

TRAVEL EXPERIENCE TREND TRACKER | FALL 2025

THE OTA ADVANTAGE

GET
YOUR
GUIDE



The travel industry has transformed: from limited access to limitless possibilities

Operators must adapt to a constantly shifting online market to stay ahead of the curve.

In the past

- Travel was limited to a privileged few
- Information was held by a handful of experts
- Only a few operators captured the majority of demand

The world of today

- There is a growing middle class with a high disposable income
- Information is free, easily accessible, and has a short shelf-life
- Operator numbers are increasing thanks to digitization and growing demand

The world of tomorrow

- LLMs (like ChatGPT) will enable personalized trip planning
- AI search will prioritize sites with domain authority
- Verified reviews will be a new trust currency

Operators who over-index on digital platforms will prevail

The shift in preference to online booking is undeniable. Travelers who use OTAs (Online Travel Agency) like GetYourGuide are far more likely to book online — meaning a strong online presence is key to targeting this audience.

Travelers prefer booking online

Relative preference for online booking methods compared to in-person methods, by traveler segment.

Average travelers

48%

Explorers

Travelers who take trips and do experiences more than average.

70% of Explorers prefer online booking methods over in-person options

70%

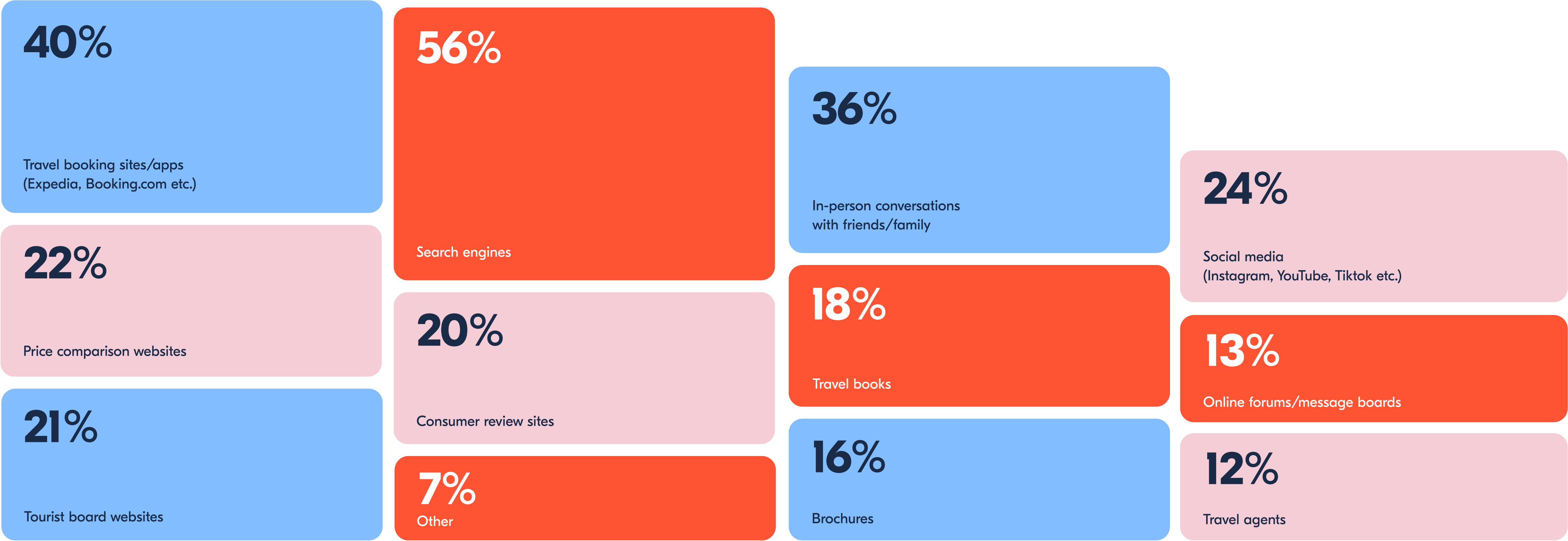
Users of GetYourGuide

118%

GetYourGuide proprietary research, Travel Experience Trend Tracker, Feb 2024

Travelers look for inspiration in multiple online places

The customer journey is anything but linear. On average, travelers use 12 online touchpoints to research their vacations. And the more places they see your experience, the more likely they are to book you when the time comes.



GetYourGuide proprietary data, GWI Customer Research, "Cross-Country Customer Compass", 2024, n=6,133

A strong and diversified distribution strategy is more essential than ever

The first step to diversifying your audience? Reaching them.

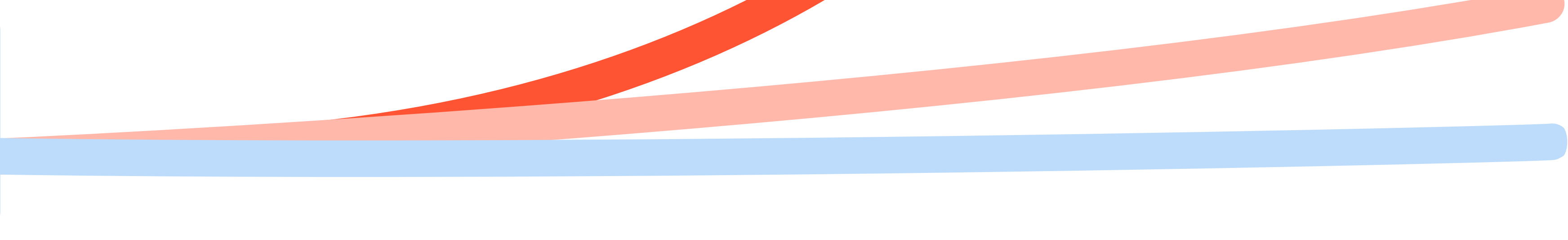
Many supply partners focus efforts on creating appealing marketing assets — but assets only work if they're being seen by the right people. Travelers use multiple platforms to research and book, so a multi-channel strategy is critical.



Revealing the truth: OTAs can boost your direct bookings

The Myth

OTAs divert bookings away from direct channels.



The Truth

Our research has found that this is false — listing on OTAs like GetYourGuide can boost your direct bookings through enhanced visibility.

This is called **The Billboard Effect**, famously proven in the hospitality sector, and now in the travel experiences industry.

The Billboard Effect: Your secret to driving more bookings

“The Billboard Effect” refers to the increased visibility — and subsequent boost in direct bookings — that hotels experience when they are listed on OTAs.

It’s never been demonstrated in the experience space...

...until now

About this study

We analyzed a broad data set for unbiased results

This study aims to answer the question:
“Does listing on GetYourGuide help or hinder a supply partner’s direct bookings?”

This research monitors the impact of joining GetYourGuide on both direct and OTA bookings globally.

We tracked both ticket numbers and net revenue to account for seasonality fluctuations, the analysis compared sales 12 months before and the 12 months after a supply partner joined GetYourGuide.

For privacy reasons, all supply partners were anonymized.

3

independent research partners

24 month

sales period



238

experience creators

8

experience categories

Our research partners



Ventrata

An all-in-one enterprise ticketing platform, created together with the world’s leading operators, unifying every sales channel and global operation into one reliable and adaptable system.



FareHarbor

Trusted by 20,000+ tour and activity businesses worldwide, FareHarbor delivers powerful software and services that simplify bookings, boost revenue, and fuel long-term growth.



Bókun

Bókun, a Tripadvisor company, is the trusted booking & channel management platform for tour, activity & experience providers to streamline operations, enhance distribution and grow bookings.

GetYourGuide maintains a commercial relationship with these reservation management systems as part of our business as an online travel agency (OTA).

Part 1

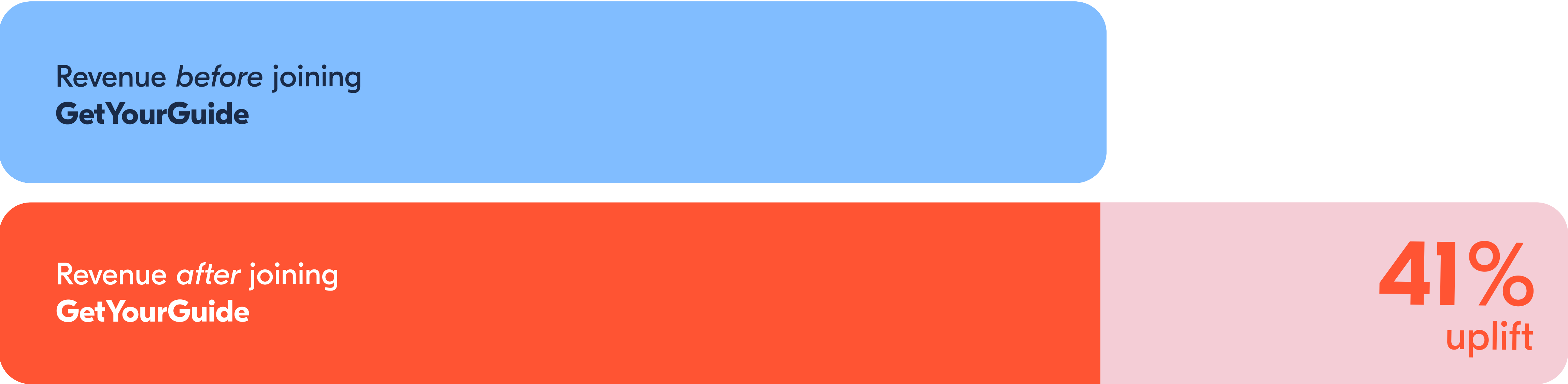
Unpacking the research findings



12 months after joining GetYourGuide

Partners' overall revenue grew by 41% on average...

New GetYourGuide partners saw 41% revenue growth from combined direct and OTA bookings in the 12 months after joining. This incremental revenue shows **OTAs can enhance profitability, turning visibility into tangible gains.**

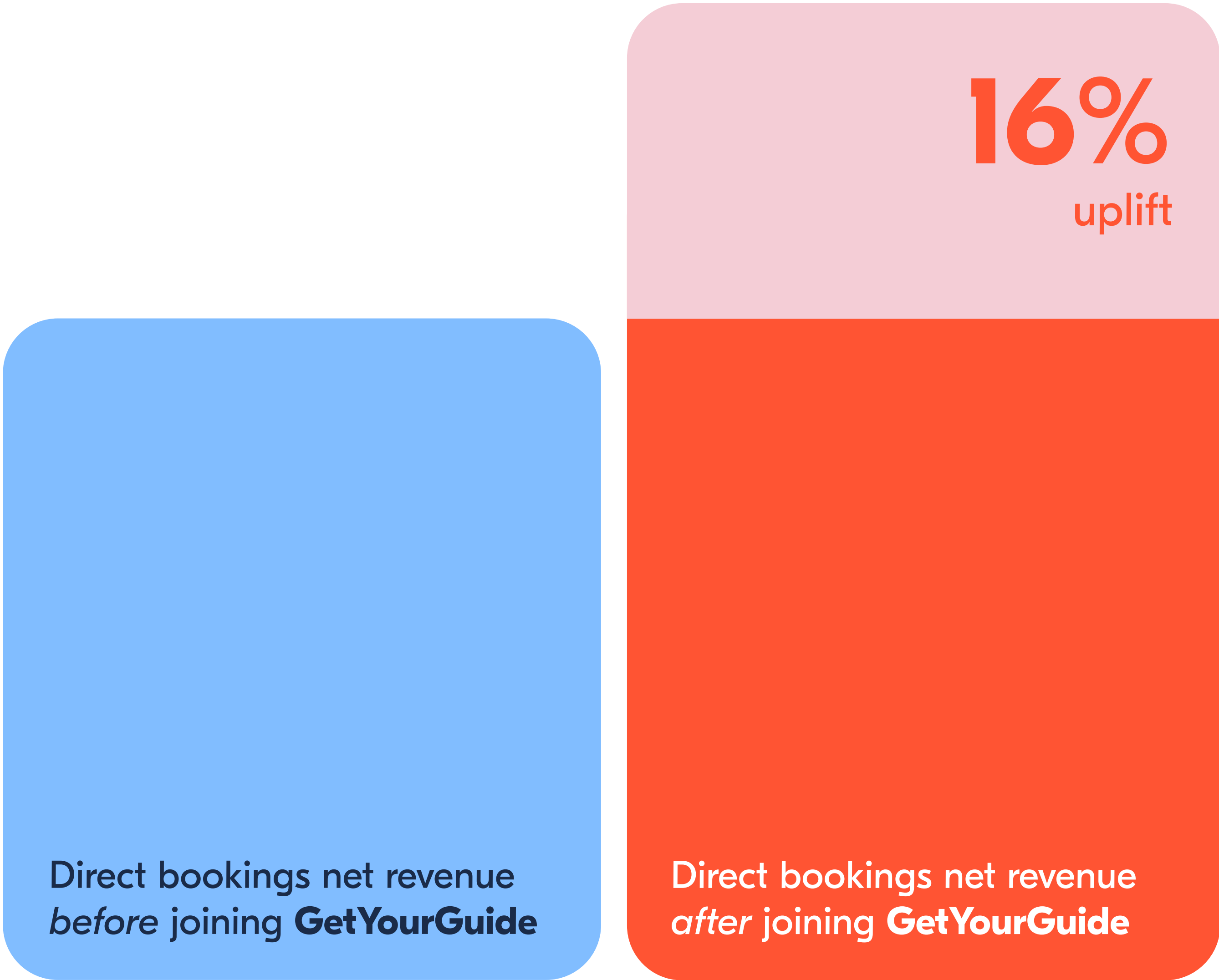


GetYourGuide proprietary research “Measuring the Billboard Effect: Impact on direct bookings by OTA listings”, 2025

12 months after joining GetYourGuide

And this wasn't at the cost of their direct bookings

In fact, NR from direct bookings grew 16% after joining GetYourGuide.



Both ticket sales and revenue soared after joining GetYourGuide

The Myth

Direct bookings decrease

Small increase in OTA sales volume

Overall growth is marginal

The Truth

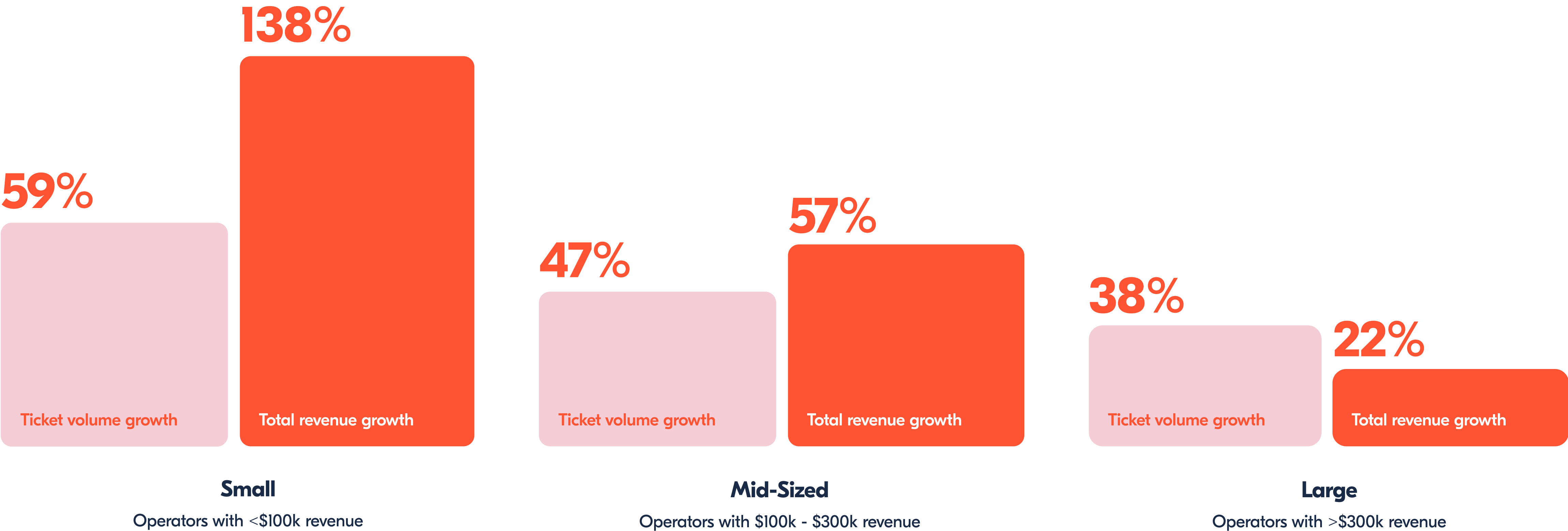
Net Revenue	Ticket Sales
16% revenue growth from direct bookings	18% growth in ticket sales from direct bookings
73% revenue growth from OTA bookings	67% growth in ticket sales from OTA bookings
41% overall revenue growth	41% overall ticket sales growth

12 months after joining GetYourGuide

Supply partners of all sizes benefited — smaller operators saw most growth

Smaller operators benefit most, as they access vast new audiences through GetYourGuide and other OTAs.

All volume and revenue data on this slide is Direct Bookings and OTA data combined.



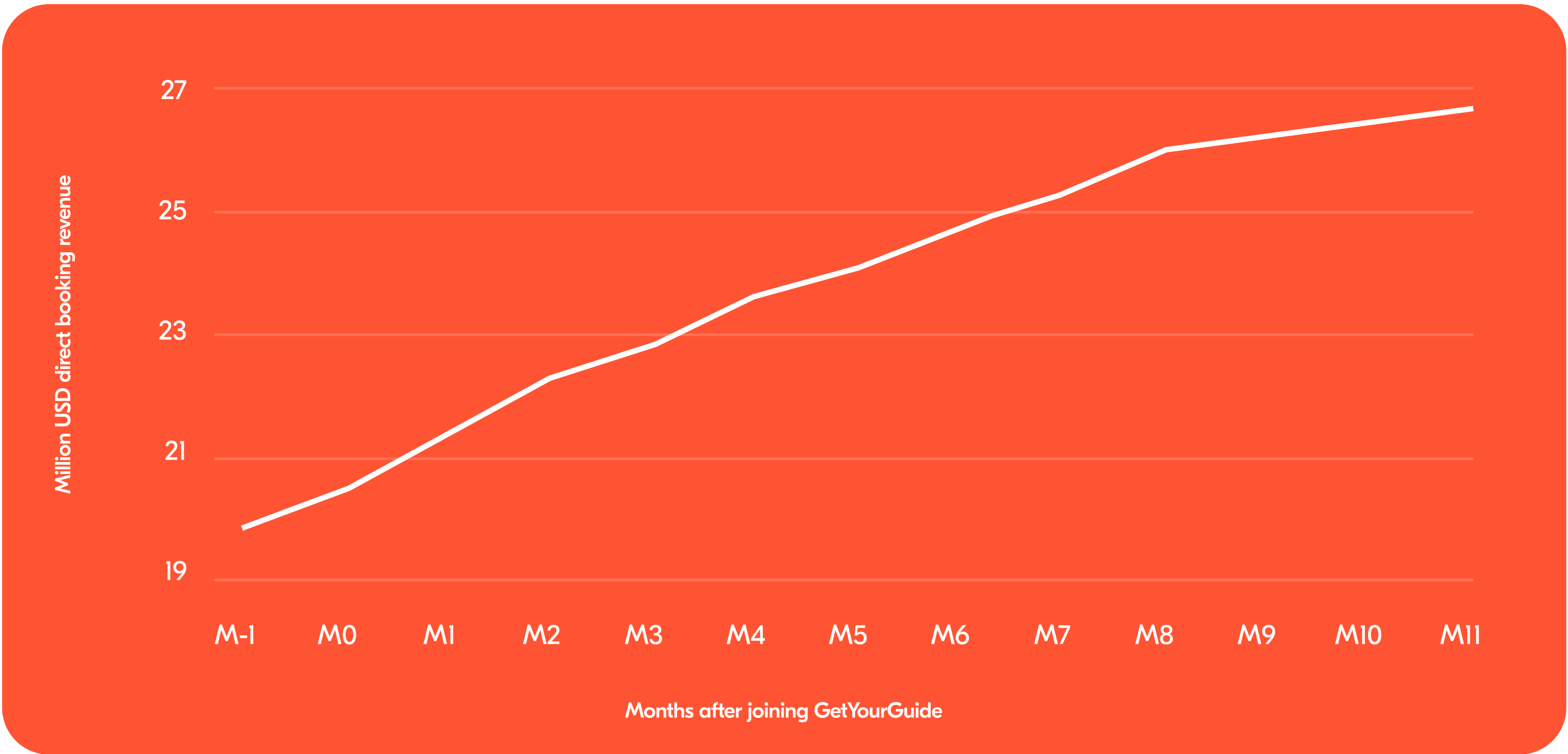
GetYourGuide proprietary research “Measuring the Billboard Effect: Impact on direct bookings by OTA listings”, 2025

12 months after joining GetYourGuide

Supply partners with fewer than 4 OTAs saw significant growth in direct booking revenue over time...

OTA exposure unlocks new audiences without over-saturation. Adding GetYourGuide early maximizes visibility and incremental growth, especially for smaller operators.

0-3 Previous OTAs: 12-month rolling sum of direct booking revenue (average daily booking)



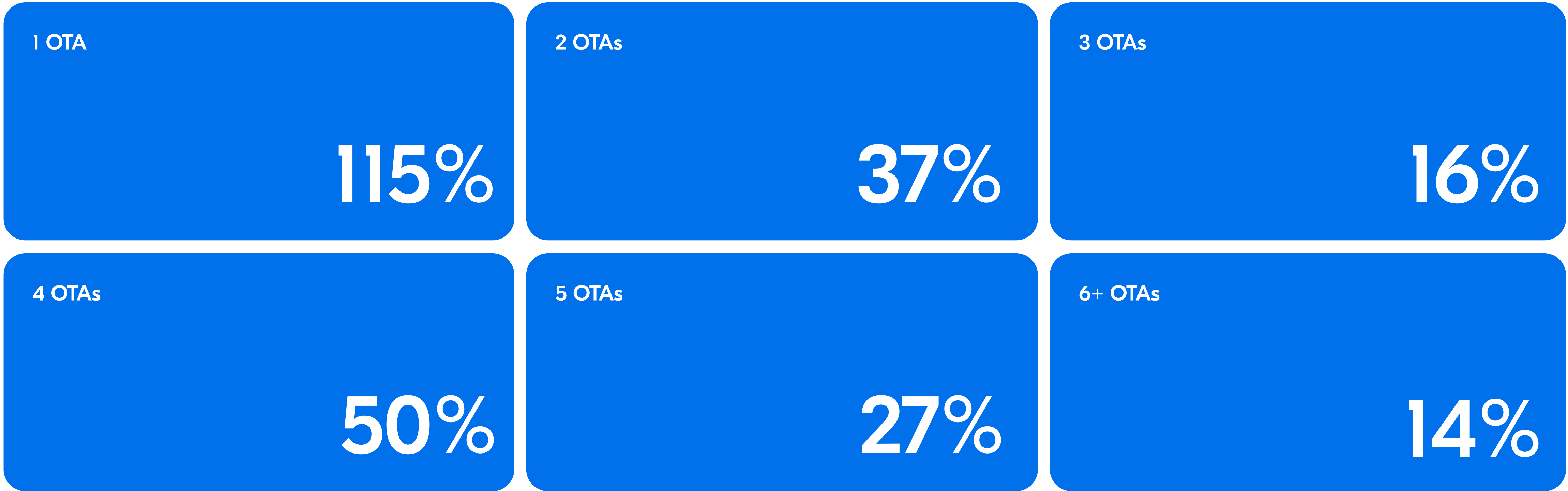
12 months after joining GetYourGuide

...but operators experienced **overall growth**, no matter how many OTAs they had previously

Operators with existing OTAs (4+) before joining GetYourGuide still saw significant overall growth. This is because each OTA has its own audience that operators can tap into by joining their platforms.

This further emphasises that OTAs drive incremental growth, and are critical to increasing distribution and accessing entire audience groups.

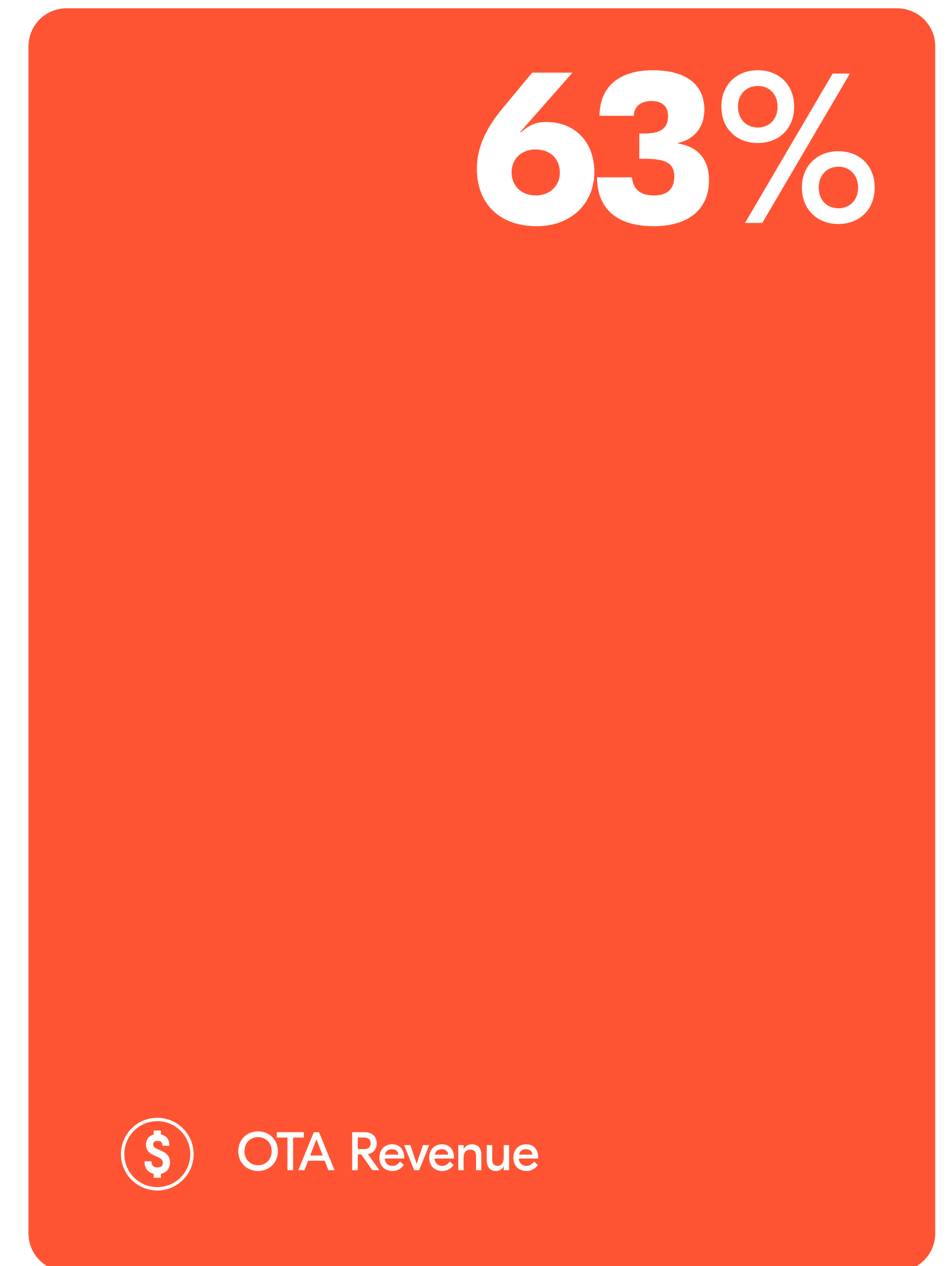
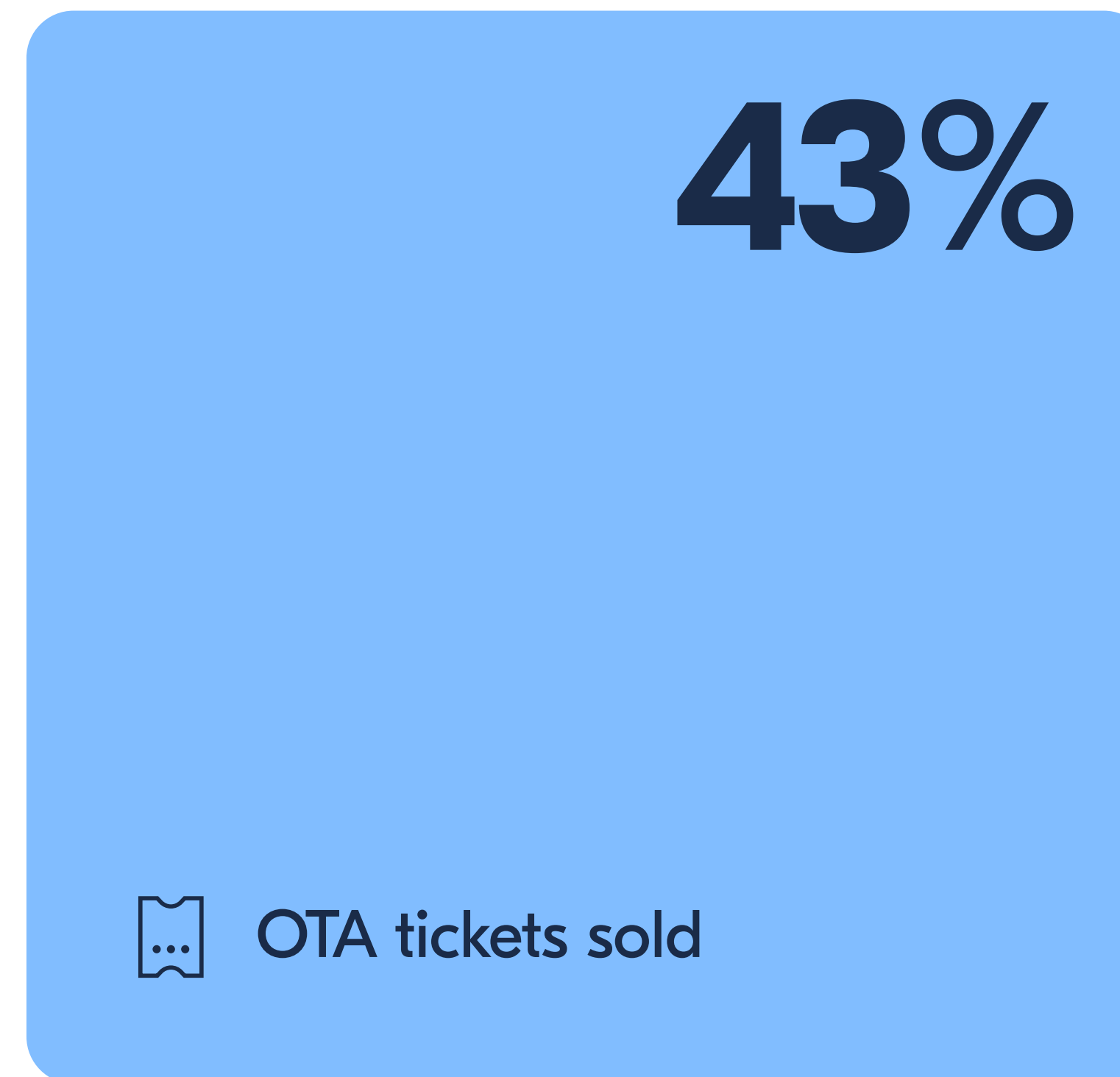
% Net Revenue YoY change after joining GetYourGuide



GetYourGuide proprietary research “Measuring the Billboard Effect: Impact on direct bookings by OTA listings”, 2025 (FareHarbor Only)

12 months after joining GetYourGuide

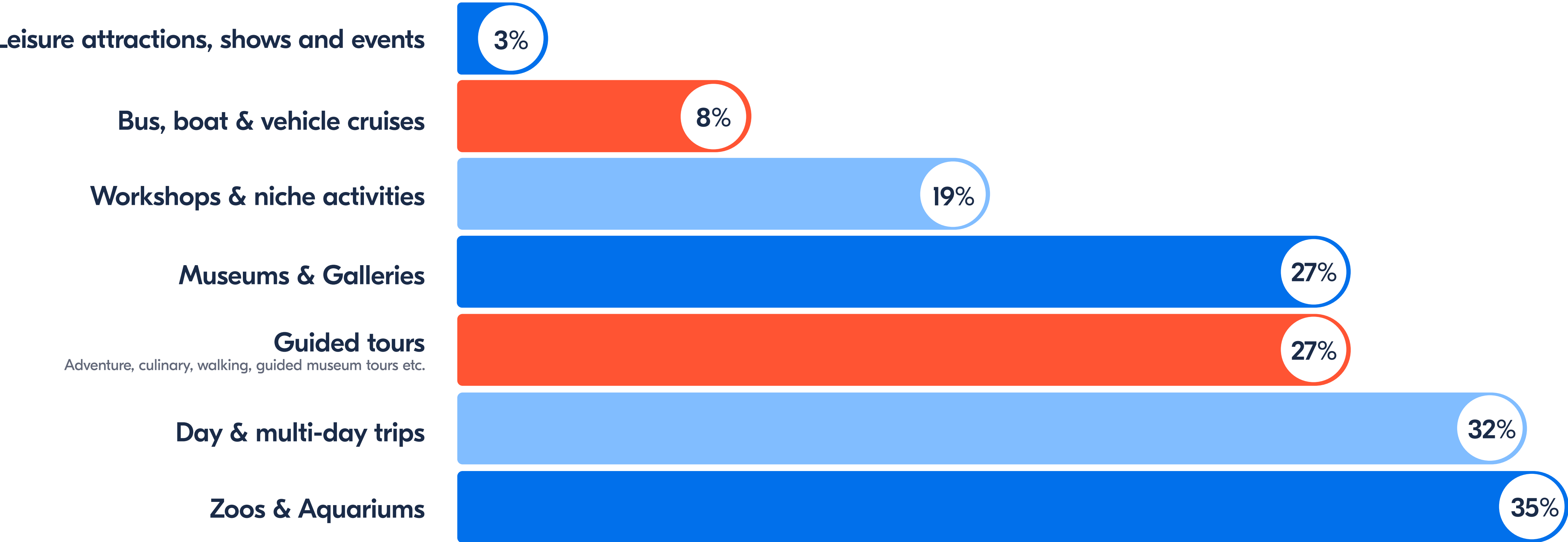
Revenue growth from OTAs outpaced growth in number of tickets sold — highlighting their effectiveness in attracting **high-value audiences**



12 months after joining GetYourGuide

A wide range of experience types benefited from increased visibility

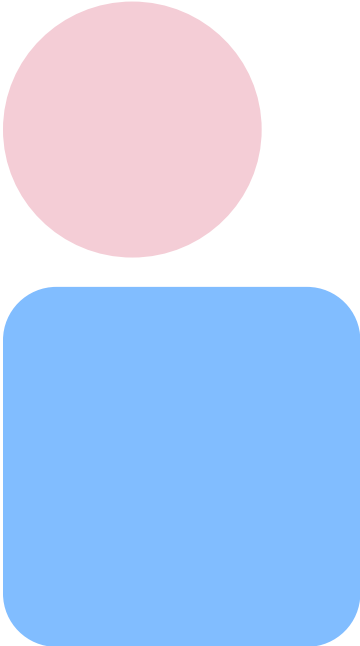
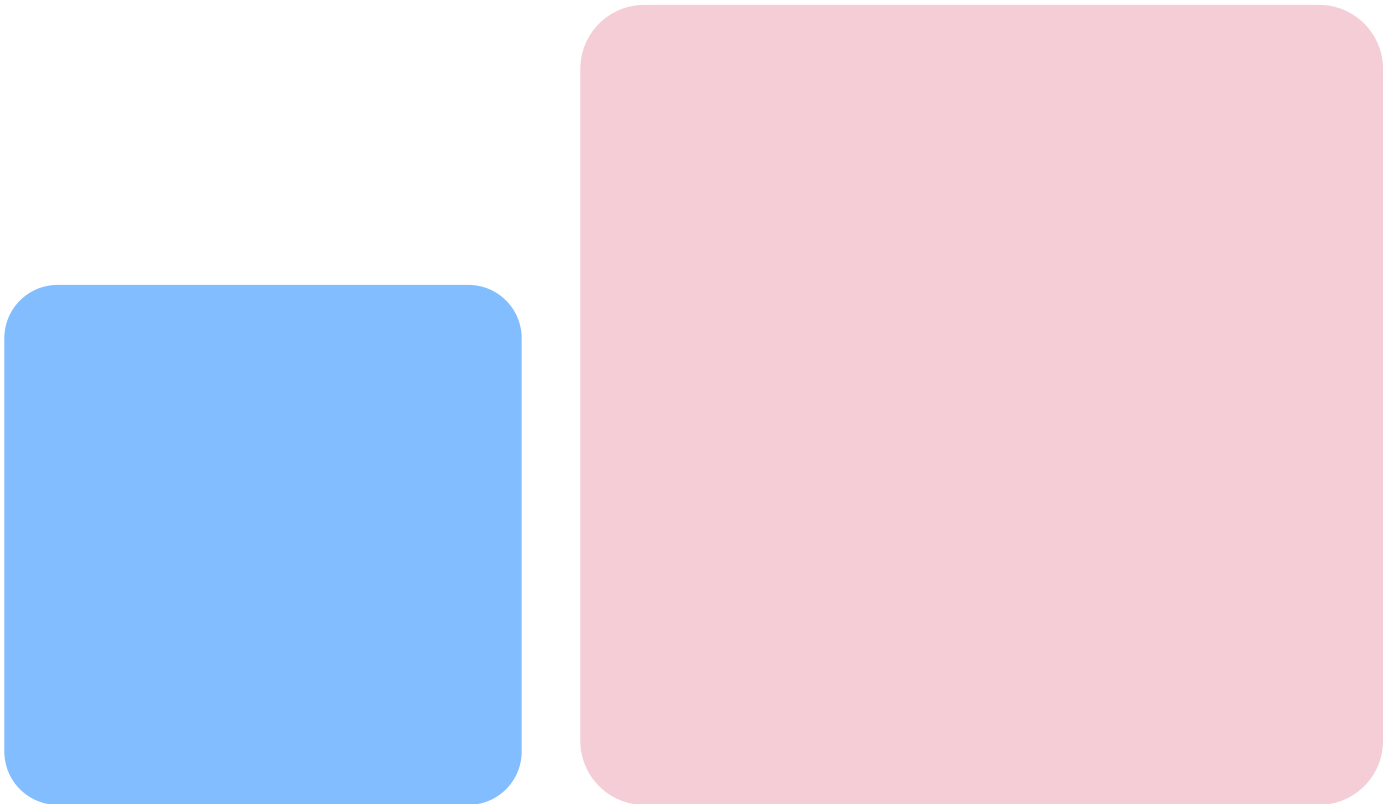
Net revenue growth from direct bookings by experience type...



GetYourGuide proprietary research “Measuring the Billboard Effect: Impact on direct bookings by OTA listings”, 2025

Ultimately, the bigger the OTA, the bigger the opportunity

The biggest OTAs have the biggest and highest-spending audiences. GetYourGuide is one of the world's biggest OTAs - **join us to connect with millions of travelers each year.**



Building a winning distribution strategy



Actionable steps to harness The Billboard Effect

Our research shows OTAs can drive growth without harming direct sales. Now, let's explore **how to build a robust distribution strategy** that maximizes reach, revenue, and resilience across diverse traveler segments.

1. Connect to a reservation management system to drive reach efficiently

2. Audit your audiences and understand their worth

3. Tweak content and products for different OTAs

4. Ensure your data is clean and complete

1. Connect to a reservation management system to drive reach efficiently

Consider connecting via a reservation management system for seamless distribution

A robust distribution strategy starts with the right technology.

Partnering with a reservation management system platform like Bókun, FareHarbor, or Ventrata streamlines your booking management across multiple channels, ensuring real-time inventory updates and data insights.

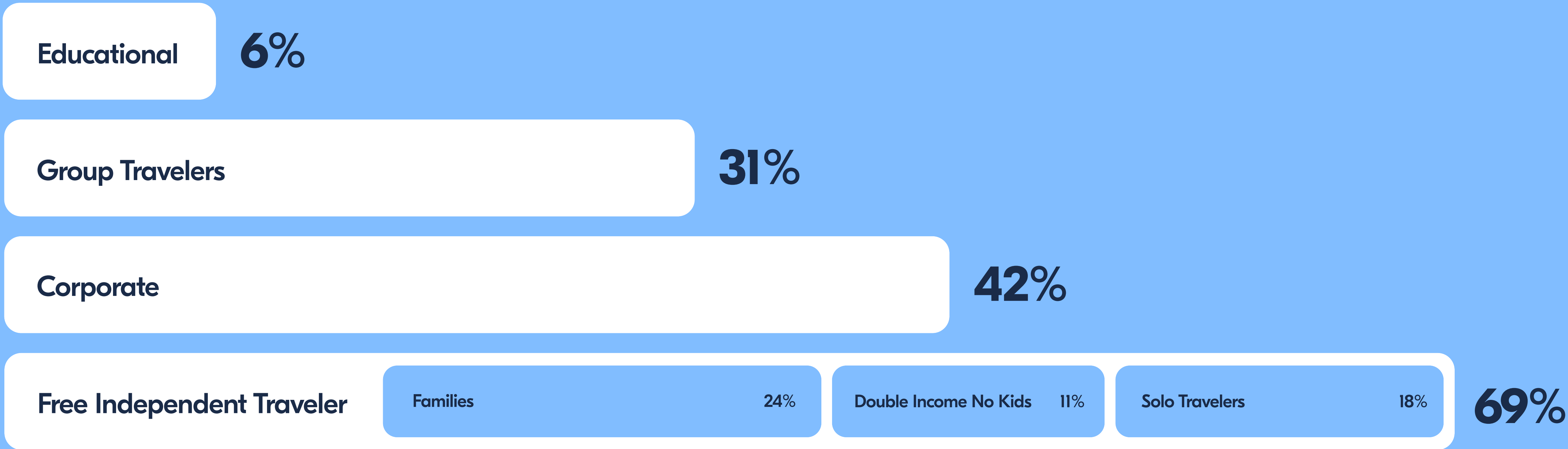
These platforms power connectivity, enabling you to optimize listings, track performance, and reach diverse audiences efficiently: **maximizing The Billboard Effect without operational headaches.**



Ensure your distribution strategy covers all traveler segments

Size of Traveler Segments

Percentages represent the share of travelers in each segment. Travelers can belong to multiple groups, so totals exceed 100%.



**Free Independent Travelers (FITs) are leisure travelers who prefer to plan and book their trip elements on their own/themselves/independently (accommodation, flights, and experiences).*

Source: GetYourGuide proprietary research with GWI, 2025, size of Traveler Segments (EU5-USA)

A deep dive into the most valuable travelers... “Explorers”

Not all FITs are the same: some travel more, and do more experiences, than others. **We call these travelers “Explorers”.**

47%

of Explorers book activities before they arrive in their destination



53%

plan to spend more or much more on experiences next year

7

trips per year — more than the average traveler

GetYourGuide proprietary customer research, Mizzouri study: About the Explorer, 2025 (n=1,441)

OTAs like GetYourGuide are crucial to reaching valuable Explorers

50%

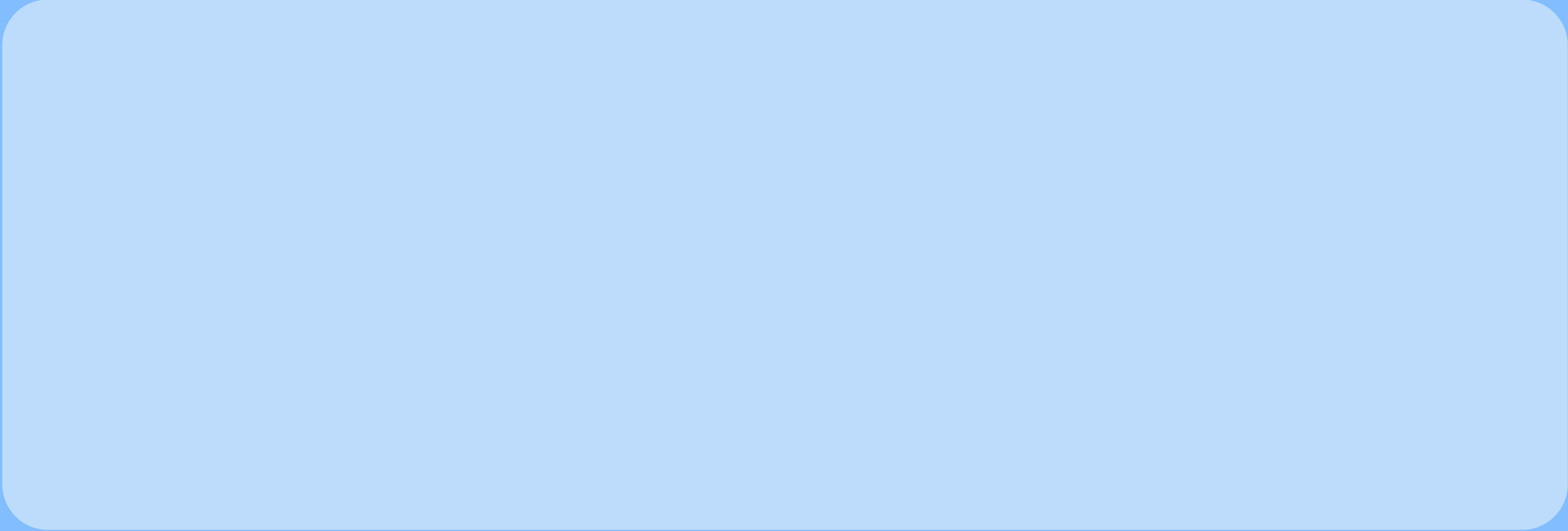
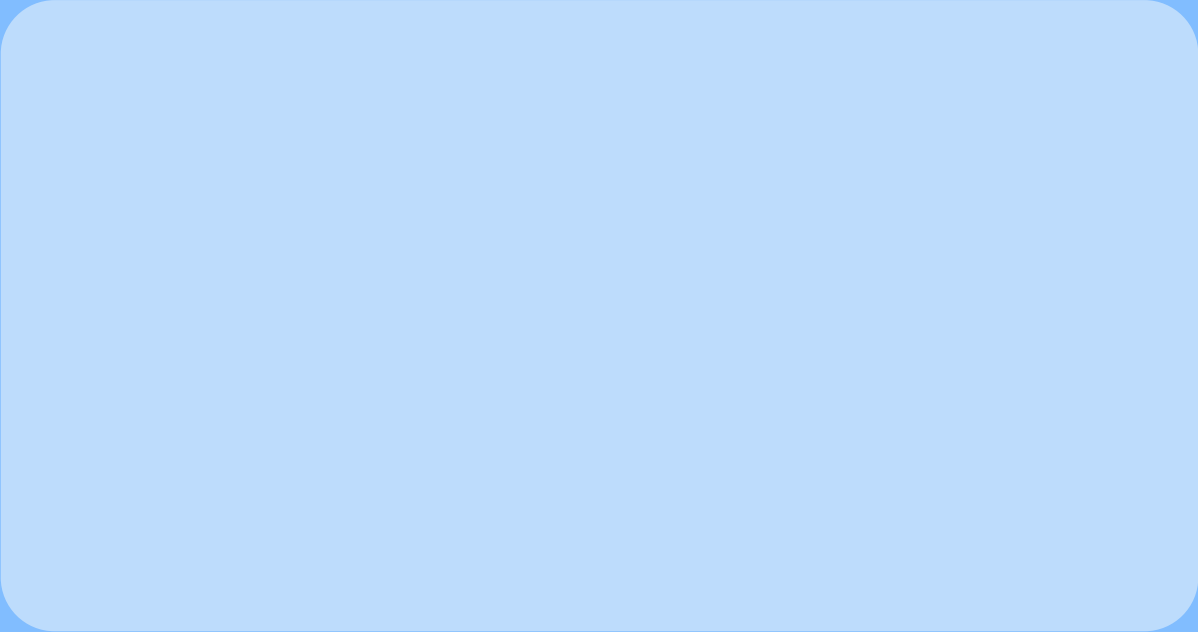
of **Explorers** have booked an experience via a 3rd party site like GetYourGuide — and this trend is set to grow.

GetYourGuide proprietary customer research, Mizzouri study: About the Explorer, 2025 (n=1,441)

Customize content to resonate with every traveler

Audit your visuals and content: family-only images may alienate solo travelers so you want to create balanced materials addressing all your priority audience segments.

Test different materials across platforms and make sure to leverage OTAs to reach niche audiences you can't access alone.



Boost your exposure and data by listing all products

95%

Impressions leading to potential cross-channel bookings

Providing access to your full inventory lets you maximize potential across audiences that you couldn't get alone.

By paying commissions only on successful bookings, you can optimize for top placement, increasing brand exposure and potentially driving bookings through other channels.

If 5 in every 100 viewers convert, that means 95 may see your product on GetYourGuide but book through other channels, **amplifying your reach and visibility.**

Comprehensive data is power. Without a full picture, you risk flawed strategies that limit growth. **List everything to unlock actionable data and optimize effectively.**

5%

Conversion rate

4. Ensure your data is clean and complete

Test new products on different platforms

Data gathered by listing all products widely can lead to valuable insights on potential new products & product variations.

Have something new to try?

Amplifying through a number of channels can help you find the right audience-product match, and set you up for success.

Above all: Think long term

Tourism — like all industries — fluctuates... but the long-term view is only positive. Like stock market investing, distribution requires a long horizon to accommodate for short-term changes in the market. **Consistent investment and optimization across channels builds resilience.**

Unlike the stock market though, your distribution channels work together — helping you to reach new revenue you couldn't access otherwise.

Your distribution channels are like your investment portfolio: continuous investment is key to long-term success.



Partner spotlight: **Bókun**

Bókun, a Tripadvisor company, is the trusted booking & channel management platform for tour, activity & experience providers to streamline operations, enhance distribution and grow bookings.

Why suppliers choose us:

- Generate more bookings: Make your own website bookable and access 2,600+ OTAs and resellers
- Never double book again: Simplify availability and manage all booking channels in one place
- Industry-leading pricing: Stay competitive with premium tools at a low and transparent cost
- Start selling in minutes: Import products from GetYourGuide and other OTAs in one click!

Try Bókun for free today

Join thousands of tour operators already using Bókun to grow and manage their businesses.



#1

Booking management platform for global OTAs

2,600+

Global OTAs and resellers



200%

Increase in bookings after connecting to Bókun



200 hrs/yr

Saved with automated tools that reduced manual work

Partner provided data

Partner spotlight: **FareHarbor**



Trusted by 20,000+ tour and activity businesses worldwide, FareHarbor delivers powerful software and services that simplify bookings, boost revenue, and fuel long-term growth.

Why suppliers choose us:

- Easy-to-use booking software and services built for growth
- Chosen by 20k+ tour & activity operators worldwide
- Intuitive tools to increase bookings & reduce admin time
- Localized payments in 37+ currencies
- Powerful integrations and reliable API connections
- Dedicated around-the-clock global support team

125,000+

Bookable activities

20,000+

Clients worldwide



Power your business today

Innovative bookings tools that empower tour and activity operators to effortlessly streamline, scale, and succeed.

A square QR code with a blue and white pixelated pattern, located in the bottom right corner of the blue box.



40+

Supported languages

Partner provided data

Partner spotlight: Ventrata



An all-in-one enterprise ticketing platform, created together with the world’s leading operators, unifying every sales channel and global operation into one reliable and adaptable system.

Why suppliers choose us:

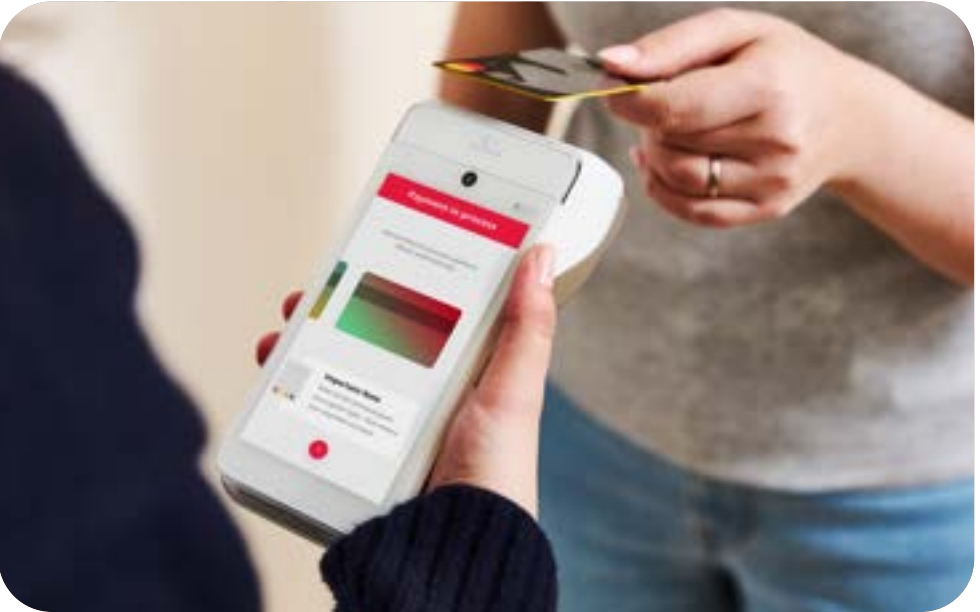
- Trusted by global leaders including the Empire State Building, Tower Bridge, Berlin TV Tower, and Big Bus Tours
- Enterprise-ready: Unified online, on-site, OTA and third-party sales; with strong POS and access control hardware support
- Quality connectivity: GetYourGuide 2025 Premium Connectivity Partner and preferred partner of all major OTAs
- Deep OTA integrations: with multi-account support, automated mapping, listing monitoring, and dynamic pricing

200+

API connections with
OTAs & resellers

99.9%

Enterprise-scale uptime & stability



Book a demo

See why the world’s largest attractions and tours trust us to power complex operations.

100%

OTAs supporting Price over API



24/7

Live customer support

Partner provided data

The insights in this report are just the beginning

In the ever-changing travel industry, GetYourGuide provides intuitive insights and data that empower experience creators everywhere to reach new audiences, stand out from the competition, and grow their businesses.



GetYourGuide is a trusted platform with over **87M** validated reviews and an average **4.5** star activity rating

Tasman Peninsula Tour, Cruise & Port Arthur...

4.9/5

★ ★ ★ ★ ★

based on 298 reviews

Guide

4.9/5

Transportation

4.8/5

Value for money

4.8/5

Customer photos





+55

From

£159 per person

Check availability

Hobart: Maria Island National Park Active F...

★★★★★ 5

M

Maite – Germany

March 6, 2025 – Verified booking

...









+1

Such a great experience with Pete, one of the best guides I ever had...Untouched nature with interesting historical backgrounds. Several encounters with wildlife such as wombats, wallabies and ... [Read more](#)

★★★★★ 5

R

Roy – Germany

November 19, 2024 – Verified booking

...

Extraordinary guide with breathtaking knowledge about all the questions and things about Maria Island and Tasmania as well.

★★★★★ 5

M

Meagan – Australia

October 10, 2024 – Verified booking

...

From

£99 per person

Check availability