



# The Path to Purchase: Digital & Distribution for Tours & Attractions in 2020 and Beyond



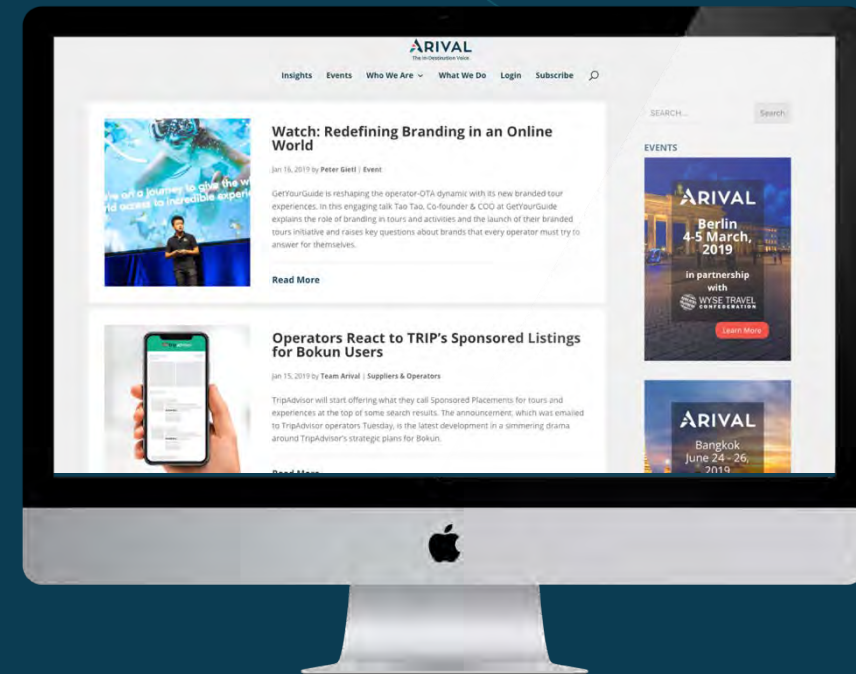
# What Is Arival?

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



**Justin Buzzi**  
Owner  
Get Up and Go Kayaking



**Liz Gilbert**  
Sr. Director, National Sales  
Hornblower Cruises and Events  
and Board Member, NCAE



1. Why: What Drives Choice
2. When: The Booking Window
3. How: The Booking Channel
4. Q&A



# Methodology

1. 1,000 U.S. Travelers, traveled domestically or internationally in the past year for leisure
2. Stayed overnight
3. Participated in a qualifying tour or attraction

In Partnership With



U.S. Travel Association

**National Council of  
Attractions and Experiences**

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# Attractions

85%

Museums, zoos, themes parks, amusements, landmarks and other cultural and natural sites

# Tours

47%







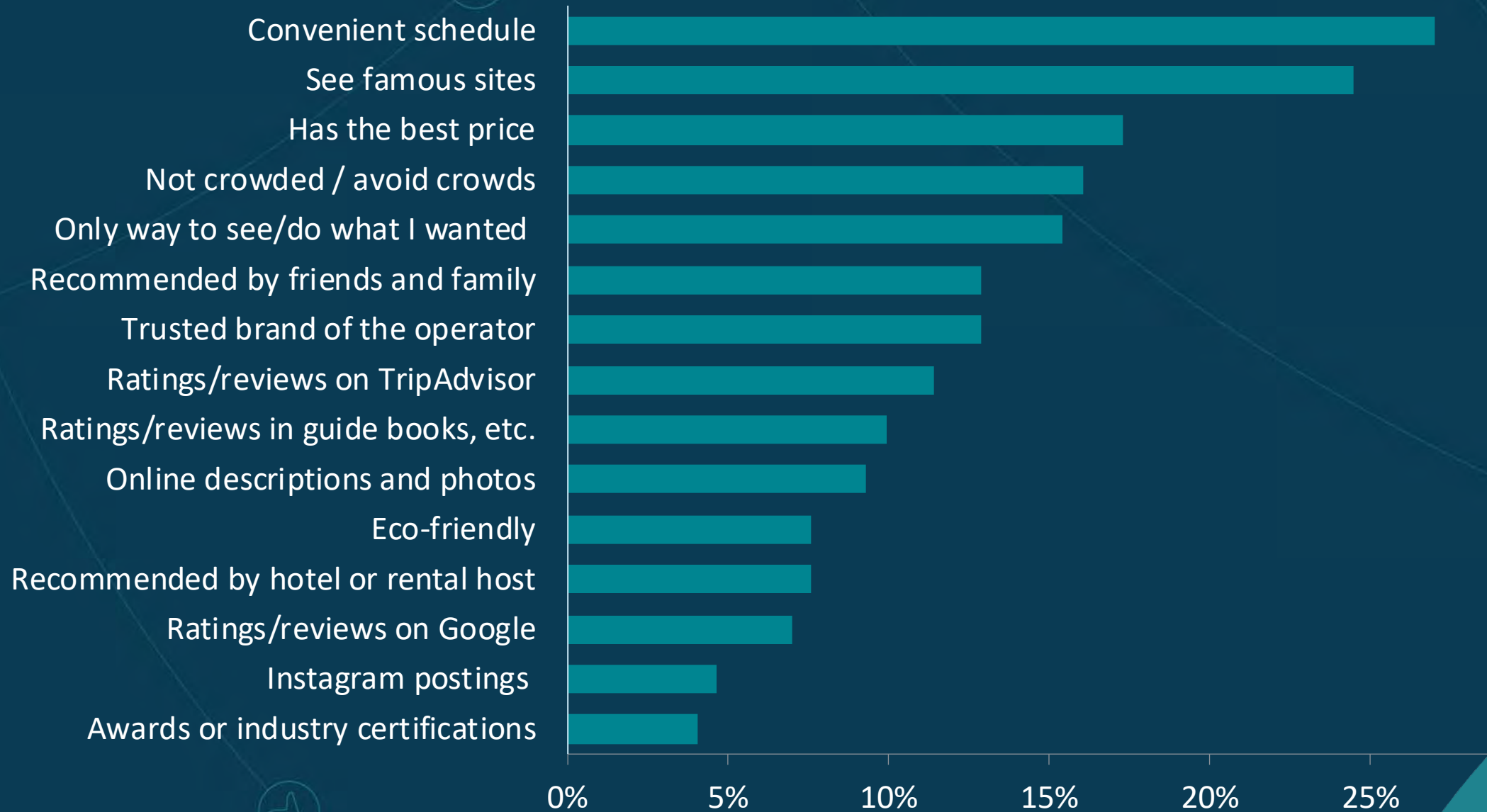


BABYLON

# What Drives Choice?

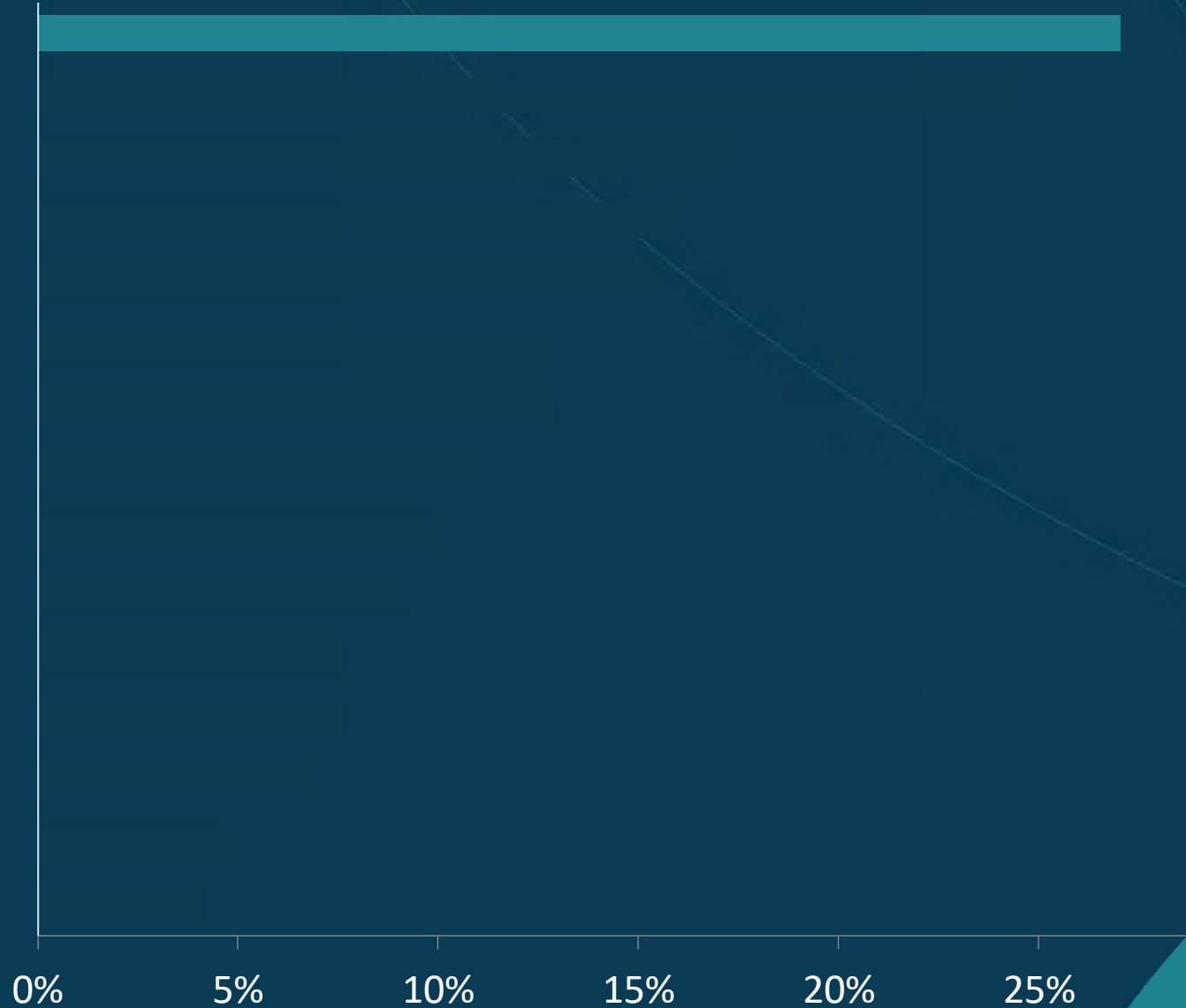


# Reasons for Choosing a Specific Tour

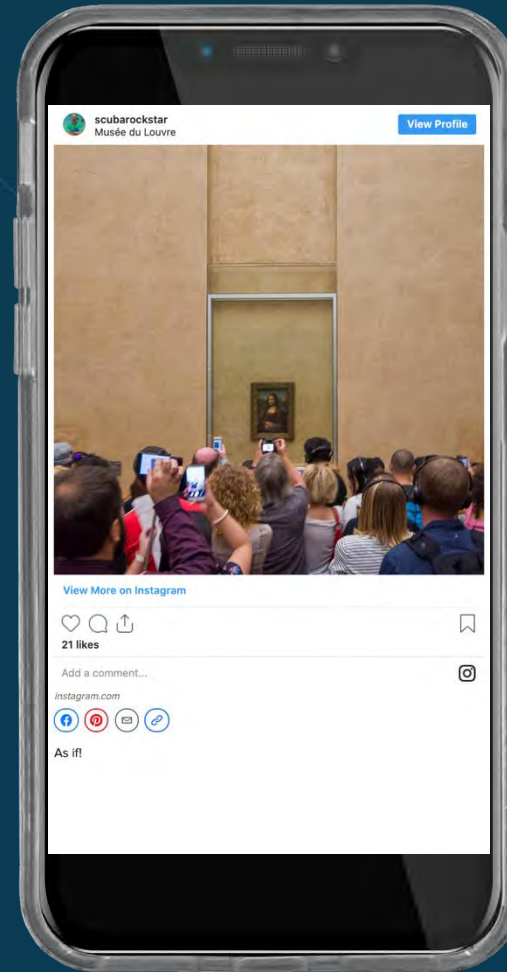


# Convenience

- Convenient schedule
- See famous sites
- Has the best price
- Not crowded / avoid crowds
- Only way to see/do what I wanted
- Recommended by friends and family
- Trusted brand of the operator
- Ratings/reviews on TripAdvisor
- Ratings/reviews in guide books, etc.
- Online descriptions and photos
- Eco-friendly
- Recommended by hotel or rental host
- Ratings/reviews on Google
- Instagram postings
- Awards or industry certifications



# What about Instagram?



- Convenient schedule
- See famous sites
- Has the best price
- Not crowded / avoid crowds
- Only way to see/do what I wanted
- Recommended by friends and family
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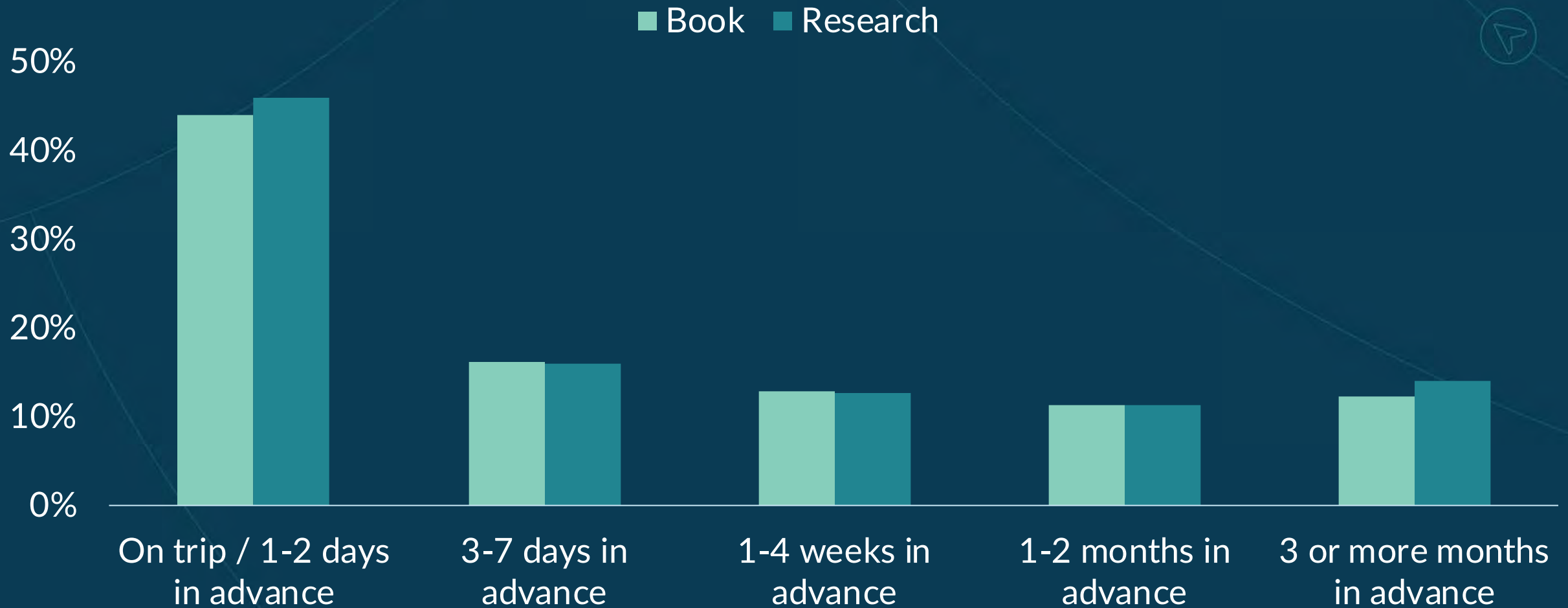


# When: The Booking Window

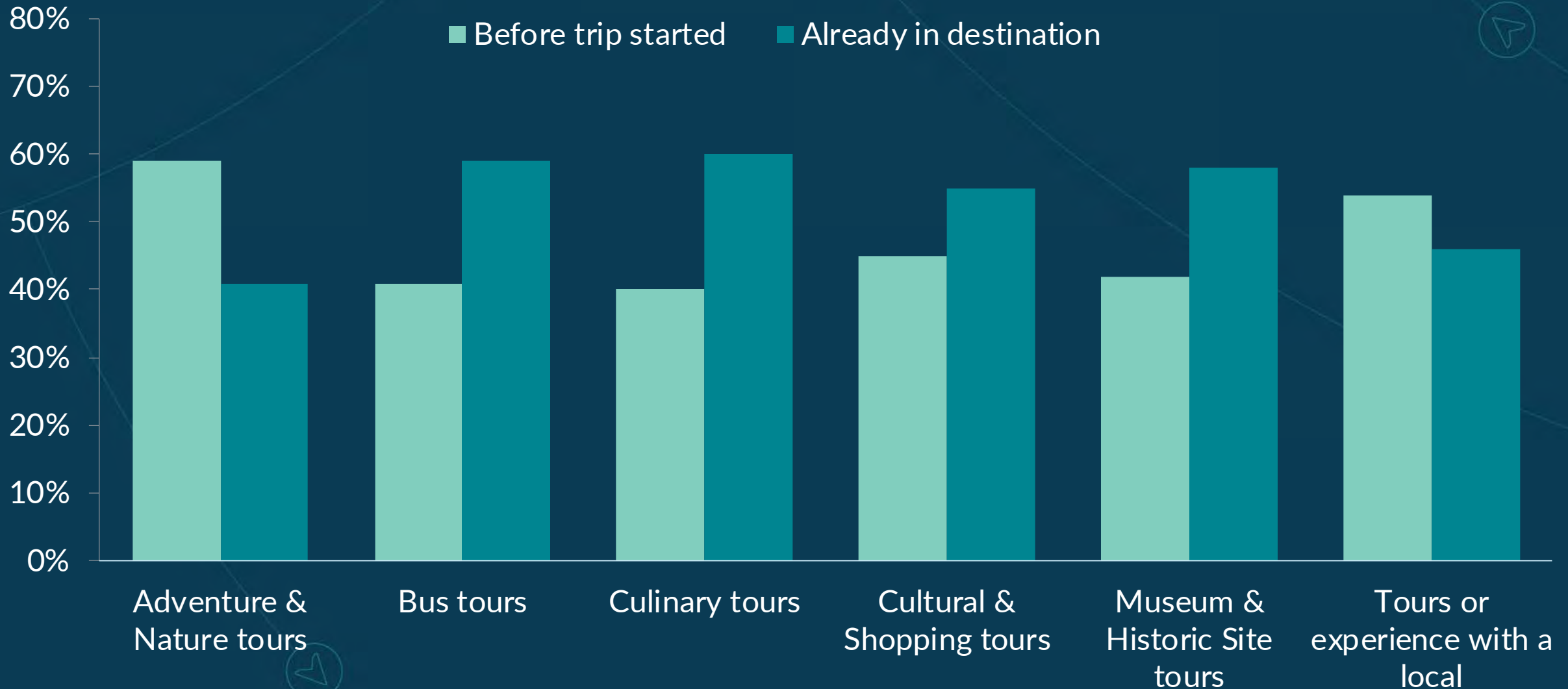
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# Tours Booking and Planning Windows

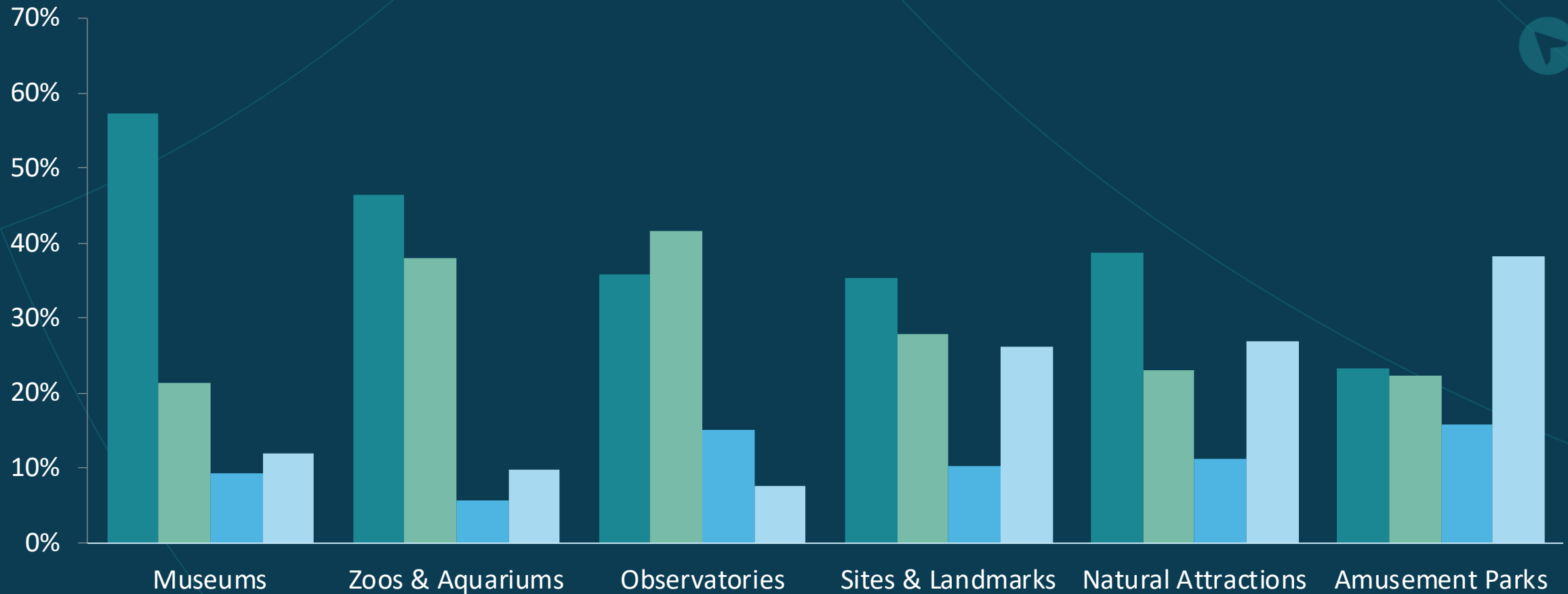


# Advanced Booking Pattern by Tour Type



# Booking Window by Attraction Type

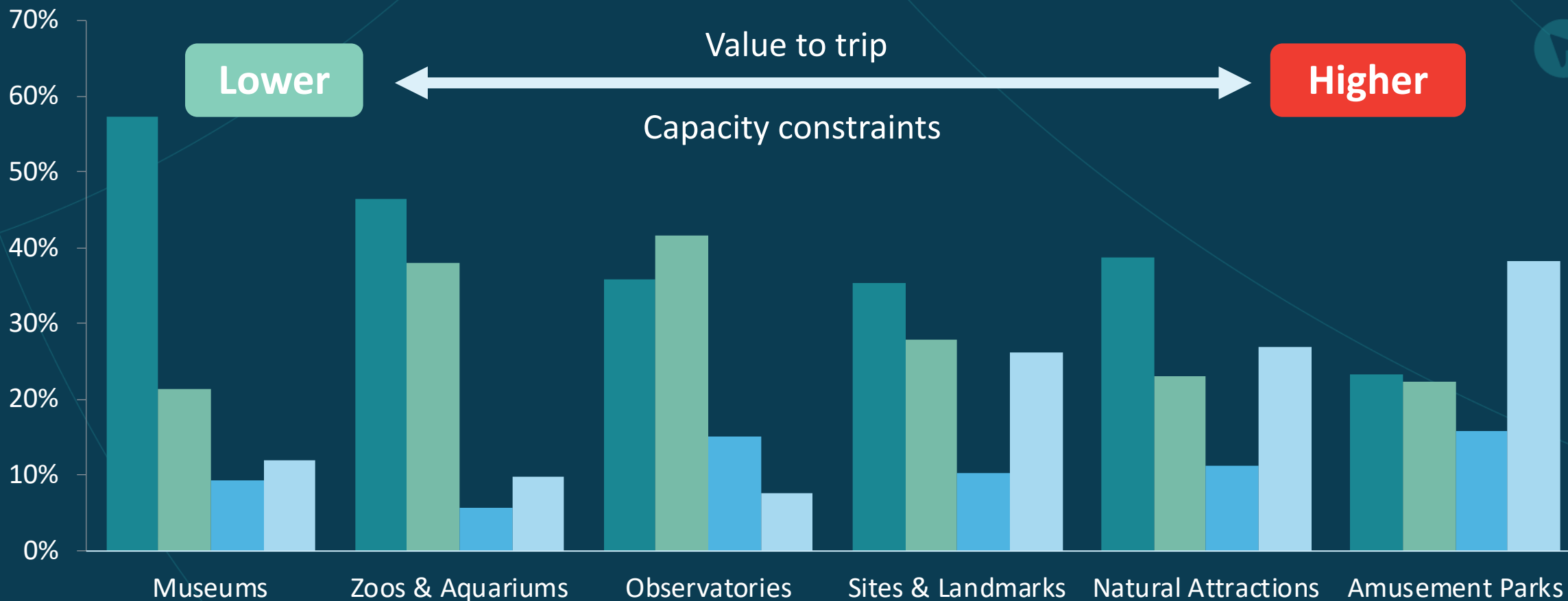
■ Same day ■ 2-7 days ■ 2-4 weeks ■ >1 month





# Booking Window by Attraction Type

Same day 2-7 days 2-4 weeks >1 month



So What?  
Know your  
customers “why”  
and “when”

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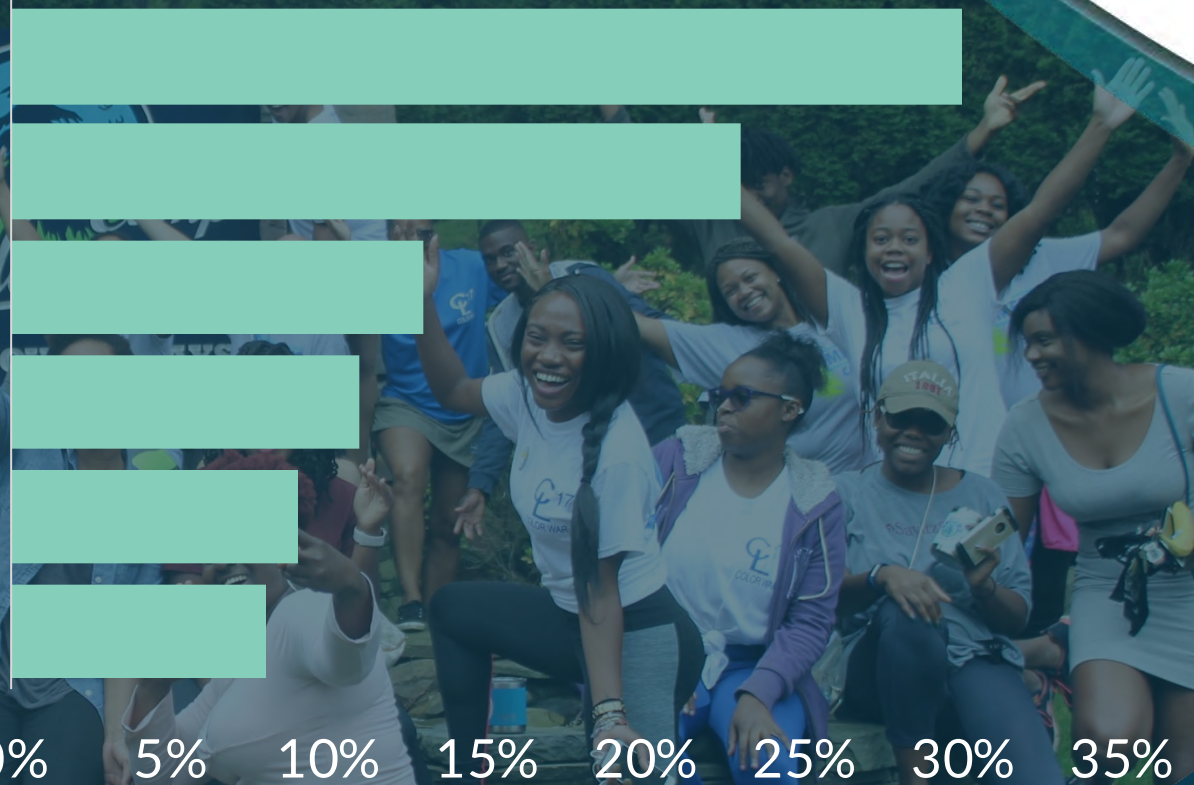
# How: The Booking Channel

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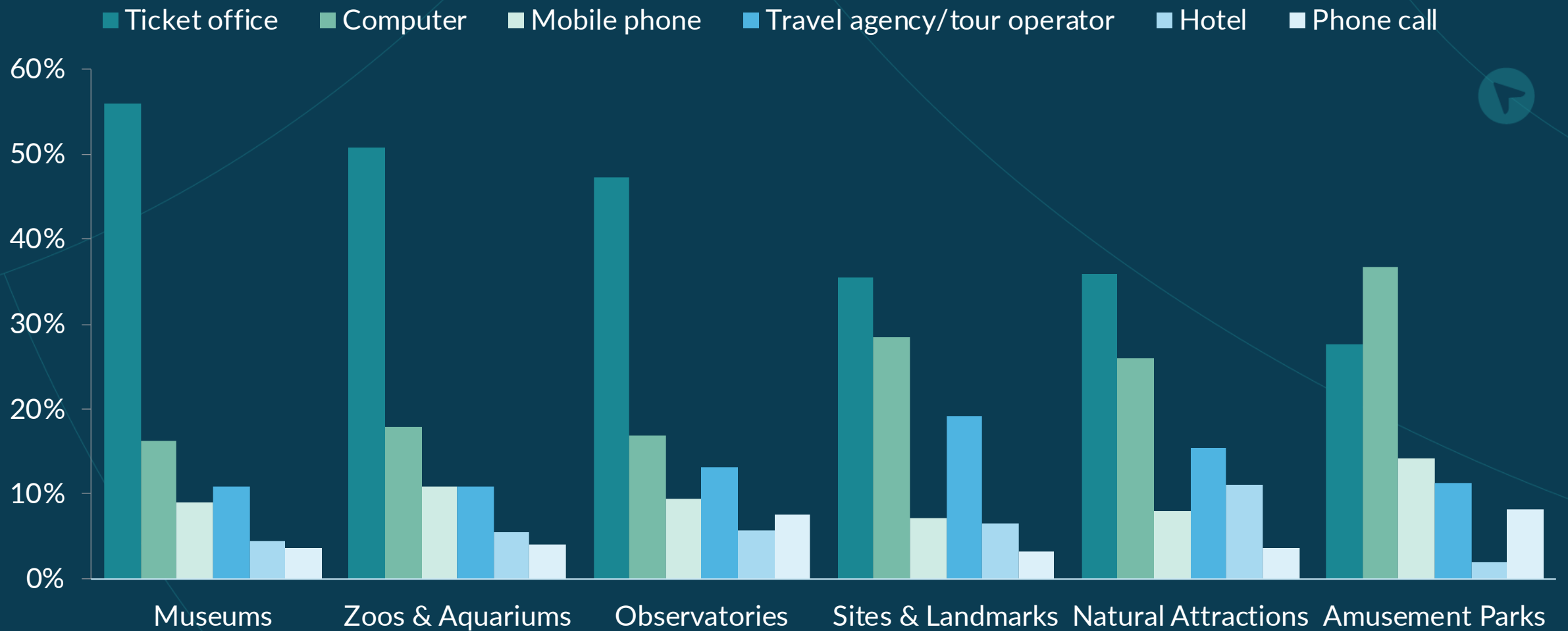


# Tours

From the tour operator, offline  
 On computer  
 Online via mobile phone  
 Travel agent / vacation package  
 Hotel  
 Visitor or ticket office in destination



# Booking Channel by Attraction Type



# Tour Spend

|                                  |      |
|----------------------------------|------|
| Direct from operator, offline    | 1x   |
| Computer                         | 1x   |
| Mobile phone                     | 1.5x |
| Travel agents / vacation package | 3x   |



# What about OTAs vs. operator websites?



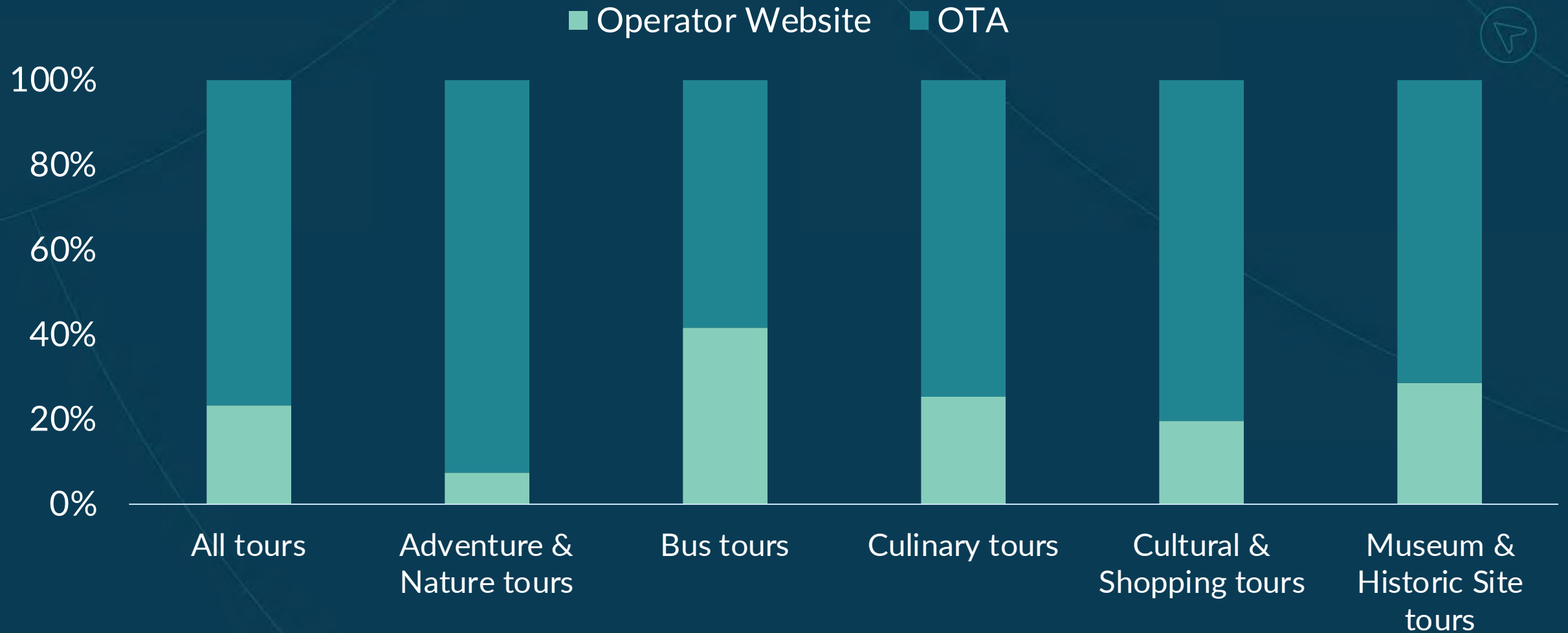
Four in five  
said they booked  
through an OTA



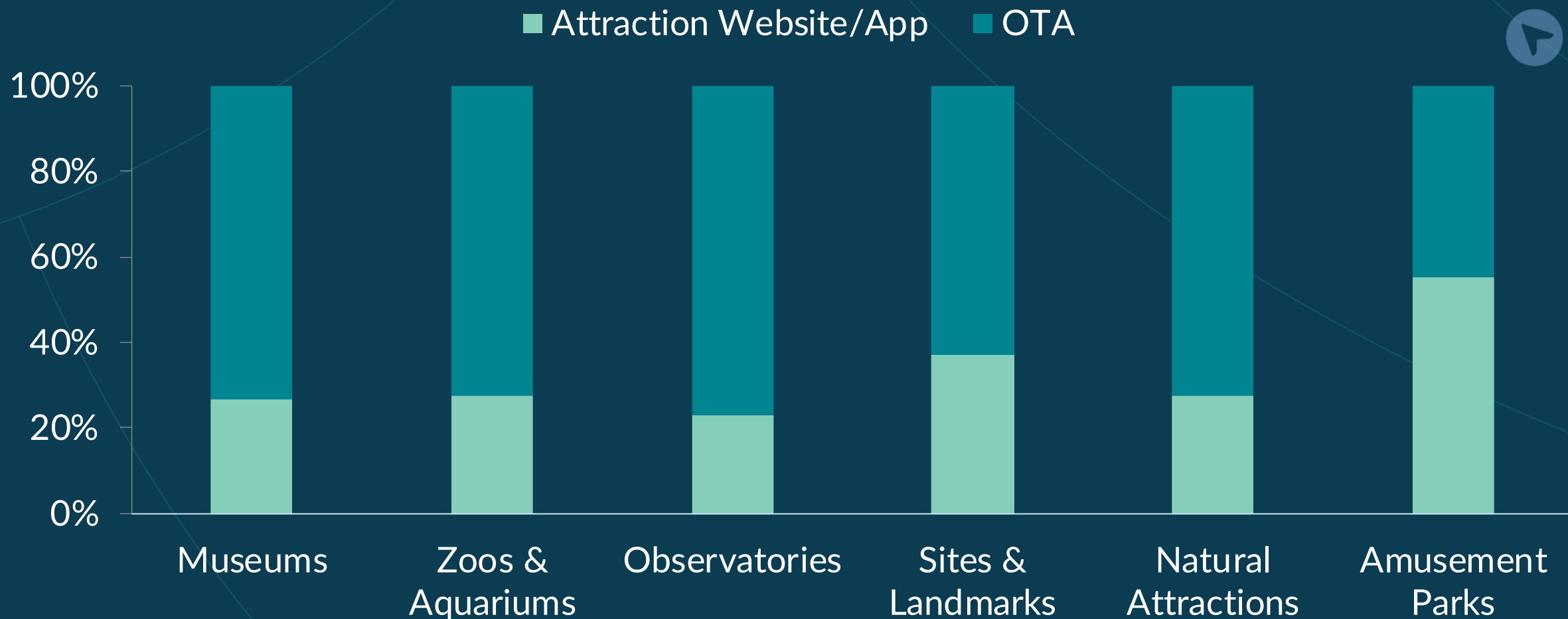
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# How Online Bookers Book Tours



# How Online Bookers Book Attractions



# Why?



Best price



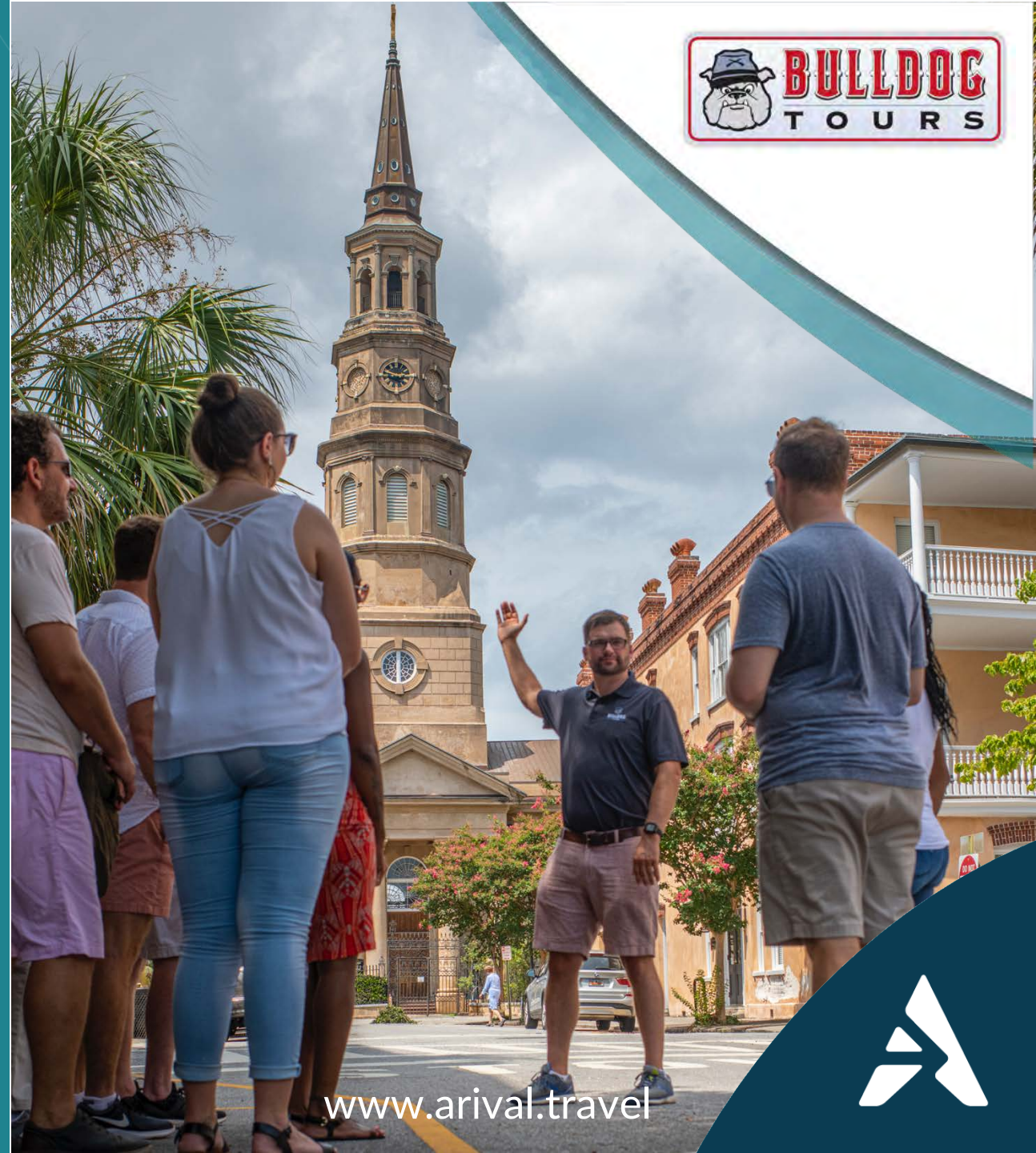
I already have an account



Operator Website

OTA

That's where I found it

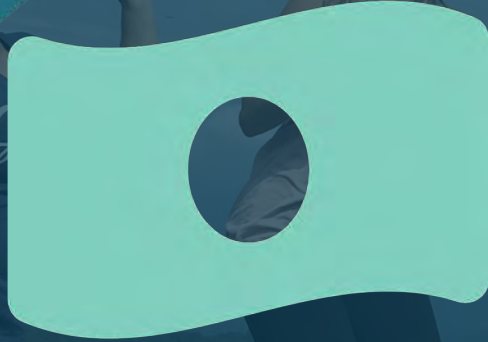


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**Price**



**Convenience**

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# So What?

- 1) Multiple channels
- 2) Not all are created equal
- 3) OTAs continue to grow faster





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# Ask a Question!



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