



The State of IN-DESTINATION

A study about traveler attitudes and behavior for attractions and experiences.

METHODOLOGY

In August 2018, Arival undertook a comprehensive study to provide insights on the in-destination experience to help creators and sellers of attractions, activities, events and tours understand key trends and drivers around traveler behavior. Arival fielded an online survey to 1,000 adult travelers (18+) from each of the following markets: France, Germany, the United Kingdom and the United States. The respondents from each market took a trip 100+ miles from home that included an overnight stay and a qualifying in-destination experience within the past year. The following analysis relates to those travelers who traveled within or to the United States (U.S. domestic and international inbound).

ABOUT THE NATIONAL COUNCIL OF ATTRACTIONS AND EXPERIENCES

The National Council of Attractions and Experiences (NCAE) represents nearly 800 U.S. Travel members in organizations as diverse as national parks, iconic landmarks, shopping centers, entertainment venues, world-class attractions and sightseeing tours.



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

Our mission: Enhance the effectiveness of the individuals and organizations who participate by providing them with research tools, educational opportunities and meaningful connections.

ABOUT ARIVAL

Arival advances the business of creating amazing in-destination experiences through events, insights and community for creators and sellers of tours, activities and attractions.

Our mission: Establish "The Best Part of Travel" as a crucial sector of the global travel, tourism and hospitality industry.

ARIVAL
The In•Destination Event

ABOUT THIS REPORT

National Council of Attractions and Experiences (NCAE) is committed to producing relevant, one-of-a-kind research products that leverage the collective strength of the attractions and experiences industry. As part of this value proposition, NCAE has collaborated with Arival on a unique, four-part study about traveler attitudes and behaviors. This comprehensive study looks at the in-destination experience to help creators and sellers of attractions, activities, events and tours understand the key trends and drivers around traveler behavior.

This research was divided up into a four-part white paper series based on the following topics:

1 THE STATE OF IN-DESTINATION

The first report presents an overview of the in-destination sector and its customers. As you read this report, you will:

- ★ **LEARN** about travel and tourism's third-largest sector and understand its extraordinary diversity.
- ★ **OBTAIN** essential insights on in-destination travelers, and what they value.
- ★ **LEARN** the role attractions and experiences play in travel decisions.
- ★ **IDENTIFY** collaboration opportunities for experience providers and destination marketers to improve visitor experience and drive more in-destination spend.

2 WHAT YOUR CUSTOMERS WANT

The second report presents an overview of what travelers want from their in-destination experiences, and future trends. As you read this report, you will:

- ★ **LEARN** about the most popular types of activities and attractions for travelers.
- ★ **UNDERSTAND** key shifts in traveler trends, and where they're headed.
- ★ **UNDERSTAND** important differences across source markets.
- ★ **DIVE** into the rise of experiences versus traditional tourist activities, and learn how to capitalize on this trend.
- ★ **OBTAIN** clear, actionable guidance on how to adapt your products to these key trends.

3 THE PATH TO PURCHASE FOR ATTRACTIONS AND EXPERIENCES

The third report presents an overview of a traveler's search and booking behavior. As you read this report, you will:

- ★ **UNDERSTAND** the traveler's path to purchase for in-destination activities.
- ★ **LEARN** about the channels being used for inspiration, shopping and booking.
- ★ **IDENTIFY** how the booking window is changing, and what that means for attractions.
- ★ **GAIN** insights into the impact of mobile, and how attractions can adapt to this mobile marketplace.

4 THE STATE OF DIGITAL IN-DESTINATION

The fourth report presents an overview of technology and distribution trends. As you read this report, you will:

- ★ **UNDERSTAND** the state of technology and online distribution in this industry sector compared to other sectors of travel and tourism.
- ★ **IDENTIFY** key shifts in travelers use of technology, and what that means for the in-destination industry.
- ★ **UNDERSTAND** the key components of the distribution landscape.
- ★ **LEARN** about the key trends in technology and distribution.