



Tours, Activities & Attractions:

Travel's Next Big Thing

(and the opportunity for destination marketers)



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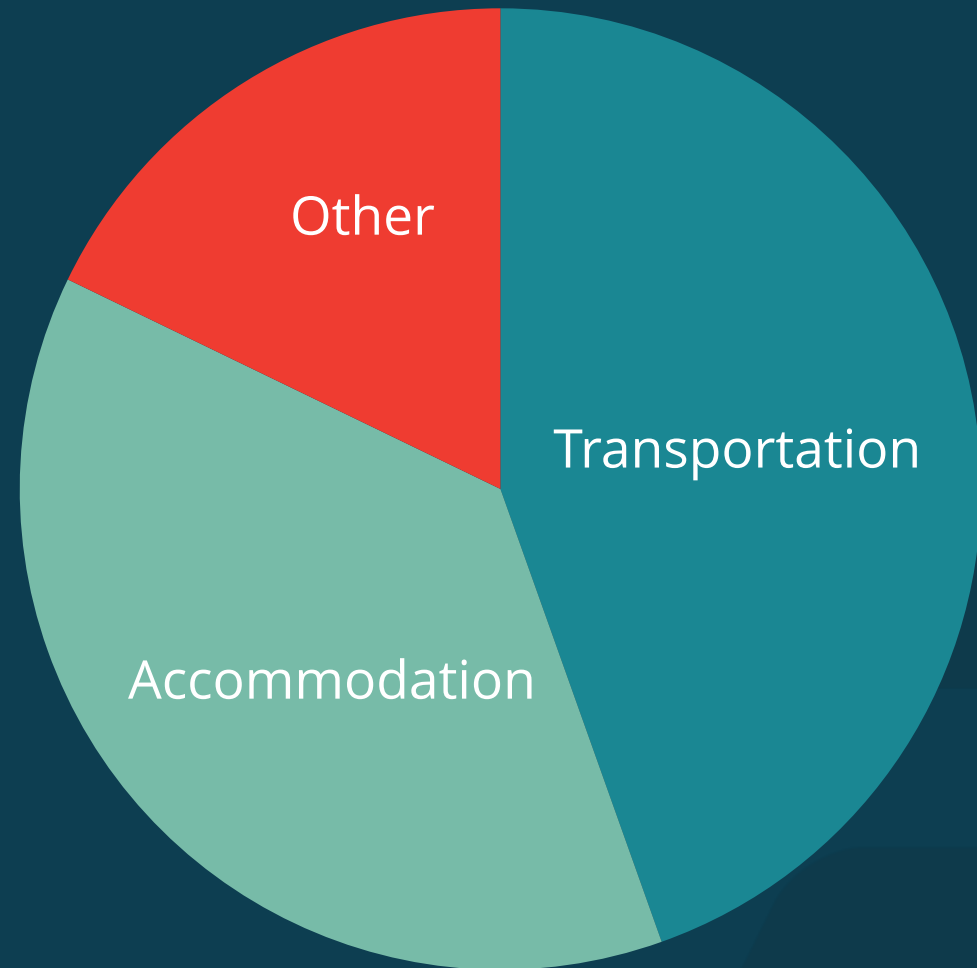
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STS
19 March 2019

#arivaltravel

What the Travel Industry Cares About...

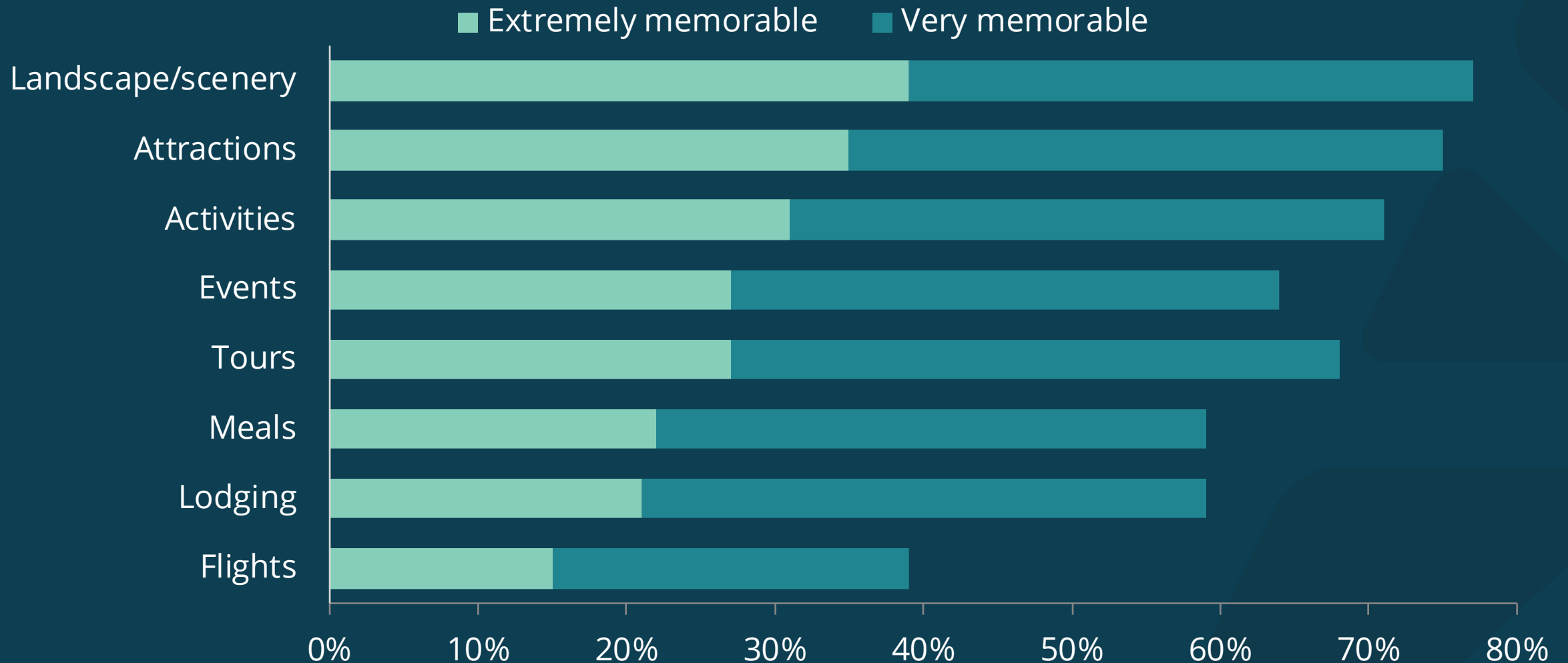
Note: *Other includes car rental, cruise and package tour operators in select markets.
Source: Phocuswright's *The State of Digital Travel 2017*



**Is not what matters
most to travelers:**

What Travelers Remember Most

(hint: it's not the flight or hotel)



What parts do you think about the most? How memorable was each part of your trip?
Arival's 2019 State of In-Destination: 4,000 U.S., U.K., French & German travelers, August 2019

We call it *The Best Part of Travel*



PHOTO: Key West Food Tours



PHOTO: Paradise Adventures





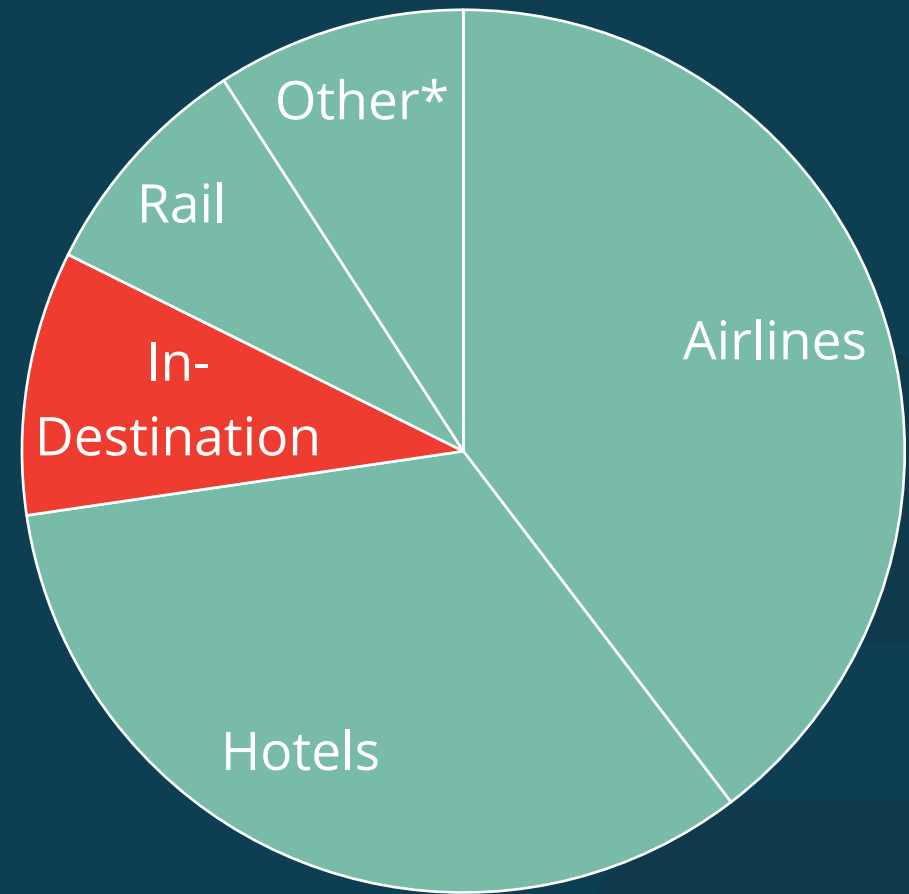
Events, insights and community for creators and sellers of Tours, Activities & Attractions.

Why should DMOs care?

First, let's look at the trends.

1) This Sector is Big

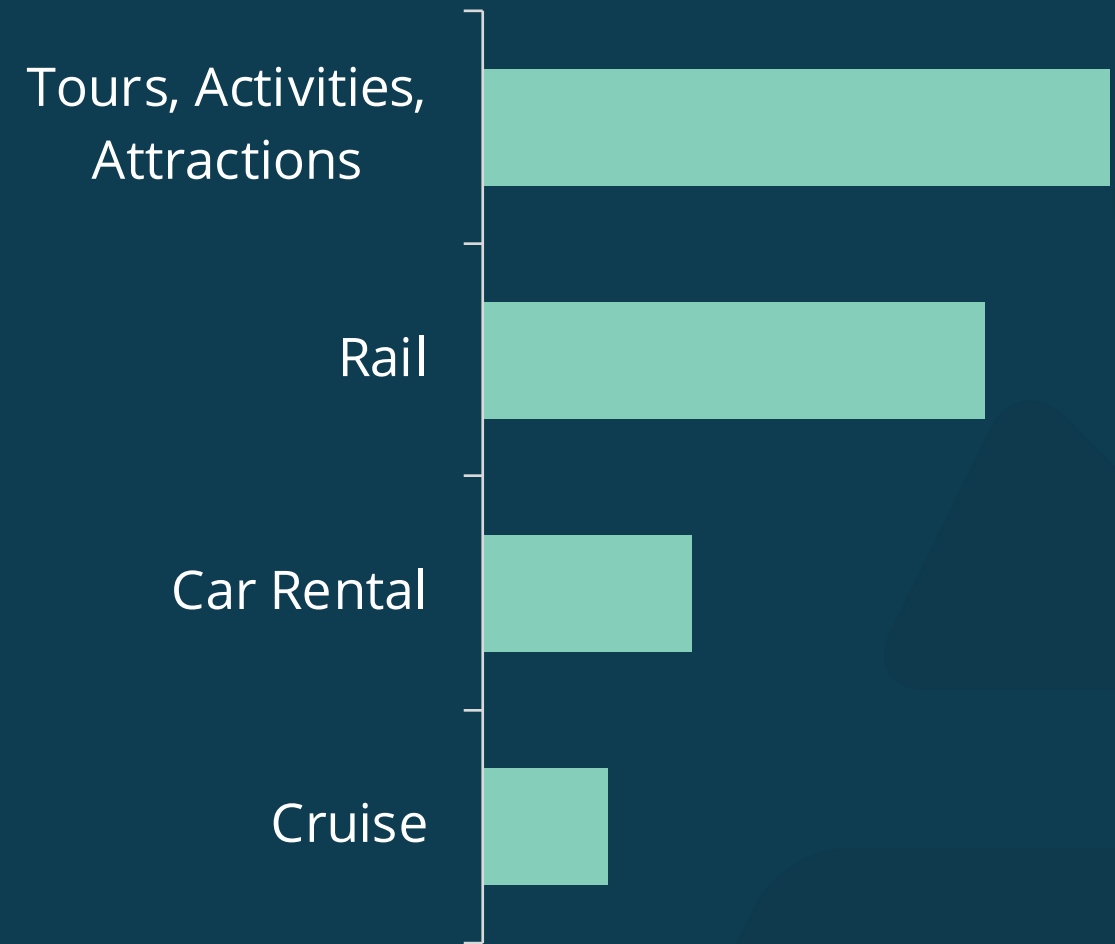
Travel's Third-Largest Sector



Note: *Other includes car rental and cruise and package tour operators in select markets.

Source: Phocuswright's *Tours & Activities Come of Age: Global Travel Activities Marketplace 2014-2020*

Travel's Third-Largest Sector



Source: Phocuswright

2. It's the Fastest Growing Part of Travel

Demand from
boomers,
millennials and
rising Gen Z are
driving growth
in experiences



3) Everyone Does It

Virtually all travelers



Book some tour, activity or attraction

U.S.
97%

U.K.
97%

France
98%

Germany
97%

Leisure traveler:

took a trip within the past year at least 100 miles from home that included an overnight stay

And they do a lot of it

Average Number of Activities per Trip:

7



What does this mean to DMOs?

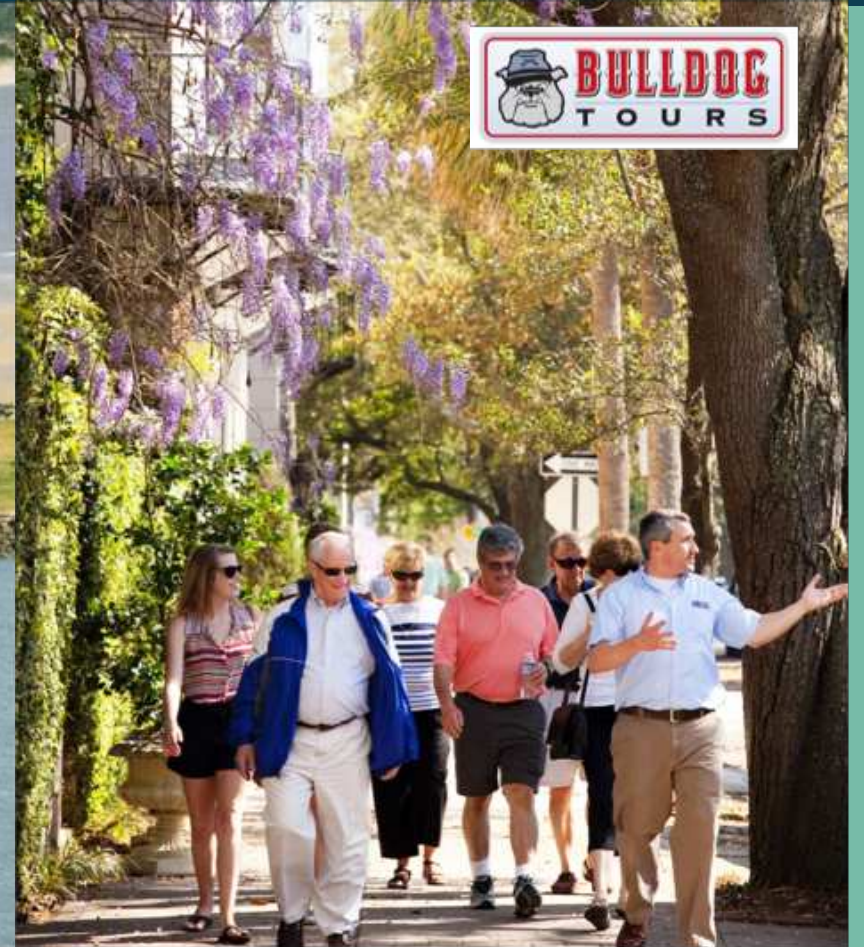
1. Operators in a destination may be competitors, but they should also be marketing partners. They probably share a lot of customers.
2. Who better to enable those types of partnerships than local DMOs

4) What Types of Experiences Do Travelers Want

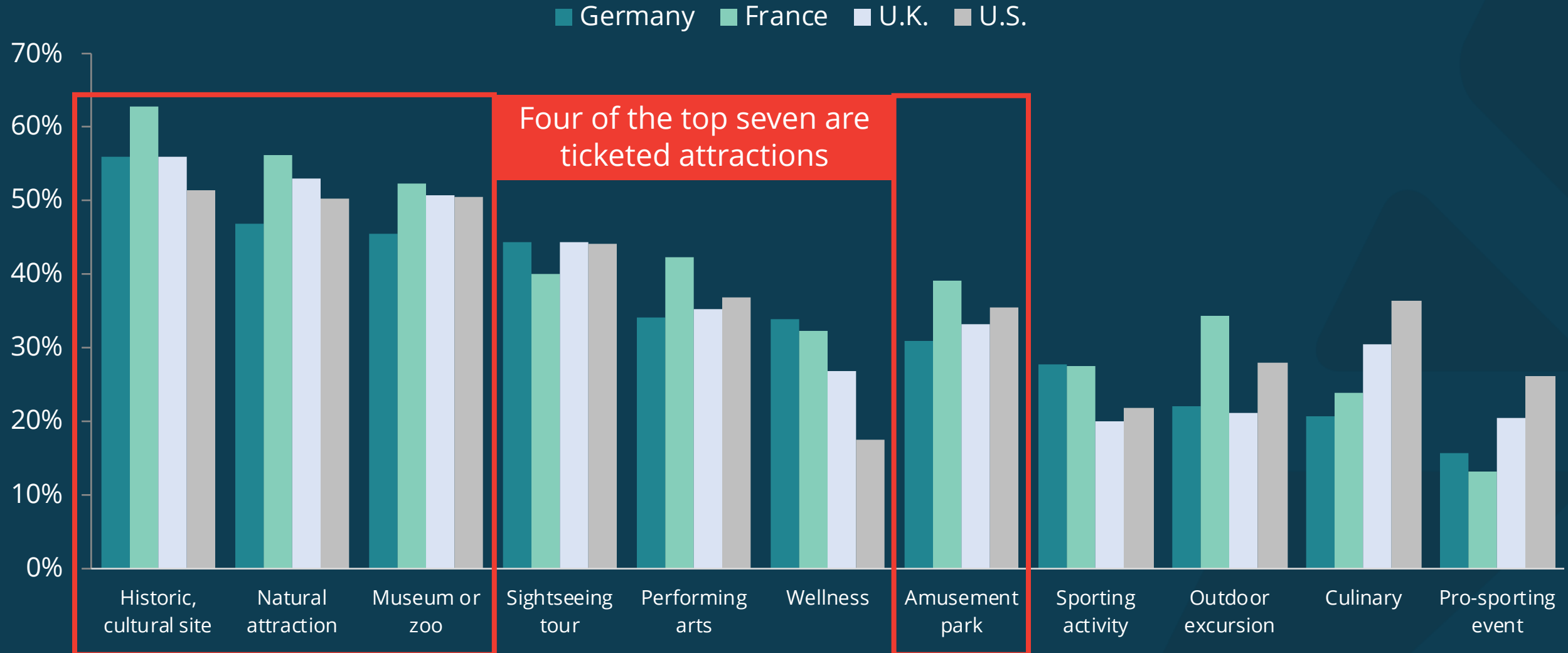
Attractions... or tours



Fort Sumter National Monument



Activities Undertaken in the Last Year



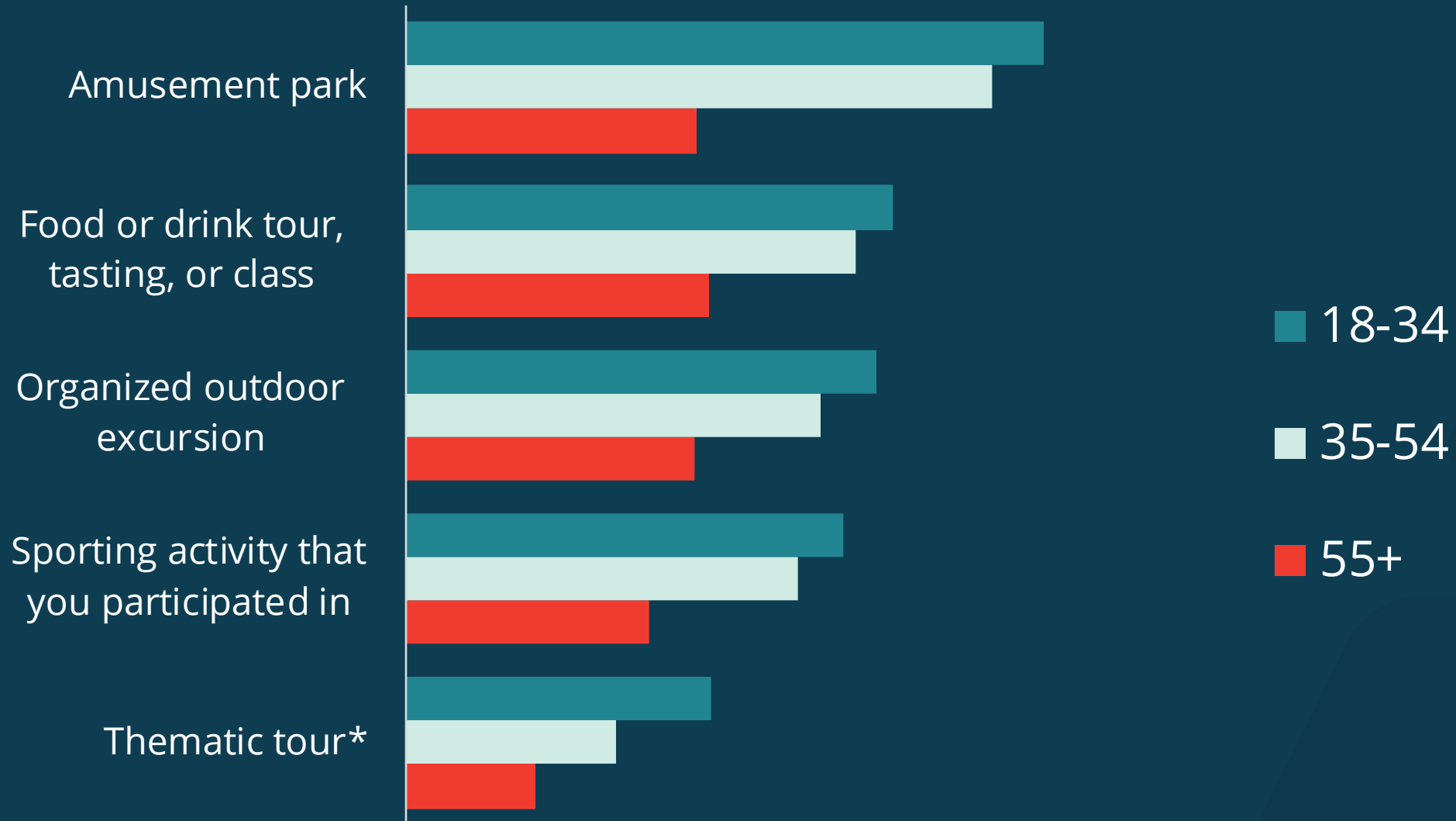
5) How It's Changing



Culinary experiences, adventure, and thematic, experiential tours are more important for younger travelers



Younger Travelers Seek Something Else



6) What about “Experiences”?

Airbnb's entry into tours and activities with Airbnb Experiences – which enable locals to host unique, non-traditional tours, activities, classes and experiences – has posed an important question to the tourism industry: what do travelers really want? If they want more local experiences, how do traditional tourism and attraction companies respond?



So we asked travelers what was more important: seeing the famous sites or having local experiences.

The results were inconclusive:



Seeing
the sites



Local
experiences



0%

20%

40%

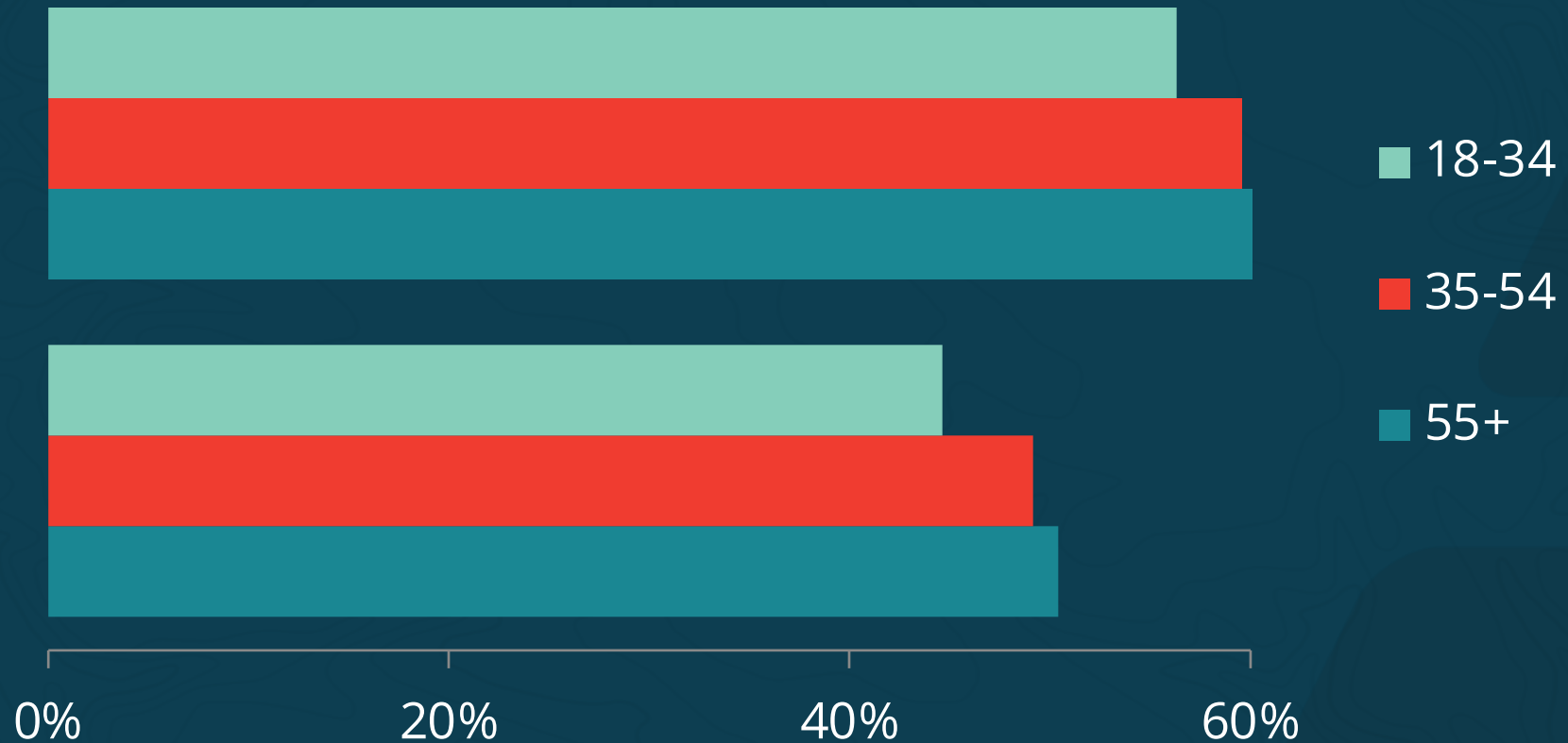
60%

**So then we
looked at age.
After all, younger
travelers seek a
different path,
right?**



The results were still inconclusive.

In fact, older travelers are slightly more interested in local experiences.





So what does this mean?
It's not an either/or. Travelers want both.

How can destinations and traditional tourism companies adapt?

Offer something “insiderly”

1. Special access: something akin to a backstage pass or “behind the scenes”
2. A special treat or sensory experience they could only get with you
3. “Let me try” – give your guests the equivalent of a swing at bat

Bonus Trend: **What do Travelers Crave?**



Culinary (food and drink) is the most important element of in-destination experience planning

Implications

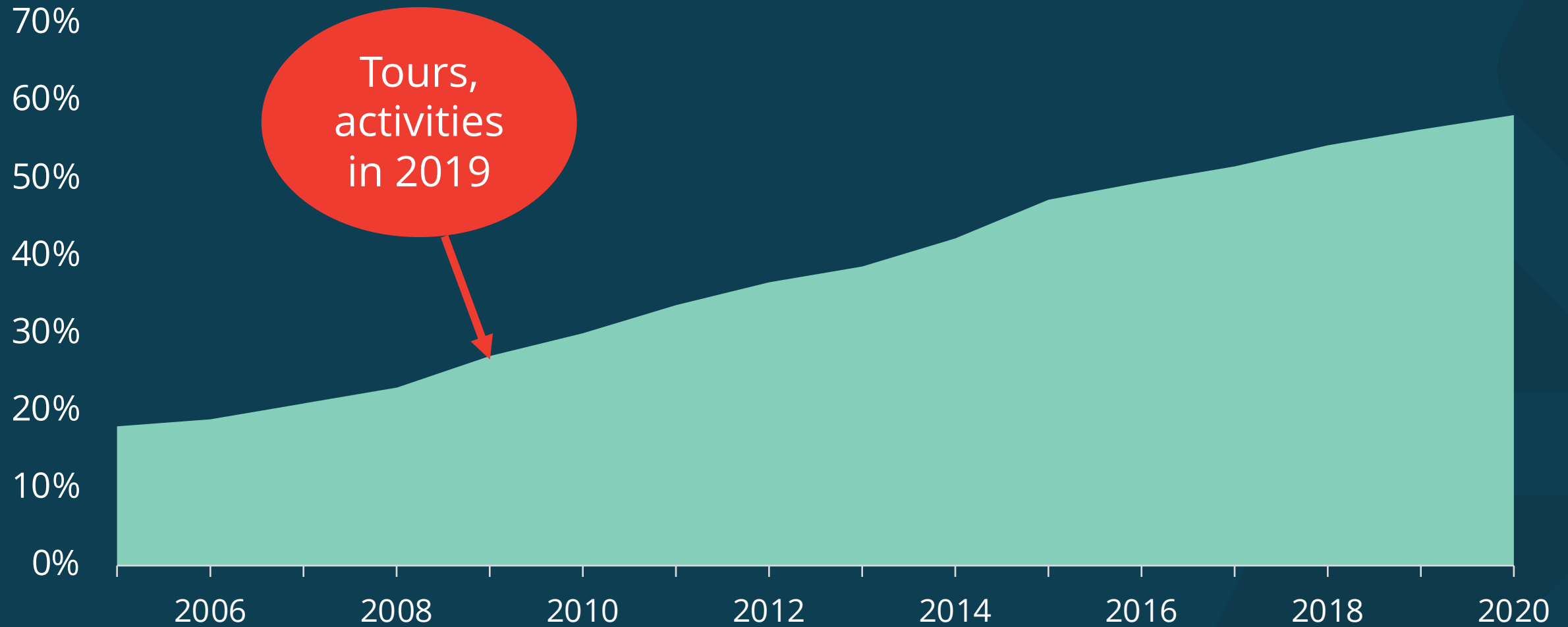
1. Every tourism company (not just food tours) are in culinary tourism
2. The question is, does your culinary set you apart – or set you back?

7) Travel's Next Digital Wave

This is how a lot of tours and tickets are purchased today. This sector is way behind the broader travel industry in online adoption and digitization.



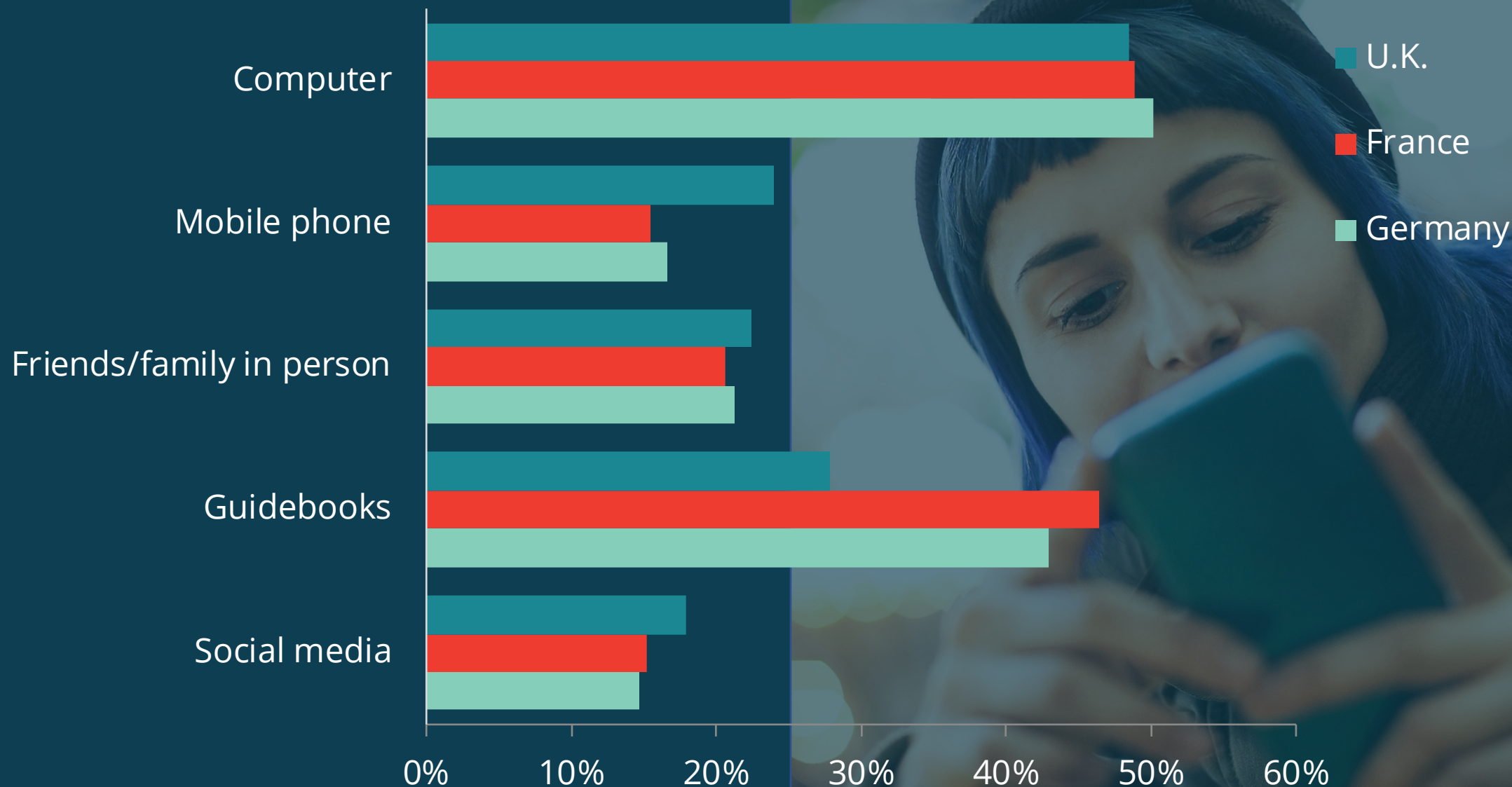
Share of Travel Booked Online



But it's changing rapidly. It has do. Travelers are already there. They expect to find and book online.



Where's that museum?

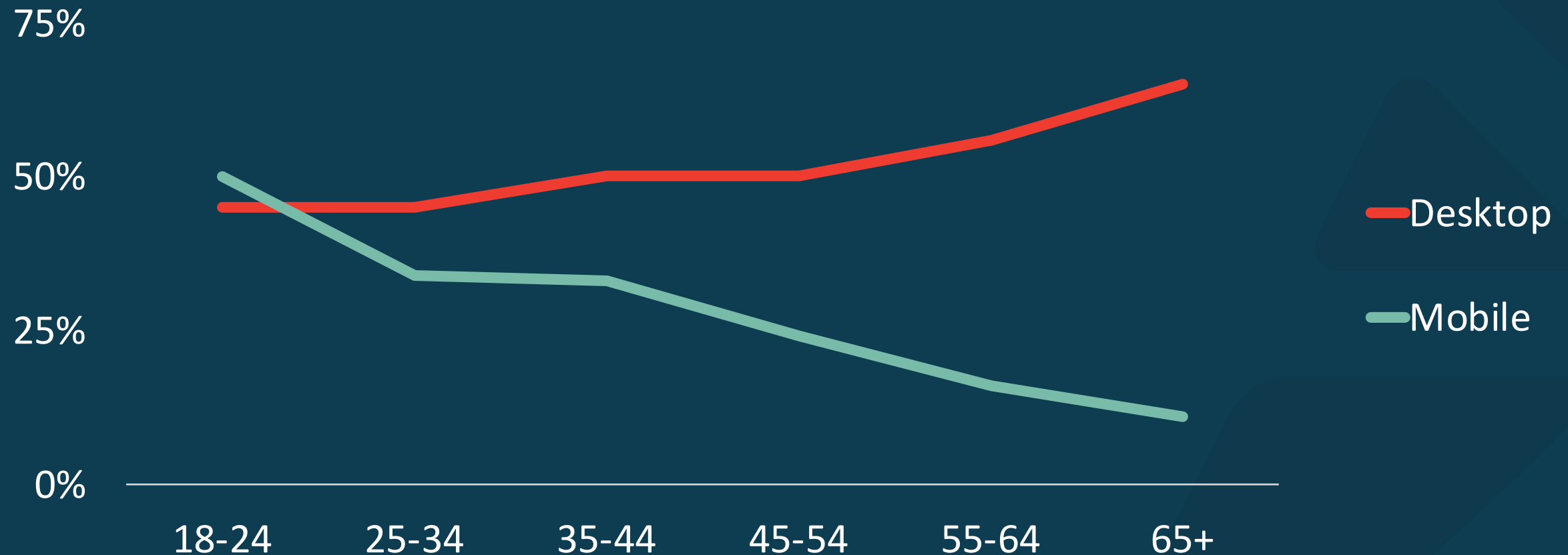


How did you book your attraction/activity/tour/events?
Arival's 2019 State of In-Destination: Activity travelers: European – 3,000, August 2019



For younger travelers, mobile tops desktop in researching Attractions

U.S. Travelers



What can DMOs do?

Create Local Community

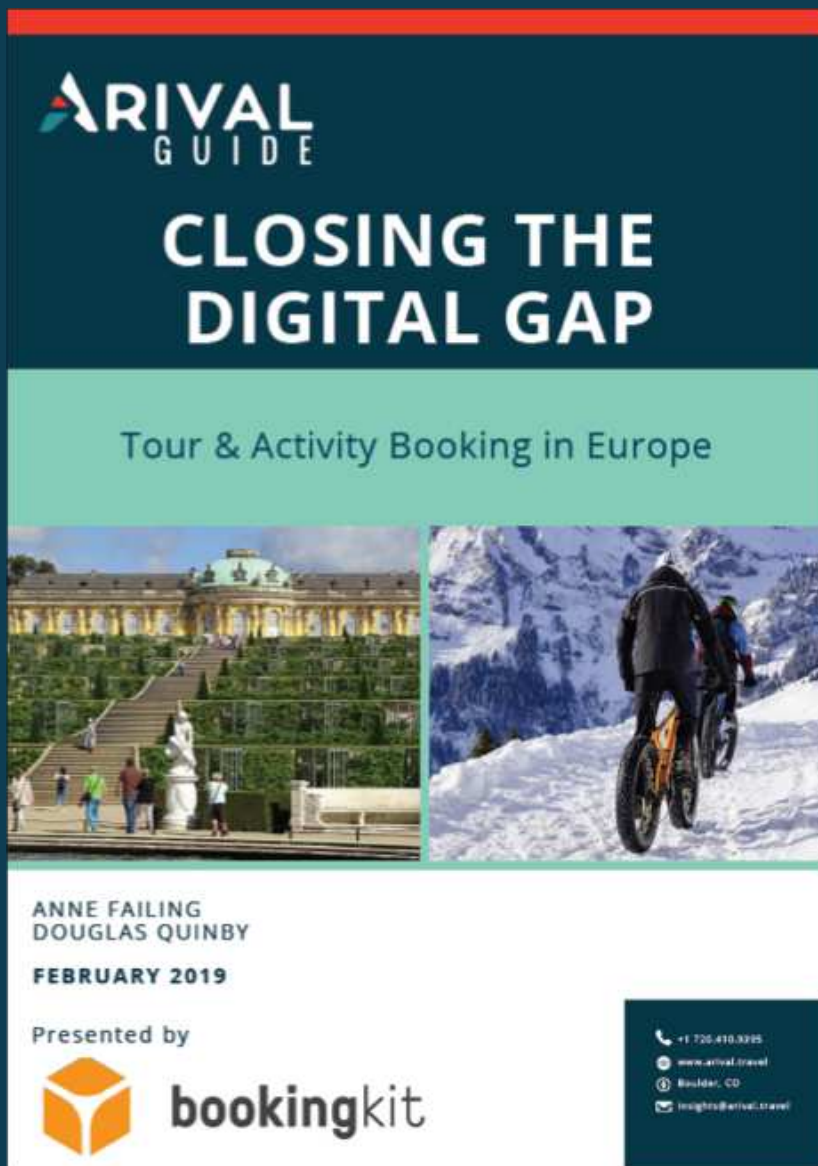
- Connect operators and attractions in your destination.
- DMOs are the obvious nexus for building local community, knowledge-sharing and partnerships.

Provide marketing support and training

- Most operators are small businesses with limited resources. Many do not have marketing expertise. Most do not have marketing teams!

Promote digital adoption

- This starts with “plumbing” – getting operators to adopt modern reservation system and business management technology.
- There are scores of great companies offering accessible tech to help bring these businesses online.
- Operators can connect with and learn about these companies at Arival.



Available at

ARIVAL.travel
The In-Destination Voice



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Thank You!

#arivaltravel