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

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

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Marketing Unforgettable Experiences in the U.S.

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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
Attractions 85%
Museums, zoos, themes parks, amusements, landmarks and other cultural and natural sites

Tours 47%

www.arival.travel
What Drives Choice?
Reasons for Choosing a Specific Tour

- 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

Arival’s Why We Tour: Inside the Mind of the Modern Tour Taker: Base – 474 U.S. tour takers
Convenience

- Convenient schedule
- See famous sites
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- 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
- 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
When: The Booking Window
Tours Booking and Planning Windows

- **Book**
  - On trip / 1-2 days in advance: 40%
  - 3-7 days in advance: 15%
  - 1-4 weeks in advance: 10%
  - 1-2 months in advance: 10%
  - 3 or more months in advance: 5%

- **Research**
  - On trip / 1-2 days in advance: 40%
  - 3-7 days in advance: 15%
  - 1-4 weeks in advance: 10%
  - 1-2 months in advance: 10%
  - 3 or more months in advance: 5%

*Arival’s Why We Tour: Inside the Mind of the Modern Tour Taker: Base – 474 U.S. tour takers*
Advanced Booking Pattern by Tour Type

- **Adventure & Nature tours**
- **Bus tours**
- **Culinary tours**
- **Cultural & Shopping tours**
- **Museum & Historic Site tours**
- **Tours or experience with a local**

Legend:
- Light green: Before trip started
- Dark blue: Already in destination

Source: Arival’s *Why We Tour: Inside the Mind of the Modern Tour Taker* Base – 474 U.S. tour takers
Booking Window by Attraction Type

- Museums: 55% Same day, 30% 2-7 days, 15% 2-4 weeks, 0% >1 month
- Zoos & Aquariums: 45% Same day, 35% 2-7 days, 20% 2-4 weeks, 0% >1 month
- Observatories: 40% Same day, 40% 2-7 days, 20% 2-4 weeks, 0% >1 month
- Sites & Landmarks: 35% Same day, 35% 2-7 days, 25% 2-4 weeks, 10% >1 month
- Natural Attractions: 30% Same day, 35% 2-7 days, 30% 2-4 weeks, 5% >1 month
- Amusement Parks: 25% Same day, 30% 2-7 days, 25% 2-4 weeks, 20% >1 month

Arival’s U.S. Attractions Traveler 2020; Base – 1,000 U.S. travelers
Booking Window by Attraction Type

- **Value to trip**
  - **Lower**
  - **Higher**

- **Capacity constraints**

- **Attraction Types**:
  - Museums
  - Zoos & Aquariums
  - Observatories
  - Sites & Landmarks
  - Natural Attractions
  - Amusement Parks

- **Booking Window**
  - Same day
  - 2-7 days
  - 2-4 weeks
  - >1 month

*Arival’s U.S. Attractions Traveler 2020; Base – 1,000 U.S. travelers*
So What?
Know your customers “why” and “when”
How: The Booking Channel
Tours

From the tour operator, offline

On computer

Online via mobile phone

Travel agent / vacation package

Hotel

Visitor or ticket office in destination

0%  5%  10%  15%  20%  25%  30%  35%

Arival’s Why We Tour: Inside the Mind of the Modern Tour Taker; Base – 474 U.S. tour takers
Booking Channel by Attraction Type

- Ticket office
- Computer
- Mobile phone
- Travel agency/tour operator
- Hotel
- Phone call

Arival’s U.S. Attractions Traveler 2020; Base – 1,000 U.S. travelers
Tour Spend

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

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What about OTAs vs. operator websites?
Four in five said they booked through an OTA
How Online Bookers Book Tours

Operator Website vs OTA

- All tours: 100%
- Adventure & Nature tours: 80%
- Bus tours: 40%
- Culinary tours: 60%
- Cultural & Shopping tours: 20%
- Museum & Historic Site tours: 0%

Arival’s Why We Tour: Inside the Mind of the Modern Tour Taker: Base – 474 U.S. tour takers
Why?

- Best price
- I already have an account
- That's where I found it

Arival's Why We Tour: Inside the Mind of the Modern Tour Taker: Base – 474 U.S. tour takers
So What?

1) Multiple channels
2) Not all are created equal
3) OTAs continue to grow faster
Ask a Question!

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