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B2B agency channel | Q4 2026 vs Q4 2025

B2B Agency Index Q4 2026

Where agencies send travelers this autumn and winter — and how that compares with last year.

Activity dates 1 Oct–31 Dec. 2026 forecast from bookings created by 5 Oct 2026; 2025 actuals. B2C excluded.



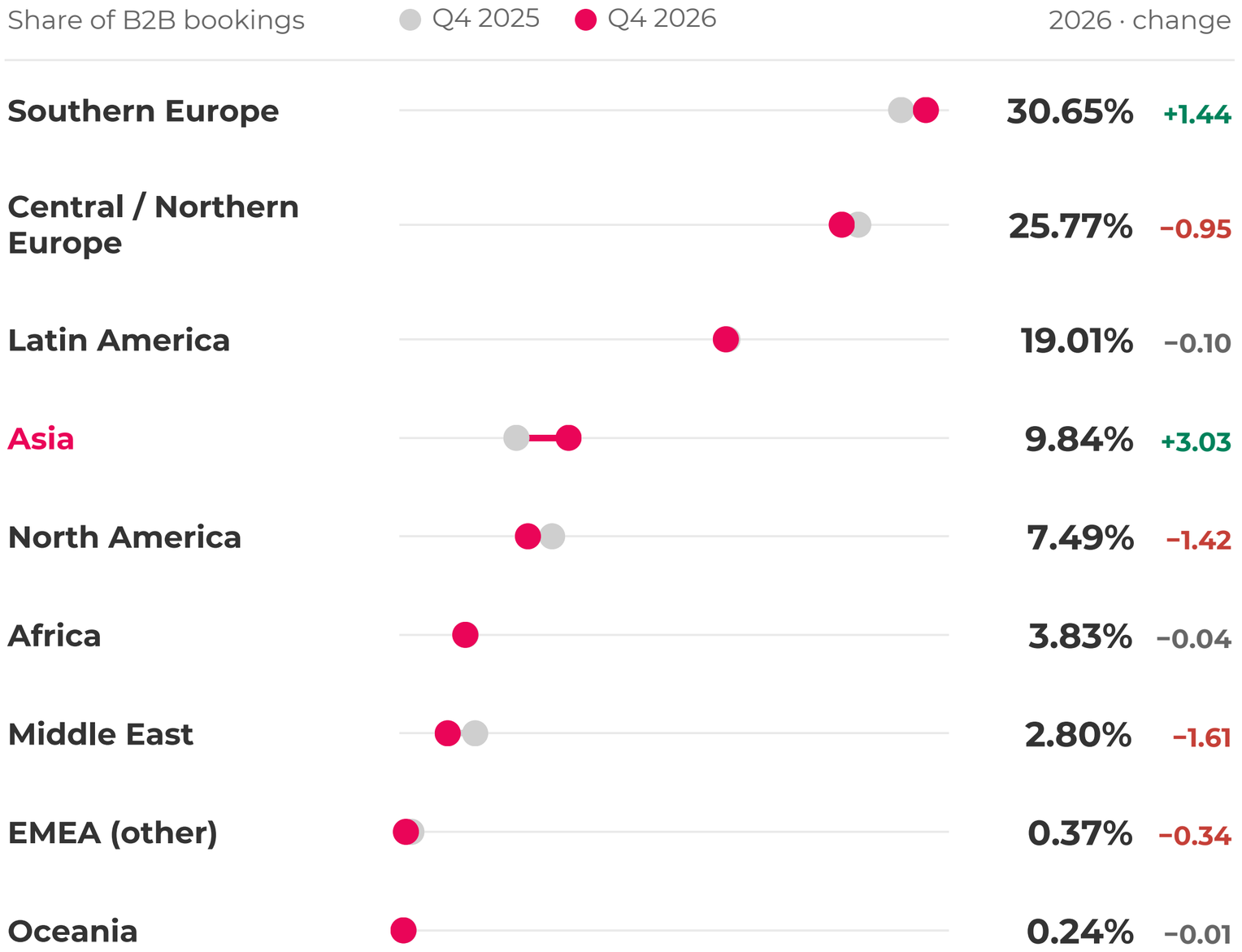
01 · Destination regions

Southern Europe leads, Asia accelerates

Japan: #10 → #5

9.84%

of agency bookings go to Asia, up from 6.81%. The Middle East and North America lose the most.



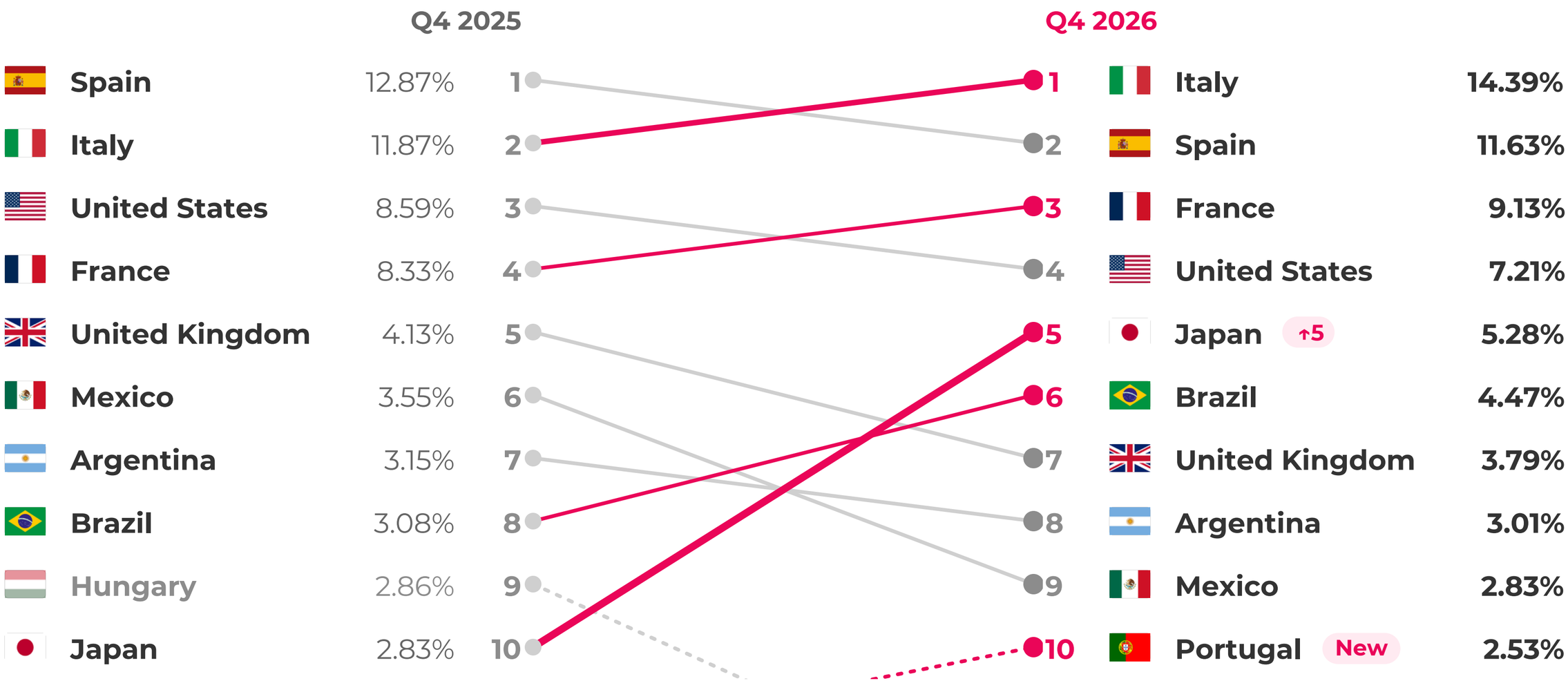
Change in percentage points (pp) vs Q4 2025.

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Italy takes the lead, Japan climbs five places

Share of B2B bookings



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Day trips and tickets gain ground

Q4 2026 share · change vs Q4 2025

Guided tours



42.82%

−4.00 pp · still half the mix

Day trips & excursions

26.25%

+2.47 pp

Attraction tickets



15.91%

+1.46 pp

Boat trips

5.28%

-0.11 pp

8 other categories

9.74%

The other categories

Action & nature	**3.04%**	**+0.23**
Shows & performances	**1.75%**	**−0.02**
Food & wine tourism	**1.42%**	**+0.08**
Transport & transfers	**1.12%**	**+0.18**
Multi-day excursions	**0.98%**	**+0.18**
Aerial tours / unique exp.	**0.60%**	**+0.04**
Additional services	**0.57%**	**−0.52**
Other	**0.26%**	**+0.02**

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Agencies plan about a month ahead

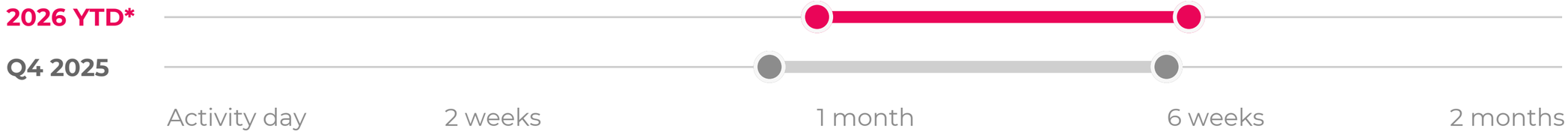
Median

28 days +2 vs 26

Average

44 days +1 vs 43

*2026 = Jan–Oct 2026



Average multi-day stay

3.45 days

Q4 2025: 3.44

Median multi-day stay

3 days

Q4 2025: 3





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One in four agency clients travels as a couple

25.69%
Couples

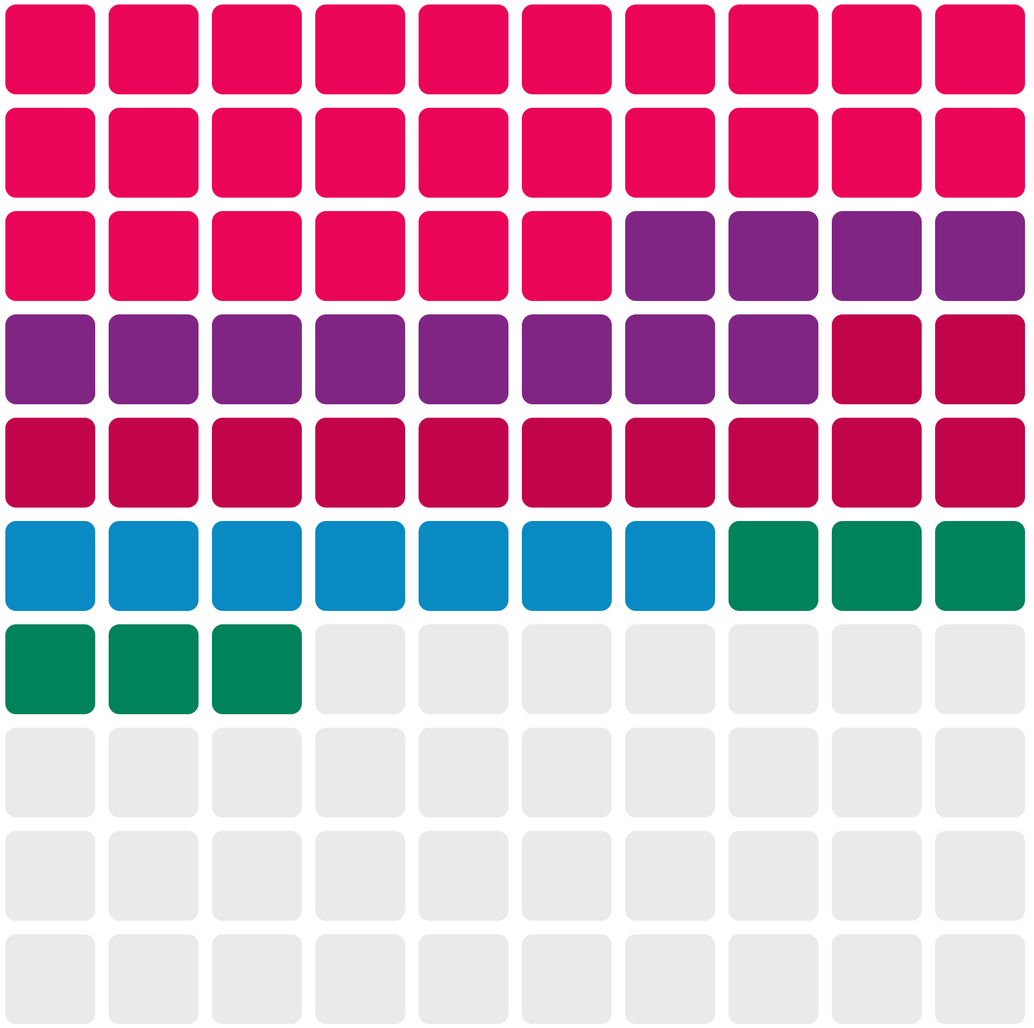
12.31%
Groups of friends

12.06%
Families (older children)

6.76%
Families (young children)

6.43%
Solo travelers

36.76%
Undefined / other



Each square = 1% of B2B bookings

Q4 2026 profiles arrive once activities have taken place.

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B2B Agency Index Q4 2026

Five takeaways

+3.03 pp



Asia grows fastest , with Japan jumping from 10th to 5th.

14.39%



Italy is the new #1 , ahead of Spain. Portugal enters the top 10.

+2.47 pp

Day trips gain share while guided tours ease to 42.82%.

28 days

Agencies book slightly earlier — 44 days ahead on average.

3.5 days



Multi-day trips hold steady , led by the Moroccan desert and Nile cruises. Couples remain the top profile.

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Thank you



Thanks for growing with us.
Let's keep building great experiences for your travelers.

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