Fall 2024

Travel Experience Trend Tracker

A deep dive into the superbookers of your travel activity

GET YOUR GUIDE

Contents

GET YOUR GUIDE

What can this guide do for you?

Travelers want unforgettable experiences now more than ever. This report explains how you can capitalize on the latest trends. So let's dive in.

If you just look at spend, you'll miss the trend.

It's no secret. **The post-COVID travel boom has slowed down.** But, by focusing on the dip in travel spending year-over-year, we miss two trends that continue to grow:

- People want experiences instead of material things and are proving it with their wallets
- The customer profile spending on travel is stable and makes up the majority of travel spending

In periods of stagnation, it's more critical than ever to identify and target the audiences that drive the industry.

GET YOUR GUIDE

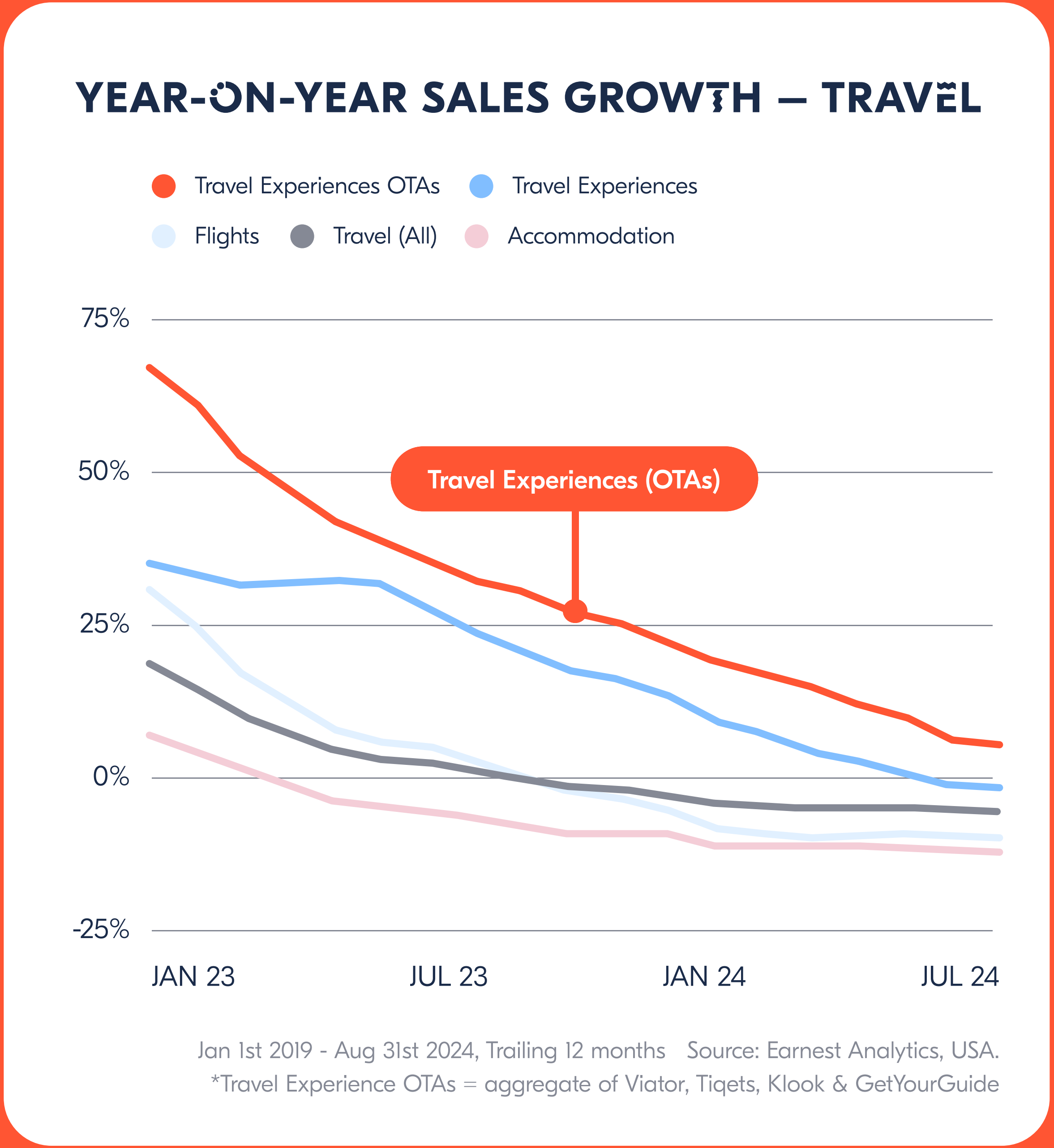
2024: An Overview

Disrupting old models

Travel spending may be down...

Since 2023, we've seen a deceleration of growth in the travel industry and an overall contraction of -2% in the past 12 months.

Experience creators and destinations around the world have felt the downtrend, with few exceptions. The trend affects all travel verticals, from OTAs to accommodation, flights, and experiences.

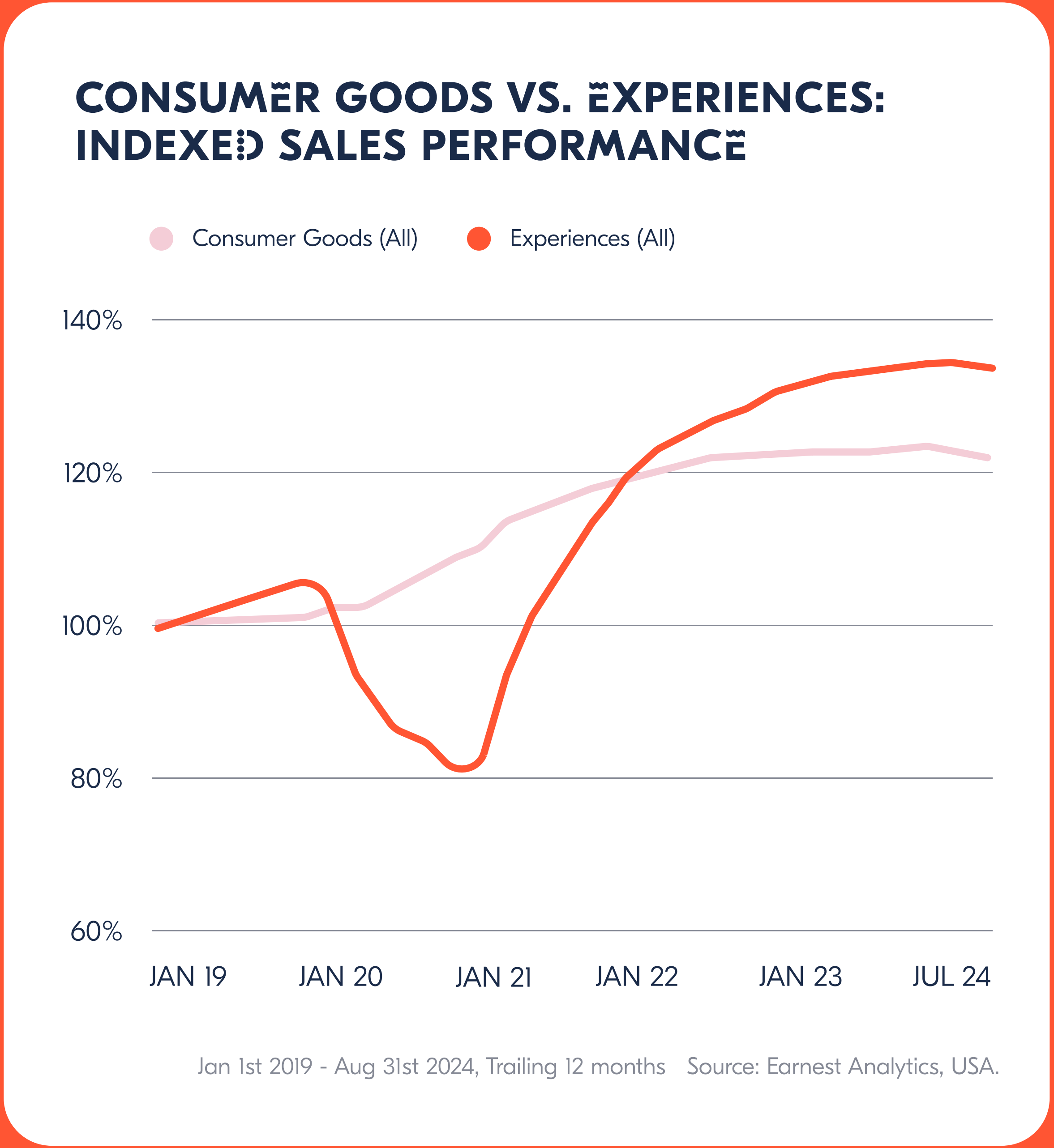


GET YOUR GUIDE

But the macro trend for experiences is on the up

While the appetite for goods is decreasing overall, the spend on experiences (like entertainment and travel) is rising.

Zooming out to 2019, we see that experiences took a -20% hit during COVID but have now surpassed the growth of consumer goods by +11% pts (32% vs 21% on August 2024 compared to January 2019).



GET YOUR GUIDE

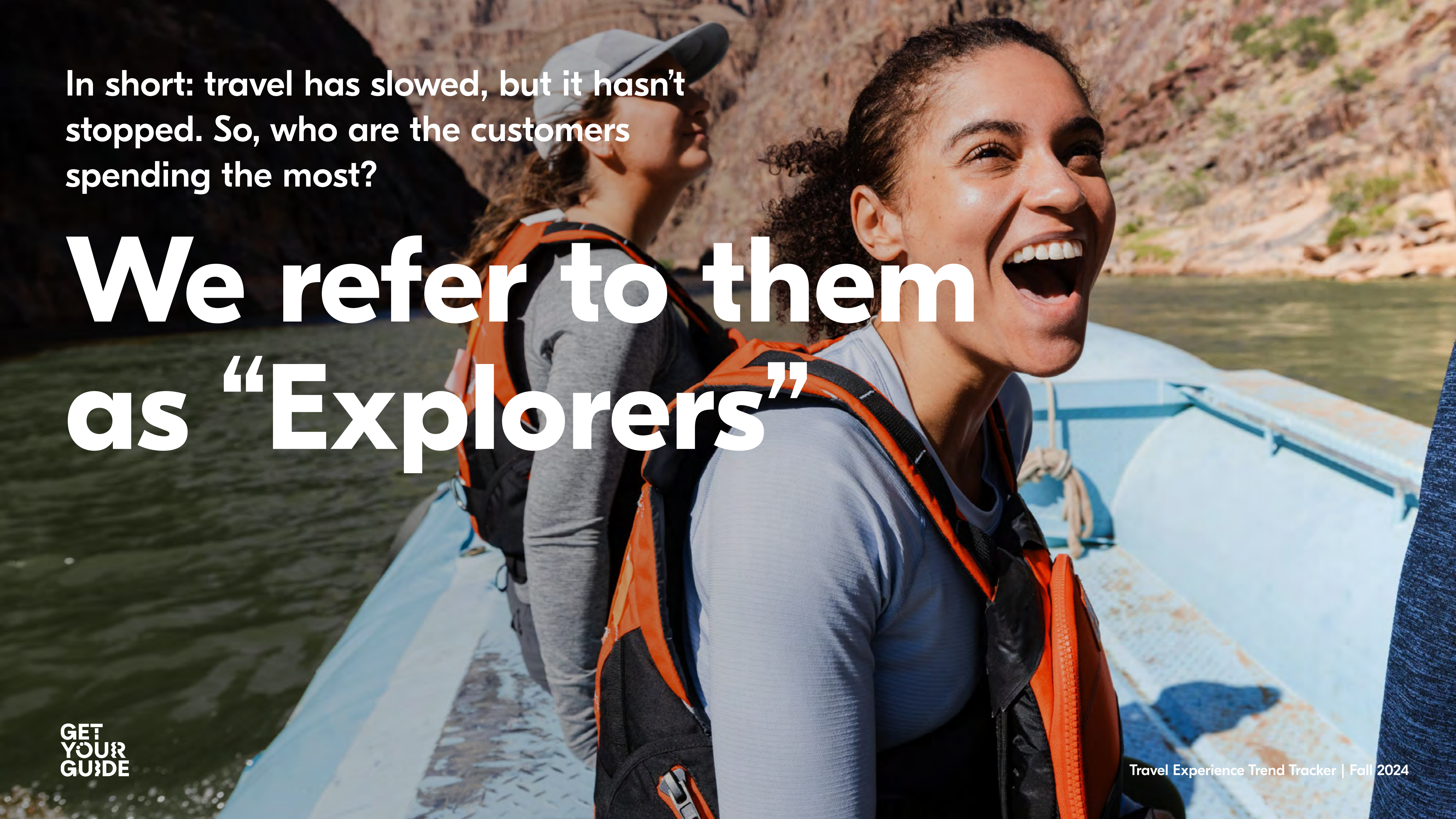
Growth looks especially good for travel experiences

Within the travel sector specifically, we see a huge year-over-year increase for Online Travel Agencies (OTAs), which represent experience spending.

Since 2019, travel experiences have grown +33%, while OTAs have grown +188%. This makes them the fastest growing travel vertical, far outpacing travel growth overall (+16% since 2019).

Flights have shown the most conservative growth, at around +4%.

GET YOUR GUIDE



In short: travel has slowed, but it hasn't stopped. So, who are the customers spending the most?

We refer to them as "Explorers"

GET YOUR GUIDE

Explorers are the biggest spenders, and likely the drivers of this trend

While consumer spending is down overall, there are still 'super-spenders' who have kept traveling despite the economic environment — and that's likely to continue.

That's because they're avid adventurers. Explorers take the most trips and do the most activities when they get there.

It's estimated that they represent 60% of the entire spend of the leisure travel market.

EXPLORER STATS

18% spent more than the average traveler

51% of all travelers are Explorers

60% of the travel experience market is consumed by Explorers

GET YOUR GUIDE

Explorers book the most experiences, and usually book them online

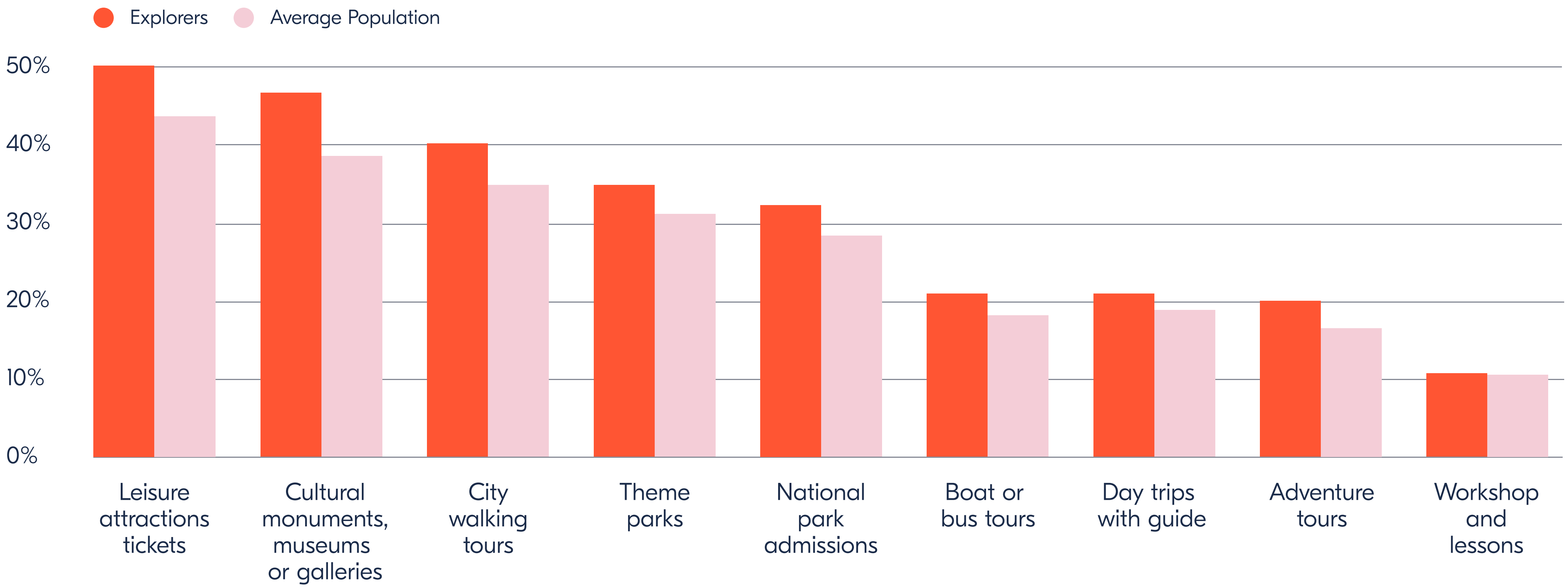
While there are factors that impact what activities they book (more on this in a moment), several things remain true of all Explorers:

- They do more of everything
- They use more resources to research and book
- They much prefer to book online compared to other travelers, especially via OTAs

GET YOUR GUIDE

Explorers vs. other travelers

Activities booked in the past year



GET YOUR GUIDE

Forget demographics, 'Explorers' are defined by a set of values

Explorers are Trip maximizers, Researchers, Planners, Always seeking authentic experiences.

9/10 Researching is part of the fun	**8**/10 I prefer to take care of the details myself	**7**/10 I book activities when I arrive, to remain flexible	**7**/10 I rely on local experts and like-minded travelers for recommendations
1/10 Researching trips is a pain	**2**/10 I prefer someone else takes care of the planning details for me	**3**/10 I book activities before I travel, so it is done	**3**/10 I rely on guidebooks and travel sites for recommendations

GET YOUR GUIDE

How can you use Explorer psychographics?

Create unique, authentic and immersive experiences that help them connect to your destination

Explorers don't want to be ripped off, but will likely pay more for an experience they can't find elsewhere: Increase the perceived value of your experience to appeal to their need for uniqueness

Aim for saturation: ensure you're present on as many online platforms as possible

Leverage a connectivity partner to maximize visibility across channels

Earn extra revenue via affiliation by giving local tips and recommendations where possible

The most important factors

Travelers think about experiences in four segments...

Cultural, natural, and historical attractions and landmarks

Leisure attractions, theme parks, stadium tours and zoos and aquariums

Boat, bus, and vehicle tours, including day trips

Small group walking tours, adventure tours, and immersive activities

...and there are 3 key factors that influence what they do

Explorers do all activities more than others — but, which ones, and when? Since they are not defined by demographics, there are 3 key factors that influence what they book:

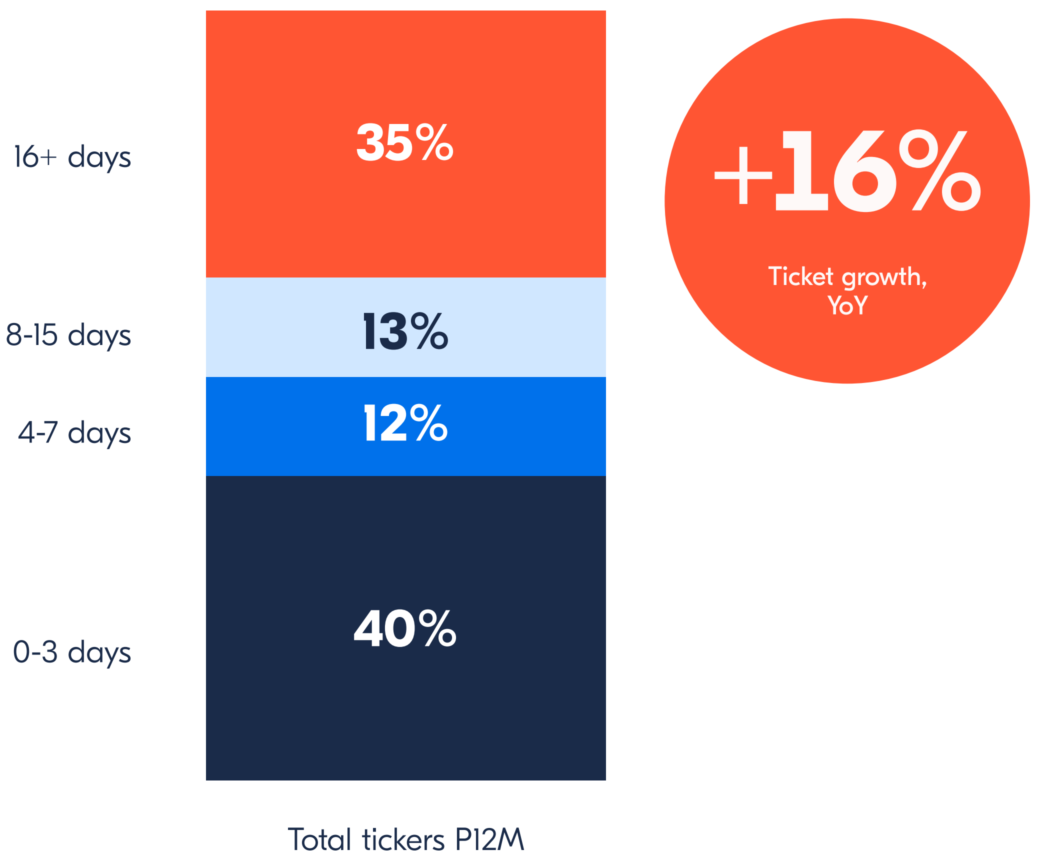
- How far they're traveling
- Who they're traveling with
- Where they're from

Cultural, historic, and natural monument bookers...

- Almost 60% said they traveled **with their partner**
- Had more **domestic vacations** than other trip types
- Are the most likely to be university educated
- 54% are Gen Z/Millennials
- Are the most likely to have visited a museum in the past 12 months, especially if they're French, Italian, or Spanish
- Are more likely to have visited a national park, especially if they're Italian or American

HOW FAR IN ADVANCE PEOPLE BOOKED?

Cultural & historic monuments, P12M



Base: 1,985 scale seekers, 2,810 heritage preservers, 2,609 leisure brands, and 2,501 independent creators aged 16-64. Markets: France, Germany, Italy, Spain, UK, and USA.

How can you use this information?

Consider offers that appeal to couples, like Valentine's Day, anniversaries, or date nights.

Increase your activity on Instagram to appeal to Millennials and Gen-Z.

Use targeted press outreach to choose where to advertise your experiences. Launch regional marketing activities to target more people from different source markets.

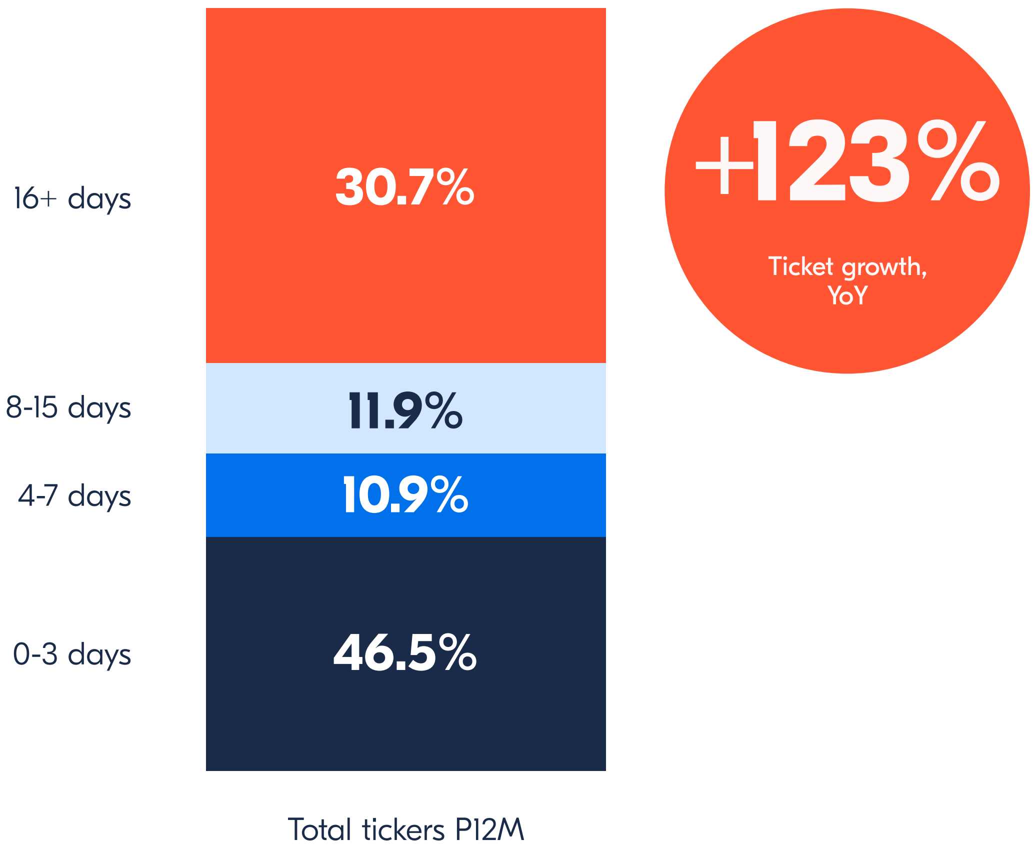
Carve out a budget for local marketing. Find ways to engage people in your own city.

Leisure activity and show bookers…

- Are most likely to travel **with children / their families** (61%)
- Are most likely to do **“staycations” (home vacation)** (38%)
- Are most likely to be married parents
- Take the shortest trips on average of all segments (4.3 days)
- Are most likely to be American (+11% vs average)

HOW FAR IN ADVANCE PEOPLE BOOKED

Leisure activity and show bookers, P12M



Base: 1,985 scale seekers, 2,810 heritage preservers, 2,609 leisure brands, and 2,501 independent creators aged 16-64. Markets: France, Germany, Italy, Spain, UK, and USA.

How can you use this information?

Explore new ways to speak to parents with kids, e.g. by engaging family bloggers, or marketing on platforms popular with younger generations

Make it easy for people on shorter trips to visit you. Can you offer package transfers or luggage holding?

Engage with locals in new ways:
Can you team up with a local chef, have a local bar do a pop-up event, or celebrate holidays like Halloween or summer solstice?

For European attractions, ensure you actively target American audiences. This means having shows in English, and being present on social media platforms.

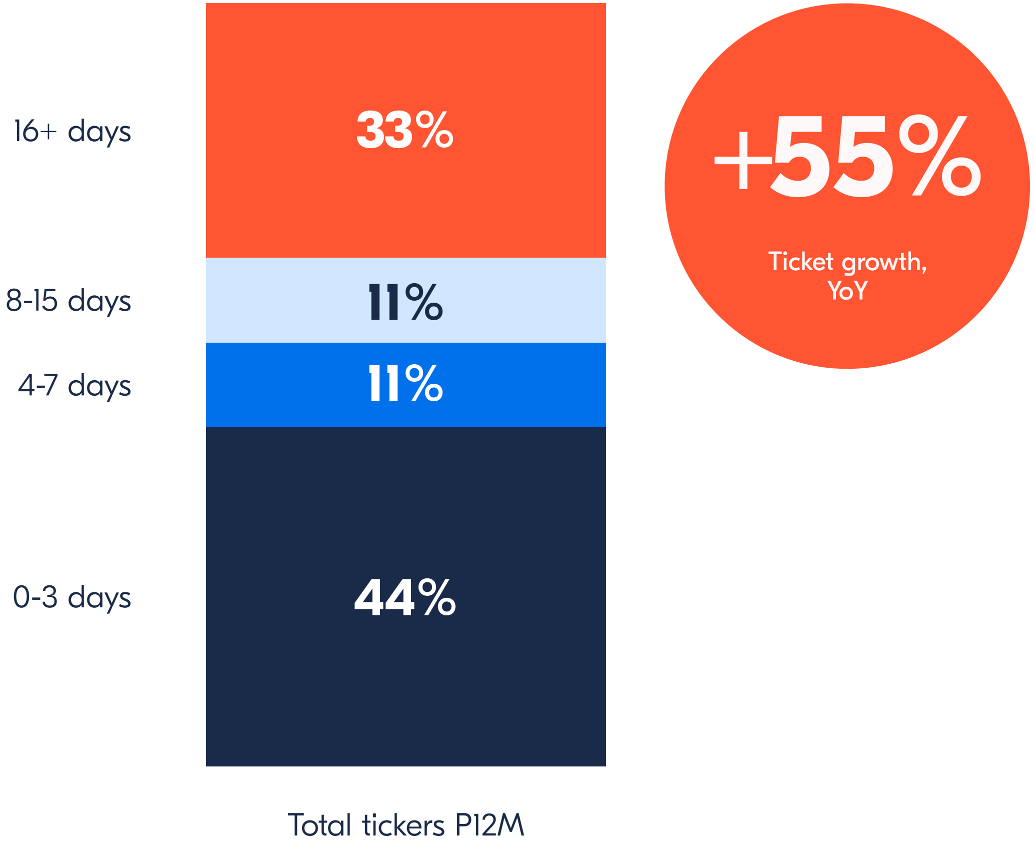
GET YOUR GUIDE

Boat, bus, and bike tour bookers...

- Are most likely to be traveling **with friends** (39%)
- Are most likely to book during an **international or domestic vacation**
- Day trips are especially popular for international trips
- Book their hotel early: 4.9 months ahead on average
- Have the highest income on average, and are least likely to pick a destination because it's affordable
- Almost 60% are Gen Z or millenials
- Europeans were 80% more likely to do a bus or boat tour than Americans

HOW FAR IN ADVANCE PEOPLE BOOKED

Vehicle & vessel tours, P12M



Base: 1,985 scale seekers, 2,810 heritage preservers, 2,609 leisure brands, and 2,501 independent creators aged 16-64. Markets: France, Germany, Italy, Spain, UK, and USA.

How can you use this information?

Market your products as “things to do with friends,” even to local audiences. Trial group pricing, and target accommodation popular with groups.

Dial up the adrenaline for adventure-lovers. Can you highlight a cliff jump, or encourage snorkel gear, for example?

Market to Europeans by promoting products in different languages. Make sure you're aware of regional holidays, and their cultural media preferences.

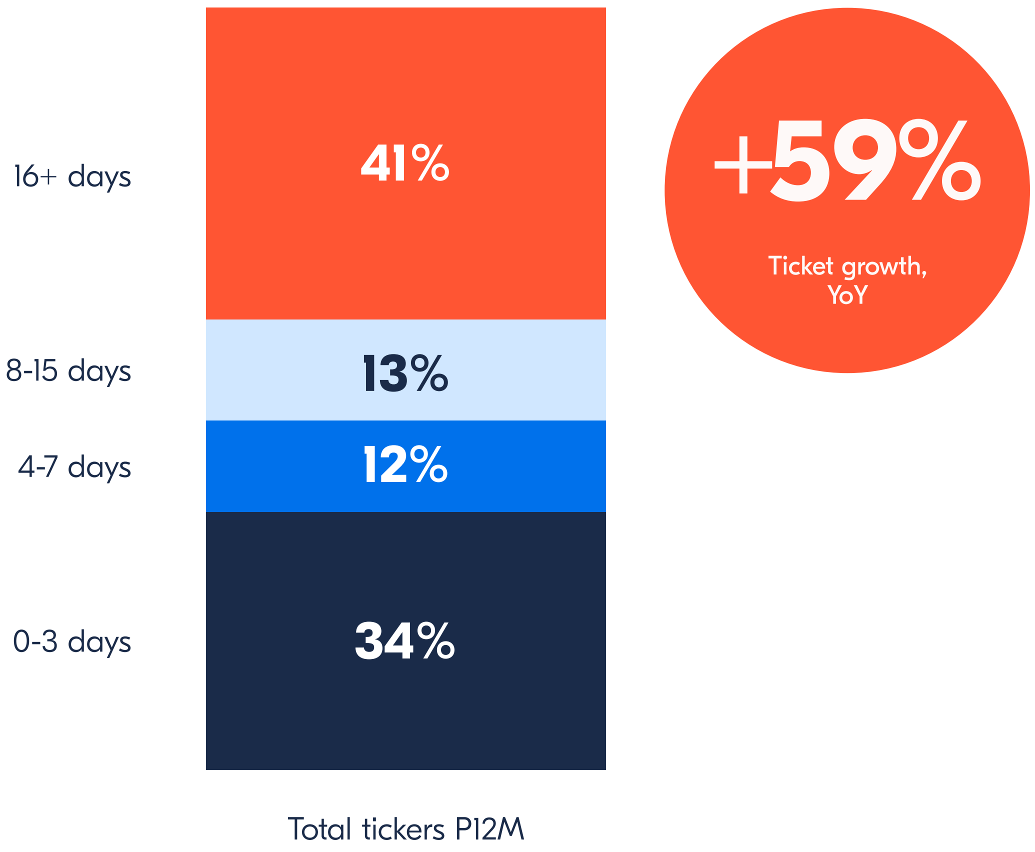
Ensure you’re visible when people begin researching and planning their trip, a minimum of 5 months in advance!

Walking tour and niche activity bookers...

- Are most likely to take **city breaks**, vs other trip types
- Are more likely to travel **with their partner** (57%)
- These travelers are more likely to be urbanites (+14%)
- Average vacation length is 4.6 days — the longest of all segments
- Europeans were 2.3x more likely to do a walking tour vs. Americans

HOW FAR IN ADVANCE PEOPLE BOOKED

Bookings for guided tours & workshops, P12M



Base: 1,985 scale seekers, 2,810 heritage preservers, 2,609 leisure brands, and 2,501 independent creators aged 16-64. Markets: France, Germany, Italy, Spain, UK, and USA.

How can you use this information?

Appeal to longer trip durations by bundling your tour with other experiences, creating longer, multi-day options.

Europeans love walking tours. Appeal to more of these European markets by offering tours (or resources) in different languages.

Help these urbanites leave the city, or explore different parts of the city. Highlight customer reviews that feature the best things to see/do/learn on your tour.

Ensure your marketing is speaking to couples. Suggest your activity as an immersive date idea, get video reviews from couples, and create targeted offers for anniversaries or Valentine's Day.

GET YOUR GUIDE

What are the key drivers for each segment?

When it comes to booking, value is always a big factor.
But there are different drivers that are particularly important for some segments compared to others.

- I use the map to help decide what I will book
- I'm the least likely to be swayed by deals / promotions

- I compare deals/prices between different booking sites
- I compare deals/prices with hotel sites/apps directly
- I often look at special offers and promotions when browsing

- I compare deals/prices with hotel sites/apps directly
- I make decisions of what to book based on reviews
- I would pay more for an experience that showed me something unique

- I want them to provide inspiration and new ideas
- I'm the least likely to be swayed by deals / promotions

GET YOUR GUIDE

How can you use this information?

Cultural monuments

What's nearby? What else could travelers do in the time that they have? What if you were to help them by partnering up with local businesses?

Leisure attractions

Deals are a driver, but a good deal doesn't mean you have to have the lowest price. What kind of special offer or add-ons can you provide?

Bus & Boat, Bike tours

Reviews are critical: ensure you're instilling confidence and making the best first impression online.

Guided tours

Here, the of the uniqueness of your activity is key. Add value by offering something no-one else does, highlighting your positive reviews, and present as a fun, unforgettable and immersive experience.

GET YOUR GUIDE

Explorer profiles by country

	Germany	Italy	UK	USA	Spain	France
They stand out for...	Being **price-conscious** and avidly research online before buying (39%)	Being **interested in travel** (58%) but 2 in 3 also say they're price-conscious.	Being **interested in travel** (50%) and other countries and cultures (55%)	Being **adventurous** (41%) and wanting to be the first to try new things (33%)	Being **interested in other cultures** (57%) and wanting to know what's going on in the world (59%)	Being most social/ outgoing (38%) but are the **least likely to be adventurous** (24%)
Want brands that...	Deliver **high value**	Have **great customer reviews** (39%)	Have **great customer reviews** (40%)	Entertain with **branded videos** (25%). Over 33% are receptive to social ads	Listen to feedback (>50%). 40% promote brands with **great customer service**	**Listen to feedback** (53%) and are socially responsible (42%)
Most popular media behaviors...	1. Online (33%) and physical (25%) **news** 2. Using the fewest social media platforms but **favor Instagram** (54%)	1. Watch live **TV daily** (82%) **2. Instagram** usage stands out @ 53%	1. Love **live TV** 2. Ties with US as top country for **streaming** TV (93%)	1. Love **online videos** (62%) 2. Most likely to use 3+ **social platforms** (72%)	1. 3 in 4 use **social media** daily 2. Over ½ scroll social platforms when watching TV	1. Watch the most **live TV** on a TV set (88%) 2. Use the **fewest resources** to research activities overall

GET YOUR GUIDE

Source: GWI Custom Q1 2024. **Base:** 1,985 scale seekers, 2,810 heritage preservers, 2,609 leisure brands, and 2,501 independent creators aged 16-64. **Markets:** France, Germany, Italy, Spain, UK, and USA.

Different markets get inspiration in different ways, so use data to choose your platform

If you're interested in targeting a different source market, examine the most widely-referenced media platforms for that audience, and ensure these feature in your media planning.

MEDIA AND RESEARCH PREFERENCES BY MARKET

	Resources used for activity research	Preferred way to consume media
	Search engines, social media, word-of-mouth	Social Media
	Price comparison websites, travel books, brochures	Instagram Video
	Travel blogs, travel booking sites, travel agents	Social Media
	Tourist board (DMO) websites (use the fewest resources of all)	Live TV
	Tourist board (DMO) websites, directly from hotels or airlines	TV, streaming
	Tourist board (DMO) websites, travel books	All kinds of video

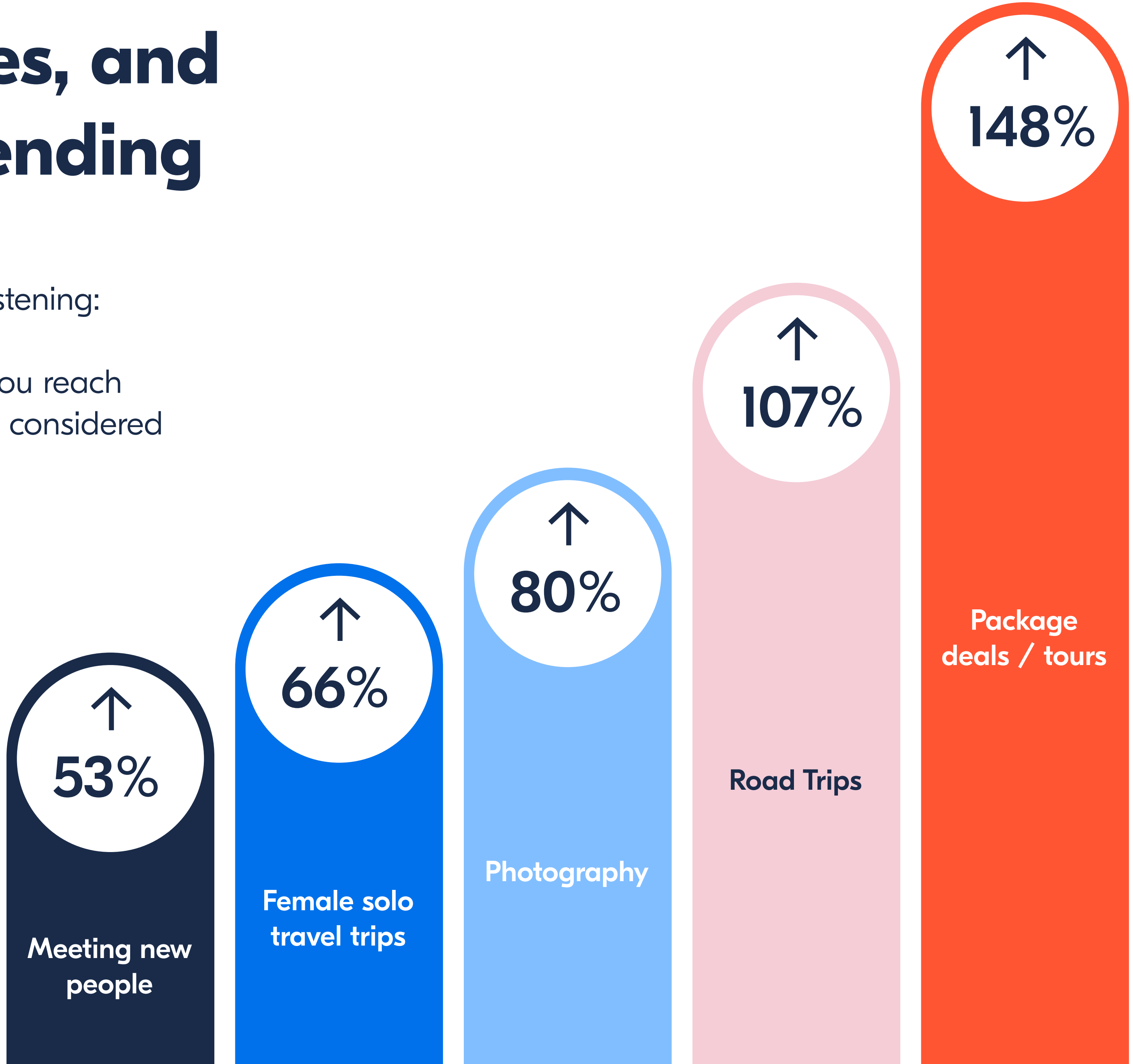
GET YOUR GUIDE

Solo travel, packages, and photography are trending

Besides exploring the 'standard' activity types, there are other trends we're seeing by social listening:

Tapping into broader macro trends can help you reach new cohorts of customers who might not have considered you yet.

Increase in P24M, social listening:



How can you jump on these trends?

Photography

- Highlight the Instagram-worthiness of your attraction, or launch a photography tour
- Invite bloggers to do an 'Instagram hotspot article' of your activity

Solo Travel

- Highlight the measures in place to keep your experience safe. Can you offer an option with tours led by women?
- Highlight and feature positive customer reviews regarding safety and your helpful, responsible team

Packages

- Bundle with other complementary experiences to make a package. How might you go from ½ day to full day, or 2 days?
- The perceived value of a multi-day trip is higher than a single day tour. Use this to your advantage to drive incremental revenue

Your travel companion is the biggest influence on the experiences you book

By thinking about consumers' travel scenarios, you can better target their needs. You can also tap into a wider customer base by considering the needs of their companions, leading to true incrementality.

GET YOUR GUIDE

Preferred experience types per travel companion

Solo		With Kids & Family		With friends		With Partner	
Workshop & Lessons	**36%**	**Theme parks**	**57%**	**City walking tours**	**28%**	**Leisure attractions tickets**	**57%**
Adventure tours	**28%**	**Leisure attractions tickets**	**55%**	**Workshop & Lessons**	**28%**	**Boat or bus tours**	**54%**
City walking tours	**27%**	**National park admissions**	**47%**	**Adventure tours**	**27%**	**National park admissions**	**54%**
Cultural monuments, museums or galleries	27%	Adventure tours	45%	Cultural monuments, museums or galleries	27%	Cultural monuments, museums or galleries	52%
National park admissions	23%	Cultural monuments, museums or galleries	45%	Day trips with guide	26%	Theme parks	50%

GET YOUR GUIDE

Source: GWI Custom Q1 2024. **Base:** 1,985 scale seekers, 2,810 heritage preservers, 2,609 leisure brands, and 2,501 independent creators aged 16-64. **Markets:** France, Germany, Italy, Spain, UK, and USA.

How can you market for different travel scenarios?

Brainstorm and **advertise activations for couples** with 'romantic' add-ons. Can you give your product a date night spin, or offer an anniversary package?

Create **family-friendly time slots** or offer amenities for kids, using themed content. Feature reviews that mention suitability for children.

Address groups of friends by offering **group pricing discounts** and tailor your messaging to speak to people traveling in groups.

Think about how you might engage more with solo travelers. Focus on connection and orientation, and **work with influencers who are big on solo travel.**

GET YOUR GUIDE

Vacation type influences which experiences you choose

Traveler activity preferences change depending on whether their trip is international or domestic.

Respondents said they did as many experiences at home as they did abroad. How often do you tailor your marketing strategy for local, regional, or international guests?

We've collated some data to show the experience popularity in relation to vacation type.

GET YOUR GUIDE

Preferred experience types per vacation type

	Same area / place of residence	Domestic	Regional	International
1	Leisure attraction tickets	Theme parks	Cultural monuments, museums or galleries	Day trip with guide
2	Adventure tours	Cultural monuments, museums or galleries	City walking tours	Boat or bus tours
3	Cultural monuments, museums or galleries	National park admissions / Leisure attraction tickets	Leisure attraction tickets	City walking tours

GET YOUR GUIDE

Source: GWI Custom Q1 2024. **Base:** 1,985 scale seekers, 2,810 heritage preservers, 2,609 leisure brands, and 2,501 independent creators aged 16-64. **Markets:** France, Germany, Italy, Spain, UK, and USA.

How can you use this information?

Don't just focus on trips types you over-index in. Drive bookings from groups who less commonly book your activity to increase incremental revenue.

If your activity is popular for international trips, increase your visibility well ahead of time. **Use the platforms that each country prefers** to inform your marketing strategy.

Travelers on regional trips favor cultural monuments and galleries. **Research public holidays** in neighbouring countries and increase marketing around these times.

Staycations are a big driver of activity spending, especially when people are reluctant to travel too far. **Introduce family friendly deals for staycation-ers**.

GET YOUR GUIDE

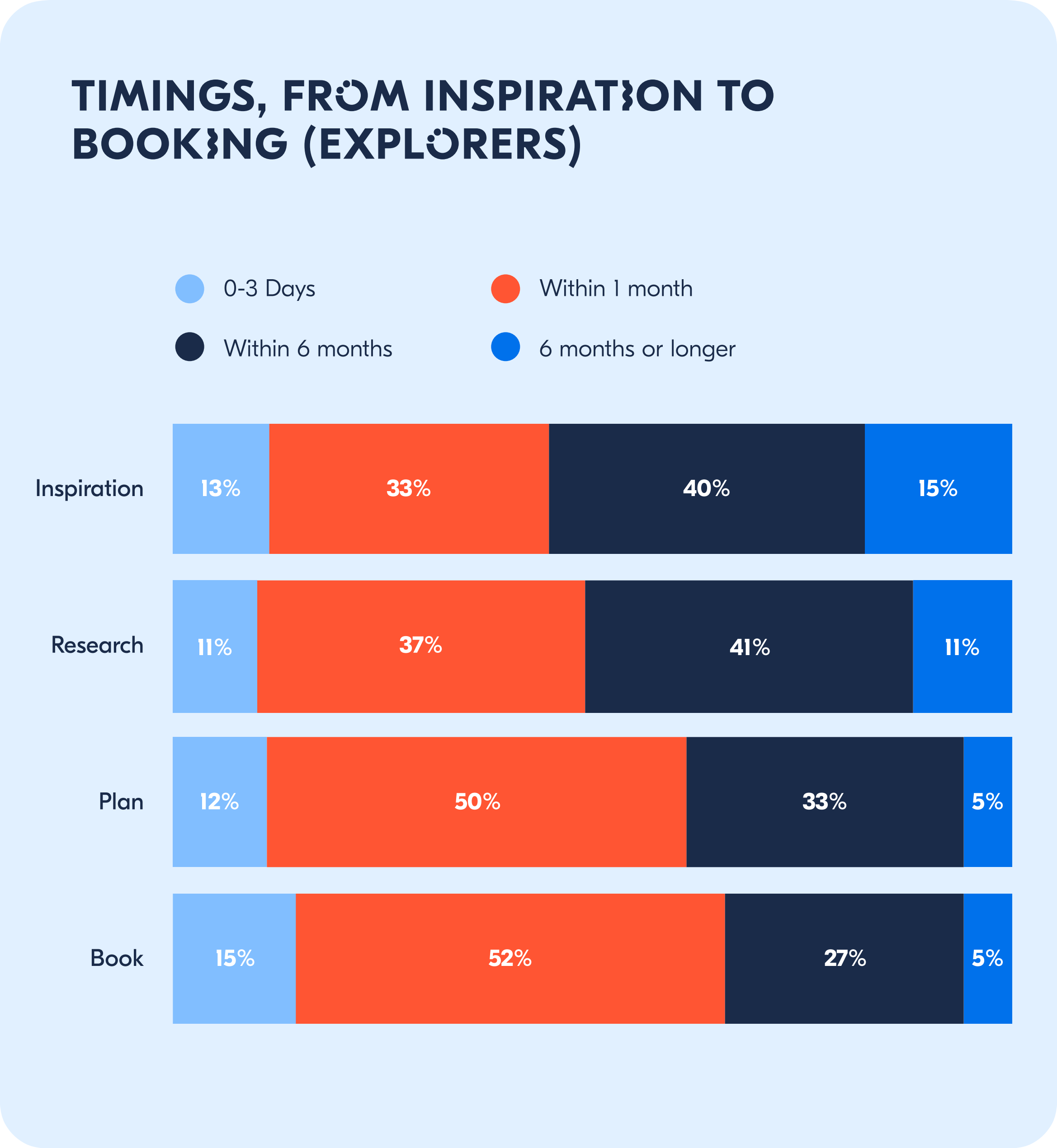
55% of Explorers start their research six months ahead

Explorers play a long game. They're always thinking of travel and actively looking for inspiration.

The window for travel and experiences — from dreaming, to planning to booking — is getting bigger.

Our data shows that mobile browsing, COVID, and overcrowding are helping to drive this trend.

GET YOUR GUIDE



How can you use this information?

Don't forget the upper funnel. Be online across all inspirational channels up to six months ahead of time.

Implement early-bird pricing to capture early bookings and increase sales from the get-go.

Update availability so that potential customers can save and wish-list you. Making it onto travelers' mental maps is key to getting bookings later.

GET YOUR GUIDE

Explorers are always looking for travel inspiration

Explorers in particular love "the hunt", and research is an important part of their trip. So showing up in the planning phase is critical.

Be present across multiple channels. The more places you're visible, the more likely you are to be noticed, shared and talked about.

HOW EXPLORERS RESEARCH ACTIVITIES

Base: 1,985 scale seekers, 2,810 heritage preservers, 2,609 leisure brands, and 2,501 independent creators aged 16-64. Markets: France, Germany, Italy, Spain, UK, and USA.

GET YOUR GUIDE

How can you use this information?

Ensure a strong and **varied mix of channels** in your marketing.

Search engines are used for general inspiration, but not necessarily booking. At GetYourGuide, **96%** of our search engine marketing traffic is from non-branded keywords (e.g: 'things to do in Rome').

Recall the basic principles of marketing: One time isn't enough. **Aim for frequent exposure** on all channels.

List with distribution partners, and ensure that you're visible by using catchy, relevant copy that's tailored to different cultures, trip types, and companions.

Aim for brand recognition, not brand recall

The hard truth about brand building is that it takes a large amount of investment, capital, and time. Especially when potential customers are all over the globe.

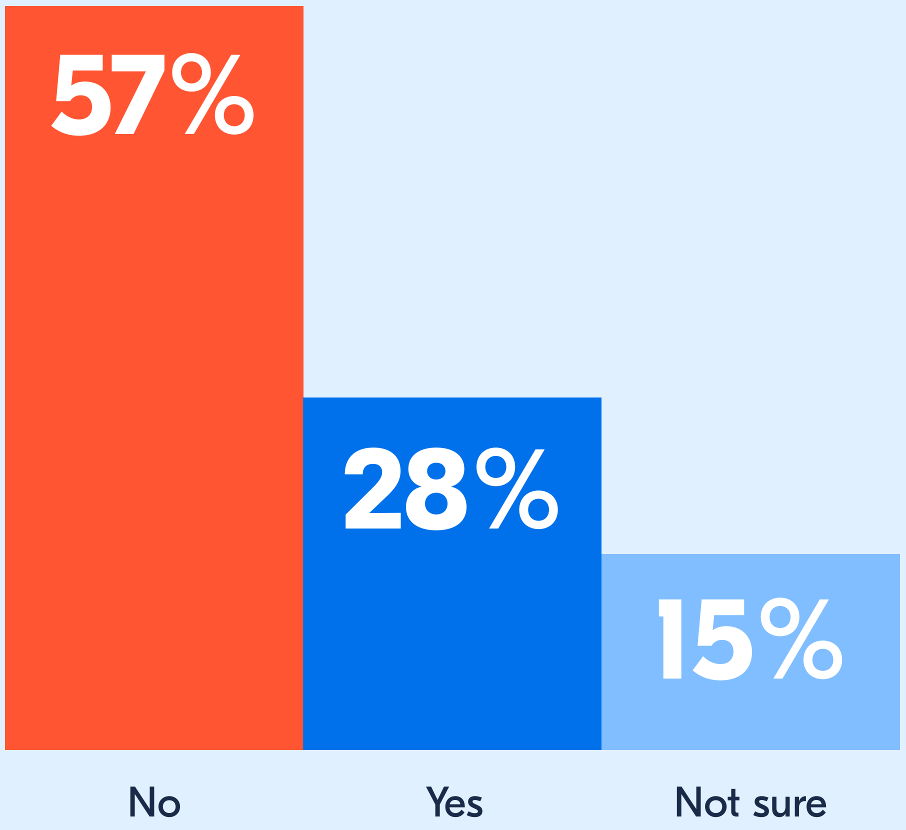
Getting the pressure you need to be a household name, for the majority of businesses, is not an attainable goal.

What is achievable? **Brand recognition**.

Leveraging the visibility of partners like GetYourGuide help bring your brand to the forefront of people's minds when booking their trip.

GET YOUR GUIDE

NUMBER OF PEOPLE WHO REMEMBERED THE NAME OF THE COMPANY THEY DID THEIR LAST ACTIVITY WITH



How can you achieve brand recognition?

Be consistent with your branding. Make sure your logo is always on your uniforms and your branding is the same everywhere.

Make it as easy as possible to book. **If you don't have an online ticketing function on your website, invest in one.** We can help.

If you have limited time, budget and resources, **lean on distribution partners like GetYourGuide**. We make your activity accessible to millions of viewers.

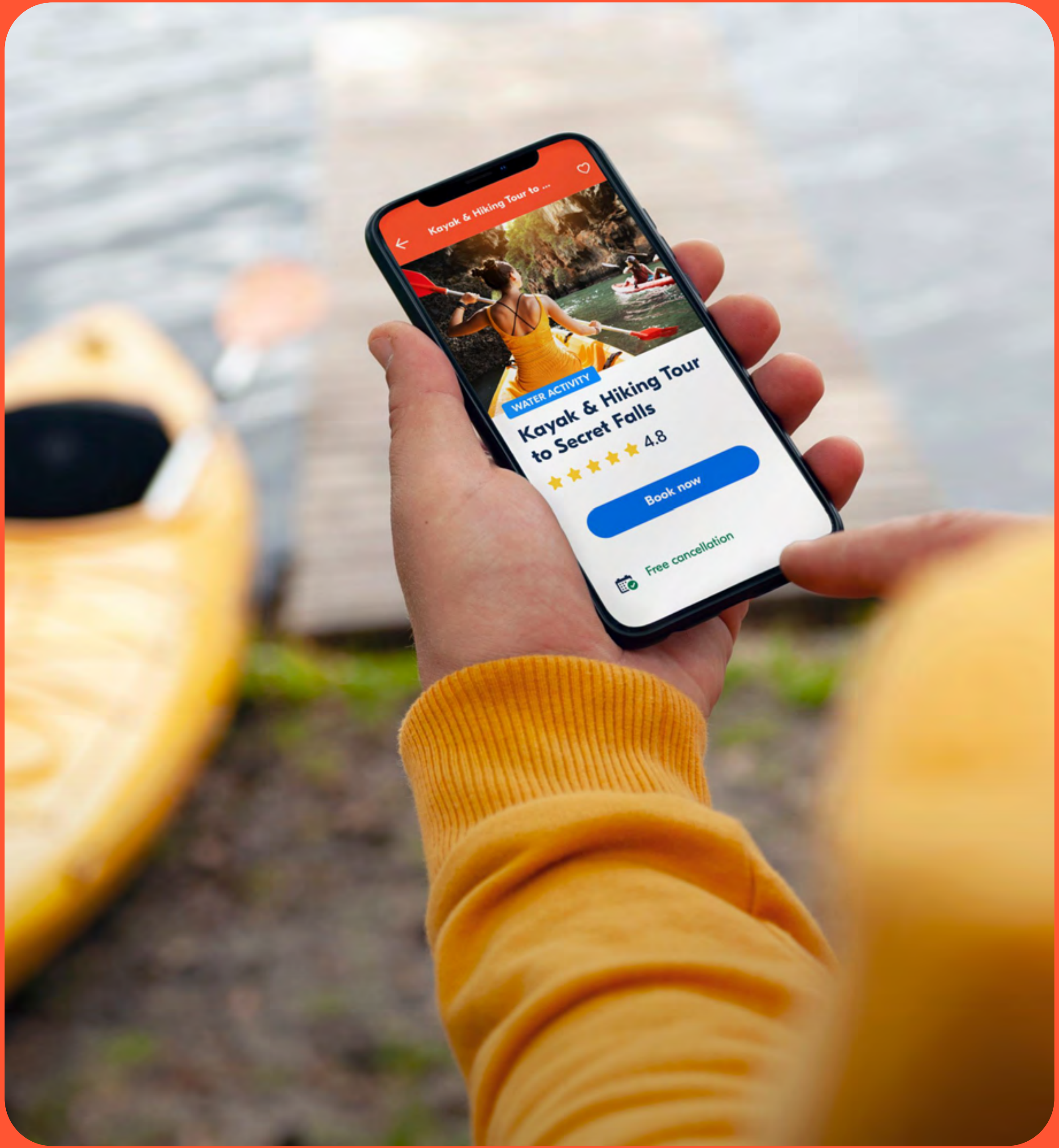
Have your logo visible in your photos online, including on GetYourGuide. This drives customer trust and authority.

GET YOUR GUIDE

How travelers book experiences: the key takeaways

- The planning phase is longer and more complex than ever
- Activity preferences differ based on vacation type and travel companions
- Media preferences and booking drivers change from market to market

We do extensive research into how your best customers make decisions. Partner with us to gain access to these insights, seamlessly integrate them into your offering, and stay ahead of the changing landscape.



GET YOUR GUIDE

Be visible. Be focussed.

Travel is aspirational — customers will always seek to be inspired

Historically, we've seen the travel industry bounce back. It's imperative to stay top-of-mind as people gather inspiration for their upcoming trips.

- Be present and consistent to those customers in the dreaming phase.
- Maximize exposure across as many channels as possible.

Focus on Explorers, as they're (still) traveling the most

The industry is forecast to grow. Explorers will continue to drive the majority of the spending, as they've done in the past.

- Cater to their need for unique, authentic experiences. Ensure your content supports this.
- Integrate as many local tips and anecdotes into your experience as possible.

Consider the wider market, and focus on specific trends for your segment

International, regional and domestic travelers all book travel experiences.

- Find the audiences that naturally gravitate towards your experience. Optimize your marketing strategies to suit them.
- Identify and prioritize the channels, offers, reviews and content that speak to your best customers.

Be aware. Be consistent.

Experiment with the macro trends

Use our research to stay ahead of the growing macro trends driving the travel sector.

- Multi-day tours and 'lite' packages.
- Photography.
- Solo travel - especially amongst women.

Make sure customers can find your experience online

Treat your distribution partners like your marketing arms. They have the potential to reach the consumers at the top of the funnel you might not have reached yet.

- Understand what kinds of promotions your partners are engaged in.
- Learn how search engine marketing can drive incremental sales.

Maximize for brand recognition

Even if a customer doesn't remember your name, using careful and considerate branding will assist with recall.

- Use your logo everywhere: uniforms, photos, and repeat your name during the tour.
- Provide a superior brand experience before, during and after the trip.

GET YOUR GUIDE

Be efficient. Be resourceful.

Extend availability and get connected

Booking windows are getting more extreme, with many travelers booking longer in advance as well as last minute.

- Ensure availability is up-to-date well ahead of time.
- Enable day-of bookings to capture last minute demand.

Serve customers you aren't actively targeting

Find the customers you're under-indexing on: Capturing these audiences leads to incremental lift.

- Speak to them more often.
- Give them reasons to visit.
- Show them why you're a must-see activity when visiting your destination.

Use resources like this!

There are plenty of thought-leaders in the field eager to help you grow your business.

- Engage with OTAs and other travel businesses to maximize your earnings.
- Take advantage of their tools, visibility, and trust to boost your brand.

Thanks for reading

The travel industry is ever-changing. We're here to help.

By providing access to intuitive tools and data-driven insights, we empower experience creators to connect with visitors while unlocking new sources of growth and innovation. We hope you've found this information useful!

GET YOUR GUIDE

About this research

Online quantitative marketing survey, conducted by GWI

- 6,133 respondents, 6 markets; fieldwork completed April 2024
- 25-64 years old; even split male/female
- Completed leisure trip in P12M
- 100s of millions of transactions; 5,500 merchants & 450+ spending categories
- Daily, anonymized data from 2018-2024
- ~100M US consumers sample

GetYourGuide platform data

- Site and visitor data
- Booking and app data (170k experiences globally)

TOTAL RESPONDENTS

	n=1,045
	n=1,037
	n=1,020
	n=1,018
	n=1,013
	n=1,000

GET YOUR GUIDE

About GetYourGuide

GetYourGuide proudly partners with over 30,000 creators and suppliers to share more than 170,000 experiences worldwide. Across our 17 local offices, we work with industry partners to shape the travel sector.

We're on a mission to help tour operators and attractions provide unforgettable experiences to engaged travelers across the globe.

Revolutionize the industry with us.

GET YOUR GUIDE