



Travel Trends Report 2019



Introduction

For this year's report, we wanted to dig deeper into the tours and activities sector. To do so, we looked at three main sources of information:

In August 2018, we ran our **Tourism Survey** with 958 participants from all over the world. It was our biggest survey to date and provided invaluable sector insights.

We also dug into **our own data** from bookings processed between 2017 and 2018. As a booking software provider, we had access to a large data source that revealed booking behaviour trends that are unique to the tours and activities sector.

Finally, we reached out to **our customers, industry insiders and distribution partners** for their thoughts and opinions about important issues and technological advances in the industry.

To everyone who contributed to this report in one way or another, we thank you. Together, we've created a resource that will help push the industry forward.

To everyone else reading this report, we hope you find the inspiration you need to take your tour or activity business to new heights in 2019.

Booking Behavior

Travellers are opting to purchase experiences over things. Skift Research's [2018 U.S. Affluent traveller Survey](#) 'found that 67% of affluent travellers would rather spend their money on activities than on a nicer hotel, up 8% from last year.' Choosing experiences is a travel trend that is shown across all generations and demographics.

In this chapter, we will review TrekkSoft's booking data, the growing importance of Online Travel Marketplaces and the surprising impact of human beings in the booking process.



Top experiences for 2019

#1 A request for unique experiences

Tour operators are now receiving requests for unique experiences from travellers who want to do something that is a once-in-a-lifetime. This is becoming more common amongst Millennials who want to explore the world and share their stories with others.

#2 Ecological tours are in demand

Ecological tours are the most popular tours offered by many tour & activity operators who responded to our 2018 Tourism Survey. These are usually rare experiences that educate and share inside information on the area, and how to protect it for the future. Tours that use proceeds to fund ecological projects such as forest or animal habitat restoration are chosen above alternatives without a cause.

#3 Local experiences

Travellers are choosing to become more immersed in the local culture when visiting a destination. They want to do what the locals do and eat where locals eat. Airbnb Experiences are offering a solution where travellers can book a local experience with a destination native.

#4 More adventure

Adrenaline pumping activities continue to grow with two new generations who are keen to push their limits. Adventure destinations such as Area 47 in Austria, Queenstown New Zealand, and Interlaken Switzerland are booked for the variety of action packed activities on offer.

#5 Multi-day tours and activities

There is a shift with multi-day tours and activities being booked further in advance and being a preferred option for travellers. Convenience is a key selling point as travellers no longer need to spend time planning various activities.

#6 History and culture

Walking tours are still one of the leading experiences for anyone visiting a new location. They are a great opportunity to find your bearing, meet other travellers and have all their questions answered by a destination expert.

65 Travel Statistics to
know in 2018-2019

Download today!



TrekkSoft booking data

By Nicole Kow

In 2017, TrekkSoft processed over 1 million bookings and as of August 2018, together with our customers, we're set to surpass this number by the end of 2018. With all these bookings made via TrekkSoft, we've been able to gather a lot of insightful data to share with you.

| When are customers making bookings?

We examined three random data points between August and September, the busiest months for tour and activity operators in Europe. The booking patterns found were strikingly similar despite a small change in volume of bookings processed.

Monday is the most popular day for people to book their trips while Saturdays are the least busy days for bookings.

Bookings made slowly drops from Monday and plateaus between Wednesday to Friday before dropping dramatically on Saturday. Bookings pick up again on Sunday and take off again on Monday.

10am CET is the time of day when most bookings are made, and 6am CET is when there are the least.

As the clock strikes at midnight, bookings begin to drop until it's lowest point at 6am CET. Between 7am to 10am, bookings pick up dramatically, more than doubling in volume prior to a few hours before. Between 10am to 2pm, there's a slight dip in bookings made. It picks up after lunch all the way to 10pm at night. After 10pm, bookings drop again and the cycle repeats.



| Bookings by channel

When examining the bookings made across channels, we compared trends in 2017 and 2018.

In 2017, 79.2% of bookings were made directly on operator websites while online marketplace bookings only made up 3.2% of total bookings.

In 2018, proportion of direct website bookings fell to 66.7% while marketplace bookings increased to 9.1%. Bookings made through agents, affiliates and local tourist offices also increased from 17.5% to 24.3% in the same time frame.

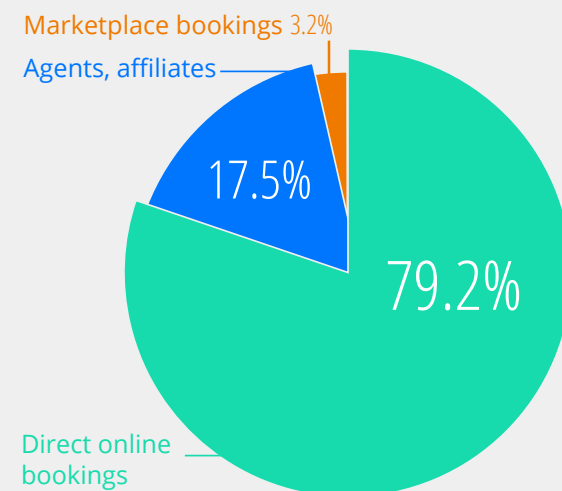
It is interesting to note the 5.9% increase online marketplace bookings. Part of this is due to the increase in number of distribution partners TrekkSoft integrated with within the year.

This guide is jam-packed with easy to implement tips and tricks to optimise your website for conversions.

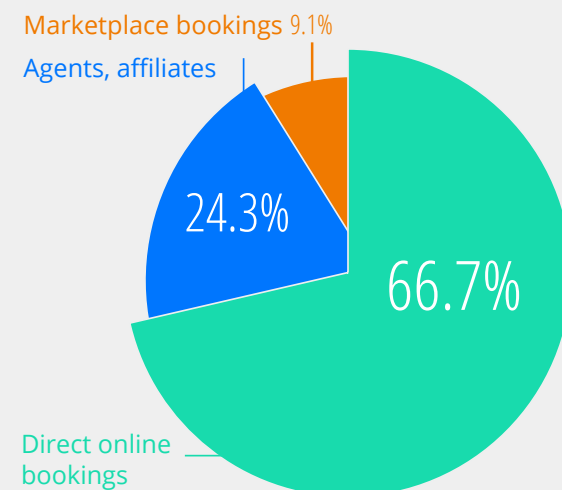
Download today!



2017

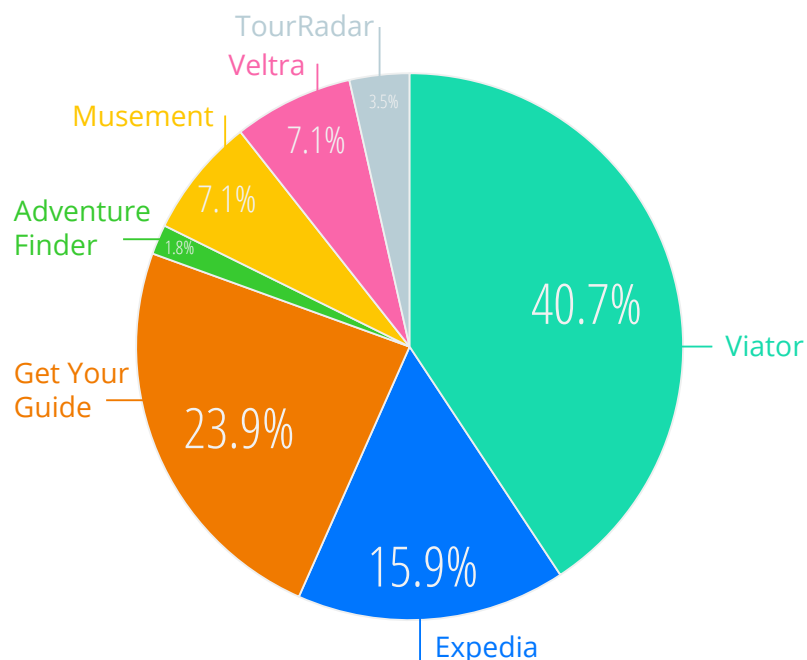


2018



The growing importance of Online Travel Marketplaces

By Nicole Kow



Back in 2016, we ran our very first distribution survey. Of the 41.3% of business (out of 209 participants) who sell their tours on OTAs, Viator was the leading OTA of choice, followed by Expedia and Get Your Guide. Not much has changed since then.

Table 1 - Marketplace bookings in 2017

Marketplace bookings (sorted by number of bookings)	Marketplace bookings (sorted by revenue)
Viator	Viator
Expedia	Expedia
GYG	GYG
Musement	Musement

Table 2 - Marketplace bookings in 2018

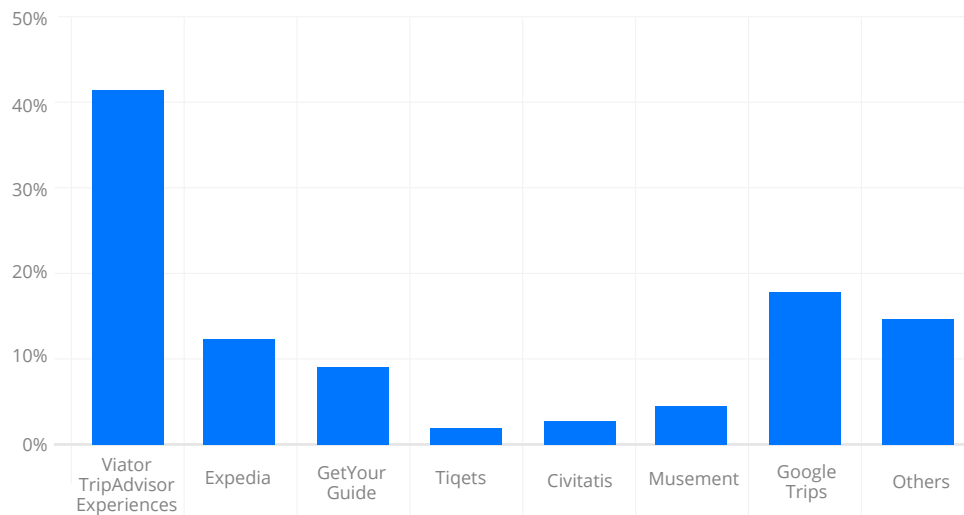
Marketplace bookings (sorted by number of bookings)	Marketplace bookings (sorted by revenue)
Viator	Viator
Civitatis	Expedia
Expedia	GYG
GYG	Civitatis

Marketplace bookings processed through TrekkSoft's Channel Manager in 2017 and 2018 show similar results with our 2016 findings.

Viator continues to lead the way, generating more than 6 times in bookings and revenue compared to Expedia in 2017.

In 2018, Viator brought in more than 10 times the bookings by Civitatis and more than 6.5 times the bookings made by Expedia in 2018.

Which OTAs provide the best return for your business?



Alongside our TrekkSoft data are the results from our 2018 Tourism Survey conducted in August 2018. The survey revealed that Viator remains the chosen OTA, with over 40% of participants voting it as “providing the best return for their business”, followed by Google Trips, Expedia and Get Your Guide.

Compare the leading marketplaces in one useful guide.

Includes Viator, Expedia, GetYourGuide, Airbnb Experiences, Civitatis and Klook



Get your free copy

Where are OTAs headed to in 2019?

With more than 25,000 tours in over 160 countries, TourRadar are on a mission to become the online marketplace for tours and activities. Since May 2016, the company has successfully raised \$66 million in funding. As one of our distribution partners, we interviewed the team to hear what we can expect from them and other online travel agents in the year to come.



In 2019, what can we expect from marketplaces?

Travis Pittman, CEO and Co-Founder



"When it comes to online marketplaces, instant is the answer. This is why a primary focus of our business is agile customer service, especially when it comes to booking confirmation. In the coming months, TourRadar will be pushing our operators to make instant bookability a priority, ensuring our customers will never have to wait for their tour to be confirmed. It's this focus on instant service that will ensure 2019 is the year of the customer at TourRadar."



How is TourRadar going to use these funds to expand your market share in the supplier and consumer market?

Brendan Roberts, Head of Business Development

"One thing we're focusing on is making advances in business intelligence and what we can share with our operator partners in real time. This helps them understand their product's performance and what actions they can take to improve. As we're offering more options for travellers in terms of travel styles, we'll be using additional technology to create a more efficient process for operators to join TourRadar."



The funds will be used to "invest in technology". Could you give some hints as to what this might be?

Nicholas Trieb, COO

"An essential element of making our customers happy is ensuring that our tech is flawless. As we scale our customer support team we'll be focusing on creating easy-to-use platforms to help them work smarter and faster, which ultimately improves the customer experience. In addition to this, we'll be providing personalisation to our customers with newly improved experiences across our website and customer support touch points."

Managing high volume of bookings from multiple sales channels

When sales channels are disconnected from the back office, it makes working with hotels, booking agents, resellers and online marketplaces a complicated and tedious process

The problems of capacity management

When working with online marketplaces or OTAs, some operators allocate a fixed number of spots per trip for each OTA which isn't always a great thing. What if the OTA doesn't sell all your available spaces and/or you're getting higher demand on another platform? The rigidity of this arrangement can cost you a few bookings each day. Over time, that can add up to a lot of lost revenue.

Managing bookings at scale

Say you currently sell trips on your own website, on Expedia and on Viator. Only three channels.

When you receive a booking from Expedia, you're notified by Expedia and you'll have to email them to confirm if you have space for two on your Tuesday 3pm canyoning trip. Then, you manually update the availability for that trip on your website and on the other marketplace, which in this case is Viator.

As your business grows, you'd have more trips to sell, more availability to track, and you'd probably want to sell larger volumes on more global platforms like Hotelbeds. Let's just take a minute to think about how much work all that would entail.

TrekSoft's Channel Manager automates a bulk of the work

Whenever a new booking is made, the Channel Manager automatically updates your availabilities across all your sales channels, removing the manual and repetitive data entry your team needs to do. Once connected, changes made to your products, for example, changes to price during the high season, will also be synced across the various marketplaces you work with, again, removing multiple data entry tasks.

[Read more](#)

The surprising impact of human beings in the booking process

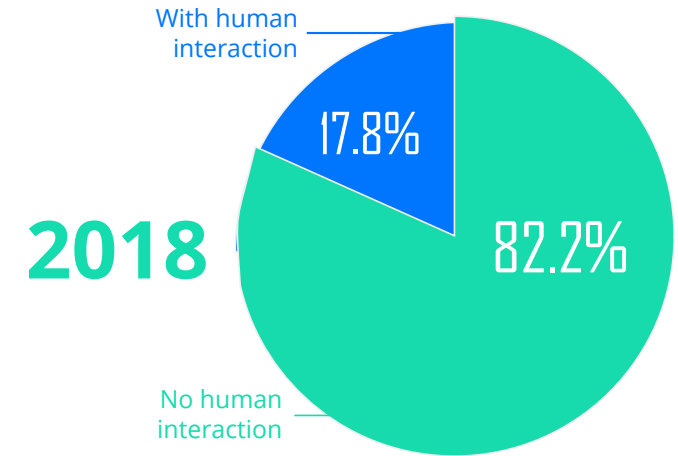
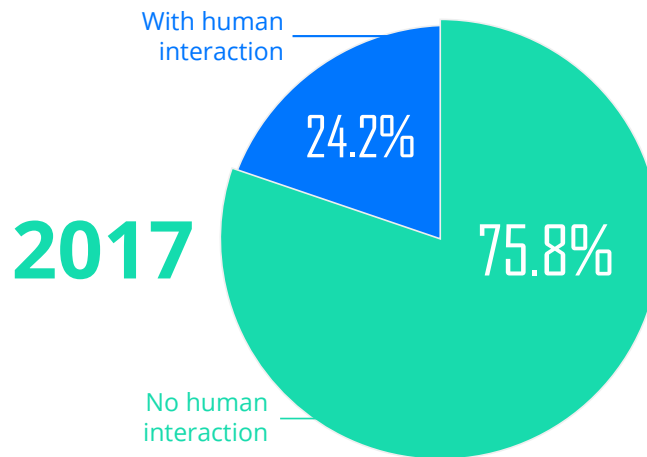
By Nicole Kow

The most fascinating insight we uncovered from our data set was that customers who interacted with a person during the booking process tend to spend more than customers who merely booked online.

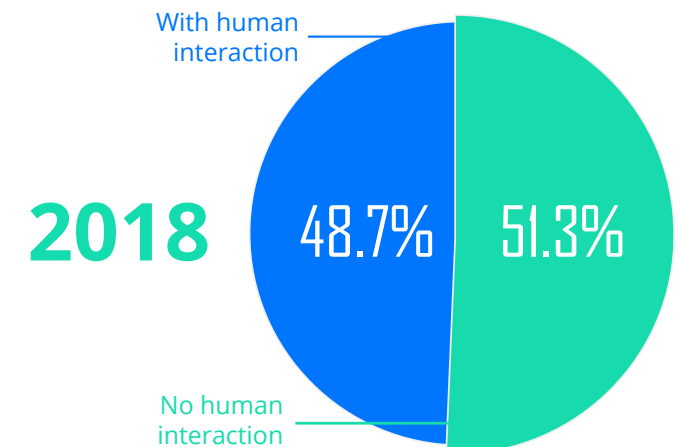
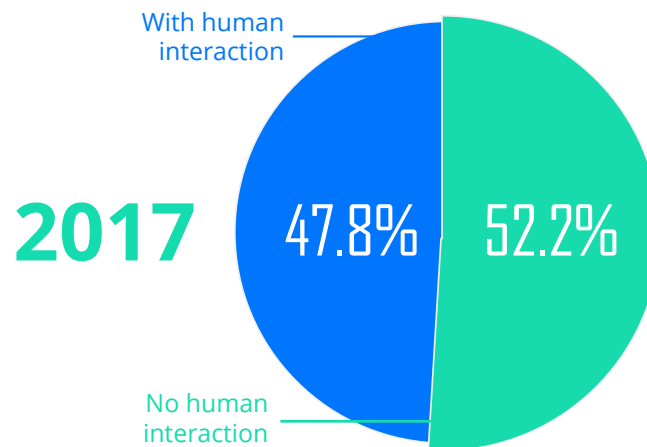
We categorised bookings made “with human interaction” as bookings made via agent accounts or via our mobile backend app and our point-of sales desk. Both these platforms are not consumer facing and are typically used by guides, resellers, booking agents, hotel concierges, tourist offices and so on.

Bookings made “without human interaction” were therefore bookings made via an operator’s website or via online marketplaces.

Number of bookings



Revenue generated



In both 2017 and 2018, bookings made without human interaction, via online low-touch methods made up more than ¾ of overall booking volume. However, online bookings made up just over 50% of overall revenue. In 2017, 17.8% of bookings generated 47.8% of revenue while in 2018, 24.2% of bookings made up 48.7% of revenue.

This pattern holds up even after adjusting both online and in-person revenue to take into account commissions paid out to online marketplaces (average of 25% commission) and in-person sales agents (average of 30% commission).

Consumers spend more when they speak to a person when making a booking, whether this is a hotel concierge, your own sales person, your guides or a booking agent on a busy street.

Using the right tools for the right situation

At TrekkSoft, we've developed a mobile app and a point-of-sales (POS) desk for tablets, making it easy for your guides and your sales team to take bookings and payments on the spot.

As a tour or activity business, it is common to upsell travellers while they're on a tour. A tour guide might recommend similar tours and offer a special discount for those who book on the spot.

A surf instructor might finish a lesson with client who has just tried the activity for the first time and is keen to book more lessons. A bus driver for a hop-on-hop-off service might attract new customers as he drives around your destination.

With TrekkSoft's sales tools, your business is ready to take bookings and payments in any of these situations.

Check your availability and book customers in while they're still interested and excited. Take a payment on the spot to ensure that customers turn up on the day of the trip. Take last-minute bookings just before departure to make the most of your resources.

Your customers will get a confirmation email and your admin team will receive automatic updates without you having to call or text them. Your guest list will be updated too, with the names and details of your customers updated on your mobile app.

The opportunities are endless, you just have to be ready for them. With TrekkSoft, you will be.

Technology in Travel

The travel industry is constantly transforming as new technology is designed and developed. Today, we can perform a self check-in at the airport, load our boarding passes, get instant alerts if our flight is delayed or when our departure gate is announced, and, more recently, connect to wireless internet and entertainment during our flight.

Tour and activity operators need to step up to ensure that they don't fall behind.



Mobile phones in the booking journey

By Stephanie Kutschera & Nicole Kow

In recent years we have seen a distinctive shift in the reliance and trust of mobile phones and it makes sense considering 62.9% of the population own a smartphone and on average spend between 3.5 to 5 hours using it daily.

| Industry research

[Google conducted a study with PhocusWright in 2018](#) to discover how mobile phones are used by potential travellers. Findings of this study confirmed that researching destinations, hotels and airfares on a mobile device, is now as normal to users as online shopping.

Customers are comfortable researching, booking and planning their entire trip to a new travel destination on a mobile device. Top consumer markets displaying this trend include India who came out top with 87%, Brazil (67%), Japan (59%), South Korea (53%), US (48%), Australia & United Kingdom (45%) and France (44%).

Mobile devices also lead to a greater propensity to book at the last-minute. Google Data shows that travel-related searches for “tonight” and “today” have grown over 150% on mobile, over the past two years.

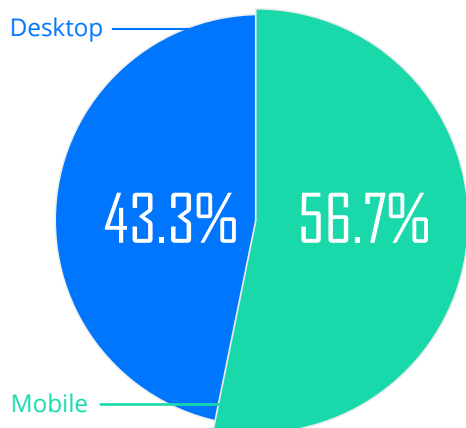


Mobile vs desktop bookings

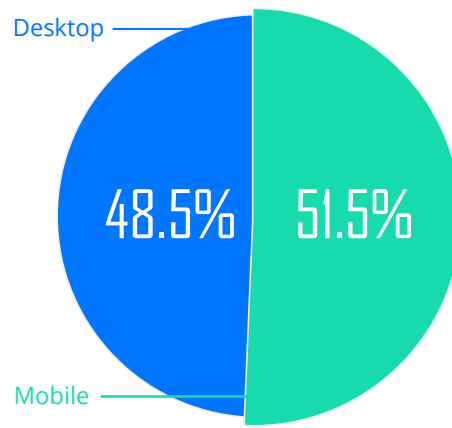
Our own data on mobile bookings is made up of bookings via TrekkSoft's mobile booking widget and white label apps we've built on request. We further define desktop bookings as those that have been made on and a company's website or via a widget on a reseller's website.

The proportion of mobile bookings increased between 2017 and 2018, from 51.5% to 56.7%.

2018



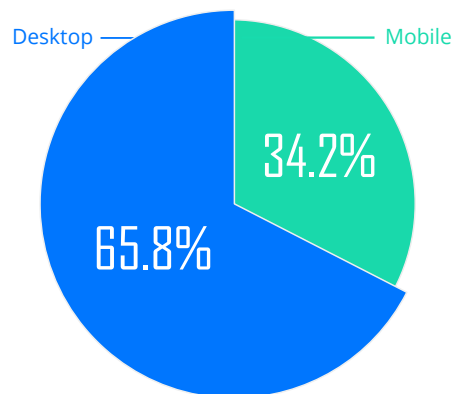
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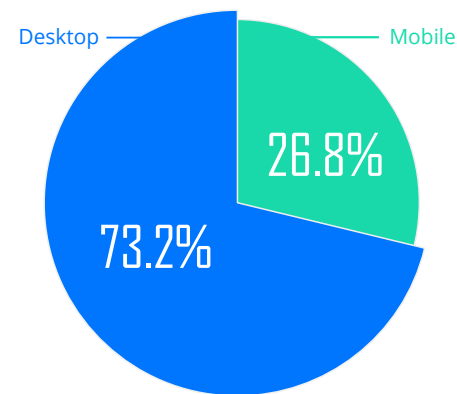
As consumers get more comfortable booking via a mobile device, tour and activity companies are now beginning to realise its importance and invest in building a bespoke mobile optimised site. This trend will only continue to grow in 2019.

In 2018, revenue from desktop bookings fell from 73.2% to 65.8%.

2018



2017

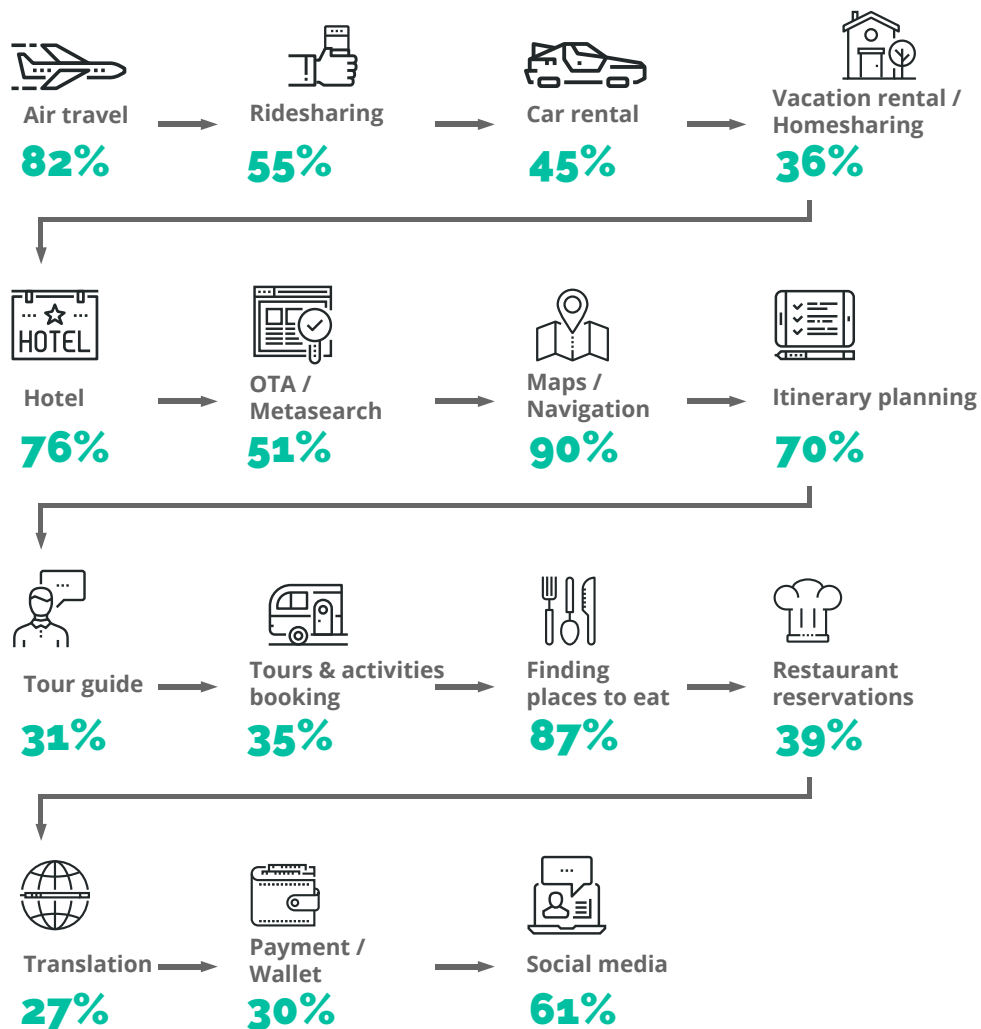


While mobile bookings make up more than half of the bookings processed via TrekkSoft, a large part of revenue still comes through desktop bookings

To explain this, we know from previous research that consumers tend to book and pay for expensive items first, such as flight tickets and accommodation. We also know the mobile booking experience still lags behind the desktop experience. This could lead to consumers doing their research on mobile, and later booking via desktop.

| In-destination bookings

[Skift's Research](#) found that 35 percent of travellers have used mobile phones to book a tour or activity while already in destination for a vacation, whilst [Phocuswright](#) found that 38% of bookings are made on the same day or two days before a trip is made.



Source: Skift Research



How to prepare for more mobile bookings

by Jason Roe, CPO TrekkSoft

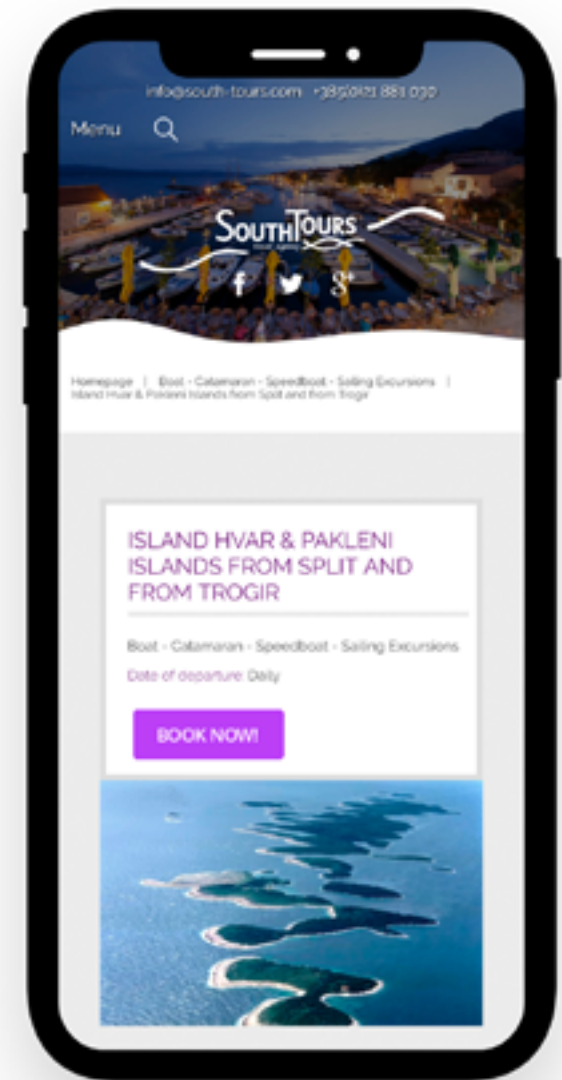
The customer experience on a mobile device can vary because of external factors such as roaming charges, patchy coverage and unsecure wifi connections. Many customers will not have access to emails when roaming. It's also important to consider that mobile devices and their capabilities vary because of screen size and hardware constraints.

Design for mobile first bookings:

- Use mobile responsive booking widgets and pages.
- Allow customers to send tickets to their phone number via SMS.
- Add QR Codes to tickets and support QR code scanning for quicker entry.
- Add tickets to a mobile wallet to save tickets directly to their device.

It's important to understand what job a customer is trying to achieve on their mobile device. Typically a mobile user will be looking to check prices, availability and make a quick last minute booking. Make sure to make these jobs as easy as possible and that they are able to access ticket information while offline.

[Read our blog: How to design and optimise your book now buttons to drive bookings](#)



Personalisation

By Stephanie Kutschera

[According to Skift](#), personalisation is currently ‘the name of the game when it comes to travel customer experience’.

In a [recent interview](#), GetYourGuide CEO Johannes Reck said that ‘true success in the future of travel comes down to personalisation.’ We now have so much data on our customers as they go through the various touch points of our website, booking process, rebooking and reviews. This data allows not only to whittle down our customer personas, but also reveals how to target them based on their personal requirements.

At TrekkSoft we know when a customer has an interest in a particular feature as they have downloaded content or asked for more information. This allows our support team to provide a personalised service by following up with information the customer would like to know.

Studies show that customers prefer personalisation as a time-saving tool. According to [Google Research](#), ‘57% of travellers feel that brands should tailor their information based on personal preferences or past behaviors.’ The same research also confirmed that ‘if a travel brand tailored its information and overall trip experience based on personal preferences or past behavior, 36% would be likely to pay more for their services.’

How can tourism organisations use personalisation? The next chapters will cover some useful tools.



Direct communication through Messaging Apps

By Franziska Wernet

For a more direct way to speak to your customers, messaging apps are becoming the fastest and most convenient way to connect and enhance their travel experience.

According to Business Insider, the average smartphone owner uses 27 apps on their phone per month and [the top four messaging apps](#) (Messenger, WhatsApp, WeChat and Viber) have more monthly active users than the top four social networking apps (Facebook, Twitter, Instagram and Google+). [Statista confirms this claim](#), stating that there are almost 4 billion users between WhatsApp, Facebook Messenger, and WeChat. This makes it the ideal method for tour & activity operators to communicate with their customers in real-time.

"53% of people are more likely to shop with a business they can message directly."

Facebook, November 2017

Messaging apps are already growing in their popularity and reliability in the tourism industry. In our 2018 Tourism Survey, we asked participants which messaging apps they use to communicate with their customers. 57.17% said that they use WhatsApp, 18.16% are using Messenger and 1.15% use WeChat.

[Read our blog: 3 ways to use messaging apps to get more bookings](#)



About WeChat

[The Chinese messaging app WeChat](#) has evolved massively in recent years to become China's number one mobile app and social media platform, with over 1 billion monthly active users. Starting as a simple chat platform like Whatsapp, today it combines social sharing, marketing, services (including travel services), and mobile payments. According to [Dragon Trail](#), 50% of WeChat users spent 90 minutes or more every day on the platform, so contacting them directly through the app is the perfect marketing tool.

The role of Artificial Intelligence

By Marcelo Butzke, SEO Expert

AI or Artificial Intelligence may sound like something from a sci-fi movie, but I can guarantee that you will have interacted with it at some point through chatbots and machine learning.

| Chatbots

Chatbots are becoming one of the most commonly used tools on websites and messenger apps due to their efficiency. You may have exchanged messages with a chatbot without noticing, and you wouldn't be alone. According to [PWC research](#), 27% of consumers were unsure if their last customer service interaction was with a human or chatbot.

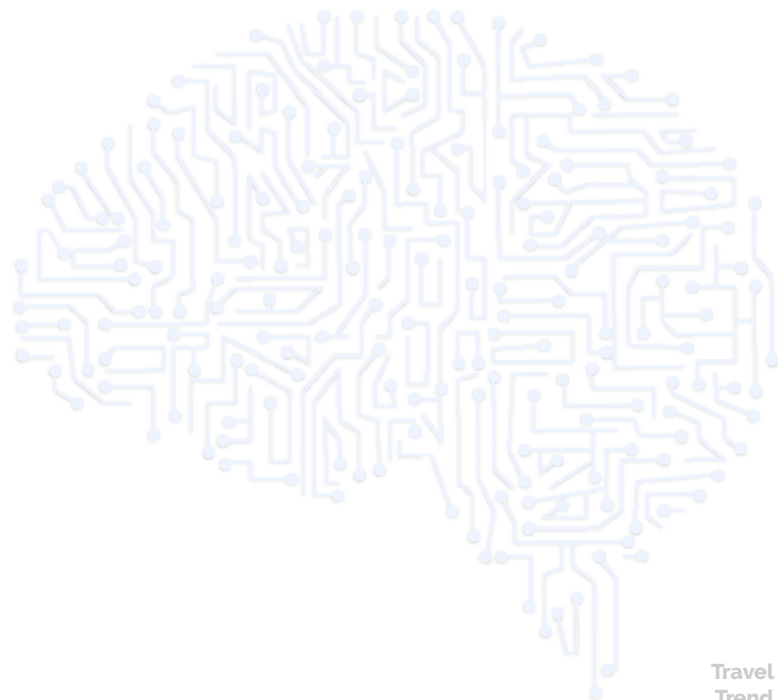
Chatbots save businesses administration time and resources while still giving customers useful answers to their questions in a timely manner. In 2017 alone, [67% of consumers](#) worldwide used a chatbot for customer support.

Facebook is now offering a [public bot service for Messenger](#) where businesses are experiencing 80% higher open rates in messages compared to previous efforts. This is because 1) Messenger has a large user base and 2) users do not need leave to the app to get in touch with companies.

| Machine Learning

Machine learning is used across all industries to track consumer behavior. It allows companies to make personalised recommendations based on past purchases, respond quickly to requests, and ultimately ensure that their customers are happy. Machine learning also allows companies to spot a churn customer who might cancel a subscription or return a product, before the customer has even taken action.

In years to come we expect that a lot of today's customer service will become automated. [Gartner](#) predicts that chatbots will power 85% of all customer service interactions by the year 2020. This could be a real cost saver for companies both large and small.



Where does Blockchain fit in?

By Franziska Wernet

Blockchain is a digital ledger in which transactions made in bitcoin or another cryptocurrency are recorded chronologically and publicly.

It was the buzzword for 2017, but does blockchain have a future in the travel and tourism industry? [According to Fritz Jousen](#), CEO of European travel giant TUI, it does. He believes that blockchain technology will first dominate B2B within the next five to ten years, while the consumer-facing changes will happen further down the line and potentially 'change the internet.'

Recently, many companies have tested blockchain technology, most of them to provide solutions for industries and sectors that are hugely influenced by monopolies. The overall influence of companies like Airbnb, Uber, Kayak, Expedia, Priceline on travel's supply chain has increased massively over the last years. Blockchain appears to provide a decentralised solution, middleman-free, and lowers the barrier to entry for new players.

TUI currently uses Blockchain for its hotel room management and has future plans to further connect its full inventory to their purchasing and property management systems.

Jousen stated that as of today, it is not possible to manage supply at a granular level, for example to a particular room in a particular hotel. With blockchain, it will be possible for a guest to book a room with his favourite number in his favorite hotel.

Winding Tree, known as a decentralised travel ecosystem, provides a blockchain based B2B marketplace. In 2017, [they announced a partnership with Lufthansa](#) where they will help the airline group introduce blockchain applications to its own digital products.

Blockchain technology has a long way to go in the tourism sector and we've barely scratched the surface when it comes to its applications. We're excited to see what future innovations will be available in the coming year.



Croatia Travel Co use Virtual Reality to create an immersive experience

By Franziska Wernet

The number of active virtual reality users has grown massively in the last 4 years with a forecast reaching 171 million by 2018. To get more insight into the creation of VR experiences, we talked to Croatia Travel Co, who began to offer a guided VR walking tour to make a chapter of history more tangible for visitors.



Interview with Germán Pino,
owner of Croatia Travel Co.

CROATIA TRAVEL CO.



How long did it take for you to turn this idea into a service you could sell?

From idea to development, it took us 6 months. A key element of this project was working with our strategic partners, Lithodomos VR, world leaders when it comes to creating VR content that has a strong focus on archeology, history and heritage.

Can you tell us about the customers who book your VR tours?

Those who buy our VR tours are people between 35 to 60 years old, mostly couples or small groups. They tend to have a strong interest in deepening their existing knowledge about Diocletian, his palace and the history of the city of Split.

Virtual Reality generates added value to the offer because the content shared through this medium is historically and scientifically accurate and reliable, especially for historical tours.

| **How do you think VR will impact travel in future?**

I see three ways VR can be used to impact the future of the travel industry. Firstly, it generates added value to the offer because the content shared through this medium is historically and scientifically accurate and reliable, especially for historical tours.

Secondly, it adds an important component to the education and training process of future guides. And lastly, through its effectiveness as a marketing tool to promote destinations at international fairs, roadshows, meetings with potential wholesalers, individual consumers and more.

| **In your opinion will VR completely take over real life travel one day?**

I hope not, it would be a disaster. Instead, I hope that virtual reality motivates potential clients to get to know the destinations in a deeper way. I hope it adds value in terms of content and experiences to visitors. Finally, I hope it allows those who do not have the possibility to travel to get to know iconic places worldwide, and they get to experience, in a different way, what these places have to offer.



Markets

This is our largest chapter in the report. It is focused on the ever changing consumer market and its demands. For this chapter, we draw on industry research, findings from our 2018 Tourism Survey and insider knowledge to draw predictions for the year ahead.



Modern Family Travel

By Stephanie Kutschera

[Growth in family bookings](#) has outpaced non-family sales since summer 2012, with the sector now accounting for almost 40% of summer bookings compared with 20% of winter sales.

According to CNN travel, [‘single-parent families](#) are changing the way we travel.’ Until recently, the travel industry wasn’t keeping up that two parents and two children families were no longer the norm. CNN recently reported that families headed by an individual now make up almost 30% of families worldwide.

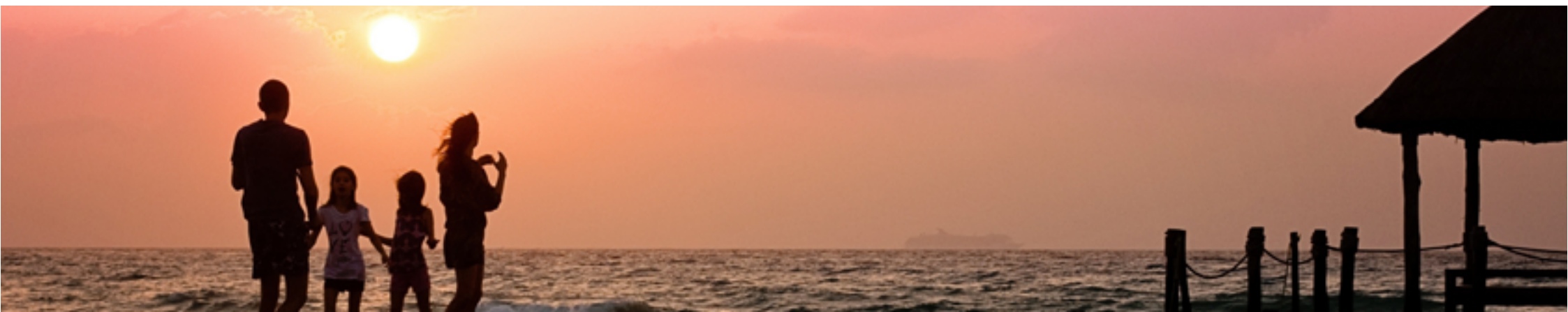
| What can organisations do?

Tour and activity companies are removing family tickets or are offering a large variety of options - and this is a good move! Given the change in family structures, operators who continue to adhere to more traditional family structures could be alienating a potential market.

Virgin Holidays were one of the first tourism companies to offer single parent families a fairer deal in their Caribbean Resorts. Previously when an adult traveled solo with one child, the child would be expected to pay an adult rate. With the new pricing structure, there’s a reduction for the second occupant if they were a child.

“At Virgin Holidays we believe that everyone can take on the world, and are proud to do our bit in helping single parents give their families the opportunity to explore some of the most exciting destinations across the globe.” said Joe Thompson, Managing Director of Virgin Holidays

Following this, Virgin Trains introduced their new LNER (London North Eastern Railway) [family return ticket](#). Purchasers have eight ticket combinations to choose from for one fixed price. The minimum requirement is to have one adult and one child while the maximum combination covers up to 2 adults and 4 children. Plus, travellers do not need to be related.



Bridal Bar on destination weddings and adventure honeymoons

By Stephanie Kutschera

As destinations become even more accessible, we are seeing a prominent change in the wedding industry as couples opt to travel for their nuptials and book adventure for their honeymoon. We wanted to find out more.



Interview with Harmony Walton,
Founder of The Bridal Bar and host
of Bridal Bar Radio.



| What is the appeal of a destination wedding?

Opportunities to travel with extended family and friends don't come along often so a destination wedding makes for a great excuse! These events lend themselves to multiple days of parties, quality down time and at times, even staying together.

| How do you think preferred honeymoon destinations have changed in the past 5 years?

In the past five years I think couples have gotten more adventurous with their honeymoon selections. Relaxing on a beach in Hawaii or Mexico is still a great option, but the trend seems to be going more towards the exotic and the activity-filled itineraries. Thailand, New Zealand, South America and less-traveled parts of Europe are on the rise.

"Honeymoons are becoming more experience driven, giving couples the chance to do and see something they never have before on this trip-of-a-lifetime."

Why do you think more newlyweds are opting for adventurous travel?

I think couples are experiencing more adventurous destinations in part because of social media. Our exposure to these exotic places and iconic landmarks is so much greater now that the demand has increased. Travel to these places seem more accessible and couples are getting a bit braver about where they'll go.

What do you predict to be the travel trends for weddings and honeymoons in 2019?

I think more couples will go to South America in 2019. Cartagena, Colombia is a hot destination for honeymooners (and affordable too) as is Peru where the foodie scene is really taking off. I also believe touring will become more popular in 2019. It's a great way to see Africa on safari or experience Iceland. There are so many luxury tour companies emerging that the opportunity to create a completely unique tour experience has become readily available and that makes for a great honeymoon.



Business + Leisure = Bleisure

By Stephanie Kutschera

It is becoming more common for business travellers to utilise the opportunity to take time for themselves, explore and travel. According to a report by [Expedia Media Solutions](#), around 60% of business trips in the last year included a leisure portion. The concept 'bleisure' has been created to describe the combination of a business trip with a leisure aspect.

Expedia recently published a survey held with 500 American travellers and found that the average bleisure trip 'adds 2.6 vacation days to a business trip of 3.7 days. Globally, two thirds of those trips were for conferences, 46% were for business meetings, 42% were sales trips, and 30% were internal meetings.'

About 80% of bleisure travellers spend one to five hours on research during both the inspiration and planning phases – a more condensed amount of time compared to typical leisure

In 2018, Roomex, an Irish travel tech company who have 70% of its business in the UK, raised €8 million in a funding round with the aim to double its staff numbers and move further into the European market. Roomex currently serves more than 50,000 business travellers from across Ireland and Britain. Founder [Jack Donaghy said](#), "Business people expect it to be as simple to book a room for work as it is in the leisure space but that isn't the case."

[Nicola McClafferty](#), Roomex board member added, "Other rival companies are digitising part of their operations but Roomex's deep automation capabilities means that 99 per cent of all its bookings are done without anybody having to talk to another person. That to us means there is an opportunity to scale this globally," she added.

It looks like we can expect a lot of growth in the bleisure market if the same opportunities are offered as the leisure market. Could these corporate booking and incentive travel websites eventually see a link with tour and activity operators?



Solo travellers are not who you think they are

By Stephanie Kutschera

We spoke about female solo travel as a trend in our Travel Trend Report 2018. Today, solo travel has extended across all generations and to many destinations.

Here is what to expect in 2019:

According to [Travel Agent Central](#), 25% of Millennials in the Future of U.S. Millennial Travel report said that they plan to travel solo in the next 12 to 24 months.

[Lonely Planet](#) reported that women over 50 years old 'are leading the boom in popularity for solo travel in the UK.' Their research found that Baby Boomers were the majority of solo holidaymakers with an average age of 57 in 2017, compared to 54 in 2014. In a survey conducted by [Booking.com](#) with 20,500 global travellers in 2018, 40% were Baby Boomers who had taken a solo trip in the last year and 21% said they were planning to take one in the future.

Around 67% of solo travellers are female claims [Lonely Planet](#). 'Solo travel was once seen as brave and risky for female travellers, but a shift in attitude has meant that it is now viewed as an adventurous, exciting experience for women.' The top ten countries solo female travellers are choosing include Nicaragua, South Africa, Bulgaria, Guatemala, Sri Lanka, Macedonia, Portugal, Tanzania and Romania.

Online hostel-booking platform, Hostelworld, reported that Cuba is the destination that seems [most appealing to solo female travellers](#). The rise in solo bookings to Cuba increased by 371% from 2016 to 2017. Hostelworld state that solo travellers are heading to more adventurous spots.

Today, we see more and more travel agents in Latin America catering to solo travellers. Travel agencies such as Mulheres Pelo Mundo in Brazil, connect solo travellers who are seeking companionship during their trip. In this case, apart from safety, convenience and the opportunity to make new relationships is key to attracting solo travellers.



New Trend 1: Destination Unknown

By Stephanie Kutschera

One unique travel trend that seems to attract Millennials is surprise holidays. Here, travellers book a package holiday without prior knowledge of where they will go, only when. This travel trend is a hit with those who are keen to explore new places around the world, without the hassle of research and booking their own itineraries..

Srprs.me is a travel agent that organises surprise holidays for travellers. Prospective travellers visit the company's website and select their holiday criteria. Once complete, they are shown a price tariff of what their trip will cost per day. After uploading personal and payment details they are booked. **To a 'destination unknown!'**

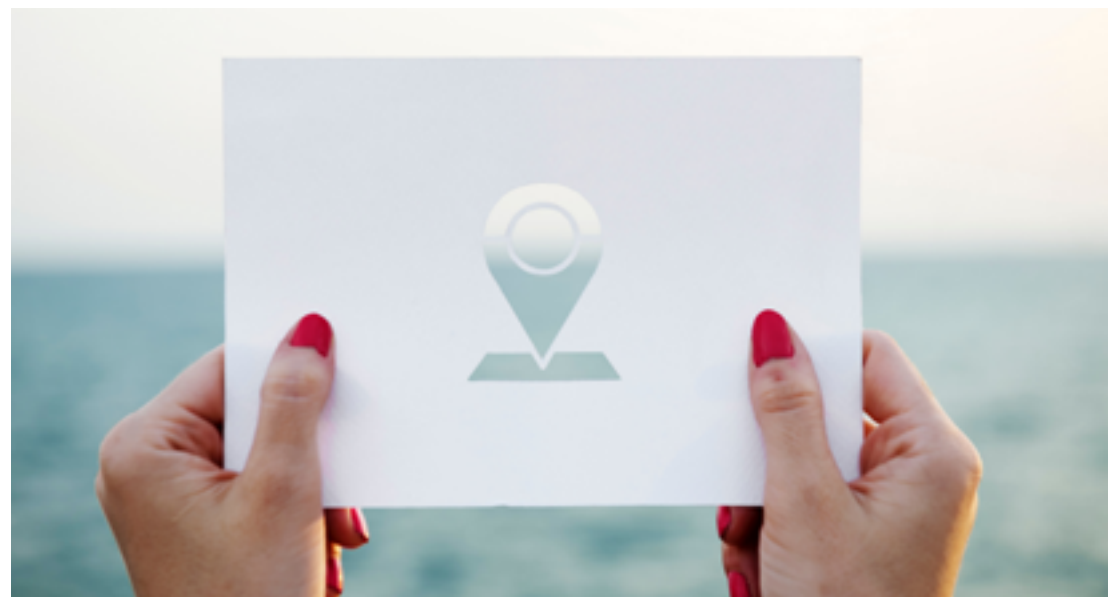
This isn't a marketing strategy to attract low budget buyers. It is for Millennials with a mid to high income who want to visit a new location. Srprs.me told us: "People book with us mostly for the surprise, but also because of how easy it is. People don't have to arrange things themselves and can just let us do the work."

Srprs.me has a creative strategy targeted at a generation who love personalisation and travel. This is the perfect combination for srprs.me to continue to grow.

[Read our blog: 3 examples of companies who have monetised remaining stock](#)

How can tour and activity operators get a slice of the pie?

By building relationships of course. We can't currently see an option to book surprise activities during these holidays, maybe your company could be the first. You can also strengthen relationships with hotel concierges and tourist offices to be resellers of your tour and activities in return for a commission.



New Trend 2: Influencers

By Stephanie Kutschera

An influencer is a user on social media or a blog who has established credibility in a specific industry. The influencer has access to a large audience and can persuade others by virtue of their authenticity and reach.

There are mixed opinions on the effectiveness of influencers to businesses within the tourism sector. Some are now placing their entire marketing budget into the hands of influencers with huge followings, and others are holding back waiting out the growing pains. One big player made an announcement that recently shocked the industry.

Built on reviews from real people around the world, TripAdvisor shared that they would soon [add professional published reviews](#) that would be written by influencers who have a large following on their own websites and social media, or who work at trusted publications, including National Geographic, Business Insider and the Travel Channel.

“We are going social and we are getting personal,” TripAdvisor CEO Stephen Kaufer, who co-founded the company told press in Manhattan. “If I’m going to London, the last thing I want to do is read 1,000 hotel reviews. I want inspiration.”

At present, TripAdvisor is described as ‘very up-funnel’ with website visitors who are not yet at the stage of planning their trip. TripAdvisor aims to redesign their website to offer inspiration. “If we can gain more traffic, if we gain more user trust, if we are a better site to inspire, we think we’ll hang onto those users through the funnel and give them a memorable experience.”

TripAdvisor may have developed a clever marketing strategy to utilise the traffic of influencers to boost their own site. The new design will offer an excellent opportunity for influencer content to be published and reach a massive audience.

This move is a completely new direction for TripAdvisor, and according to Skift, something Stephen Kaufer sees as a big deal. The new design is expected to be globally launched on all devices early 2019.



New Trend 3: SpareFare

By Stephanie Kutschera

Have you ever wondered what happens to the millions of unused travel bookings each year? Recently, I had to cancel a flight. My options were to either change the date and pay more in administration fees than I had paid for the original flight, or to cancel and receive a 10% refund of the total amount paid. Neither were a preferred option.

There is a new start-up that I believe fills a massive gap in the tourism industry, and will become its own tourism trend from 2019.

[SpareFare](#) created an online platform that connects people who are unable to use their flights, hotel stays and holiday packages, and sell them at a discounted rate to others. Sellers are therefore able to recoup most of what they paid, and the buyer can treat themselves to a trip at a slightly reduced rate.

While there is currently no platform like this that offers fraud protection when purchasing travel products or tickets from another person, SpareFare is able to offer reassurance and protection, plus the ability for a purchaser to book a trip at a reduced rate.

The website is designed for buyers looking at last minute bookings, as availability appears in order of the nearest available date. Already there are plenty of options to choose from to destinations around the world.

In an interview with [Travel Massive](#), SpareFare's CEO, Galena Stavreva, noted that the market of unused travel bookings is "Massive! And it is only going to get bigger."

"We want to create a new type of shared economy in travel. In 10 years, we want everyone to be aware that they can resell their travel reservations to other people, and for SpareFare to be the go-to site for everyone looking for a cheap holiday, flight or a hotel room."

"We want to help everyone who is not able to travel recoup at least some of the money they spent on their holidays, making travel more affordable for everyone."

This is a tourism trend that, as a consumer, I am hoping will really take off in the future!



New Trend 4: Modular Travel

By Nicole Kow

Free Independent travellers (FIT) are the ones who will happily do the research, planning and booking of an entire trip on their own.

Modular travellers, however, enjoy having their own free time, yet prefer offloading the research, planning and booking of unique experiences to a 3rd party. This way, travellers can select from curated experiences or combine multiple experiences and pre-purchase them.

More and more we are seeing a shift in the market where travellers are returning to travel agents to reduce the organisation time and hassle of arranging a trip of their own.

The success of Ctrip's Customised Travel platform is evidence of this growing trend. On Ctrip, users can enter their budget, travel dates and preferred activities while travelling and the platform shares this data with thousands of "customisers" (also known as travel agents) who create an offer that meets these requirements.

"Not only is the consumer exposed to wider range of more flexible, high-quality deals at competitive prices, but they also benefit from the opportunity to be able to contact the travel consultant providing the package at any point during their trip."

- Christopher Ledsham, COTRI

Ctrip's joint report with COTRI analysing these travellers revealed that this type of travel is popular, attracts a younger market (48% of them are between the ages of 30 to 49) and is growing rapidly. "In-depth travel" was the top keyword used by travellers planning a trip to Europe, followed by "slow pace", "leisure travel", "private" and "niche".

The report also highlighted the top 10 themes travellers were searching for, which included watching a football game in Spain and the UK, enjoying local food in Spain, France and Italy, embarking on a "study tour" around the UK, and admiring the architecture in Switzerland and France.



Market - China

Chinese travellers continue to spur growth in global travel

By Nicole Kow

Research claimed that [2016 was a "slow year" for China's outbound tourism](#), as only 122 million trips were taken. In 2017, China Outbound Tourism Research Institute (COTRI) reported that 145 million outbound trips were made, with 69.4 million (48%) of these heading to Taiwan, Hong Kong and Macau, while the remaining 75.6 million (52%) travellers exploring the rest of the world. In 2018, experts predict that this statistic will grow to a mind-blowing [160 million travellers, a 10.3% growth from 2017](#). Meanwhile, Morgan Stanley Research expect outbound travel to grow by 14%. .

China's National Immigration Administration revealed that for the first half of 2018, a total of 164.16 million Chinese residents applied for their passports for private purposes, a 21% increase from the previous year. 160 million, that's half the size of America's population and 3 times the size of UK's population [according to the World Bank](#).

In 2017, China was reported to be the highest spending country, [generating a total of USD 257.7 billion](#), surpassing United States by more than USD 120 billion.

Duration of travel

According to Travel China Guide, an average trip to countries nearby like Japan or Thailand averages 6 to 9 days. For trips further from home, to destinations like Australia, Europe and the United States, an average trip would be 12.6 days. When it comes to visiting Europe, people tend to visit an average of two countries per trip.

Top destinations

Globally, Travel China Guide reports the following to be the top destination for Chinese travellers:

1. Thailand
2. Japan
3. Singapore
4. Vietnam
5. Indonesia
6. Malaysia
7. Philippines
8. America
9. South Korea
10. Maldives



According to [Jing Travel](#), 'destinations that most older Chinese tourists wouldn't consider travelling to are able to attract more adventurous Chinese millennials who are not as put off by the potential language barriers or travel times.' The established destinations including Japan, Thailand and Vietnam still draw young independent travellers, but 'lesser-known' locations including North America, Turkey, the Czech Republic, the UAE and Egypt have also become 'beneficiaries of these travel flows.'

When it comes to European destinations, [a joint report by Ctrip and COTRI](#) published in April 2018 found that an estimated 12 million Chinese travellers visited Europe (9.3% of outbound trips), making Europe the 2nd most visited destination after Asia with. The top European destinations visited are:

1. Italy
2. France
3. Germany
4. Russia
5. Switzerland
6. Austria
7. Spain
8. Czech Republic
9. UK
10. Netherlands



When travelling to Europe, there are two clear spikes each year - one in January over the Spring Festival and another over summer, between June to August.

Over the Spring Festival, Chinese travellers tend to visit Northern European countries such as Finland and Sweden. In summer, there's strong monthly growth with destinations including the United Kingdom, France, Germany, Spain, Greece, and Italy.

International partnerships attempt to fuel growth

The EU, Canada and Turkey have made it clear that they want to attract more Chinese visitors. For example, [Canada shared their intention to double the number of Chinese travellers by 2021](#) and have now opened 7 new visa application centers to process applications quicker.

The European Travel Commission reported a [7.2% growth in bookings to Europe between January to April 2018](#). According to Eduardo Santander, Executive Director and CEO of the European Travel Commission (ETC), [their partnership with the EU - China Tourism Year \(ECTY\) is a major opportunity for growth in Europe](#). They hope to promote lesser-known destinations, provide opportunities to increase economic cooperation, improve turnover time for EU-China visa applications and increase air connectivity.

Many other national tourism boards are running their own campaigns. Tourism Ireland plans to increase Chinese visits by 150% between 2017 and 2025 (with its efforts [already bringing in results](#)), [Tourism Australia partnered with Mafengwo](#) (the Chinese equivalent of TripAdvisor) to promote Australia's travel offers to "high value travellers", and [VisitBritain partnered with Ctrip](#) amongst other efforts to double average spend of Chinese tourists to £1 billion annually by 2020.

With all these efforts at the government level to woo Chinese travellers, are tour and activity operators prepared for their evolving travel appetite?

| Financial incentives to shop abroad are weakening

A few years ago, buses full of Chinese tourists regularly headed to Bicester Village to shop till they drop. Today, the Chinese government have [lowered taxes on luxury good and reduced import fees](#) by as much as 25% on selected items. This has reduced the popularity of shopping abroad.

Following the change, [Louis Vuitton announced](#) that they will "mark down prices on a wide range of items to fully support the government's efforts to reduce the price premium for luxury goods sold in China".

In Spain, [Chinese tourists emerged as the most profitable](#) for shopping tourism with an average of 1,485 euros per tourist, followed by Argentines and Russians (due to their exchange rates).



The modern Chinese traveller wants an experience of a lifetime

In last year's report, I wrote that Chinese travellers are searching for experiences that allow them to "travel like a local". This shift in travel behaviour shows no signs of slowing down. Chinese travellers are taking even more "independent" trips (40%), while others are taking "modular" trips (40%) and only 20% still book themselves on traditional packaged tours.

Mobile use and mobile payments - China is living in 3019 compared to the rest of the world

As of 2018, [eMarketer reports](#) that adults in China will spend more time on their mobile devices (2 hours 39 minutes) than they will watching TV (2 hours and 32 minutes). This is an 11.1% increase compared to 2017, taking up 41.6% of their daily media time. Consumption of short videos is said to be the key driver of increased mobile time.

When it comes to mobile payments, China is leading the way. By October 2017, [mobile payments grew by 37.8%](#) compared to 2016, totalling USD 12 trillion, [50 times larger than America's](#).

The two dominants service providers for mobile payments are Alipay (54%) and WeChat Pay (40%). Chinese consumers use their smartphones to scan a simple QR Code and enter their password to easily make a payment. When travelling, this habit spills across international borders with [65% of Chinese travellers making a payment via mobile](#), compared to just 11% of non-Chinese travellers.

Companies interested in driving more Chinese travel spend are going along with the trend. Global Blue, the tourism shopping tax refund company based in Switzerland now offers [instant tax refunds via Alipay](#). In 2017, Malayan Banking Berhad (Maybank), one of the largest banks in Malaysia [introduced Alipay-enabled merchant terminals](#) to accept contactless payments from over 3 million Chinese visitors.



Spotlight on Klook, the leading Asian marketplace going global

By Stephanie Kutschera

Founded in 2014, Klook has quickly made its presence known in the tours & activities sector. Today, this online marketplace partners with over 6,000 service operators to provide more than 60,000 offerings. In August 2018, Klook held the largest funding round to date raising \$200 million to fuel expansion in the US and Europe.



Interview with Eric Gnock Fah,
COO & Co-Founder at Klook

KLOOK

**In just 4 years, Klook has achieved great success.
What makes your marketplace unique?**

Klook's robust growth is greatly contributed by our mindset of staying focused since the company was established in 2014. The fact that we're only concentrating on the travel in-destination services sector allows us to not only think about simply bringing the tours and activities market online, but also to think about the user experiences that fit the needs of modern travelers. We are proud to be the one of the first to introduce the use of QR code e-vouchers and instant confirmation in the sector. Our services are also available in over 8 languages and support 36 different currencies, which further improves the booking experience.

What does the Asian tourism industry need to consider to keep growing in the future?

One crucial thing to note is that many Asian markets are mobile-only, as they have skipped the desktop era. Therefore, when marketing travel products to Asian travelers, it's important to ensure that the online platform is also optimized for mobile devices. The products must be presented and marketed in ways that are suitable for Asian travelers, including having localized content for each country, various payment methods, and detailed information that allows for a deeper understanding of the products being sold.

Another key point is that Asian travelers are very active on social media. They look for travel experiences that make for good photos or videos to attract attention on social media platforms. Therefore, it is common for them to pick activities that are scenic and selfie-worthy. As such, we've encouraged many of the tour operators that we work with to add a photo-taking element to their services, because Asian travelers tend to leave more positive user reviews on Klook if operators offer to take photos for them.

What can we expect from the Asian market and Klook in the next few years?

The preferences of Asian travelers will continue to change. Given that travelers are experiencing an increasing level of ease and confidence when traveling overseas, we also see an emerging trend of Asian travelers choosing destinations that are less well-known, as well as activities that are less touristy and more off-the-beaten-path.

At Klook, we have set up offices in both Europe and the US to curate more activities in those regions. We've also been working towards launching additional destinations such as Morocco and Israel, as well as one-off/seasonal events and experiential activities like this [autumn foliage day trip](#) in South Korea and a [Northern Lights journey](#) in Finland. We aim to meet the ever-changing preferences of travelers from the Asian region.



Market - Spain

| Spain is booming despite overtourism

By Stephanie Kutschera

| Inbound Tourism

In 2017, Spain, which has only 47 million residents, welcomed 82 million tourists, up from 75.3 million in 2016. The tourism industry is now the biggest employer in Spain, with more than 2.65 million people reportedly employed in the sector as of Spring 2018. The Spanish prime minister also announced that 'tourism now provides 11% of Spain's gross domestic product, rising 12% to 87 billion Euros in 2017.'

This was set to grow even further with the addition of new airline routes from big players. Qatar has now added a series of summer routes direct from Doha to Malaga, British Airways has increased the number of available flights from London to Tenerife in winter, and Etihad has now introduced a new route from Abu Dhabi to Barcelona flying 5 times each week.



Top Destinations

Catalonia tends to welcome the highest number of tourists in Spain. In 2017, this included 19 million foreigners and five million Spaniards. Due to tourism success in the region, Catalonia employs over 450,000 workers in the sector.

Andalusia comes in second place for popularity for a sun and sea holiday.

TurEspana, the Spanish state tourism agency, created a marketing strategy for 2018-2020 with a focus on developing “international tourism of quality” and drawing “cosmopolitan tourists”. This strategy was created in an attempt to move Spain away from its reputation of being a party town with low tourist spend, youth drinking and excessive nightlife.

In 2018, the INE (Spain’s National Institute of Statistics) reported that **Madrid** had a 6.7% increase in visitors in July, compared to a drop in beach destinations such as the Balearics, Catalonia and Andalusia. Interestingly, Madrid currently has over 400,000 people in tourism, which is the same as the total in the Balearic and Canary Islands.

Valencia, a popular destination for British, Italian and Dutch tourists, welcomed over 100,000 British tourists alone in 2017, a year on year increase of 14.2%. This popularity has continued to grow in 2018 due to multiple flight paths from easyJet and Ryanair with direct routes from London, Glasgow and Edinburgh.

Tourists are now spending more which is fueling the economy

Spain’s attempt at rebranding the destination has increased the average tourist spend, up by 13% to around €1,054 per person per trip, compared to figures in 2016. Higher-end tourists are looking for more experiences, are passionate about shopping, culture and dining, as opposed to the typical “sun and beach” lovers.

According to the World Travel & Tourism Council’s Travel & Tourism Economic Impact 2018, ‘Travel and tourism generated 930,500 jobs in Spain in 2017. This is forecast to grow by 2% in 2018 to 1,154,000 jobs in 2028. The direct contribution of travel and tourism to GDP was 70.9 billion USD, 5.4% of total GDP in 2017 and is forecast to rise by 3.2% in 2018 to 94.1 billion USD by 2028.



| Spain looks to the China for more high-end tourism

Spain welcomed 700,000 Chinese tourists in 2017. The United Nations World Tourism organisation (UNWTO) estimates that this will rise to around 1 million by 2020.

Rafael Cascales, president of the Spain-China Tourism Association (ATEC), confirmed that Spain is looking for a different type of tourism and he believes Chinese travellers can offer this. "It [Chinese Tourism] is the kind of tourism that is not only interested in the sun, beach and the 'all-included' culture.

They enjoy culture, gastronomy, wine, history and nature, and the new Chinese tourists would also want to spend more money in Spain."

"They are younger, more women travel and they are more cosmopolitan. They also travel on their own or in couples or in smaller groups. The old-fashioned large groups of visitors have not disappeared, but this new form of traveling is becoming more important,"

| #TouristsGoHome - The aftermath of overtourism

In Barcelona, where the average net salary is €1,400, the average rent for a 900 sqft furnished apartment is €1,060, and for a 480 sqft studio apartment is €719. This excludes the cost of utilities. Rent prices in the area have risen so high, partly due to tourist rentals in the area, that locals have begun protesting again of overtourism in their destination.

In 2017, Mallorca, a Spanish Balearic island, was visited by over 10 million tourists in. Almost 2.5 million of these tourists were from Britain, and 4.5 million from Germany. A 2018 survey held by market research firm Gadeso has revealed that 60% of Mallorca residents agree that "The Balearic island is unable to [accommodate] more tourists because it is not sustainable." 60% also agree that there should be an annual limit of tourist numbers on the island. Oversaturated destinations are now pushing back, whilst lower density destinations are reaping the rewards.



Spotlight on Civitatis, the world's largest Spanish marketplace

By Franziska Wernet

Founded 2009, Civitatis is the leading online marketplace for the Spanish-speaking market. With over 2 million annual travellers, Civitatis offers 10.000 services in 510 destinations. Their top markets include Spain (51%), Argentina (9,65%), Mexico (5,81%) and the US (5.35%).



Interview with Enrique Espinel,
COO at Civitatis



In just 10 years, Civitatis has achieved great success. What makes your marketplace unique?

Civitatis base its success on 4 pillars. Firstly, in each destination, we make sure to curate a selection of fundamental services to offer our customers so that they know what they can do at a specific destination. Secondly, we strongly believe in one product, one provider. Unlike other resellers who operate more like a “marketplace” where everyone can get online to offer their services and compete with one another, at Civitatis, we do the work for our customers. We make sure to work with the best operators in the destination for that specific offer. Thirdly, we offer our services in Spanish, which has been our main selling point from the start. Today 90% of our tours are offered with Spanish speaking guides. Lastly, we want to deliver maximum simplicity and maximum usability. To make our customers’ lives simpler, we try to do as much of the selection process for them, including selecting the operators to book with.

What do you think is the main trend for Spanish travellers?

The trend for our sector includes the booking process of the service prior to travel, which is different that it has been so far. Today, we don't worry so much about the flight or the hotel but we want to be sure that we have every activity with the guarantee that it is the best option available. In the end, the most important part of the travel is what will you be doing, and platforms like Civitatis.com allow our customers to read millions of reviews and book at ease and transparency and only worry about enjoying the trip.

What can we expect from Civitatis in the next few years?

The online contracting of services in-destination is still growing. On the supply side, there are many types of in-destination services and they're all eligible to work with our platform, so we still have many products we could offer that will allow us to continue growing. On the consumer side, we still have many travellers to convince to book their tours and activities in advance, rather than waiting till they're in-destination to book.

Furthermore, we're beginning to expand into new language markets, replicating our model in English, French, Portuguese and Italian. Though we're still in early stages, we're already seeing positive results and expect this to continue.

Run Spanish tours? TrekSoft is connected to Civitatis.

Use TrekSoft to connect your front office, back office and sales channels, like Civitatis, and have all your inventory and bookings in one place.

[Speak to our team today](#)

Market - Italy

Italy remains a top holiday destination as operators embrace digital channels

By Alona Mittiga

Inbound Markets

The idea of “Made in Italy”, where a product with [distinctive traits](#) of quality, beauty and creativity has always fascinated millions over the world, drawing them to visit Italy. The country welcomed 58.7 million foreign travellers in 2017, an increase of 11.8% compared to 2016. This is the highest rate of increase among the top five European countries. The [ENIT 2016-2018 Three-Year Plan](#) also emphasised that foreign tourists now account for around 50% of arrivals in Italy.

Among the top 15 markets for incoming tourists, [ENIT reported](#) that Germany plays a significant role in Italy’s success, contributing €6.6 billion in tourist spend, with a double-digit increase in 2016 (up 14.7%). Other important markets include the US (€4.5 billion), France (€3.9 billion), the United Kingdom (€3 billion) and Switzerland (€6.1 billion), all up compared to 2016, excluding the US, where tourist spending fell by 1.7%.

The volume of German travellers to the region is expected to grow, as reported by [Be-Italy's](#) 2017 “Attractiveness Survey”, which places the source market in first place compared to other source markets in the coming years.



Top destinations

The five Italian regions most visited by travellers are in order of popularity are **Veneto**, **Trentino-Alto Adige**, **Tuscany**, **Lazio** and **Lombardy**. The greatest attraction for travellers is the cultural heritage of the peninsula, with 34% visiting places of historical and artistic interest. According to [Be-Italy 2017](#), the image of Italy is linked primarily to its food, wine, artistic heritage and fashion.

Italy is the country with the biggest number of [UNESCO World Heritage Sites](#), with 54 in total. The vast majority of these are cultural, with Piazza dei Miracoli of Pisa, the archaeological remains of Pompeii, Herculaneum and Torre Annunziata, as well as the well-known historical centers of Florence, Naples and Rome.

According to [TripAdvisor's 2018 Travel Trend Report](#), the world's most popular experience in 2017 was the skip the line tour for the Vatican Museums in Rome. Out of the top 10 most popular experiences, five of the spots were taken by Italian tours and activities.

In the [Intrepid Adventure Travel Index 2018](#), Italy is ranked 7th out of the top 20 adventure destinations. Other European destinations include Spain (16th place) and Croatia (17th place). In the same report, Italy is 9th place for Solo Traveller Destinations and 8th for Family Travel Destinations.

In our own 2018 Tourism Survey, where we asked 90 Italian tour and activity operators what were their most popular tours in 2018. City tours were the most popular with 64% of votes, food and wine tours and walking and cycling tours followed with 49% and 40% retrospectively.

Food and wine tourism

According to [Be-Italy of 2017](#), Italian food and wine is one of three main things that attract visitors to the country. Enogastronomic tourism is popular in most Italian destinations, with [the popular ones being Tuscany \(especially Chianti and Florence\), Piedmont \(Langhe, Baveno\), Sicily, Emilia Romagna Veneto and Umbria and Puglia](#).

There is unstoppable growth for food and wine tourism in Italy. [In 2017, food and wine tourism doubled compared to 2016](#), with over 110 million travellers sampling Italian delicacies and generating more than €10 billion in tourist spend. [Isnart-Unioncamere](#) estimates an economic impact of over €12 billion related to agro-food spend by tourists vacationing in Italy.

Finally, we couldn't not mention the novelty of [social eating](#), which is about cooking enthusiasts opening their homes to unknown paying diners. This is a popular event where diners can share a casual evening enjoying good food and widening their circle of friends. [Gnammo](#), the culinary event startup, claims that social eating is now present in 1,500 Italian cities with over 17,000 published events and 8,000 chefs.

Digitalisation of the Italian tours and activities market

When analysing the Italian market, we have to discuss digital transformation. We know that mobile devices are essential to the booking journey with [43.8% of consumers using a mobile device to make last-minute reservations](#) up to a week before the trip. But how many Italian operators actually manage reservations with a mobile device?

According to the results from our 2018 Tourism Survey, only 36.6% of participants use a mobile device to take reservations, check in guests, scan tickets, or refer to their guest list. When it comes to direct website bookings, 58% of participants said they allow customers to book tours and activities directly on their website, showing significant room for digital growth.

Interestingly, we have seen a large increase in the use of instant messaging channels such as Whatsapp which have become indispensable to delivering excellent customer service. 46% of Italian operators are using Whatsapp and 24% have Facebook Messenger. 15% of participants have implemented a chatbot communication service on their website.



Spotlight on Musement, the Italian marketplace

By Alona Mittiga

Based in Italy, Musement is a reputable digital concierge service for consumers to book tours and activities in over 1000 destinations across 70 countries. The big news of late 2018 came when Musement was [acquired by TUI Group](#). What does the future hold?



Interview with Claudio Bellinzona
COO at Musement



Distribution Partner 

In just 5 years, Musement has achieved great success. What makes your marketplace unique?

For us, it was always very important to deliver the best experience possible to our customer. We do this thanks to an excellent selection of professional and outstanding partners. We are unique because we have not limited our target market only to international leisure travellers, but we also attract domestic users by providing them with local temporary events such as concerts and exhibits. Also, Musement has always benefited from a technology-driven approach. We believe that constant improvements to our technology, along with the implementation and use of top-notch tech, are essential for us to better serve our customers.

Musement has always benefited from a technology-driven approach. We believe that constant improvements to our technology, along with the implementation and use of top-notch tech, are essential for us to better serve our customers.

What does the Italian tourism industry need to consider to keep growing in the future?

I think travel is becoming more and more a sort of psychological commodity, especially for younger generations. Italy as a destination has still much to improve, and a more digital approach could surely help with that. For example, we need a better understanding of tourists' needs, their routes and interests, as well as get their feedback about services, infrastructures etc. Such an incredible and complex territory deserves a much more long-term vision than [what we have] now, and this touches on other topics like smart mobility, service-driven approach, urban planning, and more pressing issues like overtourism.

What can we expect from the Italian market and Musement in the next few years?

We can expect much more from Italy as a source market, that's for sure. Italians are traveling more. Even their habits are changing. Based on our data we can see a consistent growth of interest for new types of experiences, short-term breaks (mostly within the country or in Europe), along with an increasing number of people traveling during low or off seasons.

With regard to Musement, we are now proud to be part of the TUI Group. Our future is all about keeping Musement's quality and technology-driven approach to best serve the existing TUI customer base alongside our current core markets. TUI's tagline is "we create smiles". Well, I deeply believe this is also our mission. It always has been.



Tour and Activity Insights

For tour and activity operators, it can be challenging to find current travel trends and statistics without having to research various articles across the web. In this chapter, we have used the findings of our 2018 Travel Survey and key news articles so that you can read everything in one chapter.



Tour and Activity Trends

By Stephanie Kutschera

#1

Last minute bookings

In our 2018 Tourism Survey, 39% of participants selected that last minute bookings had been a common trend for their business. TrekkSoft booking data shows that reservations for tours and activities which last 1 to 3 hours tend to be booked in-destination or just before arrival. Multi-day tours and activities however, are made in advance or upon arriving at the destination.

Bookings are generally made 13 days in advance. On mobile, this window narrows to just 5 days.

TrekkSoft Data, 2018

This trend will make it difficult for tour and activity operators to plan resources and staffing in advance, and for most success will be dependant on the weather. Strong marketing, local partnerships and live availability will be key tools to offset this.

See chapter: Chinese travellers continue to spur growth in global travel

#2

Travellers visiting new destinations

From the 2018 Tourism Survey, 22% of participants seen a visible increase of visitors from a new destination. Unsurprisingly this was predominantly from China, who are proven to spend more when travelling. Other destinations included USA, Latin America and Spain.

#3

Skip the line tours

The 2018 TripAdvisor Travel Trend Report showed that 'two of the three most popular products in 2017 and four of the ten fastest-growing experiences in 2017 were skip-the-line tours. TripAdvisor lists more than 1,200 skip-the-line tickets globally, with availability at some of the most popular sites in the world, including the Eiffel Tower, the Sagrada Familia, and the London Eye. Skip-the-line tours were also the second-fastest growing category for US travellers by gross booking value in 2017.'



Other trends

Other trends totalled 11% of our answers. Here are a few trends that operators have noticed and shared with us.

- Travellers are booking bespoke or custom tours and activities further in advance. This is also the case for multi-day travel.
- Operators are reporting more Millennials on their tours who are looking for once in a lifetime experiences.
- More travellers are now booking online using OTAs. This is more prominent with Millennials who can compare options, pricing and reviews in one place.
- Travellers are now more price sensitive, looking for a higher quality product at a lower price. This will be enhanced by more competition so operators to strive to be unique.



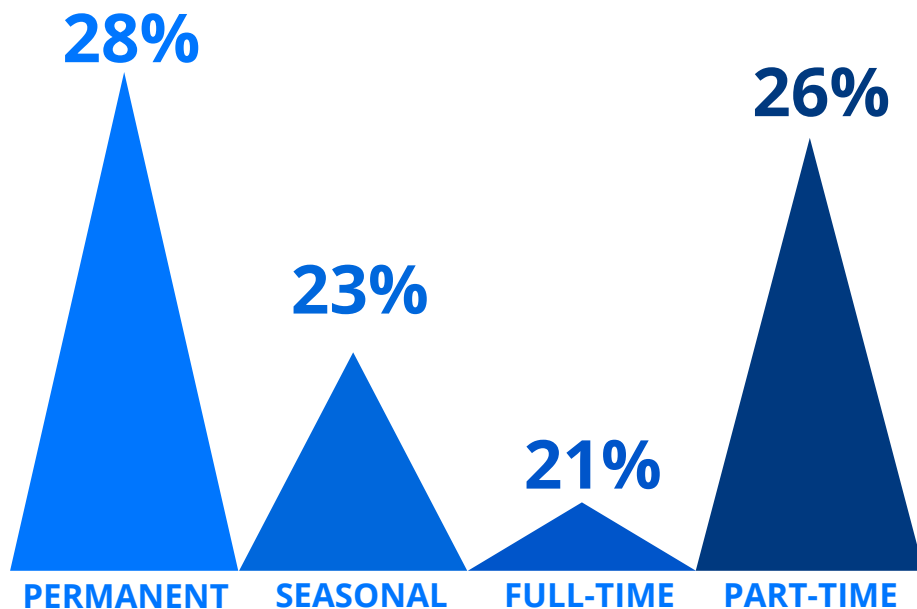
Who are our tour guides?

By Stephanie Kutschera

For operators, finding a guide who has the right balance of experience, passion and reliability isn't easy. Most experienced guides are seasonal travellers themselves and new guides need experience to learn from. In this chapter, we will find out more about the people who are the face of the business.

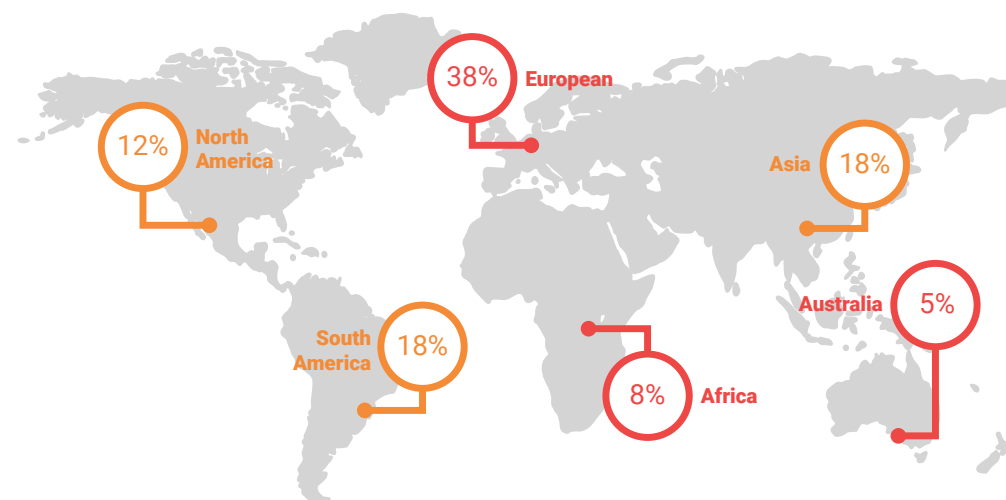
For our data, we draw insights from 2018 Tourism Survey once more, based on the answers from 786 tour & activity operators located in 112 countries worldwide with approximately 7,225 tour guides.

What type of staff are hired?



From the results we can see that most permanent employees of tour and activity companies tend to work part-time hours, with a lower number of full-time base staff. This is usually due to seasonality, and also that most companies in this sector are small, run by one or two full-time staff.

Which continent do tour and activity guides come from?



Our participant companies are located around the world, but still a clear majority of guides are European (37.5%). This is followed by South America (17.8%), Asia (16.3%) and North America (13.8%), Africa (9.8%) and Australia (4.7%).

| What percentage of guides are female?



With the discussion of the gender pay gap and companies employing less females in various industries, we wanted to know what the split was for our sector. Interestingly, in Interlaken where we are based, there is a strong demand for female guides in response to the growing number of visitors from the Middle East. These travellers would like to participate in adventure activities, but do not feel comfortable jumping off a cliff or getting into a kayak with a guide of the opposite sex.

| On average, how much experience do our Guides have?

47% Experience wins when it comes to the hiring guides.
of guides working in the industry have over 5 years of experience, followed closely by 3-5 years (24%) and 1-3 years (23%). Guides with less than a year of experience accounted for just 5%.

For those who are looking to become guides and have little to no experience, some destination are offering initiatives to those who are passionate about their city to become tour guides under their own accreditation. You can find out with the The European Federation of Tourist Guide Associations (FEG).

Download this checklist for 10 qualities every good tour guide should have



Download now

Spotlight on SANDEMANs New Europe, the largest walking tour company

By Stephanie Kutschera

SANDEMANs NEW Europe is a young, dynamic and international company offering city tours in 20 European cities. They run over 100 tours daily, cater to thousands of guests every week, and connect travellers with over 400 full-time and part-time guides worldwide.



Interview with David O'Kelly, CEO,
SANDEMANs NEW Europe



As an established tour operator, do you have specific requirements when recruiting tour guides?

For us, the most important thing is to have someone who is engaging, can connect with people and can tell a story in an interesting way. We know that most people can learn historical facts, but not everyone can share history and stories in a way that keeps people completely engaged for 2.5 (or more) hours.

You offer tours all year round. How do you find the right balance of permanent and seasonal staff?

Generally, we've seen a 'smoothing' out of the seasonal curves over the past few years, which makes this less of a problem than it used to be.

Our product portfolio is much more seasonally resilient and, moreover, pricing, crowding, and a more flexible work schedule have facilitated customers to travel throughout the year. Nevertheless, seasonality will always be a challenge that tourism businesses have to face.

With regards to the guides, like all companies that work with freelancers, it can be tricky at times to ensure that we have enough guides to cover a tour schedule. We are lucky however, because we work with around 450 freelancers, many of whom like to travel in the off-season, and so the system largely self-regulates. Quite a number of guides we work with have also worked with us in a number of cities. In fact, a good proportion of our staff have changed cities and found another job within the company.

With a large team in locations around the world, how do you keep your staff motivated throughout the year, not just in high season?

For our guides, we're lucky to have plenty of work to offer year-round. We find that guides typically enjoy working on public holidays, as there are a lot of people around and so it's a good time to make money.

We do however take our guides and staff out for social events, generally before and after the high season, and we have internal competitions for things like World Cup sweepstakes, where guides and staff can play against other guides and staff across the network, with the winner getting a trip to the SANDEMANs city of their choice, for example.

What sets SANDEMANs NEW Europe apart from the competition?

As the pioneers of the free tour model, we believe that we have pushed the entire tour guiding industry to be better. We genuinely believe that we work with the best guides in the business, because the free tour model is self-regulating – travellers can support and reward only high quality, engaging tour guides, while helping to ensure that low quality, low energy guides are forced to up their game. We feel proud that we have helped to put the power back in travellers' hands with this model.

While there are now thousands of free tour companies around the world, we're not only proud to be the originals, but we also work hard to remain on top!



A review of review sites

By Stephanie Kutschera

In June 2018, BBC Watchdog announced their investigation into leading hotel booking websites such as Expedia and Booking.com. This investigation will review how search result rankings are influenced by commissions paid by hotels to the marketplace site, false claims about how many people are looking at the same option, how many rooms are left and how long a price is available, clarity over discounts, and unexpected charges such as taxes and booking fees.

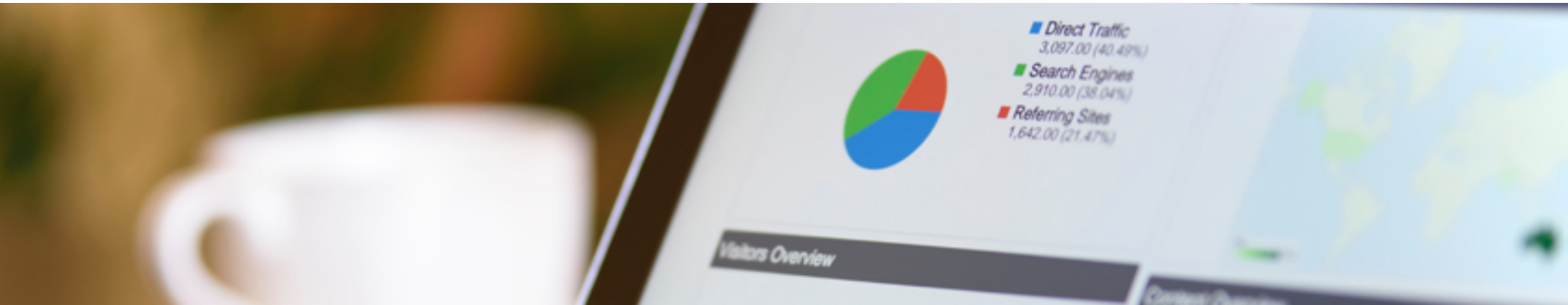
The scale and impact of this investigation is massive, and we expect to see advertising standards introduced that could extend across all marketplaces including tours and activities, and review sites that would include TripAdvisor.

| TripAdvisor changes for Tour & Activity Providers

In 2018, TripAdvisor, which began as an independent review website, purchased Viator, a marketplace for tours and activities. Some seen the acquisition as a conflict of interest, especially when without notification TripAdvisor began replacing company websites on their review listings with a direct link to Viator.

Another change to TripAdvisor, which unnerved some users, was the launch of [Sponsored Placements](#) for restaurants, allowing owners to 'sponsor' a place at the top of their city's search page, without requiring stellar reviews. Due to its success for TripAdvisor, the same package was launched for hoteliers in 2018.

Although not yet available, it's likely that Sponsored Placements will be on offer in 2019 to tour and activity operators, allowing them to promote their business above their local competitors visibly, and only paying for the clicks their ads receive.



Sustainability

According to a study published by Nature Climate Change, tourism produces around 8% of global greenhouse gas emissions, four times more than the previous estimated figure. 'Transport, shopping and food are significant contributors.' This is forecasted to continue growing at an annual rate of 4%, and will soon outpace many other economic sectors.

What can we do to protect these destinations for future generations?



Overtourism projects

By Stephanie Kutschera

“The phenomenon of a popular destination or sight becoming overrun with tourists in an unsustainable way.”

Collins Dictionary Definition

Overtourism is a relatively new term in the travel industry, but one that is impacting major destinations. The World Travel and Tourism Council released a report 'Coping with Success: Managing Overcrowding in Tourist Destinations' in which the challenges and detrimental impact increased tourism are discussed. This includes alienating local residents and families, reducing the quality of overall tourists experience, an overloaded infrastructure, damage to nature and threats and to the destination's culture and heritage.

Rafat Ali wrote in a Skift article, 'We are coining a new term, "Overtourism", as a new construct to look at potential hazards to popular destinations worldwide, as the dynamic forces that power tourism often inflict unavoidable negative consequences if not managed well.'

The most drastic case from 2018 showcasing the impact of overtourism, has been on the island of Boracay Island in the Philippines. President Rodrigo Duterte announced on 4th April 2018, his decision to close the island to all tourists for six months. For context, the island was to close just 3 weeks after his announcement.

This decision was made due to pollution from sewage dumping of local hotels and restaurants.



The Department of Environment and Natural Resources claimed that around 195 businesses and 4,000 residential businesses were not connected to the islands sewer system. The closure time would be used to build better infrastructure to welcome more visitors in the future. This includes a new garbage and sanitation system, marine conservation, zoning and construction.

The impact of this closure is estimated to have caused 36,000 job losses, and a €861m loss of tourism-related revenue. Hotels on the island instantly lost bookings and airline companies have had to reroute or refund fares.

Roy Cimatu, Secretary of the Philippine Department of Environment and Natural Resources, said that visitors will be able to enjoy a “Better Boracay” when the resort island reopens. With South Korea accounting for 356,000 arrivals to Boracay in 2017, the department seems confident that they will see more visitors by the end of 2018.

The island re-opened on 22nd October 2018.

Given tourism is such a lucrative sector, it will be a fine balance for destinations to benefit from the thriving income, whilst also protecting the destination and its residents.

Timeline of Overtourism Projects

January 2017

Barcelona officials approve new law to limit construction for hotels and to stop licences being issued to new accommodation rentals.

May 2017

Botswana introduced a new tax for tourists arriving (\$30) to raise money to support safari conservation.

June 2017

Venice will now prevent new holiday accommodations opening in their city centre.

August 2017

Dubrovnik announces a two year plan to reduce its number of visitors.

February 2018

Maya Bay in Thailand closed its doors for three-months to reverse damage caused to the surrounding coral reef.

April 2018

Boracay Island announces closure to all tourists for six-months to build better infrastructure for tourists.

May 2018

Santorini introduced a daily cap on cruise passengers due to overcrowding, traffic jams, rising water and energy consumption.

Ecological Initiatives

By Stephanie Kutschera

Tourists are now looking for experiences off the beaten-track, whether it be paddleboarding in a reserve, walking under a glacier or tubing through a cave. To accommodate demand, tour operators are taking the initiative to offer ecological tours which offer something unique to their customers, but also preserve, and in some cases reinvest back into, the destination.

In our 2018 Tourism Survey, we asked tour and activity operators if they would consider implementing sustainable initiatives in their own tour company. A substantial majority 91.36% of participants answered yes. We then asked why they felt this was or was not important to them. Most answered that these initiatives were to protect their destination and the planet in the long run and some added that being sustainable attracted travellers to their tours. The few that answered no commented that they did not currently have time available to consider sustainable initiatives or that they were unaware of what they could do.

It's encouraging to find that tour and activity operators are looking to protect their destination to ensure the longevity of their businesses. Destinations such as Canada and Switzerland are leading the way with ecotourism.



Here is their definition of what ecotourism means:

“Ecotourism is a segment of sustainable tourism that offers experiences that enable visitors to discover natural areas while preserving their integrity, and to understand, through interpretation and education, the natural and cultural sense of place. It fosters respect towards the environment, reflects sustainable business practices, creates socio-economic benefits for communities/regions, and recognises and respects local and indigenous cultures, traditions and values.”

The Tourism Industry Association of Canada

Ecological tours are visibly more important in locations where global warming and pollution has or could cause a visible impact. This includes water-based activities, cycling, climbing or wildlife that is un-motorised, and tends to be in Latin America, South Africa and Asia.

An example of an ecological tour is EcoZip in New Zealand's North Island. The zipline tour funds the conservation and restoration of Waiheke Island forest, which has now become a Site for Environmental Significance. Guests of the zipline tour also enjoy a beautiful hike through the thriving forest.



Reducing tourism's carbon footprint

By Stephanie Kutschera

There are small ways that companies can reduce their carbon footprint, such as the vehicle type and energy usage. There are destinations who have taken extreme measures to offset their carbon footprint and become self-sustainable.



Interview with Simona Altwegg,
Content & Media Manager for
Zermatt Tourism



Zermatt is Switzerland's most self-sustaining winter resort. How did it all begin?

When cars arrived in Switzerland, Zermatt decided to stay engine free. Instead of cars, electric vehicles run here. The people of Zermatt have voted three times (1961, 1972 & 1986) that they would like to adhere to this regulation.

But, traffic is not the only ecological factor in the world-famous tourist resort. 70% of our energy comes from hydropower, and numerous buildings and mountain railways are built sustainably. Zermatt looks back on a history in harmony with nature. Pioneers of tourism have recognised the beauty of the mountains and their attraction and have built a tourist resort whose strength, in addition to hospitality, is the natural treasures of the surrounding mountain world. It is a conscious decision to take care of the environment so that future generations will also experience the uniqueness of nature.

How does Zermatt Tourism engage and educate businesses to continue being sustainable?

The will for a sustainable strategy is anchored in the people of Zermatt. Zermatt Tourism does not make any regulations - the decisions are left to the companies alone. But, many people know that nature is our capital and that it is therefore appropriate to treat it with care.

We are always proud of new projects. The latest project is the station of the new and energy-efficient Matterhorn glacier ride. It will be equipped with a powerful solar system, the highest one in Europe (3821 metres above sea level).

Is sustainability and reduced carbon emissions a USP for Zermatt as a destination?

Yes, Zermatt is the most sustainable winter holiday resort in Switzerland. The destination takes care of nature and handles resources with care so that future generations can also enjoy the beauty of nature. That is definitely our unique selling point.



Initiatives in developing countries

By Nicole Kow

In March 2018, a video taken by British diver Rich Horner 20 km from Bali went viral. This video exposed the extent of plastic pollution as a result of poor waste management by local governments and a general lack of awareness of waste management amongst locals and tourists alike.

In Malaysia, my homeland that neighbours Indonesia, the same narrative unfolds. Langkawi, a beautiful island I frequented as a child, is rapidly losing its natural charm. According to the Malaysian Nature Society, 100 metric tonnes of rubbish is produced every day by tourists and residents, peaking at 150 tonnes in the high season.

The rapid and concentrated construction of luxury hotels and apartments built upon a poor sewage and waste disposal infrastructure further exacerbates the overall environmental problems. Once pristine beaches, beautiful rainforests and fascinating limestone outcrops now take a backseat for the sake of development and increasing the number of tourist arrivals.

It is not uncommon to see policies, sometimes really exceptional policies outlined in detail, with little or no efforts to follow through. For long-term initiatives to be both profitable and sustainable, governments, local businesses and residents need to be involved in the equation.



Thailand's Ministry of Tourism and Sports moves away from fast growth

Thailand has been a booming tourist destination for the longest time, with the [tourism industry bringing USD 56 billion in 2017](#). However, all this income from the tourism sector was accompanied by over 30 million visitors and [adverse impact on the local environment and its community](#).

In 2017, Thailand began moving away from fast growth, [choosing to prioritise quality and sustainability instead](#). According to then Minister of Tourism and Sports Kobkarn Wattanavrakul, "When people start to see the growth, it's a double-edged blade. Now they recognise: last year 32.6 million, next year you should get 40 million, they want growth," she said. "Definitely we should grow, but we have to make sure that people will be ready for this growth."

But what does focusing on quality and sustainability look like?

A good example is of [Thailand's homestay programmes](#), where foreign tourists experience what it's like to live in a small village. It took the government many attempts to nail this programme down. Previous efforts saw only a few homes in a village benefit from international income while the rest of the community was still stuck in poverty. Today, the government focuses more on wealth-sharing, making sure that everyone in the village gets a piece of the pie. While only two houses might host visitors, another home will provide meals, another will do laundry, and another will produce locally grown produce.

Since a large majority of visitors to Thailand come from China, Prof. Dr. Wolfgang Georg Arlt of the China Outbound Tourism Research Institute suggests that these countries should [focus on drawing more affluent travellers](#). Thailand has found this so effective that it is setting a minimum price for packaged tours to the country.

"Destinations have to develop their brands and develop new upmarket offers for special-interest groups to not only attract the lower end of the market."



Guatemala's national programme impacts local communities

In Guatemala, the IMPULSA Programme was created in 2015 to conserve its rich natural and cultural heritage, while helping to reach its full potential in the tourism industry. [The principle objective of the programme](#) was to “enhance the capacities that entrepreneurs and small- and medium-sized enterprises (SMEs) have for growth, while enabling their work to stimulate sustainable tourism.” The programme would give finalists access to experts who could consult on their businesses, meet like-minded entrepreneurs and potential for securing seed capital.

A successful business that grew from this programme was [La Choza Chula](#) based in El Paredón on the Pacific coast of Guatemala. The non-profit organisation runs turtle and mangrove tours in the area, as well as cooking classes, homestay programmes, cultural immersion programmes and volunteer programmes.

Since their inception, they now run weekly English classes for their guides and funded the construction of a [library](#), set up a mobile library, [built a computer lab](#) and [a secondary school](#).

Ecuadorian operator Go Galapagos helps conserve indigenous heritage

In 2012, Go Galapagos – Kleintours developed a [community-based tourism package with the Karanki family](#), part of the indigenous community of Magdalena. Visitors to this village walk away with an immersive cross-cultural experience by living with the Karanki family and participating in the community's daily activities such as milking the animals, planting and harvesting crops, and cooking traditional dishes.

In return, the local community receives English classes and are trained by tour operators in hospitality, food preparation, hygiene, accounting and more.

[The UNWTO reported](#) that this project impacted standards of living in the community by improving its housing conditions, opening a new medical center and upgrading the networks of pipes and filtration tanks, resulting in better water quality.

“To date, local households continue to receive training and support to cater to tourists – moves which increase their income and help them break out of cycles of poverty. Several travel agencies have engaged in marketing the project, highlighting the initiative in travel catalogues and promoting it as a community tourism destination.”

Mayakoba in Mexico redefines luxury and promotes quality over quantity

Mayakoba is located in Riviera Maya, a 15 minute drive away from downtown Playa Del Carmen, home to a beautiful golf course, luxury hotel and residence. Mayakoba is built close to vulnerable mangrove and dune ecosystems that cannot accommodate the demands of mass tourism. The Spanish company [Obrascón Huarte Lain \(OHL\) designed Mayakoba to be a “low density” model](#), i.e. minimal use generating the lowest environmental impact, due to its location.

The design of the golf resort was based on scientific research, taking into account the area's environmental elements. [As noted by the UNWTO](#), “its operation has enabled the maintenance of pre-existing flora and fauna, as well as the creation of aquatic and coastal habitats that did not previously exist. This has sparked an increase in fauna, particularly birds, fish and amphibians, forming an important new wildlife sanctuary.”

While such development projects are impressive, [this project took over 10 years to complete](#). The long-term commitment and the financial commitment of projects at such scale is not always feasible for destinations.



How can your company become sustainable?

Start by targeting your offers for niche groups

The UNWTO also noted that 73% of millennials are willing to pay more for sustainability compared to 51% of baby boomers, indicating that “tourism policies, programmes, products, experiences and marketing must be extremely well-defined and targeted.”

“If we are to build resilient communities and countries, we must project to the outside world the seriousness of our commitment,” wrote Kim Osborne, Executive Secretary for Integral Development at organisation of American States (OAS).

I believe this is something destinations, tour operators and activity providers can achieve as a first step. To maximise impact, tour companies should collaborate with one another to be better equipped to create a clearer and louder message, and stand the chance of being heard by the right people.



Final Words

Final Words

It's been a prominent year for the tours, activities and attractions industry with large-scale acquisitions, business shake-ups and multi-million dollar investments. Although we can predict trends and interests based on buying behavior, we can't predict what other transformations the sector will go through in 2019. It keeps us on our toes and keeps us excited for the year ahead.

We hope you've found data and findings in this report useful and insightful for your business. Of course, we couldn't have done it alone.

We would like to say thank you to all our contributors who have dedicated time and knowledge to this report, our 2018 Tourism Survey participants who provided valuable on-the-ground information, our authors, researchers and design team.

We wish everyone a successful year ahead!

We would like to extend a special thank you to:

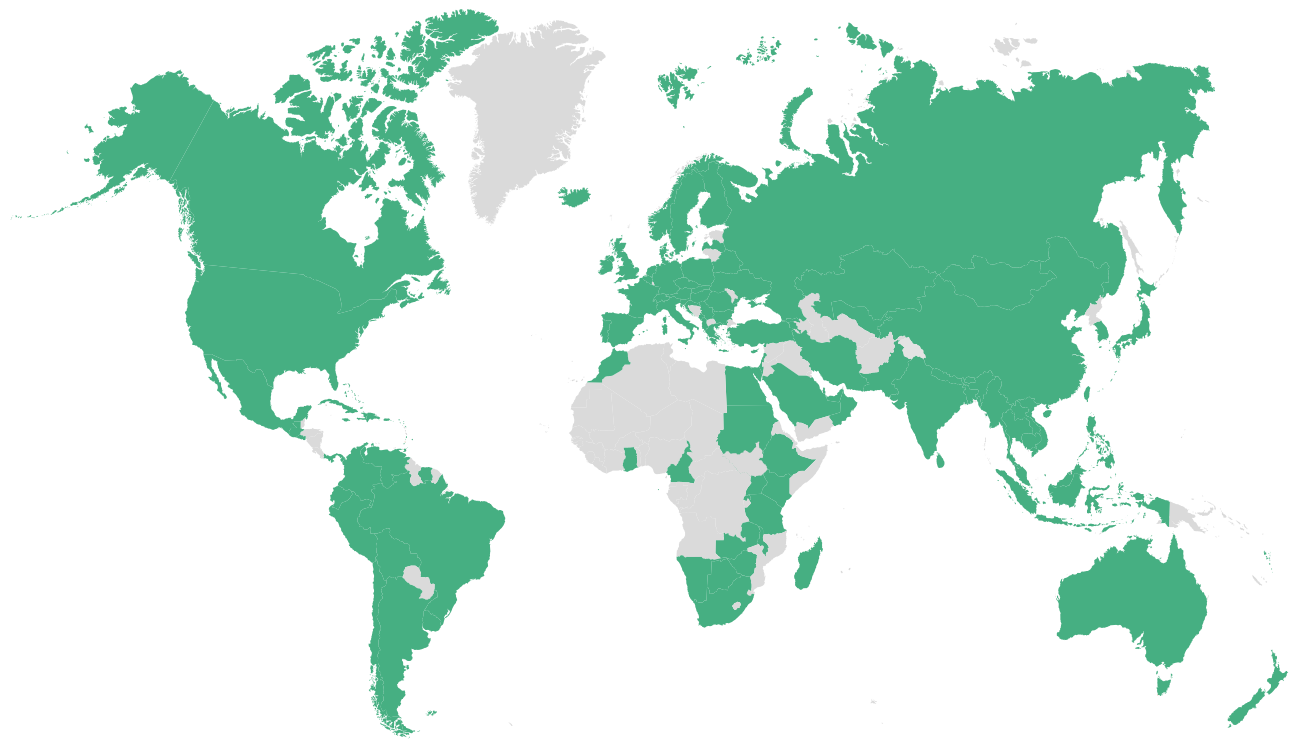
TourRadar, Klook, Civitatis, Musement, SANDEMAN'S NEW Europe, Zermatt Tourism, Croatia Travel Co & The Bridal Bar

2018 Tourism Survey

Methodology

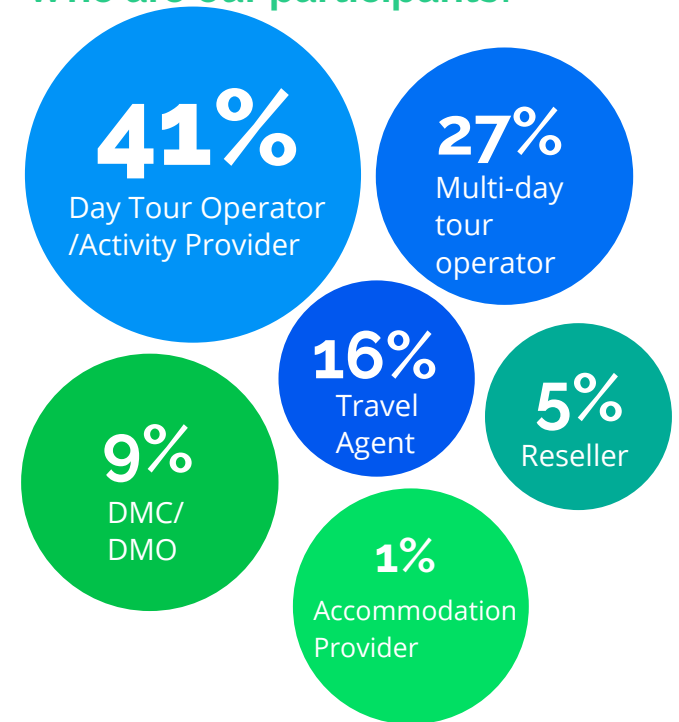
The TrekkSoft 2018 Tourism Survey was conducted between 20th August and 3rd September 2018 through an online survey platform. The survey received 959 responses in total, of which 948 have been selected for analysis after discounting duplicated and unusable responses. The respondents include both TrekkSoft customers and non-customers located in 112 countries worldwide.

Where are their business located?

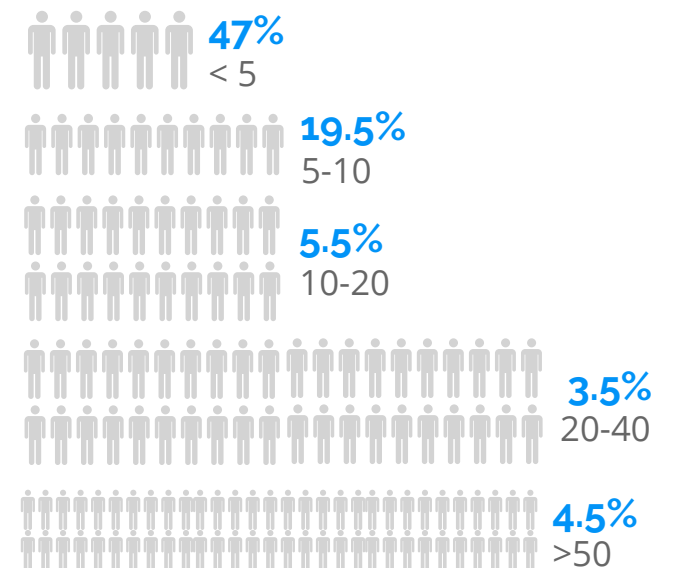


■ With business
■ Without business

Who are our participants?



What size is their company?



What type of tours do they offer?



17.97%

City & Sightseeing tours



15.60%

Walking & Biking tours



4.34%

Air, Helicopter & Balloon



8.09%

Cruising, Sailing & Boat Tours



6.91%

Water Sports



9.82%

Food, Wine & Nightlife tours



10.37%

Shuttles & Transfers



3.21%

Snow Sports



5.03%

Classes & Workshops



6.71%

Safari Tours



5.87%

Tickets & passes



6.07%

Regional (industry-independent)

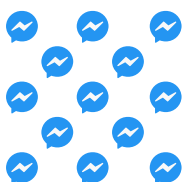
Are they using messaging apps to communicate with customers?

57.17%



WhatsApp

18.16%



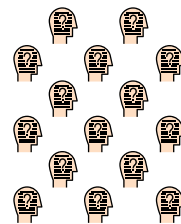
Facebook Messenger

02.68%



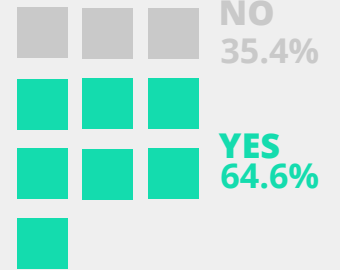
Chatbot

20.84%

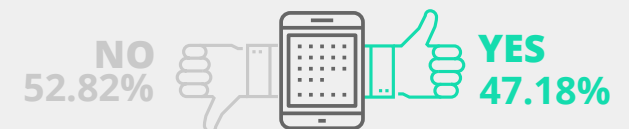


None

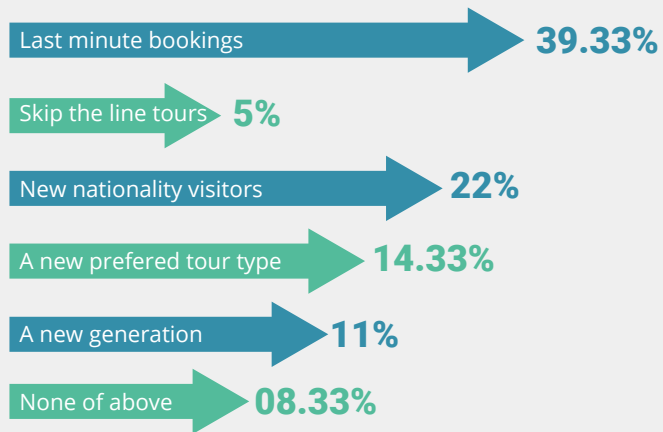
Are they accepting bookings on their website?



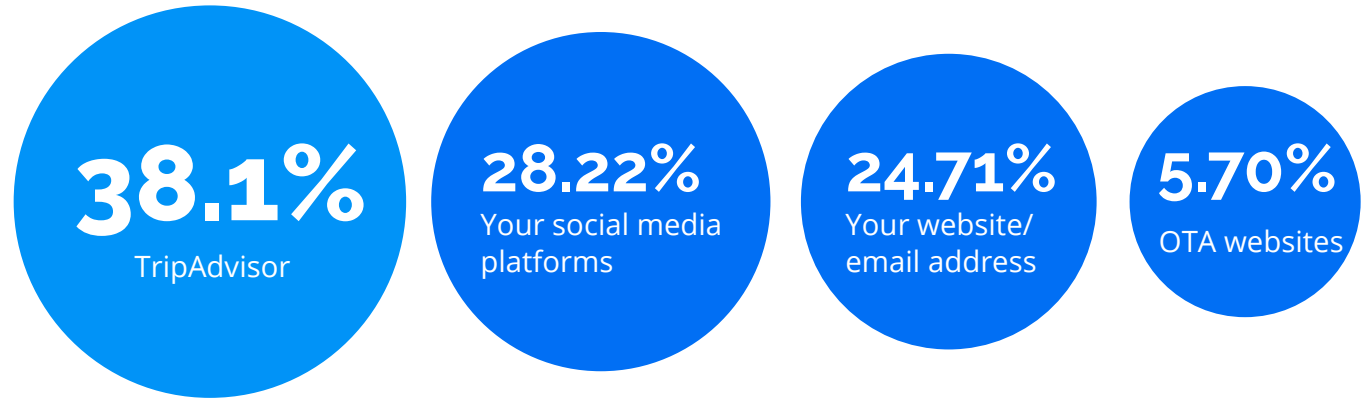
Are they using a mobile device to manage bookings?



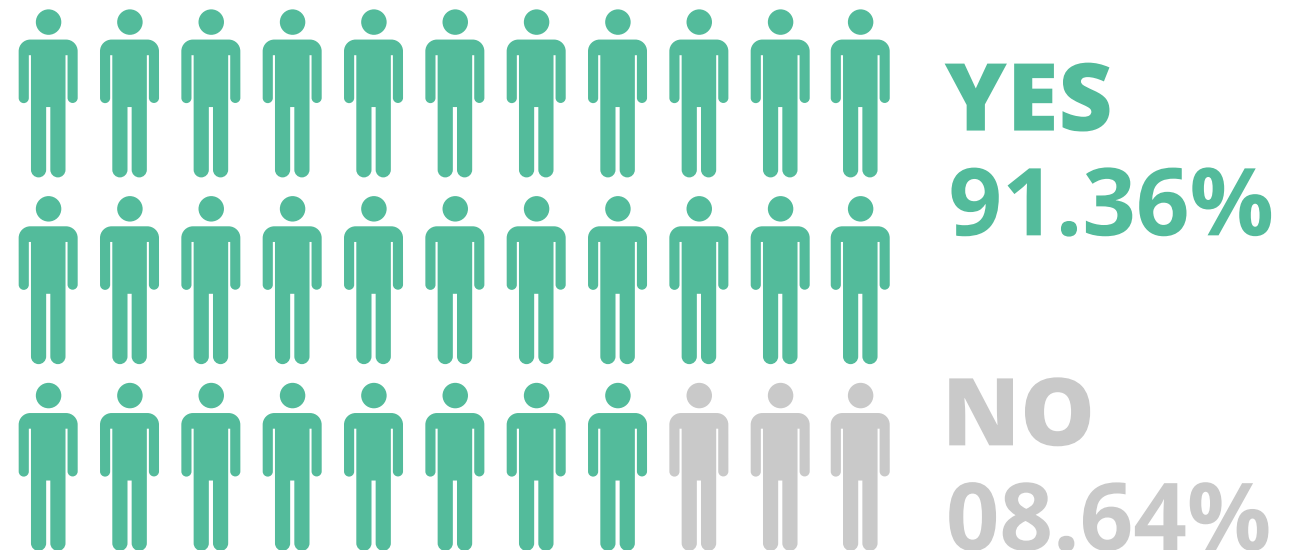
What tour trends have they noticed in your destination in the past 3-6 months?



Where are their customers posting reviews?

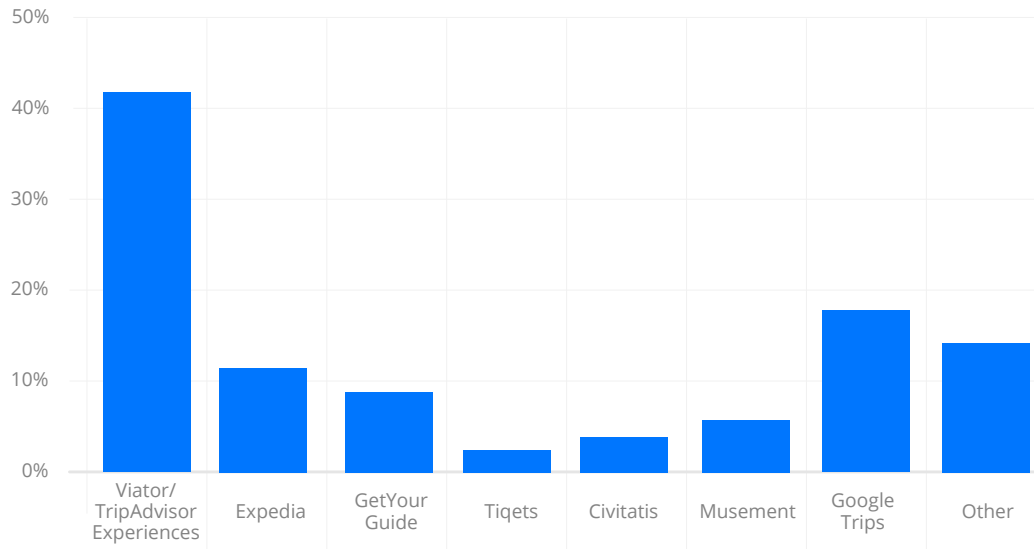


Would they consider implementing sustainable initiatives in their business?

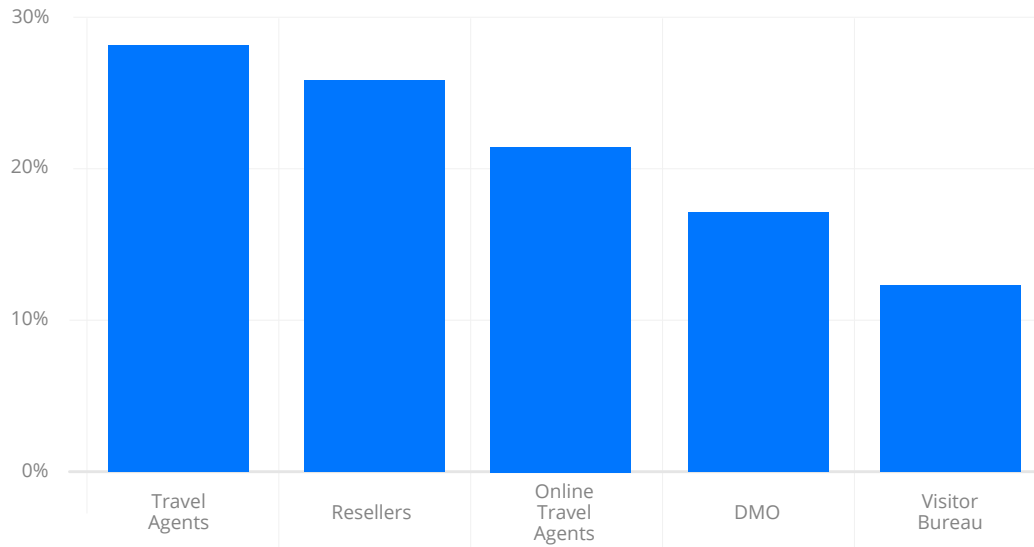


Distribution

Which OTAs provide the best return for their business?



Do they work with any agents, resellers, DMOs or Visitor Bureaus?



Would they consider reselling products from other companies?

