

A nighttime cityscape featuring a large, multi-arched bridge over a river. The bridge is illuminated with blue and red lights. In the background, a city skyline is visible with various buildings lit up. The sky is dark blue, and several large, colorful fireworks are exploding in the upper right portion of the frame. The text 'Marketing Unforgettable Experiences in the U.S.' is overlaid on the image in white. 'Marketing' and 'Experiences' are in a clean, sans-serif font, while 'Unforgettable' is in a white script font. 'in the U.S.' is in a bold, sans-serif font.

Marketing *Unforgettable*
Experiences **in the U.S.**

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The State of In-Destination

The State of Digital for Tours, Activities & Attractions

 **ARIVAL**



U.S. Travel Association

**National Council of
Attractions and Experiences**

#arivaltravel

Oct. 9, 2019

What Is Arival?

Conferences & Insights for the Best Part of Travel:
Tours, Activities, Attractions & Experiences

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Today's Speakers



Douglas Quinby
Co-founder & CEO
Arival



Bob Hofmann
Vice President
Broadway Inbound



Robert Graff
Vice President, Sales & Marketing
Bindlestiff Tours



U.S. Travel Association
**National Council of
Attractions and Experiences**

Today's Agenda

1. The State of Tech & Digital

- Where are we, and where's it headed
- Traveler expectations
- The distribution map

2. 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.

Contact:

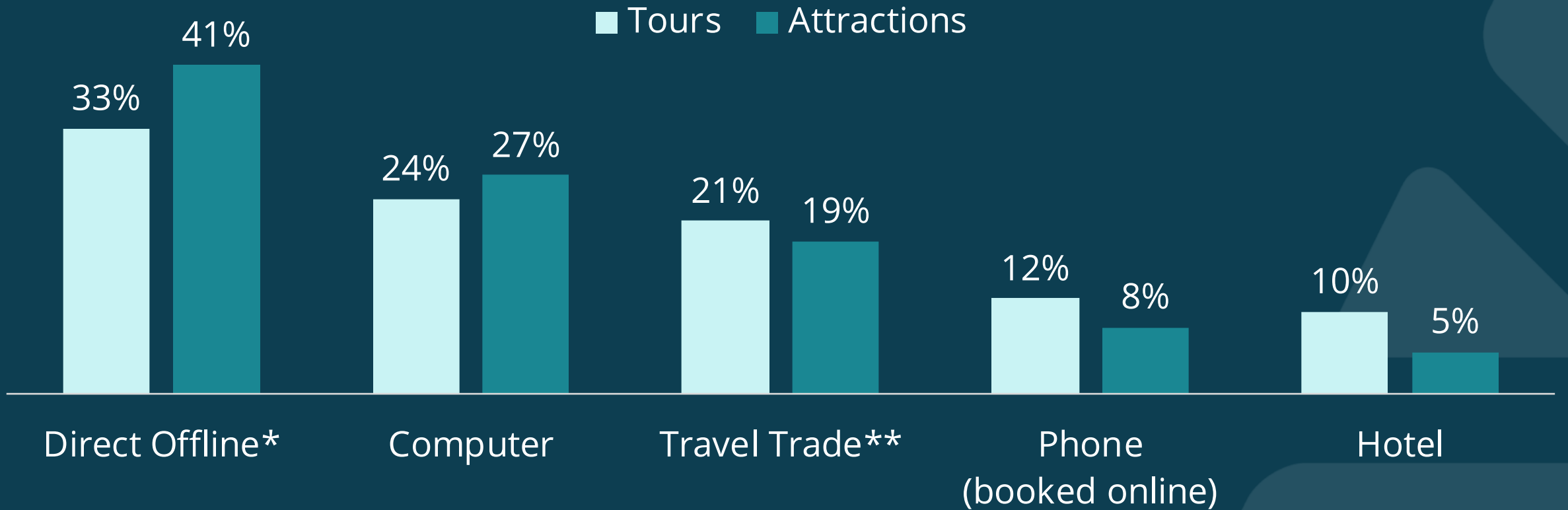
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Where are we?



What Travelers Say: How They Book Tours & Attractions (2018)



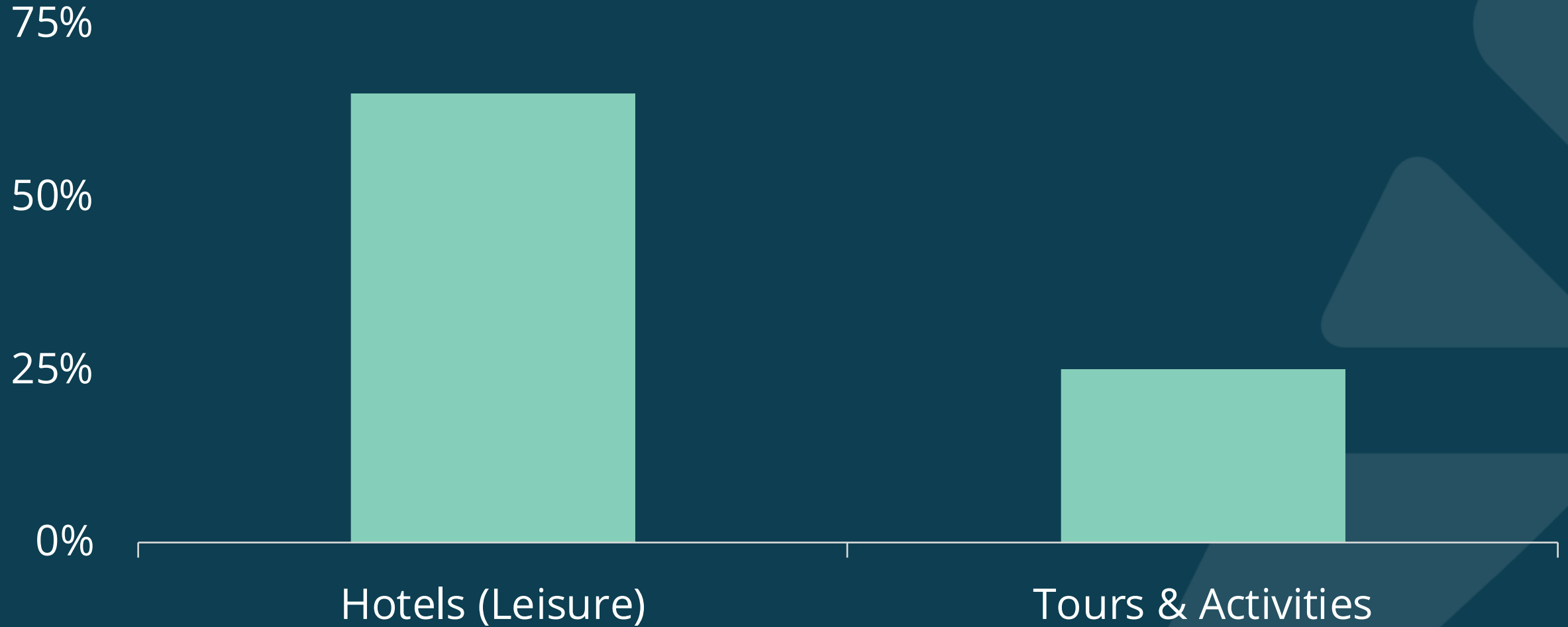
* Purchased at ticket office or over a phone call directly with the tour or attraction operator.
The vast majority of these bookings (90%) are made in person.

** Travel trade includes traditional travel agencies, tour operators and destination visitor centers or ticket offices.
It does not include online travel agencies.

Where are we going?



The Next Big Sector for Online Migration



US\$1.8B Raised Since 2017

 Yours To Explore	\$525M		\$559M		\$40M
	\$26M		\$33M		\$26M
	\$10M+		\$12M		\$6M+
	\$12M		\$9M		\$5M
	\$7M		\$8M		\$2.6M
	N/A		N/A		N/A

How do we get there?



1) Plumbing (Technology)



Insert 100+ logos

The In-Destination Distribution Map

Supply

Ground

Attractions

Activities

Events

Guide/Host

Day Tour Operator

Technology



Reservations Tech



**Distribution/
Resellers**



2) Connectivity



Connectivity Terms

a. Offline

b. Extranet

c. API (application programming interface)

d. Channel manager



The In-Destination Distribution Map

Supply

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Distribution/ Resellers

Direct (B2C)

- Online (web, mobile)
- Offline

Online Sellers

- TripAdvisor
- Expedia
- GetYourGuide
- Klook
- Groupon
- Tiqets
- Veltra

Wholesalers/ Package TOs

- TUI
- Travel Corp.
- Hotelbeds
- JTB

Non-travel Channels

Corporate benefits
(e.g. EBG,
Blueboard)

Attraction Passes

- CityPass
- Sightseeing Pass,
- Leisure Pass
- iVenture

Travel Industry Sellers

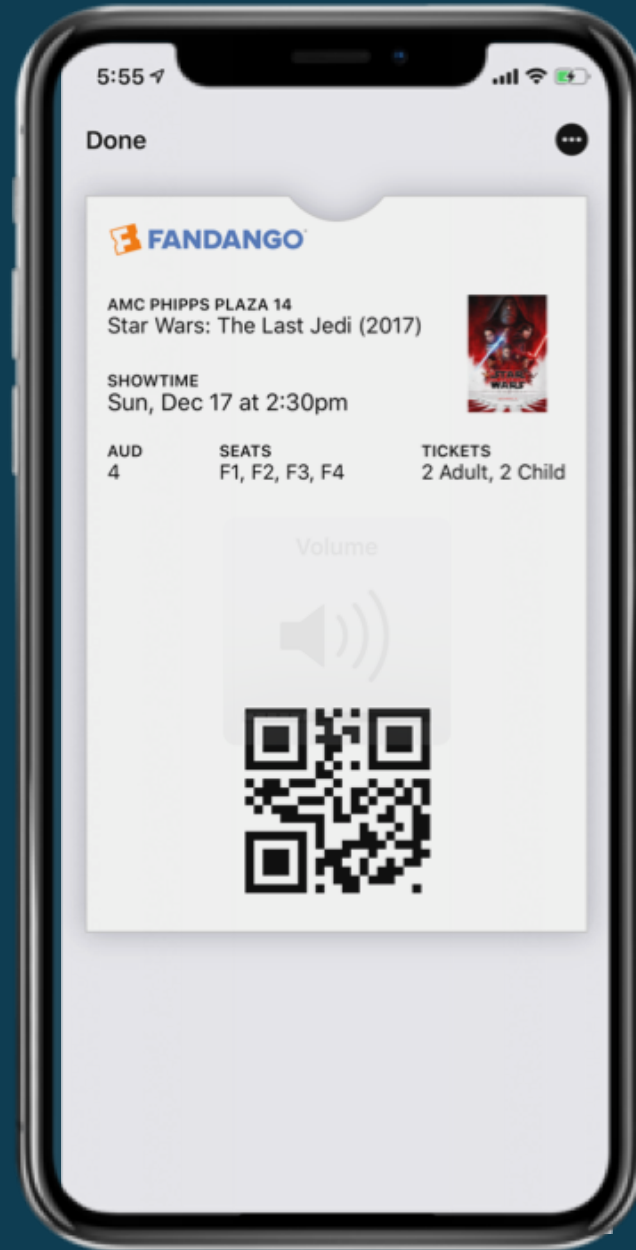
- Hotels, concierges
- Airlines
- DMOs
- Ticket reseller
- Local tour operators

P2P Platforms

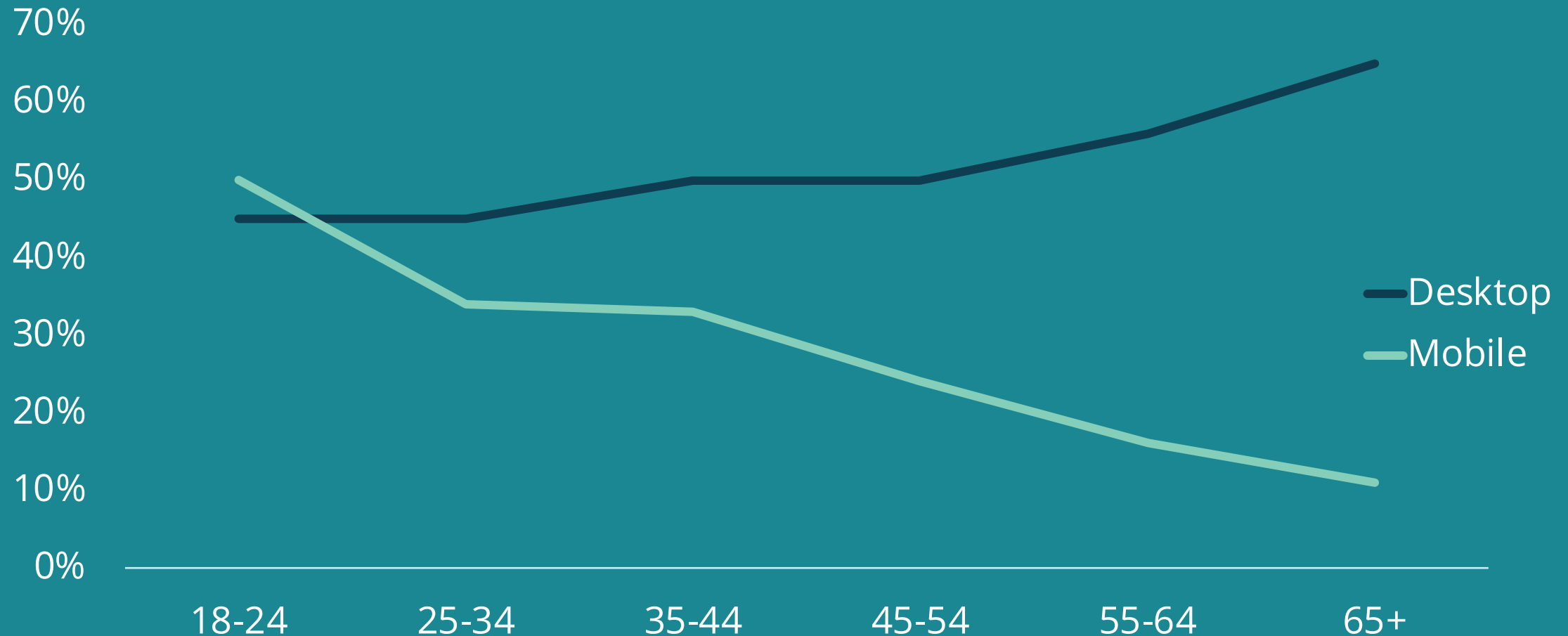
- Airbnb Experiences
- Eatwith
- Withlocals
- Tours By Locals
- City-Unscripted



3) Delivery



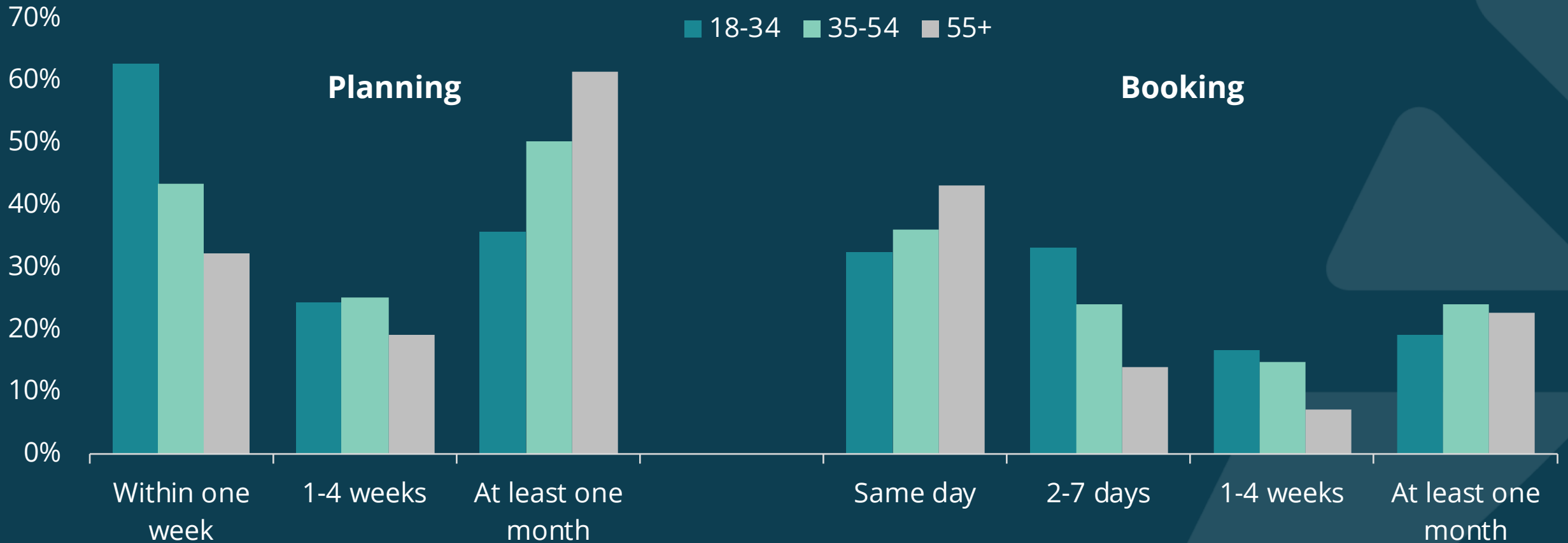
Attractions Shopping Device by Age



Arival's 2019 State of In-Destination: Active travelers: US - 574, UK - 169, FR - 137, DE - 127; August 2018

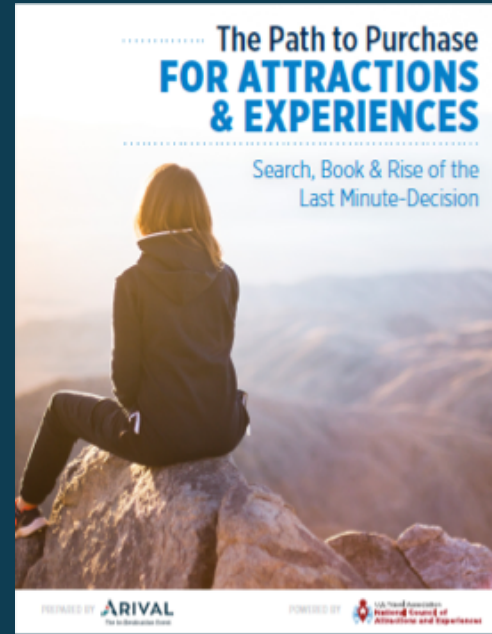
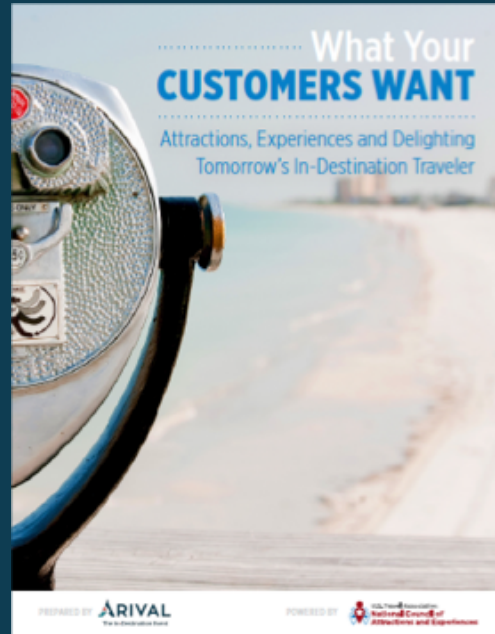
Younger Travelers, Mobile Reshaping the Booking Landscape

Research & Booking Windows for Attractions, All Markets by Age



Arival's 2019 State of In-Destination: Active travelers: US - 574, UK - 169, FR - 137, DE - 127; August 2018

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Q&A

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NCAE'S IN-DESTINATION STUDY

bit.ly/NCAEArivalStudy

All four white papers are now available online.
(U.S. Travel login required).

Questions? Email NCAE@ustravel.org

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Thank you!



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The logo for ARIVAL features a stylized 'A' composed of two overlapping triangles, one red and one blue, followed by the word 'RIVAL' in a bold, dark blue, sans-serif font.

ARIVAL

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