

An Arival Industry Insights Study

The Multi-Day Outlook

How Digital, Distribution & the Recovery Will Define
the Future of Multi-Day Tours & Experiences



Arival's Mission

Arival is the global authority on travel and tourism's third-largest segment: the in-destination industry. We provide events, research, insights, and community for creators and sellers of tours, activities, attractions, and experiences.



In 2021, Arival is conducting its first global industry survey of multi-day tour operators

Why We're Doing This

Multi-day tours have been among the most impacted sectors in travel by the pandemic, and one of most underserved by online travel distribution, technology and industry data. Operators need benchmarks and insights to track their performance as we emerge from the pandemic in 2021 and 2022.

Arival will field a global survey in 1Q2021 to the global multi-day tour operator marketplace to establish clear benchmarks and best practices across post-pandemic recovery, marketing, sales, distribution, technology use, and more.



Why multi-day tour operators now?

Multi-day tours remains one of the most fragmented sectors of leisure travel and broadly underserved by distribution and technology innovation. Operators who adapt to the emerging marketplace will be best positioned to win in travel's rebound.

Arival's Multi-Day Tour Operator Outlook Study will address

- Business firmographics (size, type, location, etc.)
- Industry outlook in 2021 and 2022
- Sales and distribution trends - Direct (online and offline), Third Party (OTAs, Wholesalers, Travel Agents), Groups
- Product trends (Group vs. Independent, Scheduled Groups vs. Custom Groups, FIT)
- Commercial benchmarks with third parties (commissions, T&Cs)
- Technology systems used, satisfaction and likelihood to change in the future
- Top challenges and concerns

Arival will examine these themes through several lenses:

- Operator segment (outbound and inbound/DMC operators, FIT vs. group, scheduled vs. custom)
- Travel segment (adventure, educational, religious, sustainability)
- Size of operator
- Geography
- Performance (growth)

What You Will Learn

Arival's Multi-Day Operator Outlook will help the entire industry

- Track the **state of recovery and outlook** for the multi-day segment
- Identify **key trends in technology** adoption and distribution
- Identify **performance benchmarks** across sales and distribution
- Understand the **top concerns and challenges** facing the industry
- **Identify strategies to engage with operators** to bring them into the digital distribution arena



All organizations seeking to better understand key trends in our industry should consider partnering with Arival, including:

1. Technology companies serving operators
2. OTAs & resellers seeking to better partner with operators
3. Operators seeking to understand industry benchmarks and best practices

How We'll Do It

1. Operator survey fielded with study partners
2. Desk research, interviews (minimum 10) and profiles of key operators, tech providers and distributors as models of best practice
3. Publish an extensive global study of operators related to technology, distribution, sales and marketing:

Survey Modules :

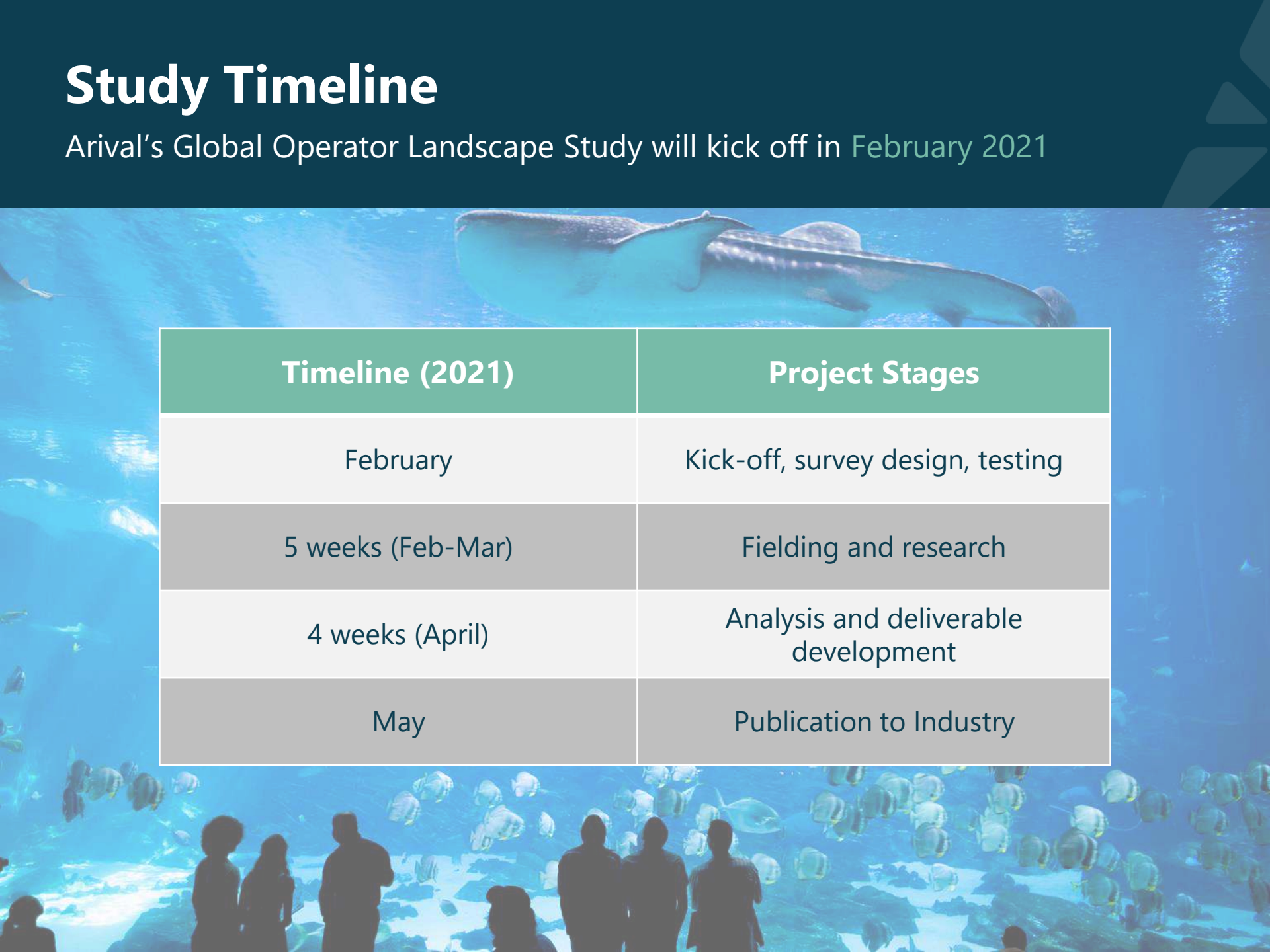
1. Operator firmographics
2. Sales & distribution
3. Technology
4. Products and pricing
5. Business outlook and post-pandemic recovery

Key Segmentation:

- Operator type
- Tour type (e.g. group vs. FIT)
- Travel type (e.g. adventure vs. cultural)
- Company size
- Geography
- Other segments to be determined

Study Timeline

Arival's Global Operator Landscape Study will kick off in February 2021



Timeline (2021)	Project Stages
February	Kick-off, survey design, testing
5 weeks (Feb-Mar)	Fielding and research
4 weeks (April)	Analysis and deliverable development
May	Publication to Industry

Arival Seeks Partners

To complete this important research, Arival seeks partners to help field the survey and fund the study.

Arival offers three partner levels for the Tour Operator Landscape Study

1. Launch Partners (two)
2. Insights Partners
3. Survey Fielding Partners



Launch Partner Benefits

Launch Partnership provides exclusive benefits for only two organizations for the Multi-Day Tour Operator Outlook Study

Research Insights Benefits

- Two **exclusive** custom questions on survey*
- **Exclusive:** Customized presentation deck
- Complete set of results and custom data tabulations
- Input on the survey process*
- Customized online presentation of the full set of results with the Arival team

Branded Content & Thought Leadership Benefits

- Custom co-branded Arival Guide (10-15 pages)
- Arival produced webinar, with partner, to partner's clients and database
- Branding on partner page of **Arival's Multi-day Tour Operator Outlook and**
- Presentation of key findings at Arival's Multi-day Forum
- Distribution of findings on Arival channels featuring partner branding for summary report (all partners)

* Arival retains final editorial control over question design and analysis to ensure findings are independent. "Launch Partners may have input on the questions, but not on the answers."

Insights Partner Benefits

Arival Partnership provides customized benefits for key partners for the Multi-Day Tour Operator Outlook Study

Research Insights Benefits

- Customized presentation deck
- Complete set of results and data tabulations
- Customized online presentation of the full set of results with the Arival team

Branded Content & Thought Leadership Benefits

- Presentation of key findings at Arival's Multi-day Forum
- Branding on partner page of **Arival's Multi-day Tour Operator Outlook**
- Distribution of findings on Arival channels featuring partner branding for summary report (all partners)

Partnerships Summary

Partner Features	Launch Partners (limited to 2)	Insights Partners
Custom presentation (slide deck) tailored to key areas of interest	✓	✓
Tabulated survey data (xls)	✓	✓
Branding on Final Report	✓	✓
Input on survey development	✓	
Custom Questions (2 questions, exclusively for Launch Partner)	✓	
Exclusive Co-branded Arival Guide	✓	
Webinar with insights deck	✓	
Partner Fee	\$10,000	\$2,000

What is a Fielding Partner?

- **Help us field this survey (February – March, 2021). All we ask is that you send out a link to the survey two times between February and March to your operator database.**
- **There is no cost.** Arival is not charging a sponsorship fee to fielding partners. We are seeking to develop comprehensive, important research and insights to benefit the multi-day tour industry.
- **Get key insights to support your strategies** before the rest of the industry. Gain advance access to the Insights Report developed from the study: *Arival's Multi-day Tour Operator Outlook*
- **Get your brand associated with market-defining industry insights published in *Arival's Multi-day Tour Operator Outlook*.** This report will be widely circulated and read by operators worldwide. Arival will provide partner acknowledgement and branding on all Arival publications and presentations stemming from this study.

How will we get operators to respond:

Each operator who fills out the survey or participates in an interview receives a free copy of *Arival's Multi-day Operator Summary Report*.

The Arival Research Team

Douglas Quinby co-founded Arival to fill the huge void in insights, information and conferences for travel's third-largest and most important sector: Tours, Activities & Attractions. Since its founding in 2016, Arival has become the defining platform for the sector, with three conferences worldwide, a series of definitive research reports and the Arival.travel media site and newsletter.

Prior to co-founding Arival he served as Senior Vice President, Research at Phocuswright, where he led seminal studies on numerous travel trends and sectors, including Tours, Activities & Attractions. He has deep experience in consumer and industry research with extensive background in both quantitative and qualitative methodologies, including consumer insights, surveys, and industry data analytics.

Douglas has also led event programming for the Phocuswright Conferences and is a recognized expert on online travel and travel distribution. He is frequently cited in leading media outlets including Bloomberg, CNN, *The New York Times*, *USA Today*, *The Wall Street Journal* and *The Washington Post*. He is a sought-after speaker and moderator, and has presented at numerous travel industry events around the world.



Douglas Quinby
Co-founder & CEO

The Arival Research Team

Anne Failing has over a decade of experience working in the travel industry and research and insights. She has led Arival's seminal research efforts, including Arival's *State of In-Destination 2018* and *Event Horizon*.

Prior to joining Arival, she worked as a market research consultant with a focus on the ski industry and economic development in mountain communities. As a lead analyst, she has developed projects that focus on product development, revenue management, strategic planning and market specific targeting decisions within the travel industry. Anne has extensive experience with both quantitative and qualitative methodologies, including consumer insights, surveys and industry data analytics.

Previously, Anne has worked for RRC Associates, Intrawest and Wisp Resort. She received a BA from Duke University and a MA from the Josef Korbel School of International Studies at the University of Denver.



Anne Failing
Research Analyst



Thank you

Bruce Rosard

Co-founder and COO

+1 720.308.5867

bruce@arival.travel