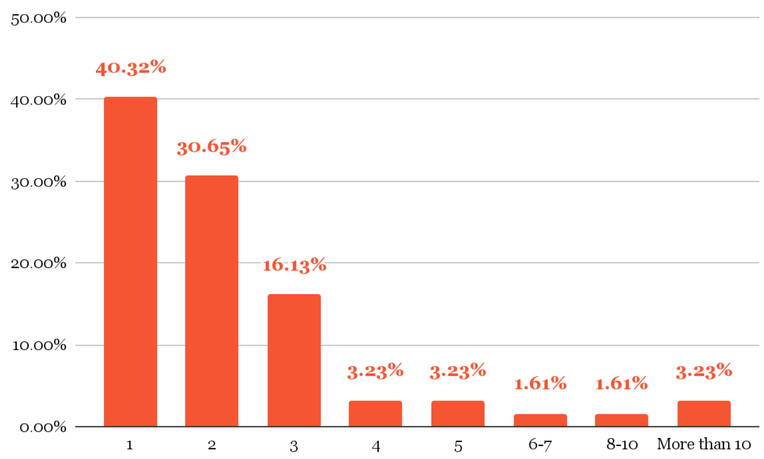


Source: formules elaboration

GetYourGuide activities have a measurable impact on the length of travellers' stay: 40% of the 4% who extended their stay thanks to the GetYourGuide experience spent at least one additional night specifically due to their GetYourGuide experience.

Remarkably, 30.6% chose to add two nights (Chart 16). These figures reinforce the evidence that GetYourGuide experiences can have a significant impact on travel behaviour, leading to longer stays and increased engagement with the destination.

Chart 16. *Number of additional nights due to GetYourGuide*



Source: formules elaboration

Most respondents purchased multiple GetYourGuide experiences during their stay. Over 56% report buying two or more activities.

Spending pattern

Regarding per capita expenditure, *the sample records an average per capita daily expenditure of 455€ and an average length of stay of 6.3 nights.*

The highest portion of the expenditure is devoted to accommodation (€140); followed by bars, restaurants and takeaways (€85.3) and touristic-cultural activities (€66.7). Expenditure for enogastronomic souvenirs is €41.7, while clothing and accessories related costs amount to €34.7. Fuel, parking and local transportations account for €33.7 out of the total, local craftsmanship amounts to €21.6 and personal care to €21.3. The smallest share is dedicated to sport activities, with an average of €9.6.
This analysis reveals the profile of a traveler who places great value on culture and enogastronomy, willing to spend generously to fully experience these aspects.

It is essential to compare the above spending data with recent surveys on the average daily per capita spending of international tourists in France. Table 7 shows the results of several studies conducted by institutional entities, providing valuable information on spending behaviour in the tourism sector.

Table 7. *Literature review: average per capita daily expenditure*

Institution	Year	Area	Sample	Results
GfK and VISA	2022	France	3.200	€400 average daily spending per U.S. tourist
Università di Bologna	2019	France	282.000	€161 average daily spending per Italian tourist
Atout France	2023	France	400	€169 average daily spending per Italian tourist
Atout France	2023	France	400	€161 average daily spending per British tourist
Atout France	2023	France	400	€180 average daily spending per Spanish tourist
Atout France	2023	France	400	€132 average daily spending per Belgian tourist
Atout France	2023	France	400	€147 average daily spending per Dutch tourist
Atout France	2023	France	400	€141 average daily spending per German tourist
Atout France	2023	France	400	€161 average daily spending per Swiss tourist
Atout France	2023	France	400	€208 average daily spending per U.S. tourist
Atout France	2023	France	400	€175 average daily spending per Chinese tourist
Atout France	2023	France	400	€131 average daily spending per Japanese tourist
Visit Paris Region	2022	Paris and Île-de-France	N.A.	€114 average daily spending per foreign tourist
Côte d’Azur France Tourisme	2024	Cote d’Azur	N.A.	€200 average daily spending per Middle Eastern, American and Russian tourist

Source: formules elaboration

The comparison highlights the peculiarity of GetYourGuide customers in the broader context of international tourism in France. While the average daily expenditure per foreign tourist, as reported generally stands between €110 and €210 (Atout France, Visa and Visit Paris Region), GetYourGuide customers show a significantly higher spending capacity, with an average daily expenditure of more than €450. This figure is more in line with the data emerged from the GfK and VISA research for U.S. tourists and still exceeds it. The figures suggest that GetYourGuide customers represent not only a high-value market segment, but also a strategically relevant target for DMOs, businesses and policy makers who want to attract sustainable, experience-based tourism. Their significant per capita spending, combined with their interest in local experiences, positions them as key players in both the vitality of the economy and the cultural enhancement of French destinations.

The following table (Table 8) focuses on the *average length of stay* of international tourists in France, reporting the results of relevant surveys carried out in the French context.

Table 8. *Literature review: average length of stay*

Institution	Year	Area	Average
INSEE	2024	Ile de France	2.4 nights
INSEE	2024	Alpes Maritime	2.4 nights
INSEE	2024	Auvergne-Rhône-Alpes	1.8 nights
INSEE	2024	Gironde	1.7 nights
Atout (Italians in France)	2024	France	6 nights

Source: formules elaboration

The average length of stay of 6.3 nights recorded in the survey is significantly higher than the national benchmarks, except from the data of Italian tourists in France by Atout France. In fact, it is almost double the average values reported by authoritative French sources, such as the INSEE, which indicates an average stay rarely exceeding 2 nights. This high value indicates a longer and more engaging travel experience than the standard.

Focus on french residents

The survey collected 510 responses from French residents. Only 13% reside in Paris, indicating a predominantly extra-Parisian distribution, with 87% based elsewhere in France. When considering the broader regional level rather than the department, residents of the Île-de-France region account for approximately one third of the total sample.This distribution underscores the platform's widespread recognition and use across the country.

Moreover, the Covid-19 crisis has further heightened the appeal of local and domestic travel in France. In line with this trend, 80% of the respondents are day-trippers, enjoying scenic destinations that are just a few hours’ drive from their homes.

2.
GetYourGuide's economic impact in France

2.1. Methodology

Economic impact analyses seek to measure or estimate changes in economic activity within a given region resulting from a particular business, organisation, policy, program, project, activity, or other economic occurrence.
Among the various methods for performing such analyses, the most common is the Input/Output (I/O) Model.

Input-output models are grounded in the theory of intersectoral linkages developed by economist Wassily Leontief. At their core lies a simple assumption: every economic system consists of multiple interconnected sectors. The output produced by each industry is partly sold to final consumers and partly to other sectors, which use it as an input in their own production processes.
Within its area of operation, any firm produces output by acquiring and combining inputs from households or other productive sectors. The intricate network of transactions between firms across different sectors is represented in input-output tables, accounting frameworks that track the flow of goods and services within a specific geographic area, such as a region, state, or country.

These tables serve a dual function: on the one hand, they provide a snapshot of how the economic system operates at a

given moment; on the other, they act as analytical tools that estimate the broader economic impact of increased demand in a particular sector.
The results of an Input/Output analysis are divided into:

Tourists expenditure + direct impact + indirect impact + induced impact
=
Total econonomic impact

- Direct effects. They refer to the immediate changes in local business activity resulting from public or private decisions, policies, programmes, or specific projects. These effects usually involve changes in production or expenditure by producers and consumers in response to a particular activity or intervention. They can be either positive or negative, depending on the nature of the initiative.
- Indirect effects. They refer to the secondary changes in business activity that occur within the supply chain as a result of the initial expenditure by directly affected industries. These effects encompass the business-to-business transactions taking place within the region, as suppliers respond to increased (or decreased) demand for goods and services from the front-end businesses.
- Induced effects. They stem from the household expenditure of labour income earned by employees of both directly and indirectly affected businesses. After deducting taxes, savings, and commuter expenses, the remaining disposable income is spent on goods and services, such as food, housing, clothing, transportation, and leisure activities.

2.2. Estimate of the economic impact

To estimate the overall economic impact, two main components are necessary:

1) An estimate of the initial demand shock, and
2) A model equipped to analyse and quantify the economic effects resulting from such a shock.

This study assesses the overall economic impact on the French economy *from foreign tourists who bought at least one activity via GetYourGuide in 2025.*

Three key elements are necessary to quantify the initial demand shock:

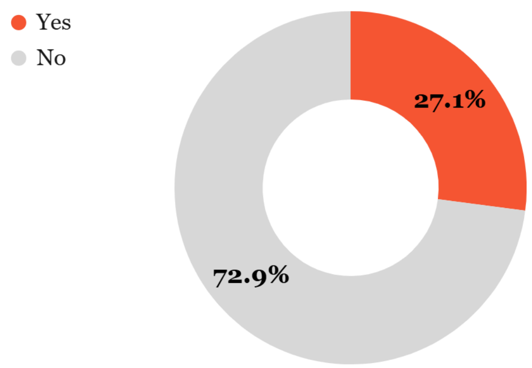
1.The **total number of foreign tourists who booked an experience in Italy through GetYourGuide**

2. A **proxy** to determine **the proportion of tourist expenditure attributable to GetYourGuide**

3. The **average spending per tourist**

While the first variable was available in the GetYourGuide internal datasets, the latter two were not. They were instead derived through a dedicated survey (see paragraph 1.3). As mentioned earlier, 27.1% of survey respondents indicated that the GetYourGuide experience was a key factor in their decision to visit the location. This share was adopted as the proxy for the proportion of tourist spending attributable to GetYourGuide and was therefore included in the calculation of the initial demand shock.

Chart 17. *Share of respondents who stated that GetYourGuide played a fundamental role in choosing the destination*



Source: formules elaboration

To estimate the average spending profile of a GetYourGuide foreign customer in France, respondents were asked to report their daily expenditures across nine categories (Accommodation; Restaurants, bars or takeaways; Fuel, parking, tolls and local transport; Tourism and cultural activities; Sport experiences; Clothing and accessories; Local handicrafts; Personal care and well-being; Food and wine souvenirs). For each category, respondents indicated their spending within one of seven predefined brackets (0€, 1–20€, 21–50€, 51–150€, 151–300€, 301–500€, and over 500€). Answers were then sorted by expenditure category and bracket. Additionally, for each bracket, the average length of stay was calculated.

Using the median value of each expenditure range served as a proxy for actual daily spending. A total per-tourist expenditure was estimated by multiplying the average daily expenditure by the average length of stay. This amount was then multiplied by the total number of GetYourGuide foreign tourists in France whose spending was considered attributable to the platform (i.e., 27.1% of the total), thereby producing the estimated initial demand shock.

In 2025, the total number of foreign GetYourGuide customers visiting France was estimated at 4,125,916 making a total of 1,64 million bookings. Based on the proportion of respondents who indicated that their choice of destination was significantly influenced by a GetYourGuide activity, 1,116,880 customers could be ascribable to the GetYourGuide platform.

The average daily expenditure per tourist in this group was calculated at €455.04. Among the various categories of spending, the most substantial contributions came from accommodation, food services, and cultural and tourist activities. Specifically, average daily expenses in these categories amounted to €140.25 for accommodation, €85.30 for restaurants, bars, and takeaway services, and €66.77 for cultural and tourist activities.

Table 9. *Per capita daily spending categories*

Spending categories	Amount
Accommodation	€ 140.25
Restaurants, bars or takeaways	€ 85.30
Tourism and cultural activities	€ 66.77
Food and wine souvenirs	€ 41.69
Clothing and accessories	€ 34.71
Fuel, parking, tolls and local transport	€ 33.74
Local handicrafts	€ 21.66
Personal care and well-being	€ 21.32
Sport experiences	€ 9.60
Total	€ 455.04

Source: formules elaboration

The average length of stay for foreign tourists who bought a GetYourGuide experience in France was estimated at 6.32 days. By multiplying this average by the total number of such tourists and their average daily expenditure,the initial demand shock to the French economy in 2025 is calculated. It is estimated that such tourists directly boosted the French economy of approximately € 3.21 billion.

To estimate the direct, indirect and induced impacts on the economy, an input–output model based on Leontief's inverse matrix was developed. The analytical framework relies on official data provided by (INSEE), specifically drawn from the

"Statistics and Studies" section of its website, which provides detailed national accounts and intersectoral transaction tables.

These data were used to construct the baseline input–output matrix, describing the flows of goods and services among productive sectors. On this basis, the Leontief inverse matrix was calculated, allowing the estimation of production multipliers and the tracing of how an initial expenditure shock propagates throughout the economic system. This initial expenditure injection resulted in an estimated total economic impact of €5.625 billions, with a multiplier of 1.75. This means that each €1 spent locally by international visitors generated a total economic impact (direct, indirect, and induced) of approximately €1.75 in the French economy.

The overall economic impact is distributed across the economy as follows:

Table 10. *Economic impact*

Direct effect	€ 622 mln
Indirect effect	€ 1.818 bln
Induced effect	€ 3.185 bln

Source: formules elaboration

In conclusion, the input-output model employed in this analysis provides a comprehensive understanding of GetYourGuide's economic impact in France. By integrating direct, indirect, and induced effects, the model goes beyond the initial expenditure to account for the broader interconnections within the French economy.

The findings presented herein underscore the significant strategic role of GetYourGuide in fostering economic activity via tourism and facilitating regional development throughout France. By bridging the gap between international travellers and a diverse array of local experiences, GetYourGuide serves as a pivotal catalyst for incoming demand, instigating economic flows that transcend the confines of the tourism sector.

3.
Conclusion

This report provides a robust assessment of GetYourGuide's role in the French tourism economy, combining data analysis, survey evidence, and an input–output model based on INSEE national accounts.

The findings show that GetYourGuide attracts a high-value, experience-oriented segment of travellers, characterised by above-average daily expenditure (€455) and longer stays (6.3 nights). Notably, 27.1% of foreign customers identify the platform as a decisive factor in choosing their destination, allowing the estimation of a demand shock of approximately €3.21 billion in 2025.

Through the input–output analysis, this translates into a total economic impact of €5.63 billion, with a multiplier of 1.75.

Overall, the results position GetYourGuide as a strategic actor in France's tourism ecosystem, contributing not only to direct visitor spending but also to broader economic dynamism and value creation.

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5.
Appendix

Survey Structure

**compulsory question*

1. What is your gender? *
   - Female
   - Male
   - Other gender identity
   - I prefer not to answer

2. What is your age? *
   - < 18
   - 18-35
   - 36-50
   - 51-65
   - > 65
   - I prefer not to answer

3. Do you currently reside in France? *
   - Yes
   - No

3.1. [If "No"] Please select the country where you reside: *
[drop-down menu for the country selection]

3.2. [If "Yes"] Please select the region where you reside: *

- Alsace
- Aquitaine
- Auvergne
- Bourgogne
- Brittany
- Centre-Val de Loire
- Champagne-Ardenne
- Corse
- Franche-Comté
- Île-de-France
- Languedoc-Roussillon
- Limousin
- Lorraine
- Lower Normandy
- Midi-Pyrénées
- Nord-Pas-de-Calais
- Pays de la Loire
- Picardy
- Poitou-Charentes
- Provence-Alpes-Côte d'Azur
- Rhône-Alpes
- Upper Normandy

4. In which department do you reside? *
   [drop-down menu for department selection]

5. Did the most recent GetYourGuide activity/activities that you experienced take place in the same department where you reside? *
   - Yes
   - No

6. How many nights did you spend away from your usual place of residence?*
   - ☐ None
   - ☐ 1
   - ☐ 2
   - ☐ 3
   - ☐ 4
   - ☐ 5
   - ☐ 6
   - ☐ 7
   - ☐ 8
   - ☐ 9
   - ☐ 10
   - ☐ 11
   - ☐ 12
   - ☐ 13
   - ☐ 14
   - ☐ More than 14

7. *[If replied >1 in question 6]* What was your main place of stay? *
   - ○ Bed & Breakfast
   - ○ Campsite / Camper area
   - ○ Hotel 1–2 stars
   - ○ Hotel 3 stars
   - ○ Hotel 4–5 stars
   - ○ Guest of friends/relatives
   - ○ Rented house (Airbnb, etc.)
   - ○ Owned house

8. *[If replied >1 in question 6]*, Did the activities you booked through Get Your Guide influence your decision to stay longer in France or to include an overnight stay in your trip?
   - ☐ Yes, I chose to visit that location specifically because of the activity/activities.
   - ☐ Yes, I extended my stay in that location because of the activity/activities.
   - ☐ No, the activity was just a small part of a trip I had already planned
   - ☐ No, I had planned to stay in that location regardless of the activity/activities

9. *If Yes I extended my stay in that location because of the activity/activities,* How many nights (or extra nights) did you spend away from your usual place of residence specifically because of your GetYourGuide activity/ies?
   - ☐ None
   - ☐ 1
   - ☐ 2
   - ☐ 3
   - ☐ 4
   - ☐ 5
   - ☐ 6–7
   - ☐ 8–10
   - ☐ > 10

10. Was the GetYourGuide experience a key reason for choosing to visit the location where the experience took place?*
    - ○ Yes
    - ○ No

11. Please indicate how many people are travelling with you (i.e., group or family), *including yourself.*
    - ○ I'm travelling alone
    - ○ 2
    - ○ 3
    - ○ 4
    - ○ 5
    - ○ 6
    - ○ 7
    - ○ 8
    - ○ 9
    - ○ 10
    - ○ More than 10

12. Please indicate the daily price range paid for each of the following expense items. If you are traveling in a group, please refer to the per-person cost:
    *If the expenses incurred collectively for the entire group (e.g., shared meals or accommodation), please calculate the individual share by dividing the total amount by the number of people in the group.**

    Items: Accommodation; Restaurants, bars, and takeaways; Fuel, parking, and local transport; Cultural and tourist activities; Sports experiences; Clothing and accessories; Local handicrafts; Wellness and personal care; Food and wine souvenirs, groceries.

    Price range: €0; €0-€20; €21-€50; €51-€150; €151-€300; €301-€500; More than €500

13. How many GetYourGuide experiences did you purchase during your stay?
    - ☐ 1
    - ☐ 2
    - ☐ 3
    - ☐ 4
    - ☐ 5
    - ☐ 6
    - ☐ 7
    - ☐ More than 7

14. How much did you spend on GetYourGuide experiences during your stay?
    - ☐ €0
    - ☐ €0-€20
    - ☐ €21-€50
    - ☐ €51-€150
    - ☐ €151-€300
    - ☐ €301-€500
    - ☐ More than €500

This research was conducted by Formules s.r.l.

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