

State of the Nations Research 2021

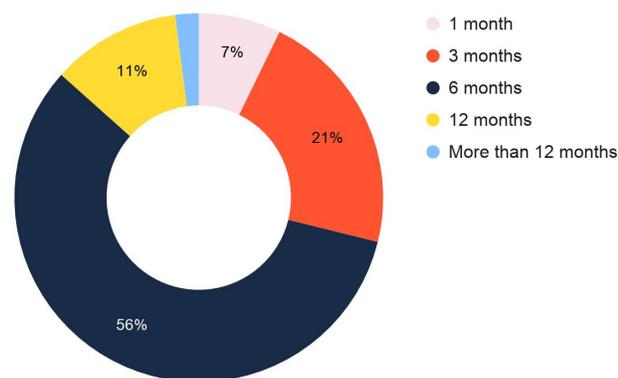
Understanding traveler trends post-COVID

GetYourGuide's State of the Nations Research surveyed over 7,000 travelers in 6 key markets to understand traveler sentiment in the age of COVID. It gives tourism players actionable and statistically significant insights to help position their brands, businesses, and product offering as travel reopens around the world.

The 2021 outlook is positive: Here are some key findings from GetYourGuide's market research

65% of travelers are "Eager": 28% expect their next trip in 1-3 months.

- High or very high willingness to travel
- Between 30-60 years old
- 18% are already booking



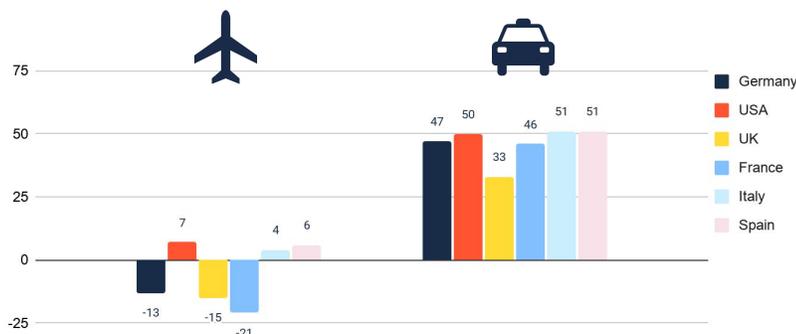
Families & couples will be travelling first

Data shows that in 2021 travel plans are with partners or kids / families. Travelling in order to visit family is also high on the list of triggers.

Tip: Create products that cater to travelling families or couples, consider add-ons for kids, and use targeted marketing campaigns to resonate with these audiences,

Driving is the clear preferred mode of transportation

Target audiences within driving distance and use messaging that communicates accessibility of your venue for drivers ("only a drive away.")

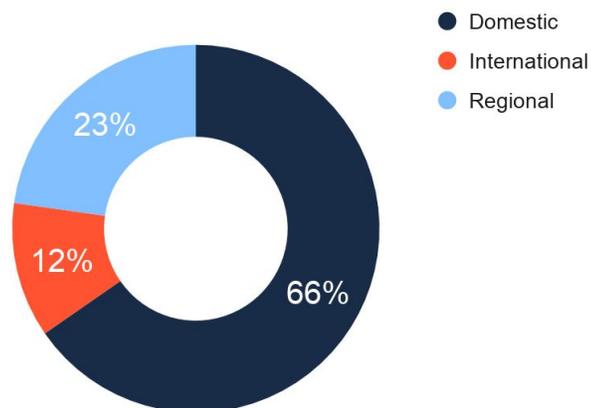


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Like in 2020, the majority of trips will be domestic

UK is most likely to travel internationally (25%), followed by the DE (24%). US most likely to explore own cities (20%). IT and ES most interested in visiting neighboring cities or outskirts. FR has an even spread, with 32% preferring short haul travel.



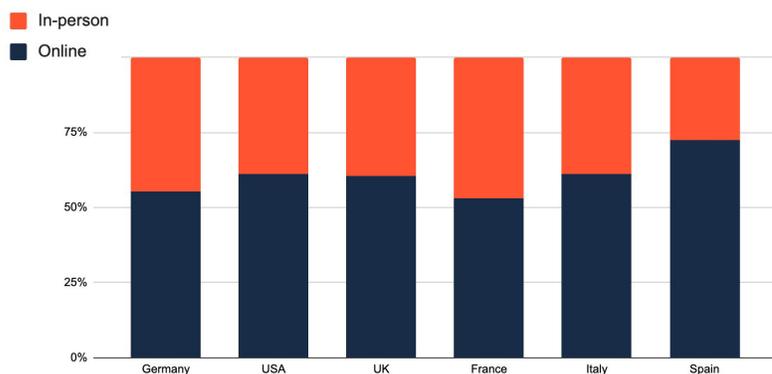
Cancellation flexibility & deals: Top booking incentives

T&As can increase consideration by meeting these customer needs.

1. Flexibility to cancel

2. 20% discount

3. Smaller crowds



Online booking is preferred, and likely to rise as a result of health & safety concerns

Ensure online presence is strong and all product options are visible and bookable, without requiring physical tickets.

Travelers will take 2,74 trips in 2021 on average

Capturing market share across all seasons will be key to the rebound

DE
2.38

US
3.86

UK
2.37

FR
2.30

IT
2.55

DE
3.20

