

Beneath the Surface

Market Report

2025 insights to power your 2026 growth

Published January 2026



FAREHARBOR

How to use this report

Beneath the Surface is a data-driven snapshot that includes trends in customer behavior, booking performance, channel mix, and product usage. We invite you to use these findings to explore new strategies and opportunities to enhance your business.



01

Benchmark your 2025 results

02

Regional and segment-level insights

03

Action items to prepare for a successful 2026

04

Track market shifts and stay ahead

What to keep on your radar



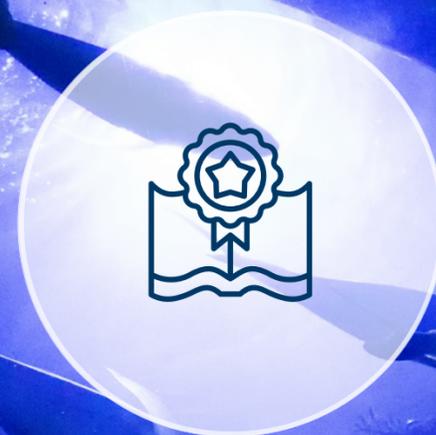
Data

See what's changing



Don't Drift

Apply quick wins



Success Stories

Copy what works



Wave Watch

Plan for 2026



Table of Contents

Surface scan: Baseline performance metrics

- [5. Surface Scan](#)
- [6. Revenue growth by region](#)
- [7. Revenue growth by country](#)
- [8. Revenue by state](#)
- [9. Revenue growth by category](#)
- [10. Average ticket price by region](#)
- [11. Don't Drift: Is your pricing appropriate](#)
- [12. Dynamic pricing](#)
- [13. Success Story: The ups & downs](#)

Patterns: How, when, & where people are booking

- [14. Patterns](#)
- [15. Channel Mix by region: AMER](#)
- [16. Channel Mix by region: EUR](#)
- [17. Channel Mix by region: APAC](#)
- [18. The OTA landscape in 2025](#)
- [19. 2025 FHDN growth](#)
- [20. New distribution integrations](#)
- [21. Wave Watch: AI & LLMs](#)
- [22. How to leverage ChatGPT](#)
- [23. Average booking window by region](#)
- [24. Average booking window: AMER](#)
- [25. How far U.S. customers travel](#)
- [26. Average booking window: EUR](#)
- [27. Average booking window: APAC](#)
- [28. Don't Drift: Operation checklist](#)
- [29. International vs. domestic bookings by region](#)
- [30. Wave Watch: Live Tourism](#)

Conversions: How people convert

- [31. Conversions](#)
- [32. Device usage](#)
- [33. Average conversion rate by category](#)
- [34. Don't Drift: Conversion checklist](#)
- [35. FareHarbor Sites](#)
- [36. SmartAds](#)
- [37. Don't Drift: AI powered search](#)
- [38. Success Story: FareHarbor Sites](#)

Product

- [39. Product features](#)
- [40. Waitlist](#)
- [41. Success Story: Waitlist](#)
- [42. Trip Protection](#)
- [43. Combos](#)
- [44. Success Story: Packages](#)
- [45. Private Events](#)
- [46. Wave Watch: Corporate Buy Outs](#)
- [47. FH Dock](#)
- [48. Waivers](#)
- [49. Don't Drift: New product integrations](#)
- [50. New! Customer Profiles](#)
- [51. Don't Drift: Features + Strategy = Success](#)

[Index](#)

Surface Scan

A high-level scan of 2025, with key metrics to
assess performance and pricing

Exploring the depths of growth

Here's a look at revenue growth across the world — based on FareHarbor operator performance.

AMER
1%-3%

EUR
11%-13%

APAC
3%-5%

AMER / The Americas & the Caribbean

EUR / Europe

APAC / Asia Pacific

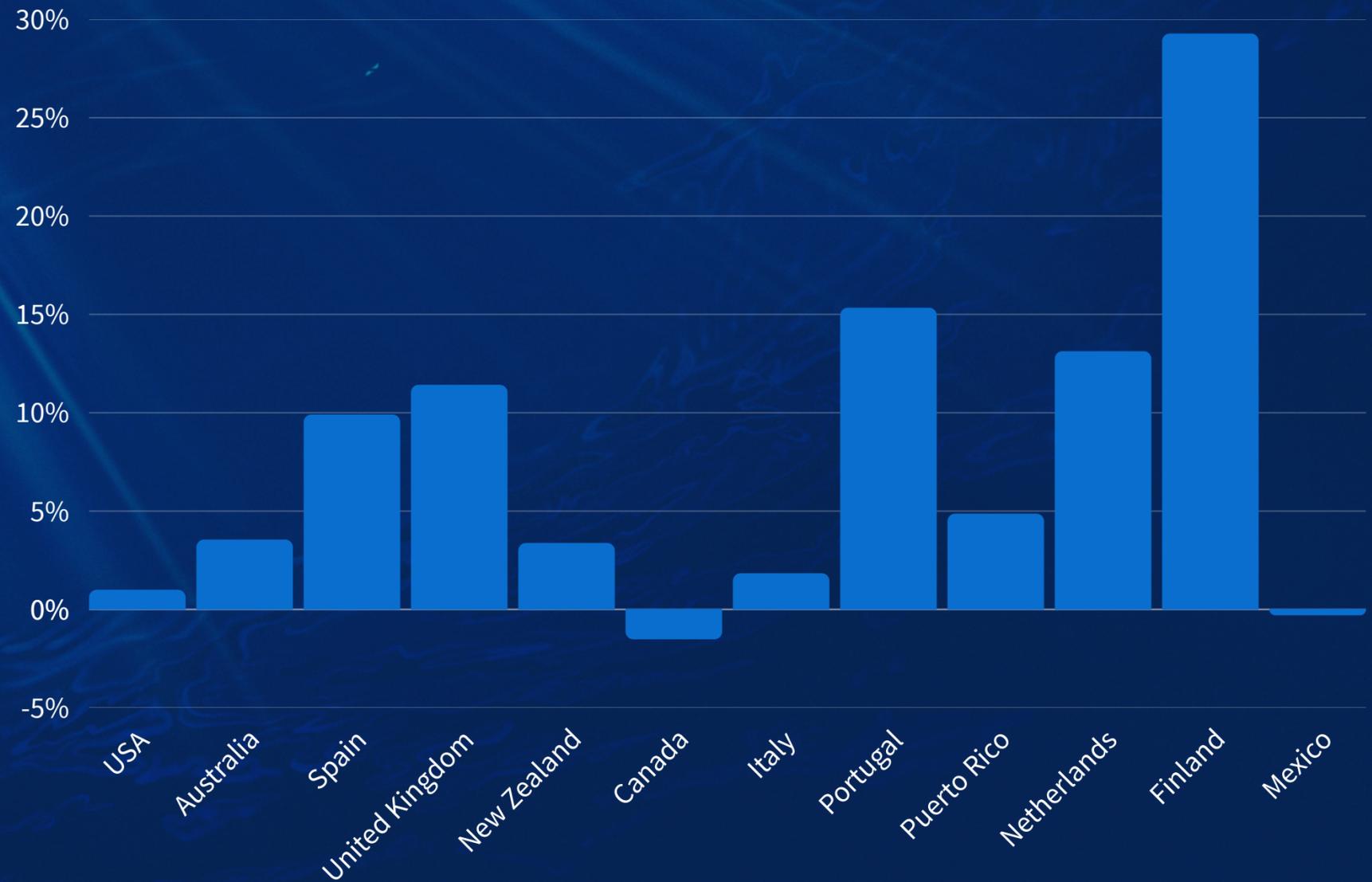


Exploring the depths of growth: A global shift in travel

While global growth remained modest in 2025, regional trends tell a deeper story. See how your market compares.

2024 V. 2025 FAREHARBOR OPERATOR GLOBAL TTV*

*Total transaction volume



Exploring the depths of growth by category

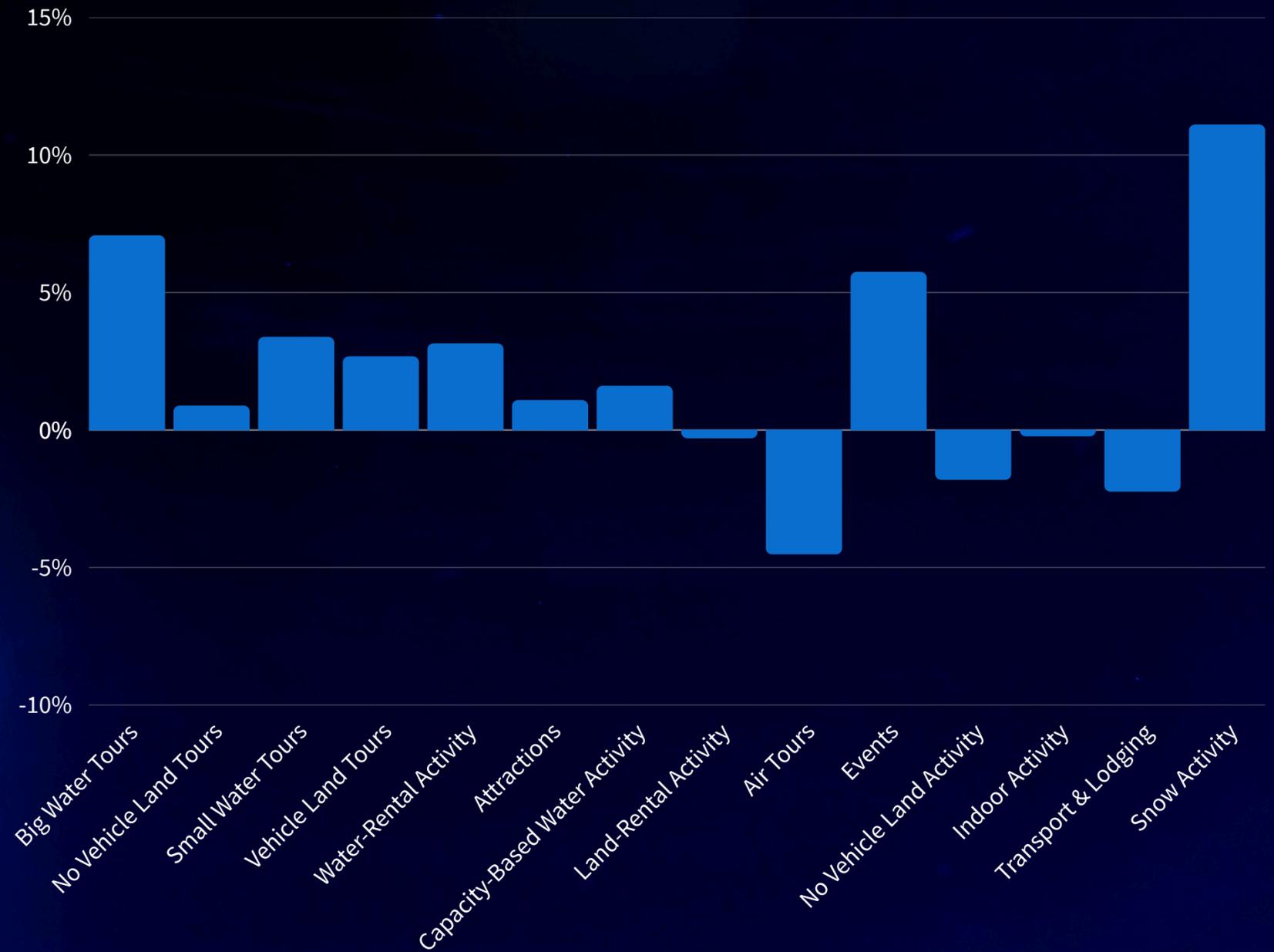
Category-level performance reveals the types of experiences travelers sought out in 2025.*

Visit the [Index](#) for a deeper breakdown of each category.



2024 V. 2025 FAREHARBOR OPERATOR TTV*

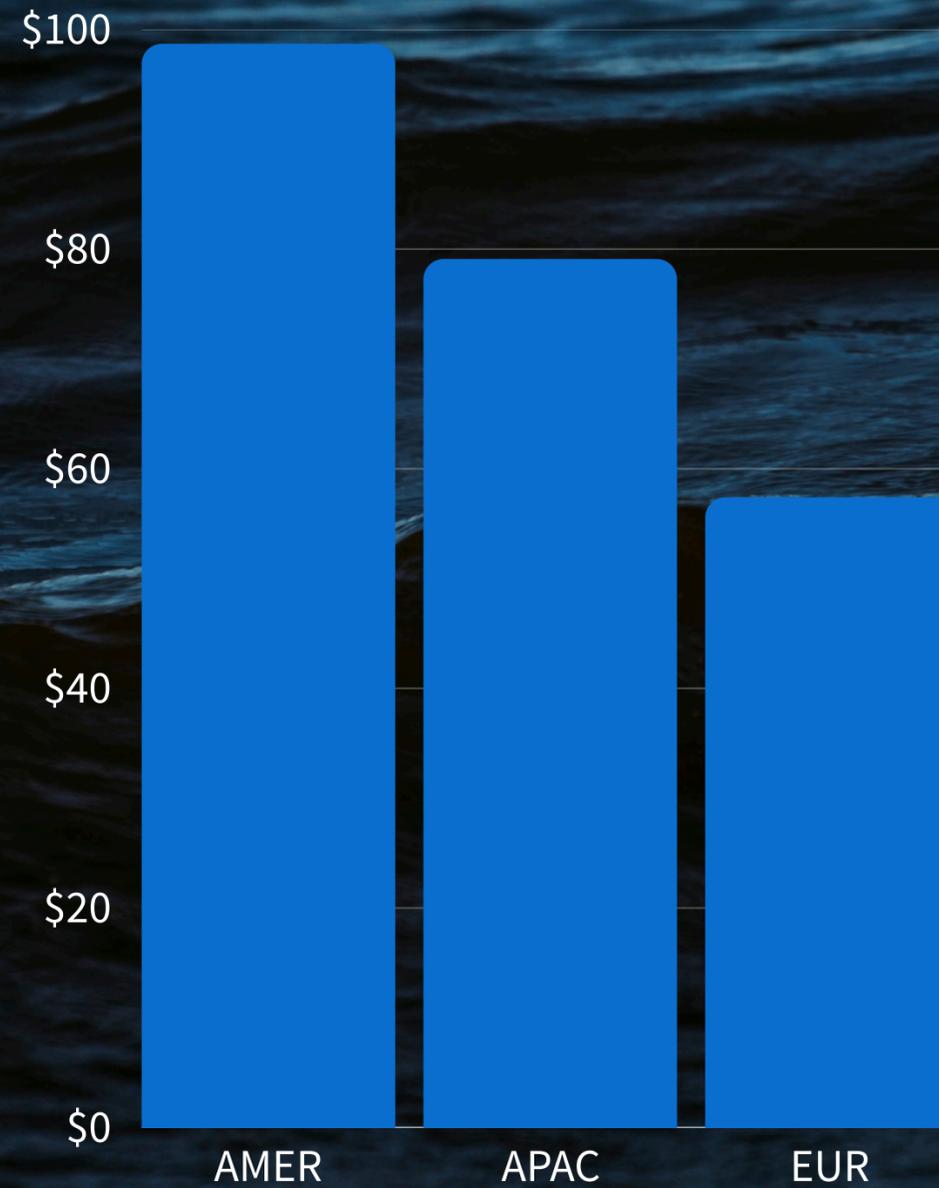
*Total transaction volume



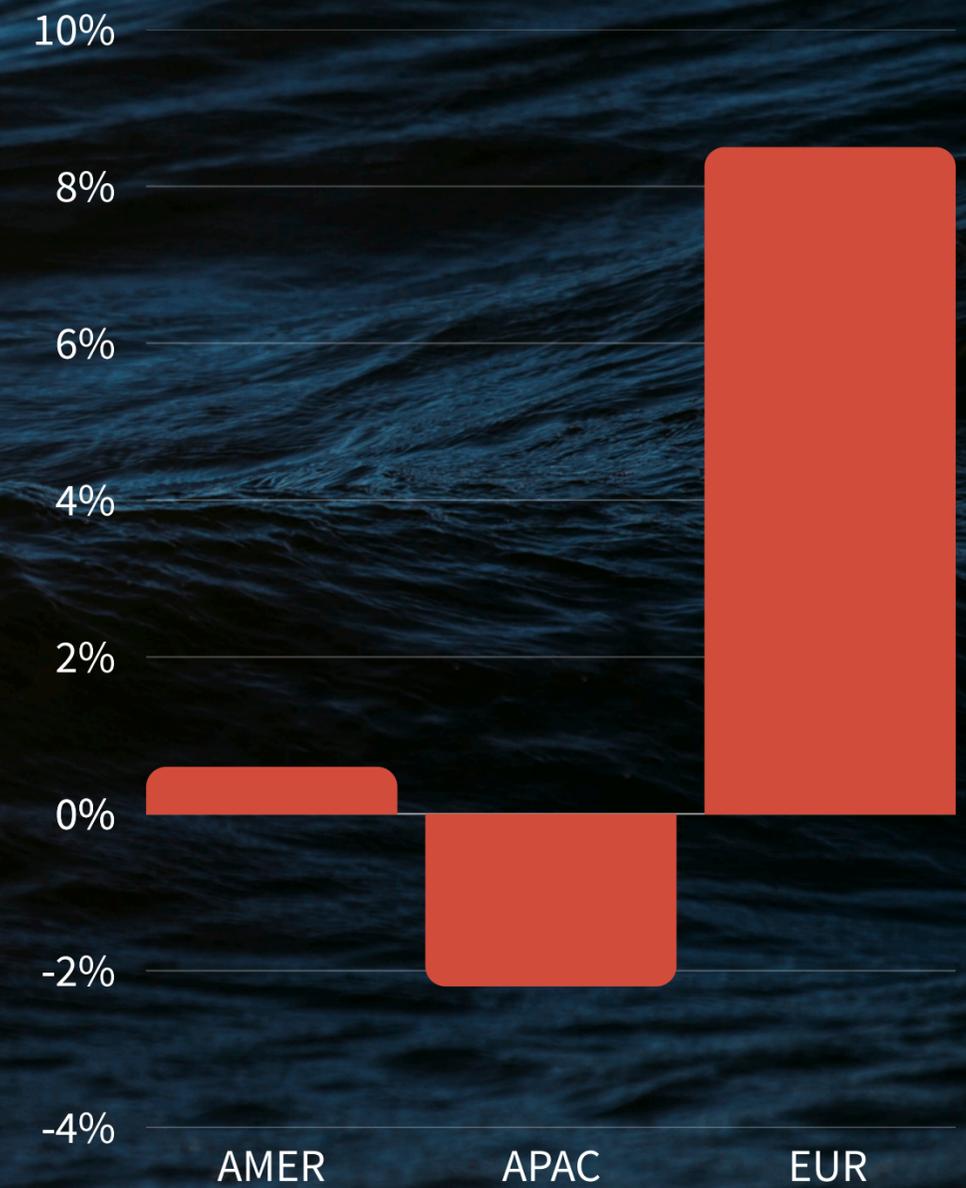
Riding the pricing wave

From coastlines to countryside, here's how average ticket prices rose (or dipped) across the globe in 2025.

AVERAGE TICKET PRICE



GROWTH IN TICKET PRICE



Don't Drift: Is your pricing appropriate?

Tourism faced rougher waters this year — from shifting demand to fewer international travelers. If you're seeing a decline, it may be time to check in on your pricing strategy.



Your 2026 Pricing Checklist

- Have I raised prices in the past 2+ years?
- Are any of my tours regularly selling out far in advance?
- Are any offerings or time slots consistently underbooked?
- Am I using **Affiliate Rules** to manage my channel mix effectively?
- Am I using **Combos** or **Packages** to boost average order value?
- Do I offer premium options (like private bookings or add-on upgrades)?
- Have I checked competitor pricing in my region or category?
- Have I reviewed my **Sales Report** to spot top-performing time slots?
- Have I looked at my **Bookings Report** to identify peak periods or lulls?
- Am I pricing around local events, holidays, and demand spikes?
- Do my listings clearly show **value and trust signals** (badges, headlines, etc.)?

An underwater scene with a deep blue background. In the center, there is a large, dark coral reef structure. Numerous small fish are scattered throughout the water, some swimming towards the camera and others away. The lighting is soft, creating a serene and slightly mysterious atmosphere.

Dynamic Pricing

Your pricing should always flow with demand. Whether you implement Dynamic Pricing with automated tools or manually, don't let outdated pricing sit too long.

Success Story: Your partner through the ups & downs

Nā Pali Coast Tours relied on FareHarbor since 2015, but when some aspects of FareHarbor's pricing model changed, they reconsidered their options.



“A competitor approached us with what seemed like a better arrangement with no website hosting fees and lower booking fees, so we were open to trying them out,” said Kamalani Baptiste, Operations Manager.

After testing another system, they returned to FareHarbor, drawn back by stronger support, platform reliability, and a better fit for their values.

Now back on board, they're using Waitlist in creative ways, and exploring reporting tools to grow without losing their intimate, culturally grounded feel.

“Recognize that any change, even a positive one, will have an effect on your operations so it's important to really make sure you will have the support you need in your transition.”

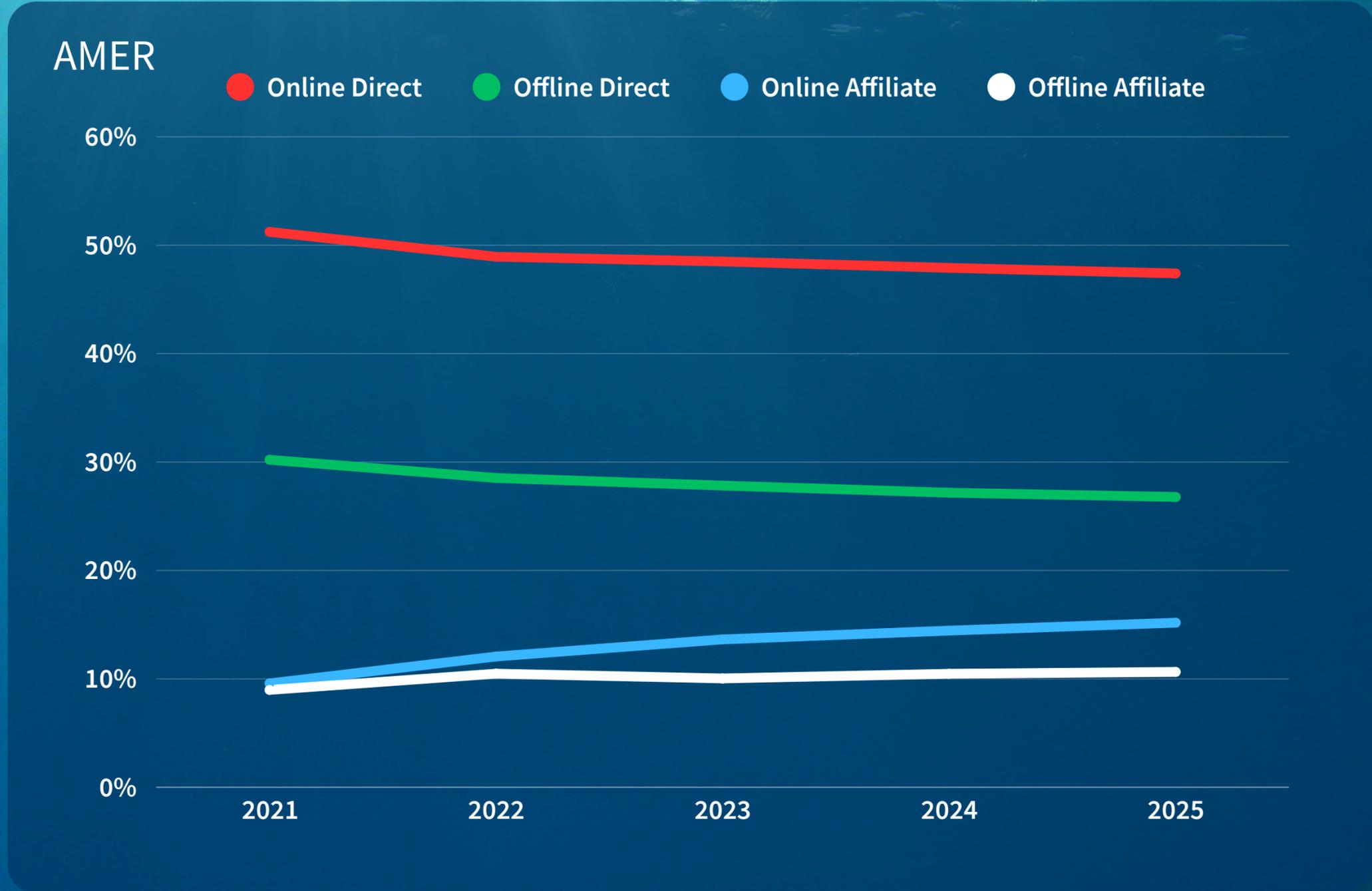


Patterns

See where travelers booked, when they booked, and how to optimize your channel mix for stronger margins.

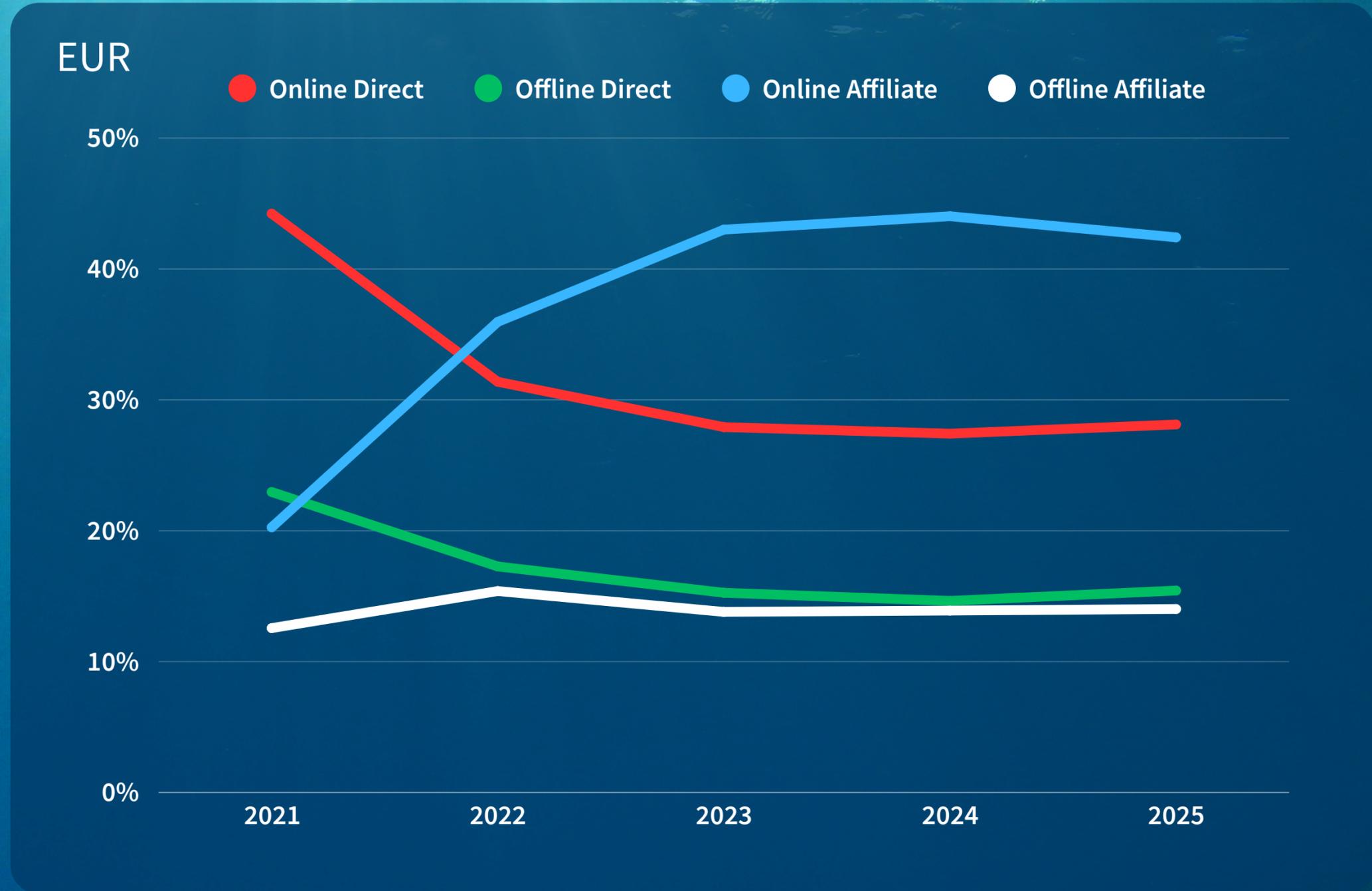
Channel Mix across regions

In the Americas & the Caribbean we've seen a steady increase in customer booking through affiliates, while direct booking has softened slightly.



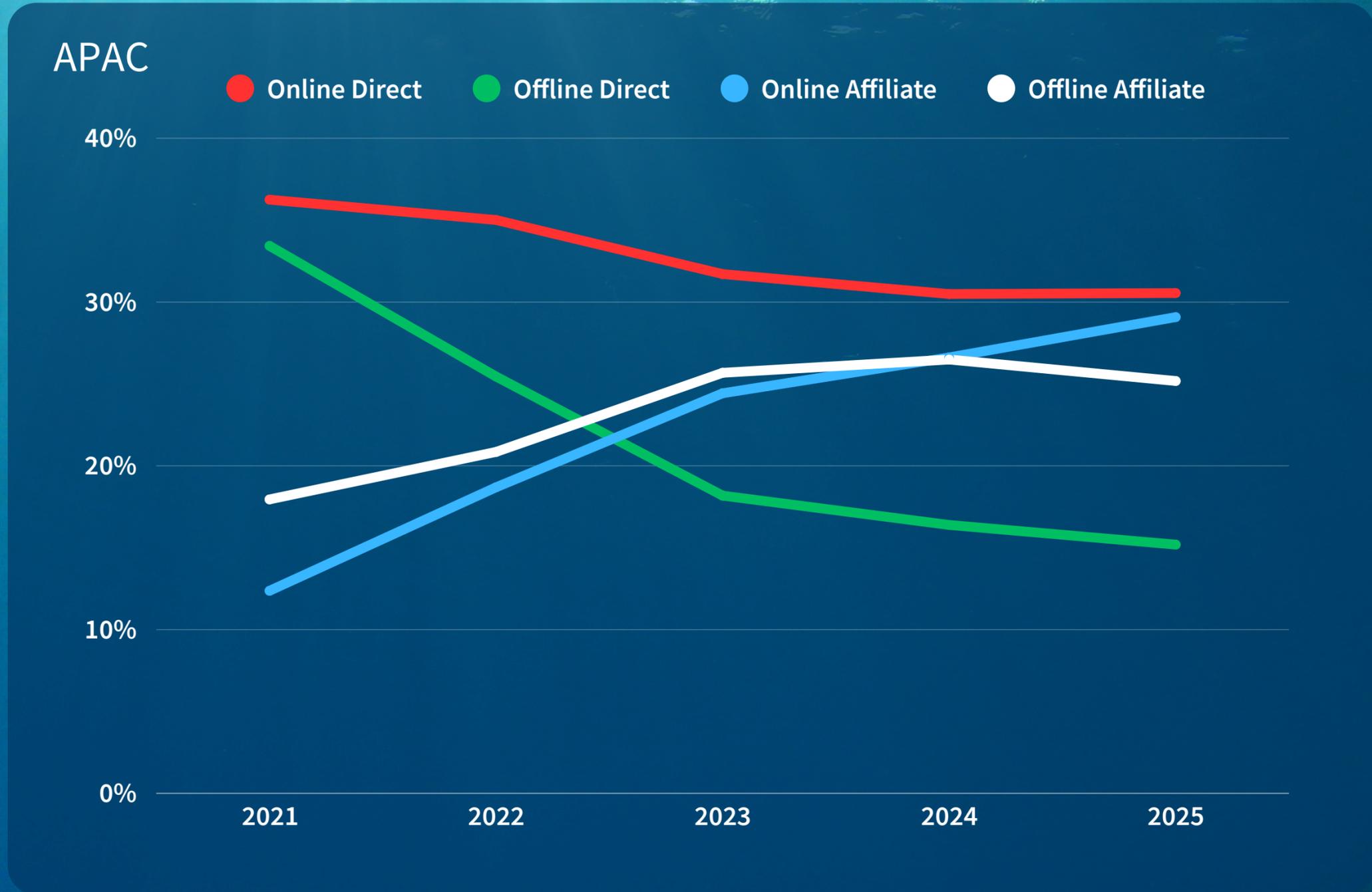
Channel Mix across regions

Over the last few years Europe saw a surge in affiliate marketing. In 2025, there has been slight increase in all other channels.



Channel Mix across regions

In areas such as Australia, New Zealand, and Asia, we continue to see the strongest growth in bookings through online affiliates.

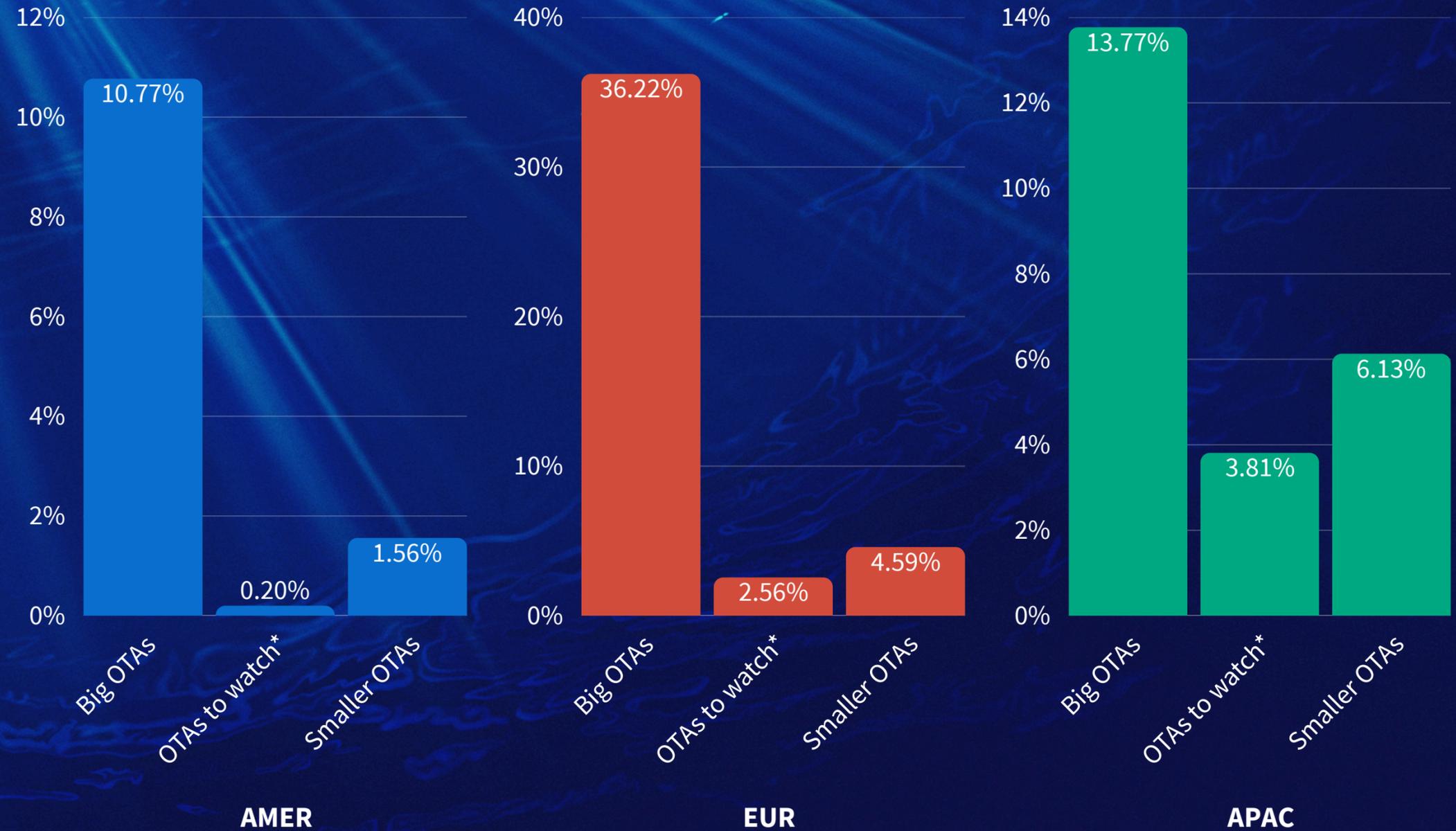


The OTA landscape in 2025

OTA (online travel agency) usage varies widely by region, but don't forget smaller platforms may hold untapped potential.

**OTAs to watch refers to mid-range OTAs that are up and coming. To learn more about specific OTAs, reach out to the Account Management team today.*

SHARE OF OTA BOOKINGS BY REGION



The FareHarbor Distribution Network

With over 17,750 operators joining the FHDN in 2025, affiliate connections are driving more exposure and turning visibility into bookings and revenue.

**27% increase in TTV*
from 2024**

**Total transaction volume*



New integrations. Unmatched reach.

Together, these platforms have welcomed over 8 billion guests in the last decade — as of 2025, you can connect directly through FareHarbor.



Sources: www.news.booking.com/fast-facts/ & <https://news.airbnb.com/about-us>



Wave Watch: The rise of AI-powered search and Large Language Models (LLMs)

AI is changing how travelers discover and book experiences. Are you showing up where it counts?

From Google's AI Overviews to ChatGPT trip planning plugins, more travelers are turning to conversational tools to research activities and make bookings.

These tools rely on structured data and strong SEO signals to surface results. That means how your business shows up in search and in chat matters more than ever.

LLM Optimization Self Evaluation

- Are you using accurate, keyword-rich descriptions in your listings?
- Is your location data clean, consistent, and geo-specific?
- Are your direct booking links accessible and discoverable?
- Have you Googled your own experiences lately to see how they surface?



Use ChatGPT to enhance your website copy

1. Use natural, conversational language

Prompt: “Rewrite this tour description to answer the question: ‘What are the best family-friendly boat tours in Charleston?’”

2. Include structured, geo-specific info

Prompt: “Add local context to this tour listing so it includes city, region, and nearby landmarks, while sounding natural.”

3. Make copy scannable and structured

Prompt: “Restructure this tour page into clear sections with headers, bullet points, and FAQs to improve readability and SEO.”

4. Optimize for long-tail keywords

Prompt: “What long-tail search queries would a traveler use to find a [sunset kayak tour in Maui]?”

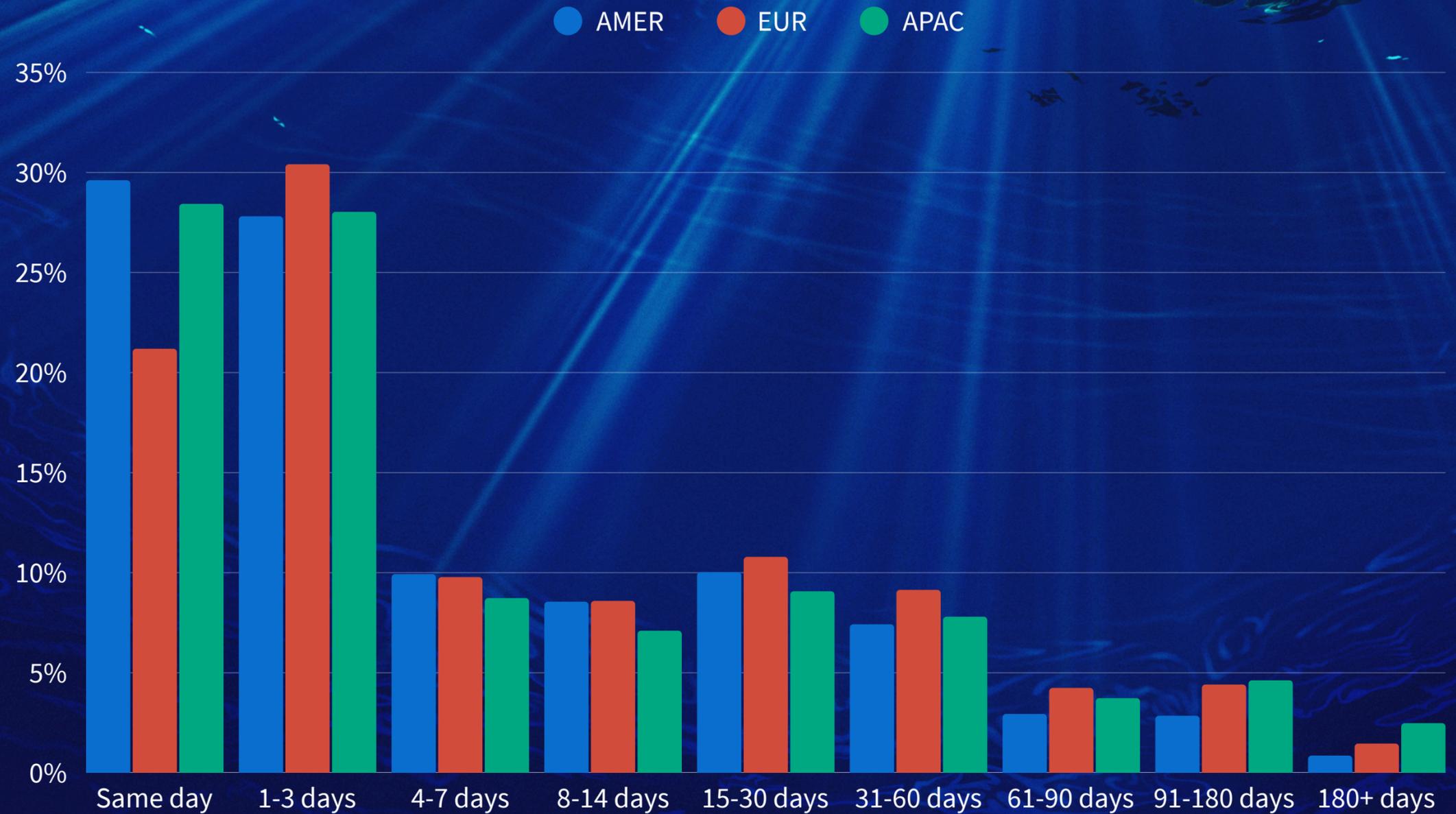
5. Audit and refresh older content

Prompt: “Review this tour description and improve it to rank well in AI-generated search results.”

Timing is everything

Over 50% of global bookings happen within 72 hours of the experience. However, don't forget to build your calendar in advance to capture early planners.

HOW FAR IN ADVANCE CLIENTS ARE BOOKING

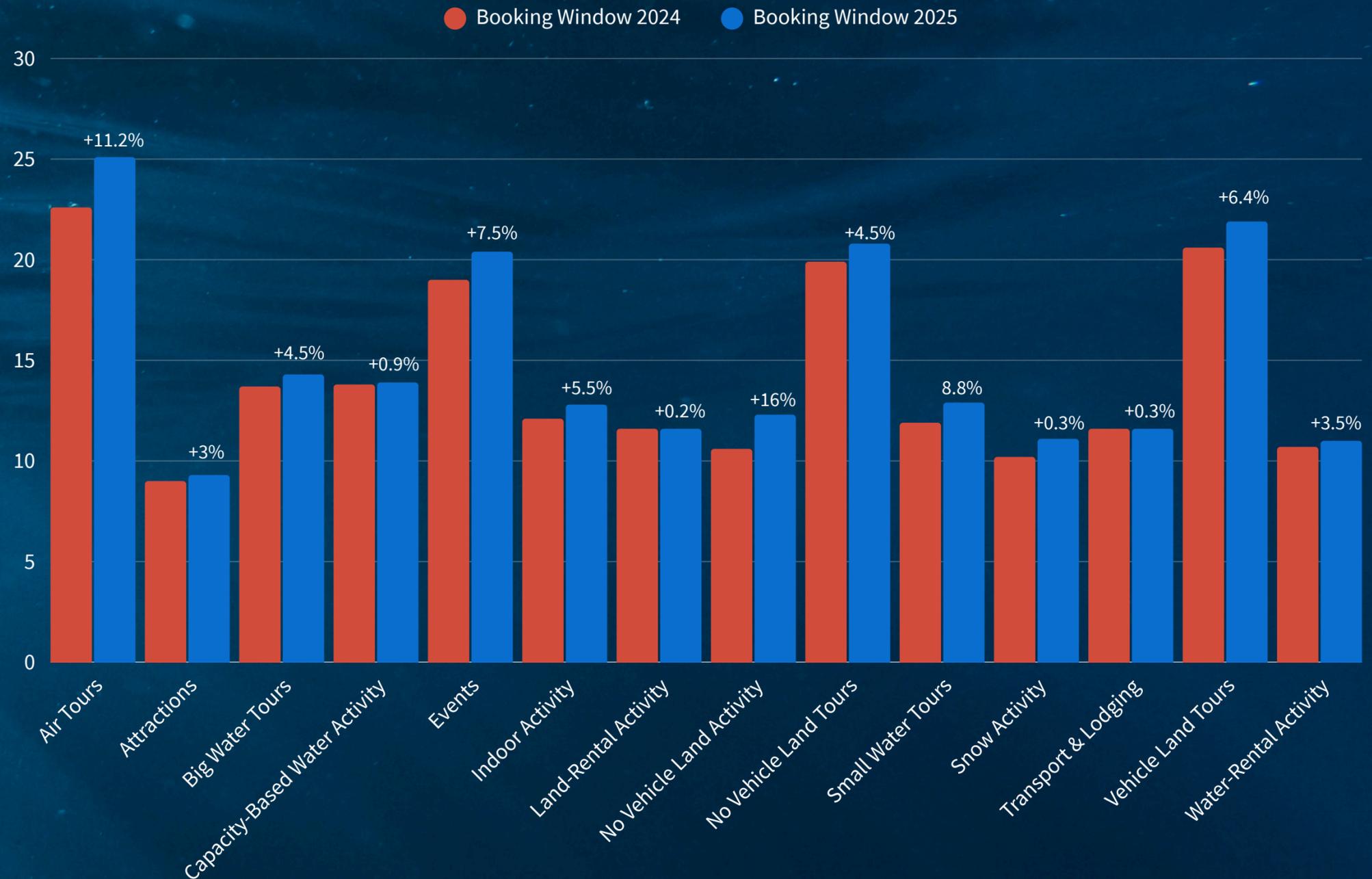


AMER

Understand your customer booking window at a deeper level

Across the Americas & the Caribbeans there was a general customer trend of booking at least few more days in advance compared to 2024 patterns.

AVERAGE BOOKING WINDOWS BY REGION (AMER)*



*A booking window refers to the time between when a customer books and when the tour or activity happens.



How far customers will travel within the U.S.

See the average one-way distance customers travel from their origin to your activity location

80-170 miles

Connecticut
Ohio
Indiana
New Jersey
Maryland
Delaware
North Dakota
Illinois
Kansas
Wisconsin

170-255 miles

Wisconsin
Minnesota
Pennsylvania
West Virginia
Michigan
Iowa
Nebraska
Arkansas
Virginia
Missouri
New Hampshire
New York

270-400 miles

Oklahoma
North Carolina
Kentucky
Texas
District of Columbia
Tennessee
Rhode Island
Mississippi
Massachusetts
Georgia
Alabama
Vermont
Oregon
Idaho

400-900 miles

California
South Carolina
Colorado
South Dakota
Florida
Maine
Louisiana
Utah
New Mexico
Nevada
Arizona
Washington

1000+ miles

Montana
Wyoming
Alaska
Hawaii



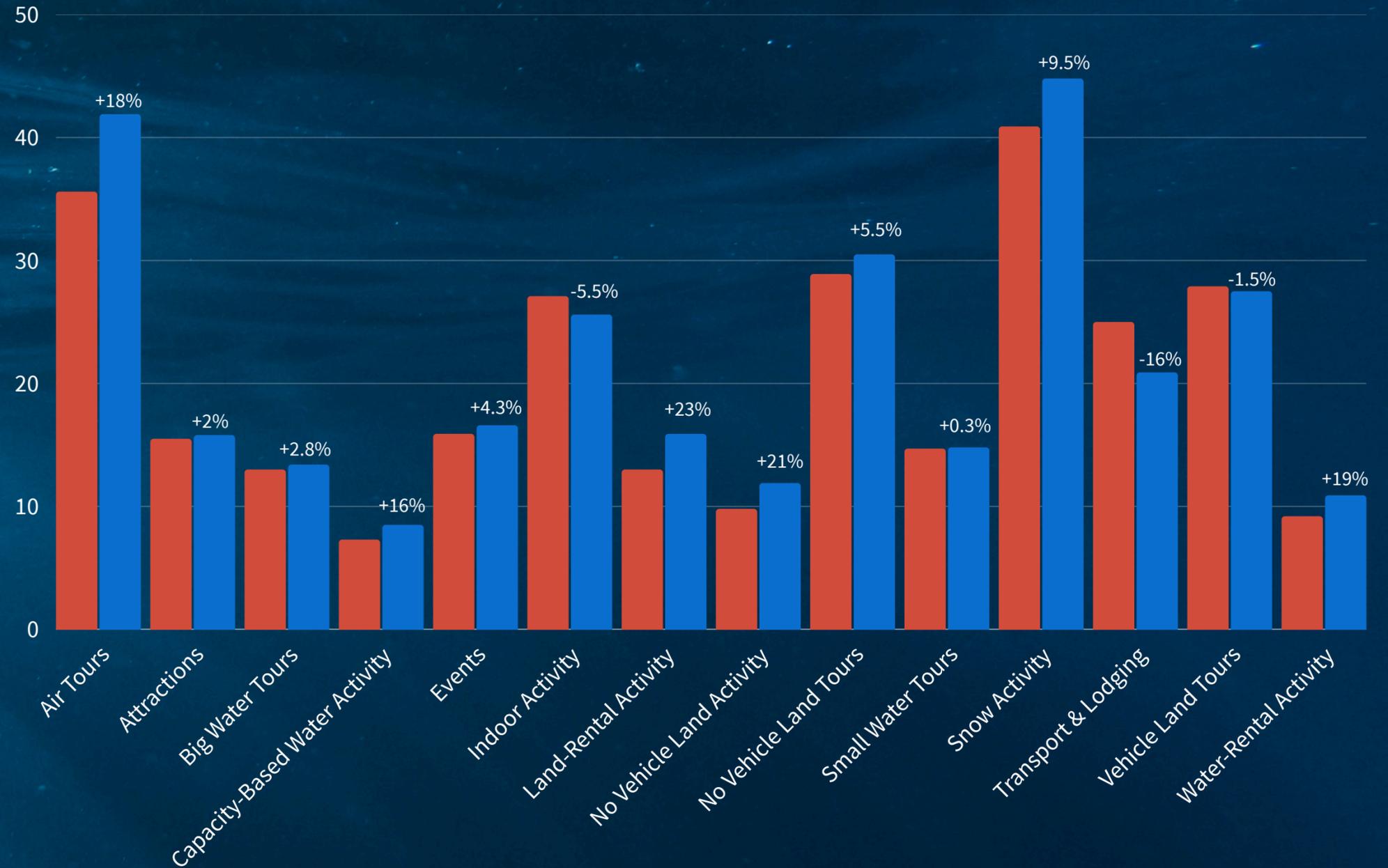
AVERAGE BOOKING WINDOWS BY REGION (EUR)*

● Booking Window 2024 ● Booking Window 2025

EUR

Understand your customer booking window at a deeper level

Across Europe consumer typical booked farther in advance with the exception of Indoor Activities and Transport & Lodging which was booked with less notice.



*A booking window refers to the time between when a customer books and when the tour or activity happens.

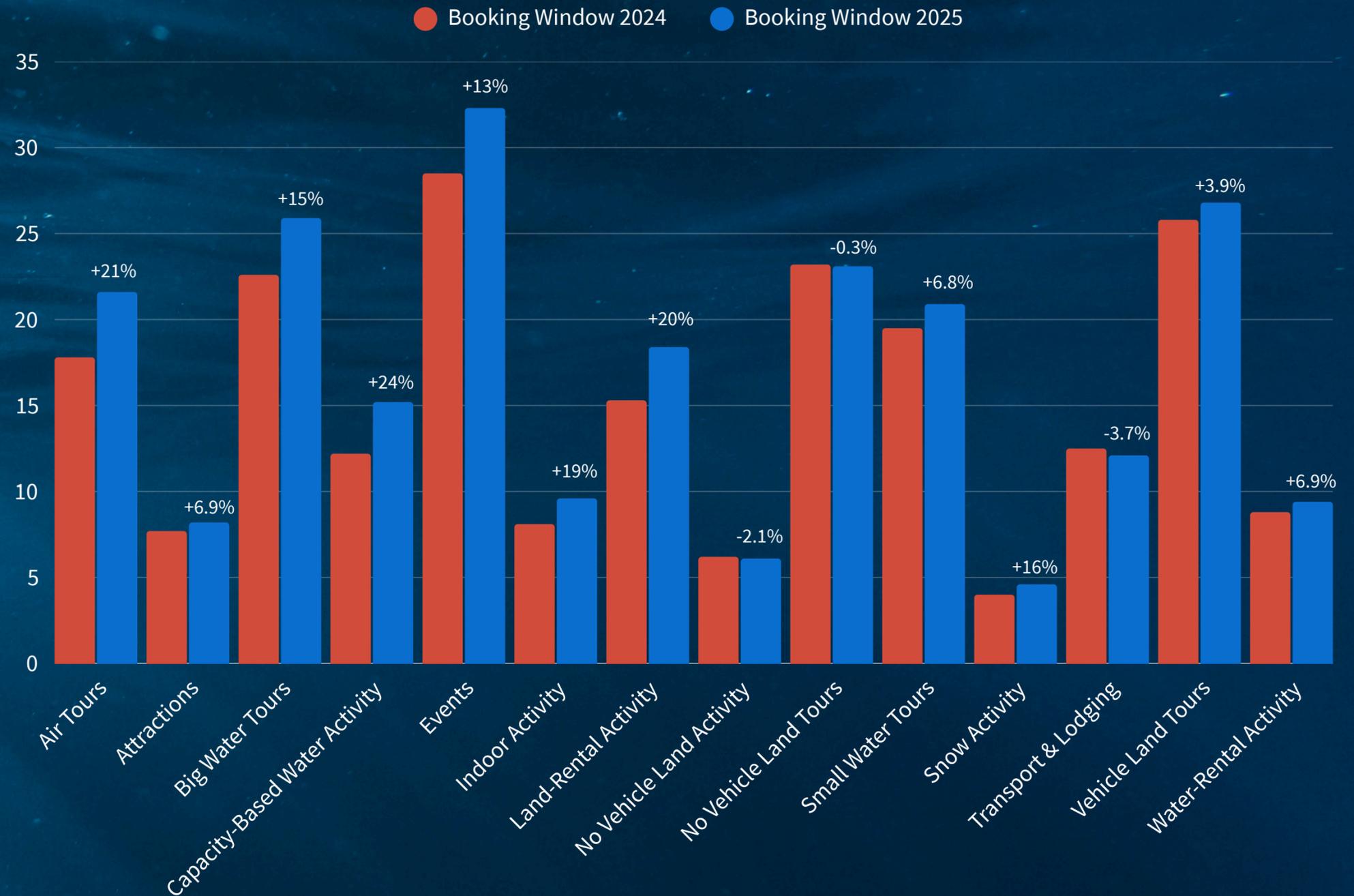


APAC

Understand your customer booking window at a deeper level

Australia, New Zealand, and Asia saw massive spikes in early bookings as well as some dips for No Vehicle Land Activities & Tours (see index for context) and Transport & Lodging.

AVERAGE BOOKING WINDOWS BY REGION (APAC)*



*A booking window refers to the time between when a customer books and when the tour or activity happens.



Don't Drift: 7 questions to see if you're showing up when & where it matters



Calendar Prep

- Are your tours and availability bookable at least 3–6 months in advance to capture early planners?
- Are you opening availability in peak travel periods based on last year's booking windows?

Marketing Alignment

- Are you tailoring ads or email timing based on how far in advance different markets book?
- Are you targeting local vs. long-distance travelers with region-specific content?
- Have you adjusted messaging for desktop and mobile-first buyers?

Channel Strategy

- Are you using the FHDN or affiliates to boost visibility?
- Is your OTA share balanced for profitability?

Tidal shifts in travel demand

See how global booking patterns flowed across regions — and where domestic vs. international demand surged.

INTERNATIONAL VS. DOMESTIC BOOKINGS BY REGION (TTV YOY GROWTH RATE)



Wave Watch: There's growth in live tourism



Travelers are planning trips around live events — from concerts to the World Cup — and the wave is building.

Take Bad Bunny's 31-show Puerto Rico residency for example. FareHarbor operators saw a clear surge: between July 1 and September 14, 2025, TTV rose 14% year-over-year — nearly double the island's overall growth rate for the year.

What this means for you:

- Highlight availability before and after major local events
- Use geo-targeted keywords like "things to do near [event/city/venue]"
- Offer themed packages or promo codes tied to local events
- Check local calendars and events schedules for 2026 to see potential opportunities to capitalize on

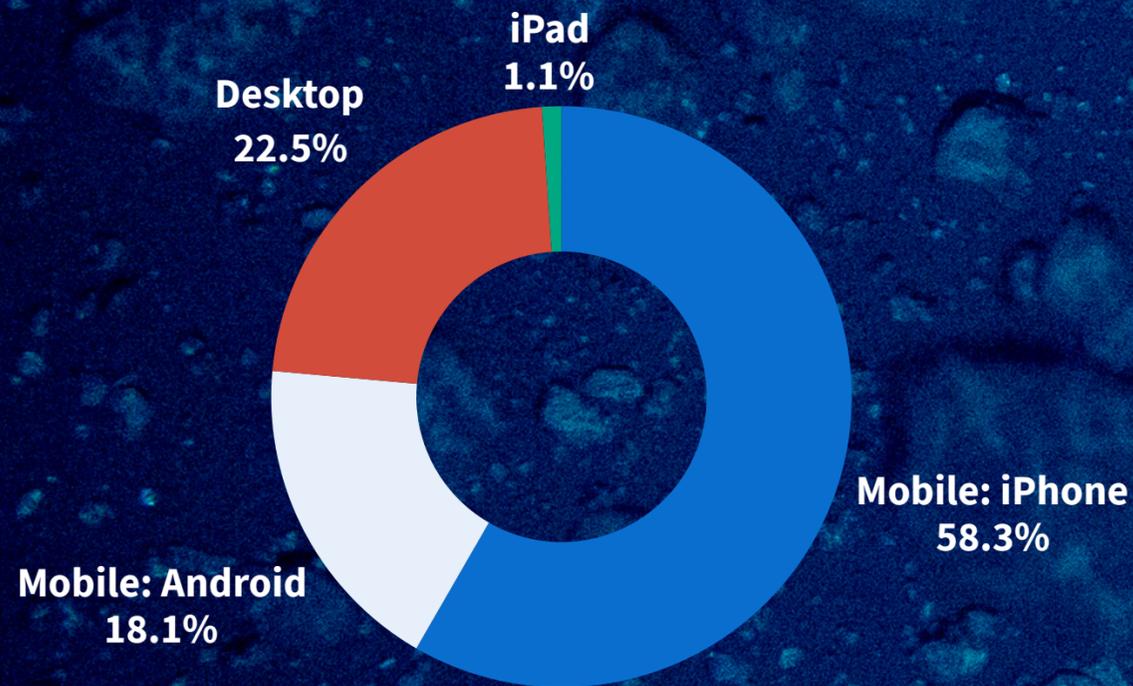
A glowing jellyfish is the central focus, set against a dark blue, deep-sea background. The jellyfish's bell is translucent and glows with a soft, ethereal light, revealing internal structures. Its tentacles are long and thin, trailing downwards. The overall mood is mysterious and serene.

Conversions

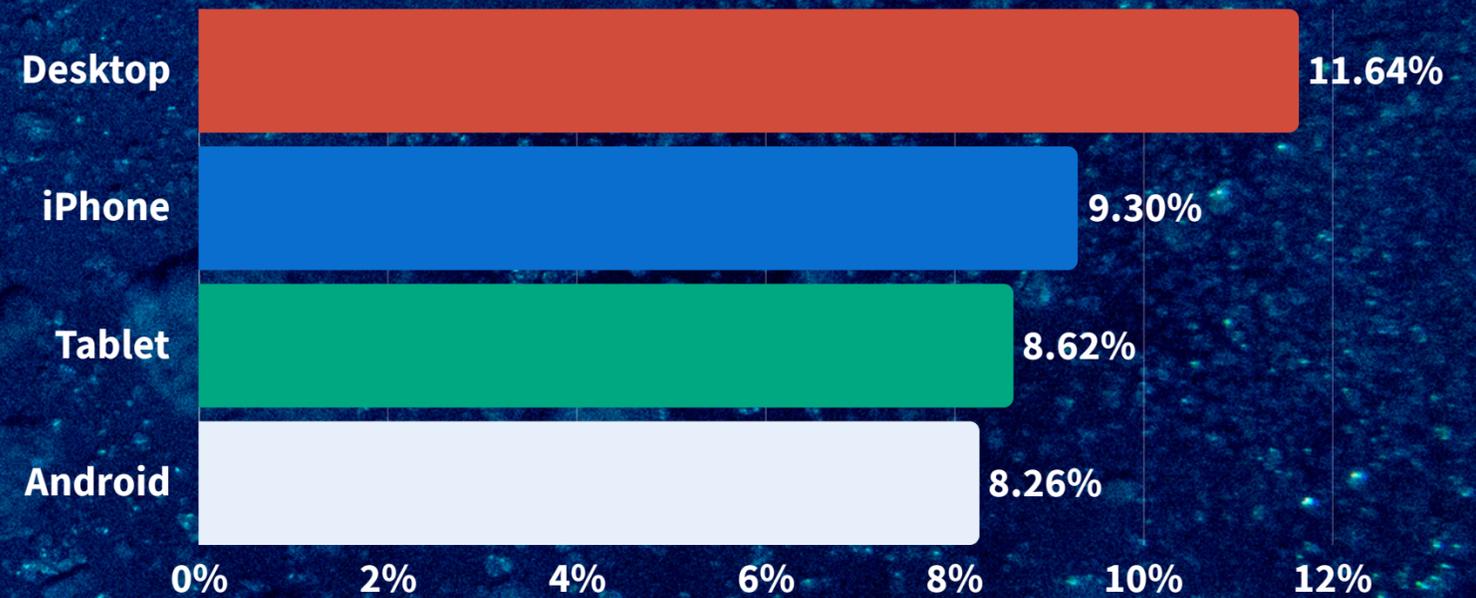
Getting to the bottom of what turns lookers into bookers

Mobile accounts for 76% of bookings

However, Desktop users are still more likely to convert. Staying optimized for all devices is key.



PERCENTAGE OF CONVERSIONS BY DEVICE IN 2025



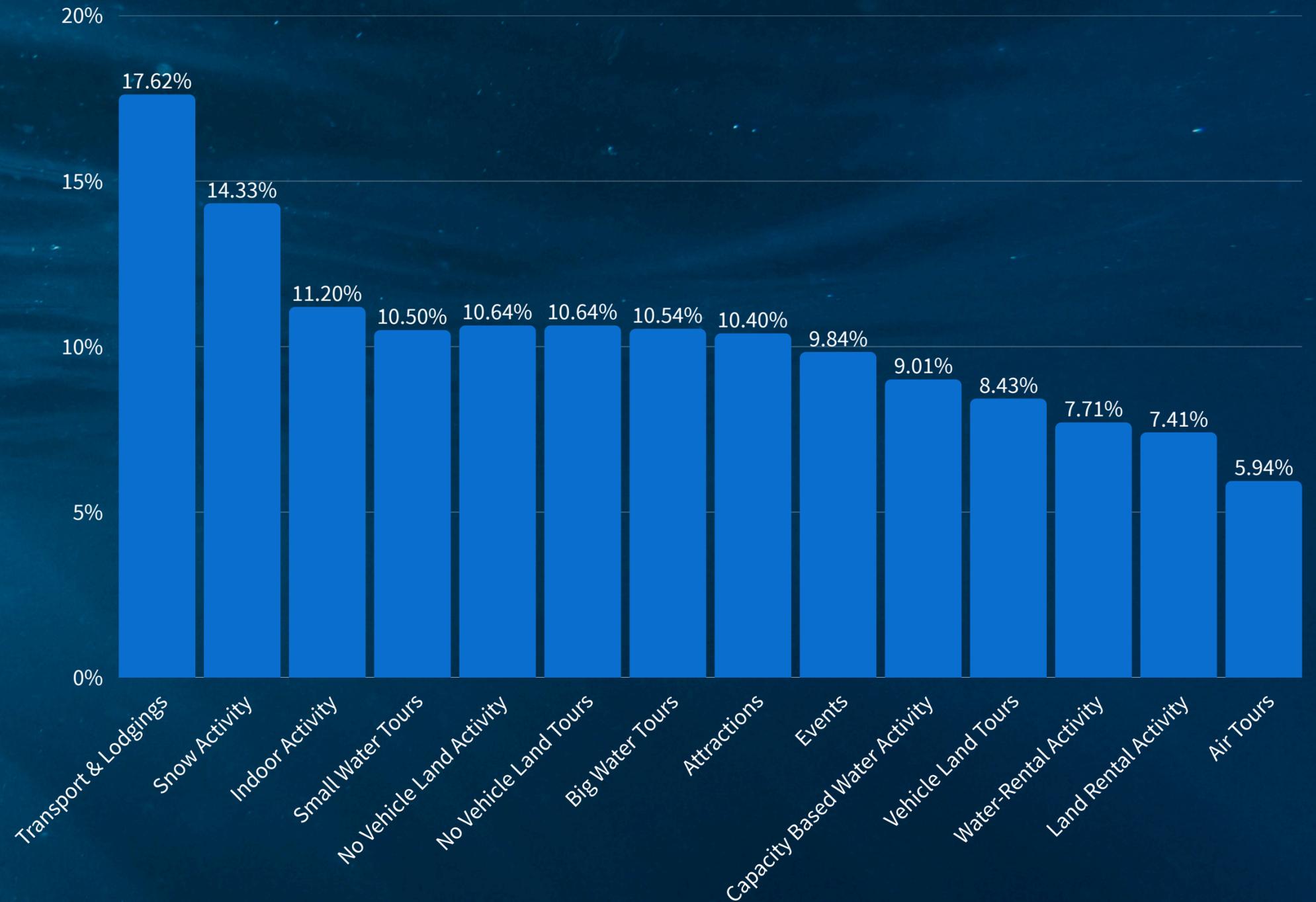
CONVERSION RATE BY DEVICE IN 2025



Average conversion rate by category

How does your conversion rate stack up in your category?

Visit the [Index](#) for a deeper breakdown of each category.



Don't Drift: Boost bookings instantly

Use this quick checklist to audit your booking flow and spot easy wins.

- Feature only up to 6 items in your booking flow to reduce choice overload
- Sort items by popularity to help guests pick faster
- Include subheadings in your listings to add more important info at a glance
- Enable price preview to improve clarity and build trust by having no fee surprises
- Use photos that show guests enjoying your experience to build an emotional connection
- Include 6+ images per item to boost trust and exploration
- If spots are limited, promote the remaining seats to encourage guests to book on the spot
- Open more spots when demand is high, and scale back when it's slow



Clients using FareHarbor Sites experience an average 19.8% increase in conversions compared to those without

What do 19.8% higher conversions look like? If you previously had 1,000 bookers, with a FareHarbor Website you'd see 1,198. That's extra revenue right in your pocket.

Additionally, in a study of 100+ FareHarbor Websites, operators saw an average increase of 10% in website traffic and 7% increase in revenue.



The average return on ad spend (ROAS) with FareHarbor SmartAds is 5x

Operators have the flexibility to set their own ROAS target, allowing them to balance between maximizing growth or maintaining tighter margins.



Don't Drift: Are you showing up in AI-powered search?

Search is changing. To stay visible, your website needs to be optimized for both traditional SEO and Generative Engine Optimization (GEO).

4 ways to improve your visibility:

- 1 Add seasonal content with natural, question-based language
- 2 Refresh title tags and meta descriptions
- 3 Use Public Headlines and conversational language
- 4 Schedule a call with the FHS team for an SEO & GEO review



Success Story: From rankings to revenue

How Dolphin Quest scaled their
impact (and their bookings)
with a FareHarbor website

Dolphin Quest has inspired and educated visitors since 1984, offering marine mammal encounters that support ocean conservation across Hawai'i and Bermuda. As demand grew, they needed a website that could keep up with both their mission and their momentum.

After switching to a FareHarbor site, they saw major growth across all key metrics — with a cleaner design, simplified booking flow, and better visibility in search.

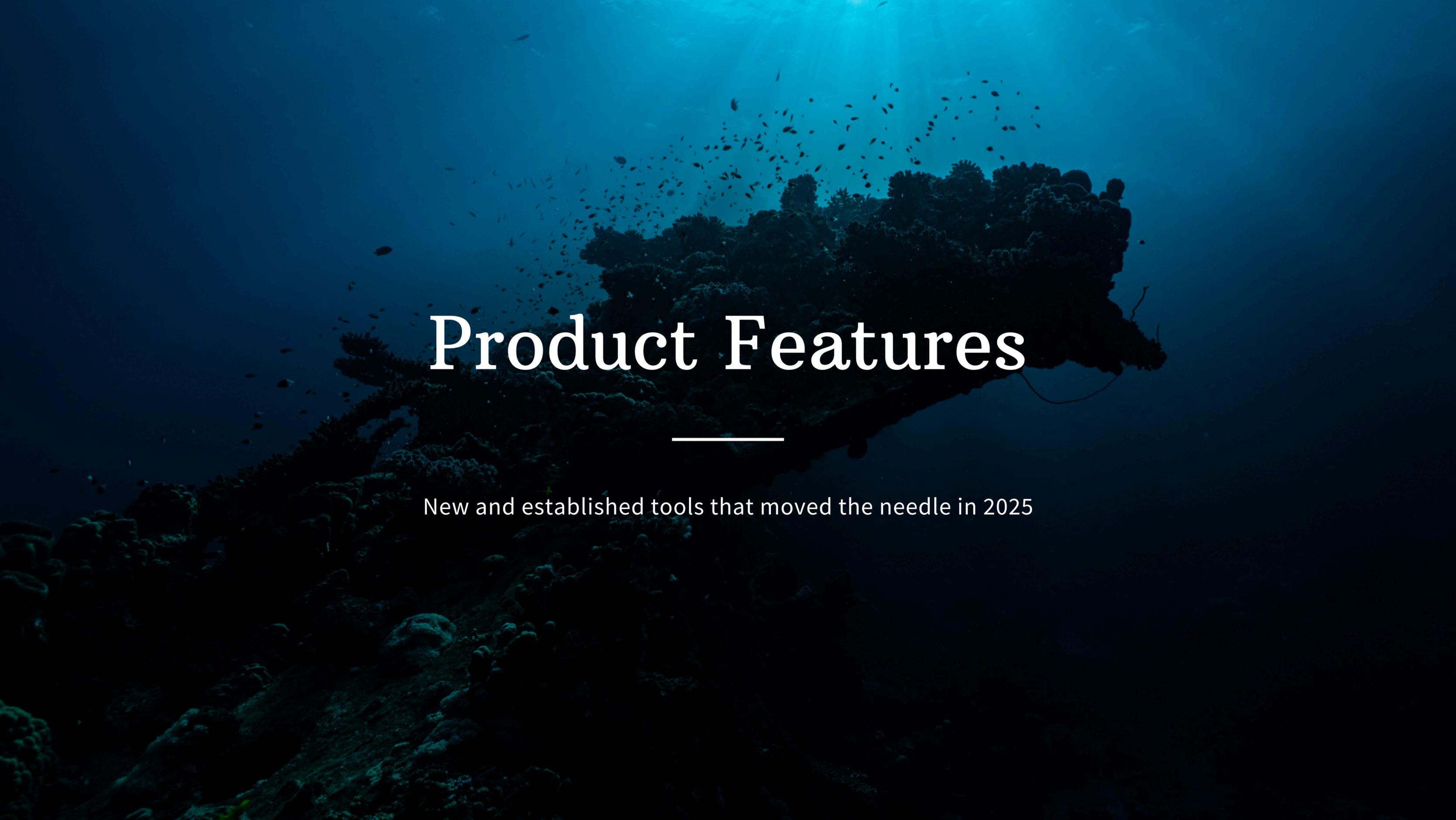
“Having FareHarbor design and build our new website was one of the best decisions we’ve made.”

— Bill Wolden, Director of Operations

Key Results

- **+92%** increase in monthly traffic
- **+94%** growth in top-ranking keywords
- **+40%** increase in online direct bookings



An underwater scene with a vibrant blue color palette. In the foreground, there is a large, dark coral reef structure. Above it, a school of small fish is swimming. The background shows a bright light source, possibly the sun, filtering through the water, creating a shimmering effect. The overall atmosphere is serene and natural.

Product Features

New and established tools that moved the needle in 2025

Wait no longer for Waitlist

Capture high-intent demand and turn it into real earnings with this simple, yet powerful tool. When a customer tries to book a fully booked activity, they can join a waitlist to be contacted if a spot opens up.

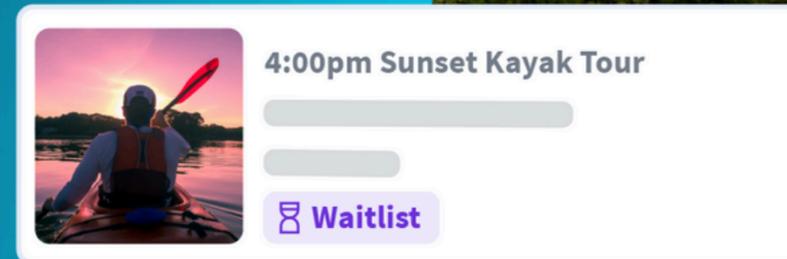
To enable Waitlist, visit [FareHarbor's Help Center](#) or reach out to support@fareharbor.com for more assistance.



2:00pm Kayak Tour

Progress bars: 100% (grey), 50% (grey)

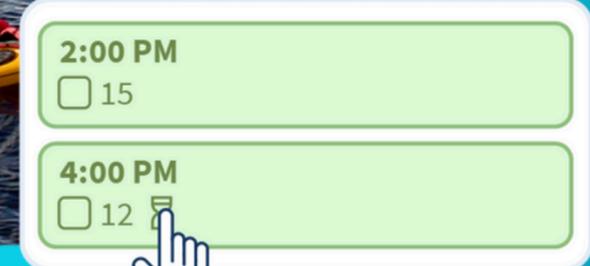
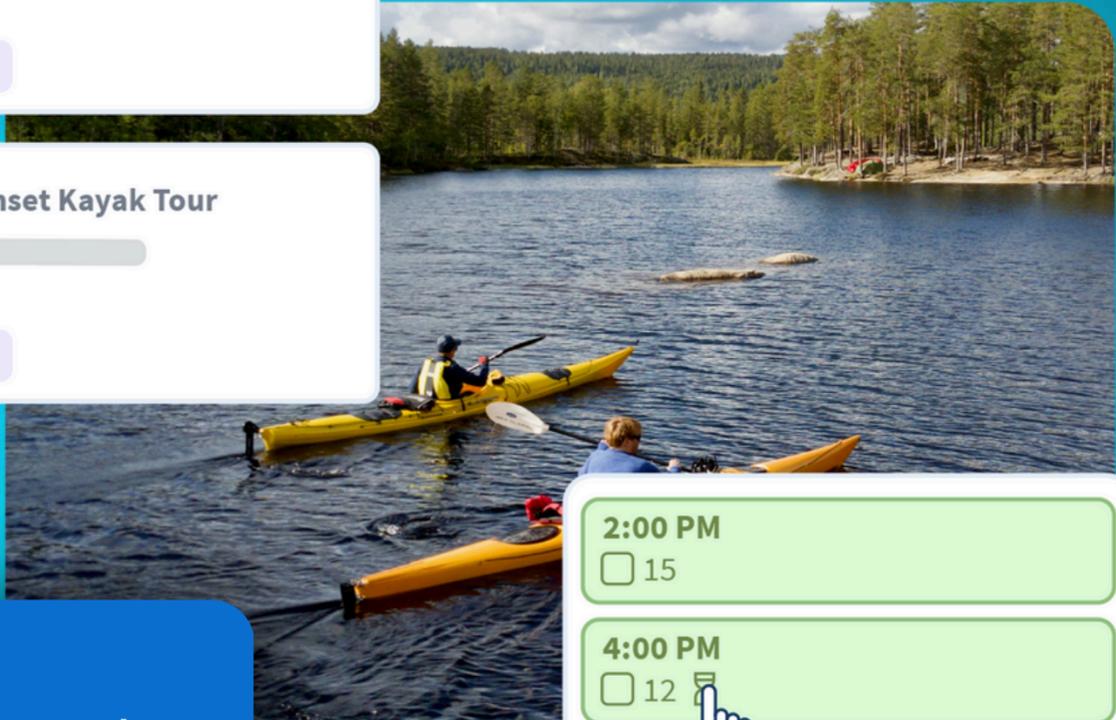
 Waitlist



4:00pm Sunset Kayak Tour

Progress bars: 100% (grey), 50% (grey)

 Waitlist



2:00 PM
 15

4:00 PM
 12 

 3 waiting

Since it's release in April, **\$2M in TTV** has been driven from Waitlist

Success Story: Sold out? No problem.

How one Kauaʻi-based luau used Waitlist to capture \$23,000 in bookings in just two months.



When their luau and dinner show repeatedly sold out, the team needed a better way to handle guest demand. Their DIY waitlist process was hard to manage — and easy to miss.

After enabling FareHarbor's Waitlist tool, they were able to streamline everything. Now, guests can easily join the waitlist when availability runs out, and staff can manage submissions, send follow-ups, and convert cancellations into revenue — all within the Dashboard.

Key Results

- **\$23,000+** in revenue from waitlist customers (in 2 months)
- **Smother guest experience** and fewer missed opportunities
- **Seamless waitlist management** no extra tools needed

Trip Protection in action

It's a win-win — customers get flexibility, and you get fewer refund disputes and more revenue.

Trip Protection is a tailored Custom Field. For more assistance, reach out to support@fareharbor.com



Trip Protection drove

\$10.1M

for our operators in 2025

7.25%

of all bookings purchased Trip Protection, but it was purchased the most in May through September during the high summer vacation season

The power of Combos

Our Combos functionality makes it easy for operators to upsell additional offerings, such as experiences or retail items, within a single, uninterrupted booking experience.

Here are the results after six months of enablement.

To setup Combos, visit [FareHarbor's Help Center](#) or reach out to support@fareharbor.com for more assistance.



An infographic on a teal background. At the top, a blue rounded rectangle contains the text '6.76%' in large white font, with 'TTV growth after enabling Combos' in smaller white font below it. Below this is a white rounded rectangle representing a mobile app interface. It features a 'No thanks' button at the top, a large blue plus sign icon in a circle, a red 'Save 20%' button, a photo of a boat with a colorful parachute, and a blue 'Add combo to cart (1)' button at the bottom. The interface also shows a red button and a photo of a person on a boat.

Success Story: \$220K in one month with Packages

How one ferry operator used FareHarbor Combos to streamline round-trip bookings and increase revenue.



This ferry company transformed their guest experience by introducing round-trip Packages, allowing customers to book both departure and return in a single, seamless flow. The result? A faster checkout, fewer booking mistakes, and a setup that better supports their operations.

By guiding guests through a clearer booking path, the team saw a massive boost in both volume and efficiency — all while simplifying the process for their staff and their travelers.

Key Results

- **2,150+** round-trip tickets sold in one month
- **\$220,000+** in ticket revenue generated
- **Streamlined booking flow** = fewer errors and faster conversions

Operators lean into Private Events for premium revenue

The events drove an average

**\$2,113 in revenue
per booking**

Operators hosted

**8,000+ private
events this year**

**Private events are only available in the U.S.*



Wave Watch: Fewer individual bookings? Big groups might be your tide-turner.

When individual bookings slow, one corporate buy-out can fill the gap. Team outings, incentive trips, and private retreats are gaining traction — and they bring high volume, locked-in revenue, and fewer logistics per head.

The key: Remove friction from the decision

- **Bundle it:** Use Combos or Packages to group activities, add-ons, or perks to drive up value.
- **Privatize it:** Use Private Events to offer exclusive group access.
- **Simplify it:** Ensure your booking flow makes bulk-buying a breeze.

Corporate groups want ease, exclusivity, and experiences that wow. Give them that, and you'll make waves even in slower waters.

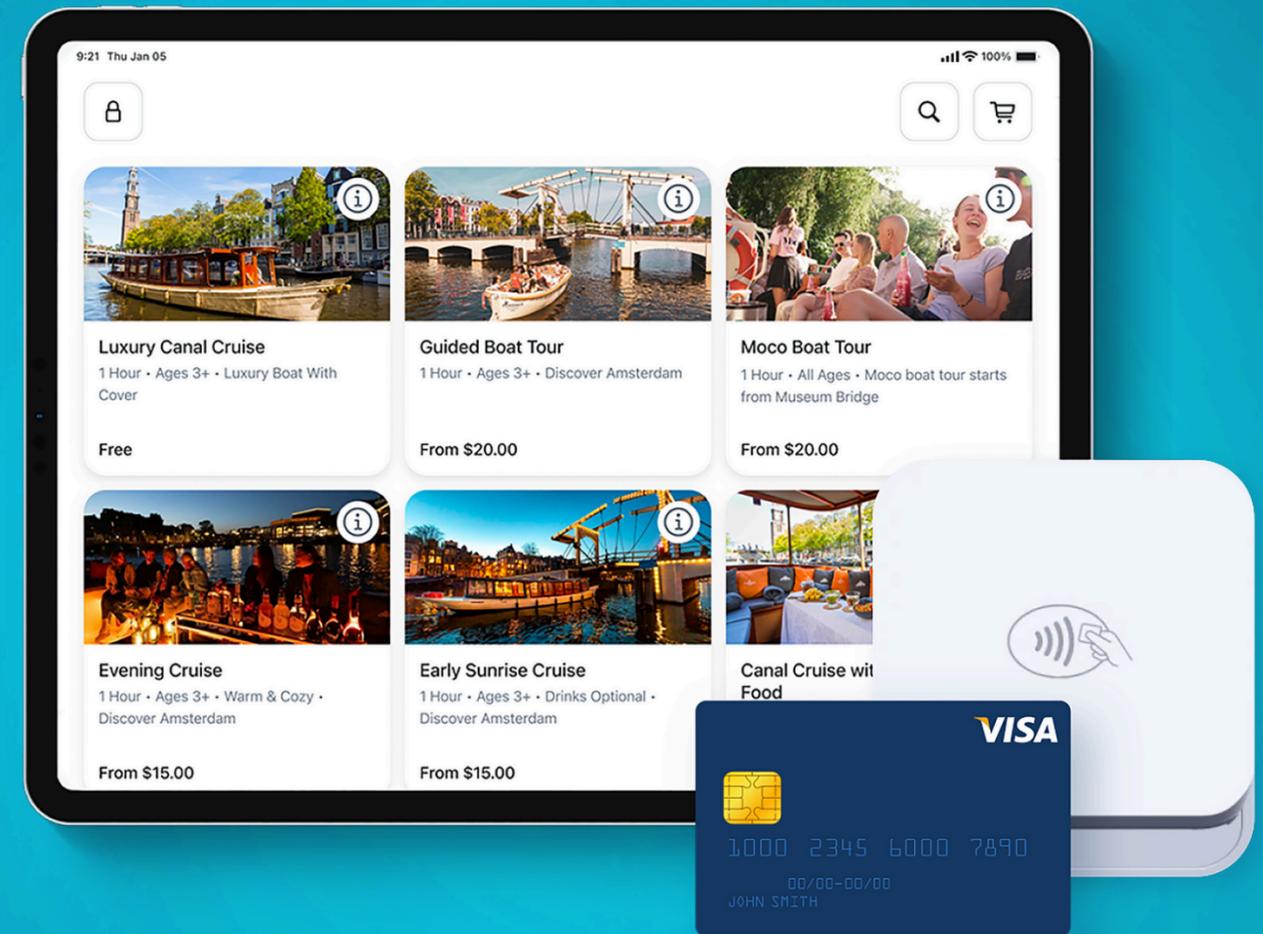


Saving time with FareHarbor Dock Staff Mode

90% of the time, selling a ticket using Dock Staff Mode is 3x faster than using the FareHarbor App Dashboard.

That means faster lines, more walk-ups, and more sales without adding staff.

FareHarbor Dock (iOS/Android) is currently only available to U.S., Canada, UK, Australia, New Zealand, and the EU. If you are interested in learning more, visit our [Help Center](#), please reach out to support@fareharbor.com, or the Account Management team.



7.6M+ waivers signed, zero hassle

Waivers make check-in faster, smoother, and easier for everyone involved — so your team can stay focused, and your guests can get straight to the experience.

To enable FareHarbor waivers, visit [FareHarbor's Help Center](#) or reach out to support@fareharbor.com for more assistance.

The screenshot displays a table with three columns: 'Self service check-in', 'FH waivers', and 'Buttons'. The table contains four rows of data. Below the table is a signature and a confirmation modal.

Self service check-in	FH waivers	Buttons
✗	✗	Start booking →
✓	✗	Check in → Start booking →
✗	✓	Sign waiver → Start booking →
✓	✓	Check in → Start booking → Sign waiver and check in Book your experience

[Handwritten Signature]

✓

Waiver signed!

We have sent a confirmation email to janedoe@email.com

Does anyone else have to sign? [Sign another waiver](#)



Don't Drift: Try a new integration to boost revenue or efficiency



BUOY



New! View guest info all in one place with Customer Profiles.

From booking history and waiver status to repeat-visitor tags and custom notes, Customer Profiles equips your staff to understand guests at a glance, deliver more personalized experiences, and market to the right audiences.

If you are interested in enabling Customer Profiles, please reach out to support@fareharbor.com or the Account Management team.

The screenshot displays a customer profile for John Blake. At the top, it shows 'Customers / John Blake' and a profile card with a 'JB' avatar, name 'John Blake', and 'VIP' status. Below this, four summary boxes provide key metrics: 'Last booking' (19 May, 2024), 'Lifetime value' (\$563), 'Total bookings' (4), and 'Customer since' (2 weeks). The profile is divided into two main sections: 'Customer information' and 'Activity timeline'. The 'Customer information' section includes contact details (+19 234 324 32 04, john.blake@gmail.com), preferred language (UK English), marketing consent (Subscribed), address (Hayes Street 65, San Francisco, CA 94102, United States), and birthday (18 April 1976, 49 years old). The 'Activity timeline' section, titled '7 activities', lists recent events: 'ATV Rentals' (Booked 28 Dec, 2024, Upcoming, Paid), 'San Francisco Helicopter Tours' (Booked 03 Dec, 2024, Past, Paid), and 'Signed waiver' (27 Nov, 2024) for a 'San Francisco Helicopter Tour' (Sunday, October 13, 2024 at 4:00 PM). Navigation tabs for 'All', 'Bookings', 'Waivers', 'Waitlists', and 'Memberships' are visible at the top of the activity timeline.



Don't Drift: Features + Strategy = Wins

Success comes from pairing smart tools with smart strategies. Build your calendar around real booking windows, use Affiliate Rules to protect your margins, and highlight key info with Public Headlines and Badges to convert faster.





FAREHARBOR

Index



AIR TOURS

Helicopter
Airplane
Balloon

ATTRACTIONS

Attraction
Zoo
Museum
Environmental attraction
Farm
Pop up
Aquarium
Haunted house

BIG WATER TOURS

Boat tours
Sailing
Dolphin or whale watching
Catamaran
Cruise / large boat
Sternwheeler / riverboat
Booze cruise
Pirate ship
Tallship

CAPACITY BASED WATER ACTIVITY

Fishing
Parasail
River tube

WATER-RENTAL ACTIVITY

Boat rental
Jetski
Surf
SUP
Marina
Kiteboard
Flyboard

EVENTS

Cultural performance
Festival
Theater

INDOOR ACTIVITY

Escape Room
Workshop
Cooking class
Rage room
VR

NO VEHICLE LAND ACTIVITY

Zipline
Axe throwing
Cave
Shooting range
Ropes course
Skydive
Climbing
Paintball

NO VEHICLE LAND TOURS

Hiking
Horse
Walking tour
Eco tour
Food tour
Ghost tour
Winery
Photography tour
Pub crawl

VEHICLE LAND TOURS

Bus tour
Train
Jeep
Bike tour
Trolley
Carriage
Segway
Brew bus

LAND RENTAL ACTIVITY

ATV
Exotic car
Bike rental
Scooter

TRANSPORT & LODGINGS

Ferry
Lodging
Shuttle
Campground

SMALL WATER TOURS

Snorkel
Kayak
Scuba
Rafting
Airboat
Dinner boat
Jet boat
Canoe
Duck boat

SNOW ACTIVITY

Snowmobile
Dogsled
Ski
Heliski
Snow tube
Ice rink
Sleigh ride