

# UNLOCKING 2025: INSIGHTS & OPPORTUNITIES FOR EXPERIENCES

Douglas Quinby, CEO, Arival

In partnership with

**civitatis**

*February 2025*



**ARIVAL**

# Where Are You?

---

1. U.S. / Canada
2. Mexico / Caribbean
3. South & Central America
4. Europe
5. Middle East
6. Africa
7. Asia Pacific
8. Middle Earth or Outer Space



# Today's Agenda

---

1. The Outlook for Operators
2. What's Booking
3. Channel Trends
4. AI (of course)
5. Discussion!



# Our Panelists

---

**Enrique Espinel** COO, Civitatis

**Jose Arozarena** CEO, Amigo Tours

**Lori Timony** SVP, Go City



~7,000 operators  
worldwide  
April-August 2024

# The Outlook for Operators: The State of Tours, Activities & Attractions

Global Operator Landscape 3rd Ed.

October 2024



**ARIVAL**

# Arival Global Operator Landscape *3rd Ed.*

Launch Partner

---

**GET  
YOUR  
GUIDE**

Strategic Insights Partners

---



**viator**<sup>®</sup>



# Arival Global Operator Landscape *3rd Ed.*

## Fielding Partners

---

Activitar	ETOA	OtoTrak	TourReview
Adrenaline	Freedome	Palisis	TripShock
Asoview	Gotuuri	Priohub	UKInbound
BeMyGuest	Great France	Prioticket	Veltra
Bókun	Guruwalk	Redeam	ResPax
Byfood	HBX Group (formerly Hotelbeds)	Regiondo	Vox Tours
Ceetiz	iTicket/Visit Group	Sojern	Winerist
Checkfront	Latitur	TOItaly/Towns of Italy	Xola
Checkyeti	Manawa	Tourdesk	Zau
Civitatis	Marketing Greece	Touristcheck 360	
Digitickets	Nexus Tours & Juniper Experiences	Tourpreneur	



# Arival Travel Experience Operators: Key Categories & Sub-Segments

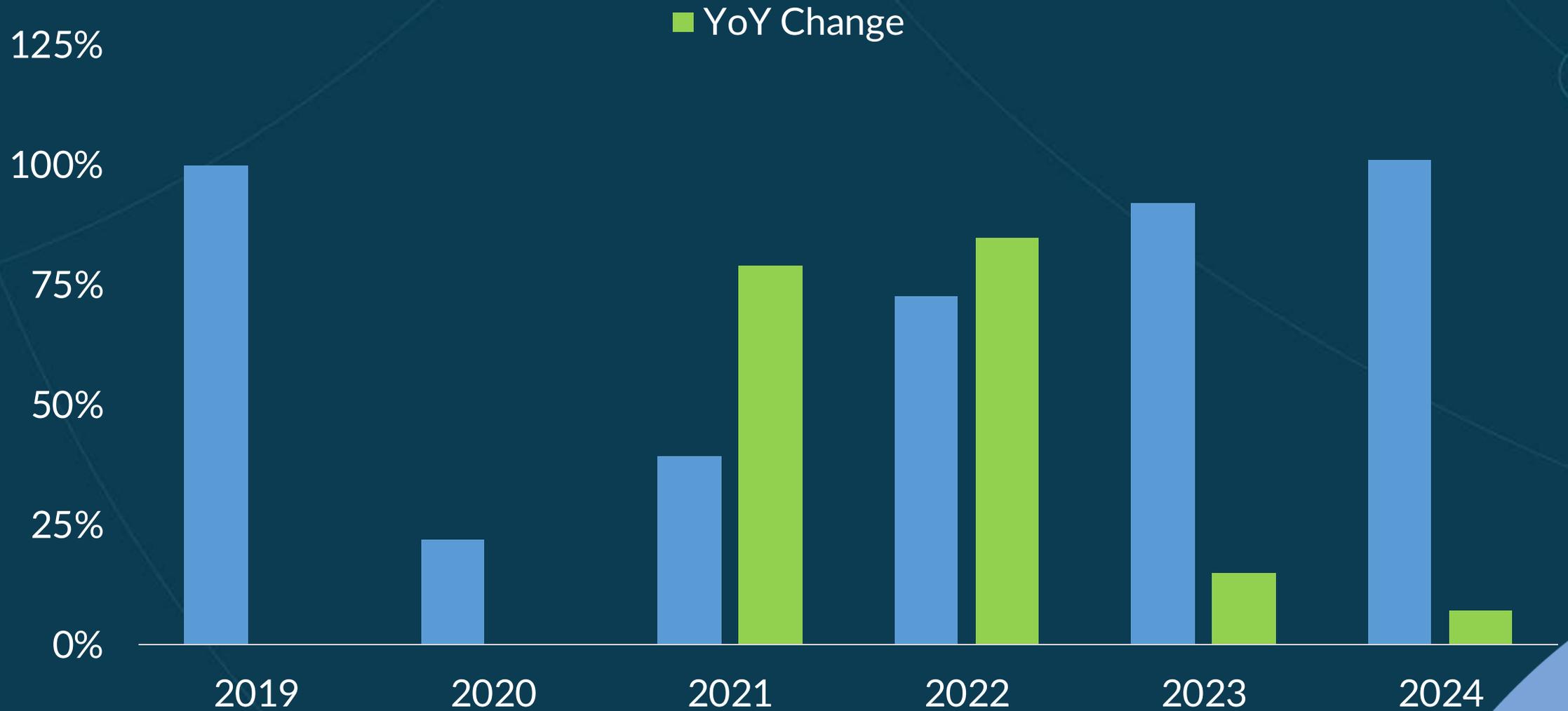
Tours	Activities	Attractions
All tour types:	Cultural classes	Amusement parks
Tour operators <ul style="list-style-type: none"> <li>• All modes of transportation (airplane, bike, boat, bus, helicopter, walking, etc.)</li> <li>• All thematic types (adventure, art, culinary, ghost, history, sightseeing, etc.)</li> </ul>	Escape rooms	Museums
	Land-based activity or rental	Cultural sites & monuments
	Flying activities	Observatories
	Spa & wellness	Zoos & Aquariums
	Theater, show or entertainment	Ticketed experiences (e.g. immersive)
	Water-based activities & rentals	
	Zipline, adventure parks	



**How are we doing?**



# Global Travel Experiences Revenue as Share of 2019

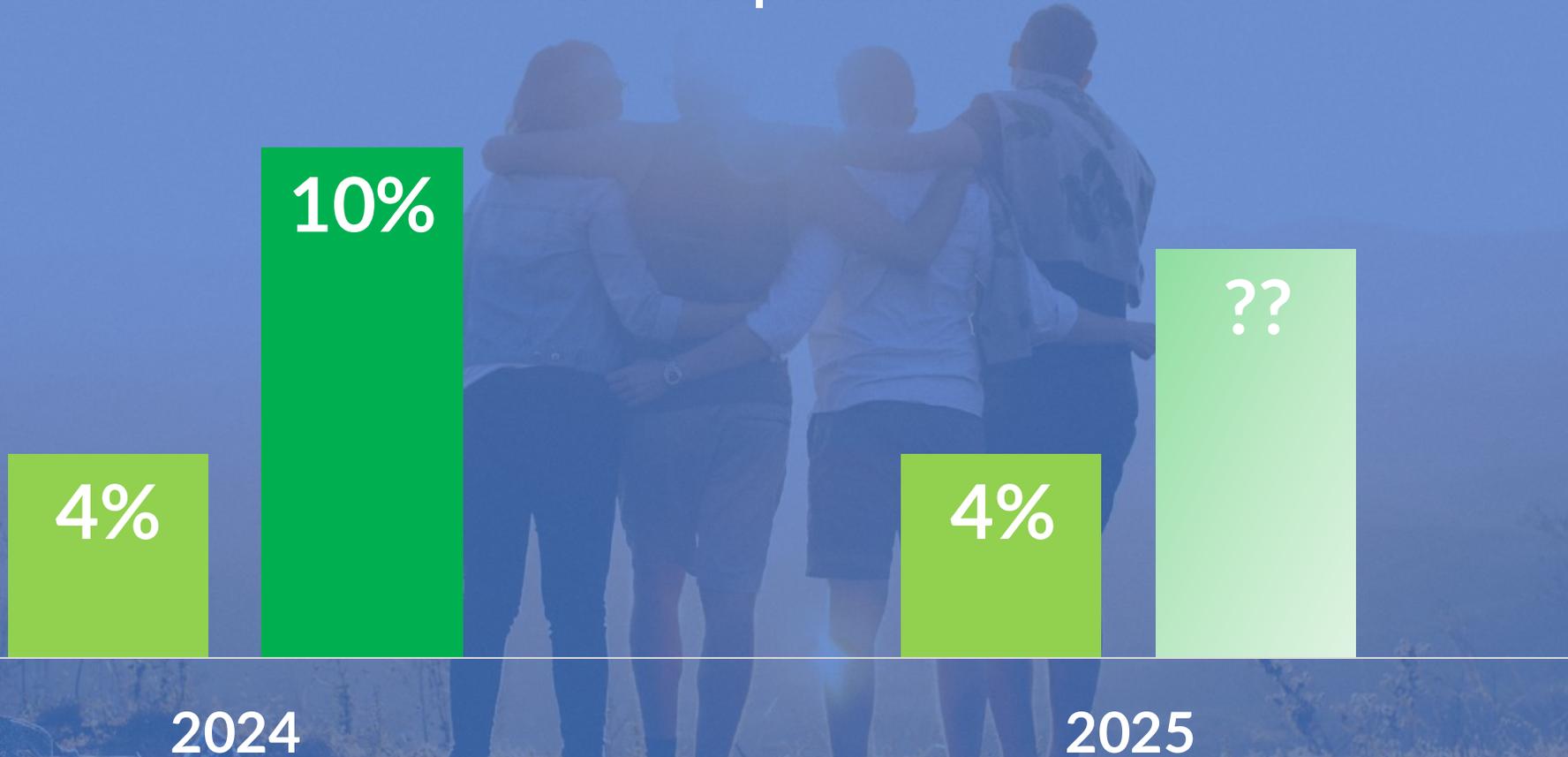


# The Outlook for 2025



# Outlook for 2025

■ Travel ■ Experiences



Sources; Arival, Skift, Statista, US Travel

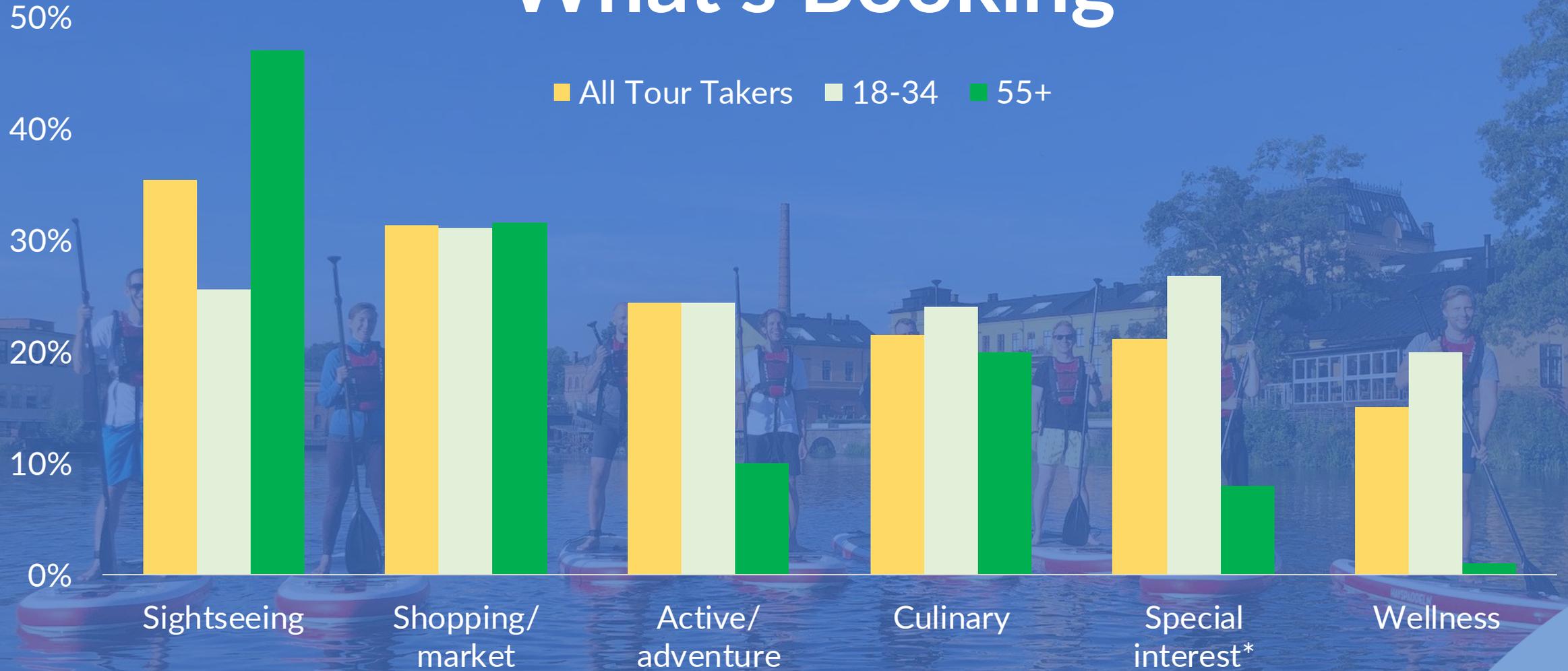
Arival *The Outlook for Operators: Global Operator Landscape 3<sup>rd</sup> Ed.*, October 2024



# What's Booking



# What's Booking



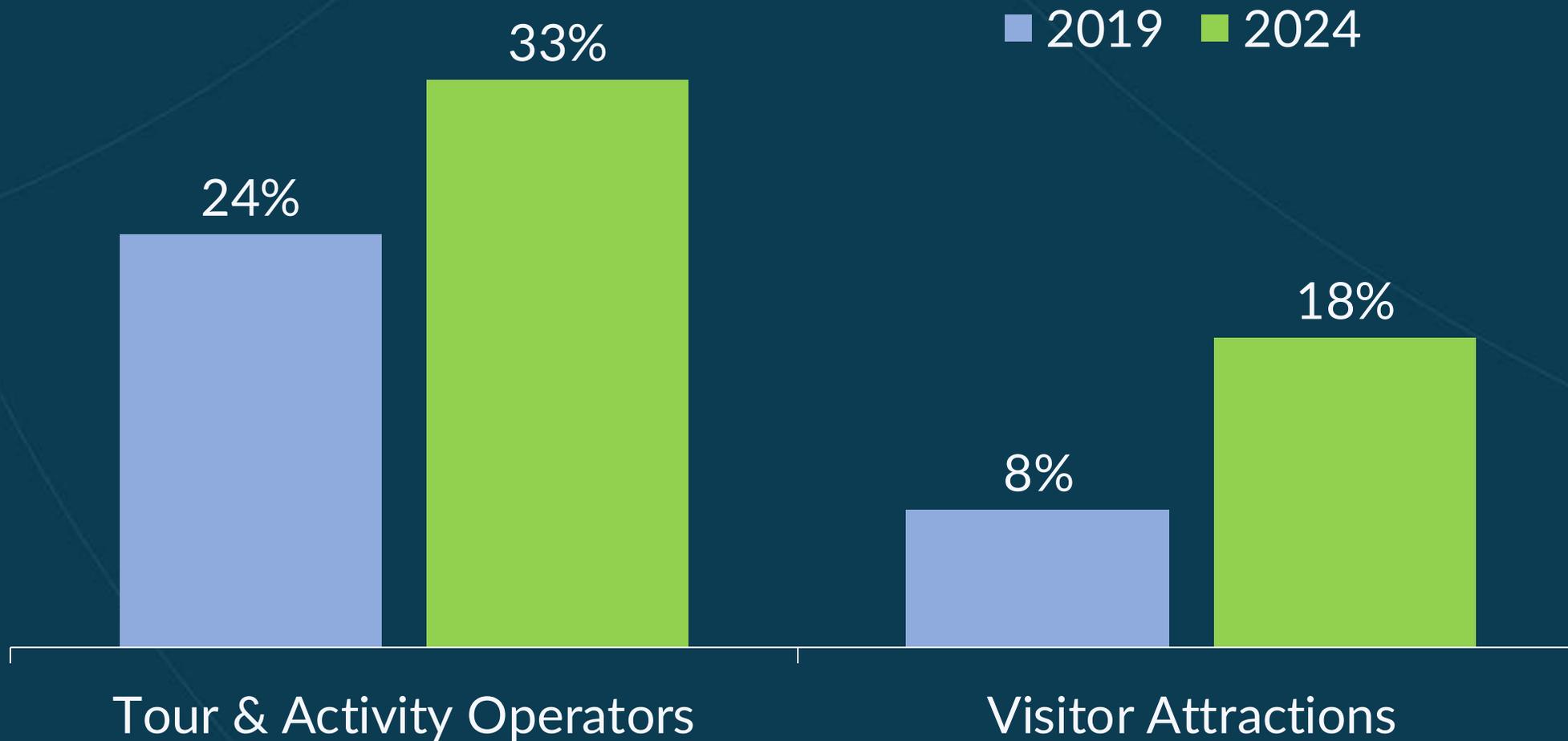
\* Tour on a specific theme or interest, such as photography, film, art or artist, etc.  
Arival: The 2025 U.S. Tour Taker (forthcoming) – 800 U.S. travelers



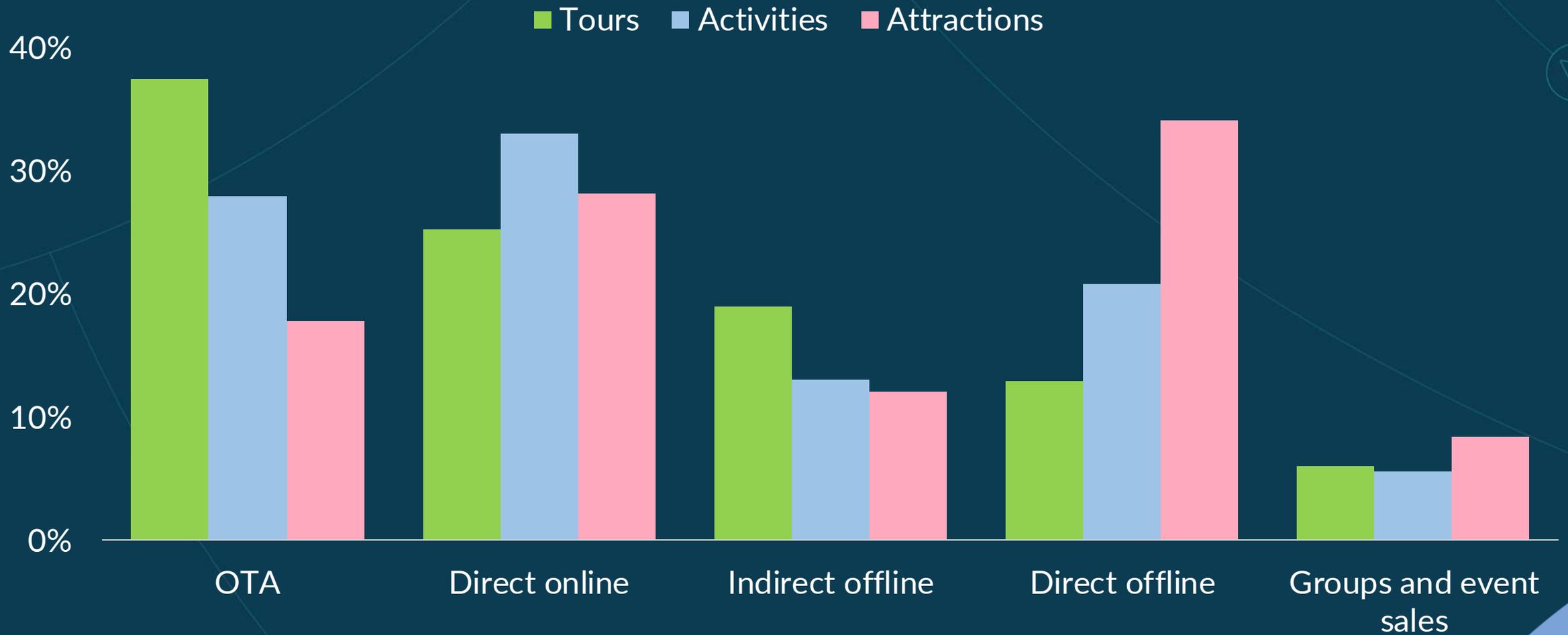
# Channel Trends



# OTA Share of Bookings



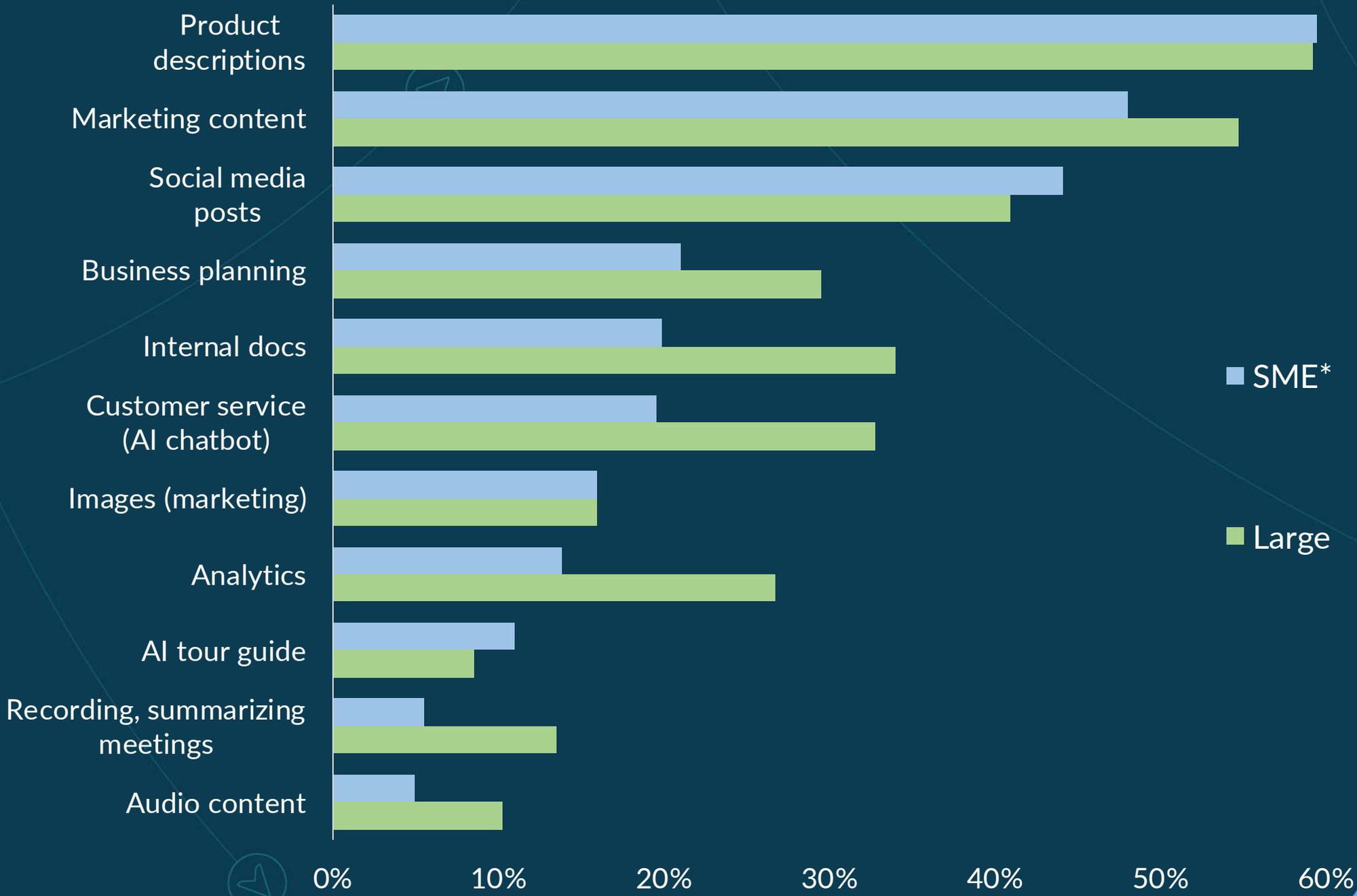
# Distribution Mix by Key Operator Category



# The AI-Powered Operator

---





# Arival.travel/research

## The Outlook for Operators: The State of Tours, Activities & Attractions

Global Operator Landscape 3rd Ed.

October 2024



**ARIVAL**



Learn more @

# ARIVAL

## 360 VALENCIA

28-30 April 2025



**civitatis**

**SAVE 10% as an Civitatis partner.  
Use code SPMPVLC10CI when registering.**

Discount does not apply to Arival Insider Pro Access Members or non-operators.