Marketing Unforgettable Experiences in the U.S.

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The State of In-Destination

How Changing Traveler Trends are Transforming the In-Destination Industry

#arivaltravel

August 7, 2019
What Is Arival?
Conferences & Insights for the Best Part of Travel: Tours, Activities, Attractions & Experiences

www.arivalevent.com
www.arival.travel
Today’s Speakers

Douglas Quinby
Co-founder & CEO
Arival

John Laverne
Owner
Bulldog Tours

Perrin Lawson
Deputy Director and VP of Business Development
Explore Charleston
Today’s Agenda

1. Defining the In-Destination Industry
2. What Your Customers Want
3. Panel Discussion & Q&A
State of In-Destination

A multi-market survey of traveler attitudes, ambitions and behavior for tours, activities, attractions and events

Markets: U.S., U.K., France and Germany

Method: Online survey

Sample: 1,000 travelers from each market (adults, 18+) who have traveled 100 miles from home in the past year, including an overnight stay and qualifying activity or attraction, with a focus on the inbound U.S. travel market.
What Is the In-Destination Industry?
## In-Destination Activity Categories

<table>
<thead>
<tr>
<th>Attractions</th>
<th>Outdoor Adventure</th>
<th>Recreational Activities</th>
<th>Events</th>
<th>Tours (style)</th>
<th>Tours (mode)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amusement, adventure, or water park</td>
<td>Hiking/mountaineering</td>
<td>Golf</td>
<td>Music performances (rock, classical, jazz, etc.)</td>
<td>Sightseeing / seeing famous sites</td>
<td>Bus or motorcoach</td>
</tr>
<tr>
<td>Museum</td>
<td>Camping/backpacking</td>
<td>Tennis</td>
<td>Festivals</td>
<td>Tour of a specific museum or historic site</td>
<td>Car or van</td>
</tr>
<tr>
<td>Zoo or aquarium</td>
<td>Hunting/fishing</td>
<td>Yoga</td>
<td>Theater (plays, musicals)</td>
<td>Culinary or food tour</td>
<td>Walking</td>
</tr>
<tr>
<td>Historic or cultural site, monument,</td>
<td>Road biking, mountain</td>
<td>Spa or wellness</td>
<td>Dance or ballet</td>
<td>Shopping or market tour</td>
<td>Boat</td>
</tr>
<tr>
<td></td>
<td>or landmark</td>
<td>biking, cycle tour</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Observatory</td>
<td>Snorkeling/scuba diving</td>
<td>Culinary classes</td>
<td>Professional/collegiate sporting events</td>
<td>Beer, wine or drink-related tour</td>
<td>Bicycle</td>
</tr>
<tr>
<td>Natural wonder or attraction</td>
<td>Water sports (sailing, kayaking, surfing etc.)</td>
<td>Art classes</td>
<td></td>
<td>Art, music, photography or cultural tour</td>
<td>Segway</td>
</tr>
<tr>
<td></td>
<td>Climbing or caving</td>
<td>Shopping excursions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Safari, wildlife viewing, bird watching, etc.</td>
<td>Outdoor activities (zip lines, mini golf etc.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Horseback riding</td>
<td>Winter activities (ski, ice skating etc.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Off-roading, ATV, snowmobiling</td>
<td>Racing event (marathon, Tough Mudder, etc.)</td>
<td></td>
<td></td>
<td>Organized multi-activity multi-day tour</td>
</tr>
</tbody>
</table>

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Everyone does it
Leisure traveler: took a trip within the past year at least 100 miles from home that included an overnight stay
Average Number of Activities per Trip: 7
<table>
<thead>
<tr>
<th>Total Activities</th>
<th>U.S.</th>
<th>U.K.</th>
<th>France</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.7</td>
<td>5.4</td>
<td>7.8</td>
<td>8.9</td>
<td>7.3</td>
</tr>
</tbody>
</table>

Arrival’s 2019 State of In-Destination: 4,000 U.S., U.K., French & German travelers, August 2019
So What?

1. Those other activities may be your competition **AND** your marketing partners.
2. Your DMO/CVB can be the key to local cooperative marketing
What Your Customers Want
Activities Undertaken in the Last Year

- Historic site: 60%
- Attraction: 55%
- Natural attraction: 50%
- Museum, zoo, aquarium: 45%
- Sightsseeing tour: 40%
- Concert, theater: 35%
- Amusement park: 30%
- Spa, wellness: 25%
- Culinary tour/class: 20%
- Outdoor excursion: 15%
- Sporting activity: 10%
- Festival: 5%
- Pro-sporting event: 1%
- Thematic tour: 0%
Younger Travelers Seek Something Else

- Amusement, adventure or water park
- Food or drink tour, tasting, or class
- Organized outdoor excursion
- Sporting activity that you participated in
- Thematic tour*

* Thematic tour: a tour with a specific theme, such as a ghost tour, TV show themed tour, art or photography tour, etc.

Arival's 2019 State of In-Destination: Activity travelers: US – 993, UK – 1,001, FR – 1,000, DE – 1,000; August 2019
What about “Local Experiences”? 
Younger travelers seek a different path, right?
It’s All Kinda Equally Important

- Seeing the sites
- Cultural enrichment
- Going off the beaten path
- "Local" experiences

Arival's 2019 State of In-Destination: 4,000 U.S., U.K., French & German travelers, August 2019; Icons by Flaticon.com

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Arival's 2019 State of In-Destination: Activity travelers: US – 993, UK – 1,001, FR – 1,000, DE – 1,000; August 2019
How does the traditional attraction or operator serve the demand for alternative and local?
"Let me try"

Offer something “insidery”

1. Special access: a backstage pass
2. A special treat they could only get with you
3. Give them a swing at bat

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1. Classic tours
2. Experiences
3. Self-guided

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**Venice Tours**

<table>
<thead>
<tr>
<th>Package</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Venetian craftsmen workshop - Masks, food, glass and more!</td>
<td>€ 159.00</td>
</tr>
<tr>
<td>Venice Grand Canal Treasures Boat Tour</td>
<td>€ 15.00</td>
</tr>
<tr>
<td>Charming Gondola Ride in Venice</td>
<td>€ 32.00</td>
</tr>
<tr>
<td>Venetian Gondola Serenade</td>
<td></td>
</tr>
<tr>
<td>Gondola Ride &amp; Historical Venice Walking Tour</td>
<td></td>
</tr>
<tr>
<td>Vivaldi e Mozart in st. Mark's square</td>
<td></td>
</tr>
</tbody>
</table>

Read about Venice City Tours here on Arival.travel
Two Insights Papers Available to US Travel Members:

Access your papers now at www.ustravel.org/research/ncae-arival-study
Q&A

Access the full research now at www.ustravel.org/research/ncae-arival-study

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NCAE’S IN-DESTINATION STUDY

bit.ly/NCAEArivalStudy

The third white paper will focus on the Path to Purchase for Attractions and Experiences and will be released in late August.

SAVE THE DATE for the next webinar on September 4.

Questions? Email NCAE@ustravel.org
Join us at Arival in Orlando

The Event for the Best Part of Travel:
Tours, Activities, Attractions & Experiences

Oct 28-31, Orlando, FL, at the Gaylord Palms Resort & Convention Center

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Thank you!

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