

In September 2019, Arival conducted a survey of U.S. travelers to understand what activities they do, how they plan and book, what influences their decisions, and more, to help activity operators understand key trends in traveler behavior.





### Methodology

Online survey of 590 U.S. travelers, fielded in August/September 2019, who:

- 1. traveled domestically or internationally in the past year for leisure
- 2. stayed overnight
- 3. participated in a qualifying adventure or recreational activity





### 1) Activities Are Popular

3 in 5 U.S. travelers did some type of activity



# 2) Top 3 Reasons Travelers Choose a Particular Activity





Why #3:
Passion
(always wanted to do it)



### Why #2: Price



### Why #1 Convenience

It needs to fit conveniently into their vacation plans.

"It's my vacation, I'll do what I want, when I want."



### So what?

Travelers have lots of choices.

Operators should offer many options for traveler flexibility (e.g. multiple departure times, optional hotel pick-up, etc.)





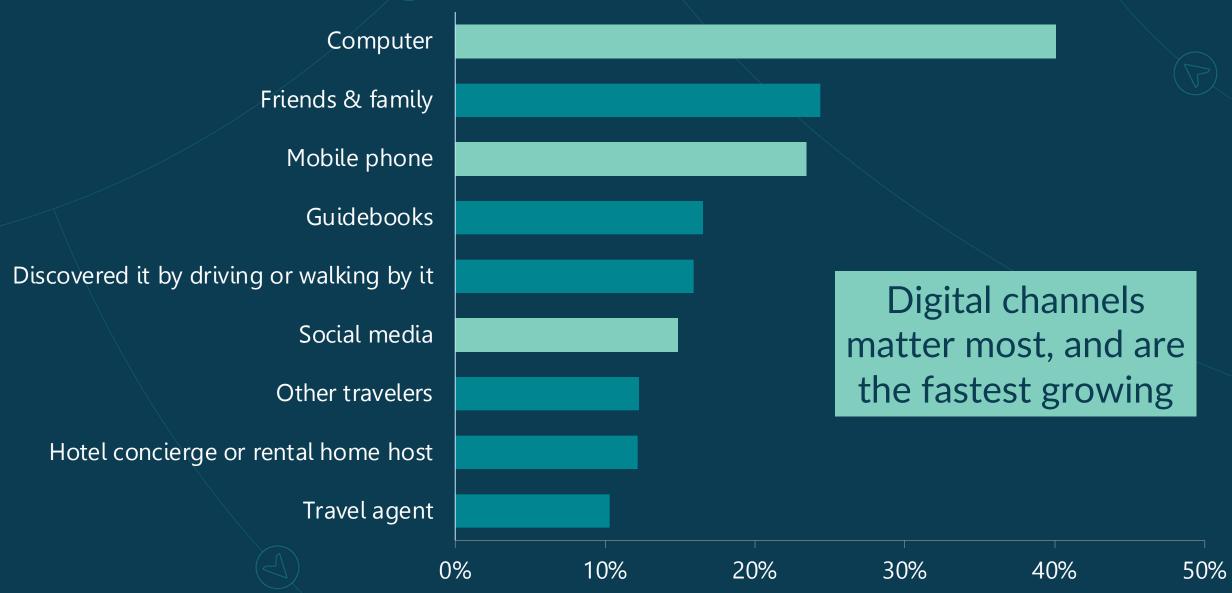
### 3) Choosing is Changing



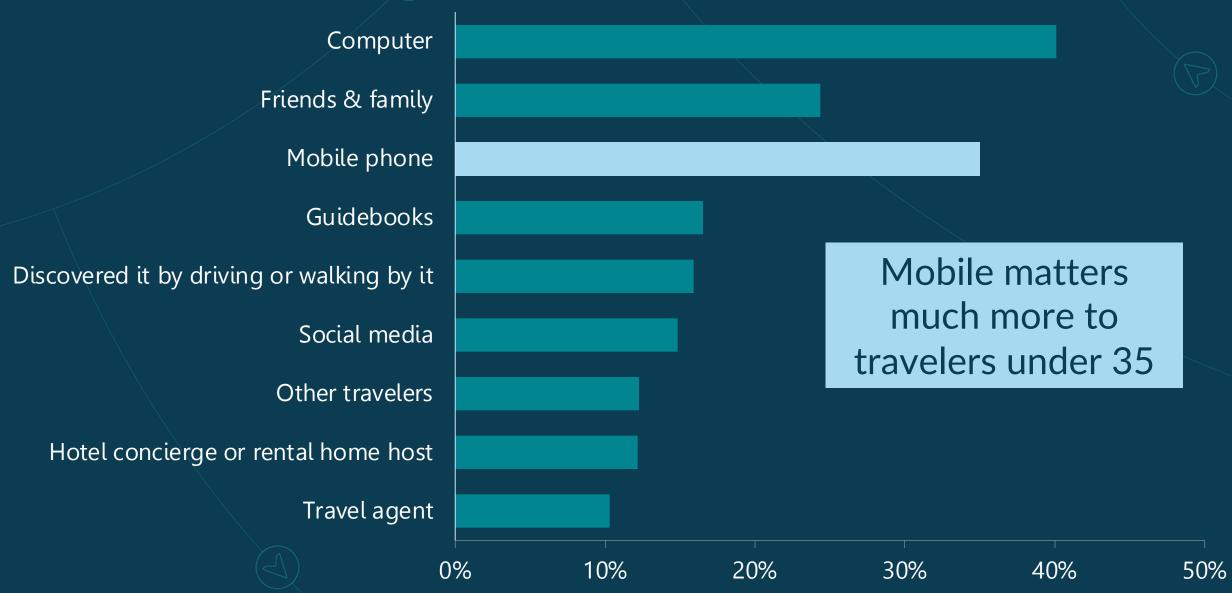




### How Travelers Find, Plan Activities



### How Travelers Find, Plan Activities



### So what?

- There are many points of influence. Do you know from where your customers get their activity information?
- 2. Mobile matters most to the youngest travelers. Develop and review everything (website, email, etc.) on mobile first





## 4) Last-Minute Booking Is Surging



### Last-Minute Booking

**Booked within** 7 days

62%

**Booked within** 2 days

31%

Travelers aged 18-34





#### So what?

The present and future of activity booking are increasingly last-minute. Operators that can offer last-minute, real-time booking and shorten advance booking requirements will be better positioned to win this growing segment.







## 5) Booking Methods Snapshot





From the operator, offline

On computer

Visitor or ticket office in destination

Online via mobile phone

Travel agent / vacation package

Hotel

0%

10%

20%

30%

www.arival.travel

### Method Spend

From the operator, offline

Computer

Mobile phone

1x

1x

1.4x



# Mobile bookers are 2x more likely to post a review







### So what?

- 1. Travelers use multiple booking methods.

  Operators should learn about all of them, and work with those that make the most sense for their business.
- 2. Mobile bookers are especially valuable and more influential. Track those customers who book on mobile, and treat them well!





# 6) The Rise of Online Travel Agencies (OTAs)









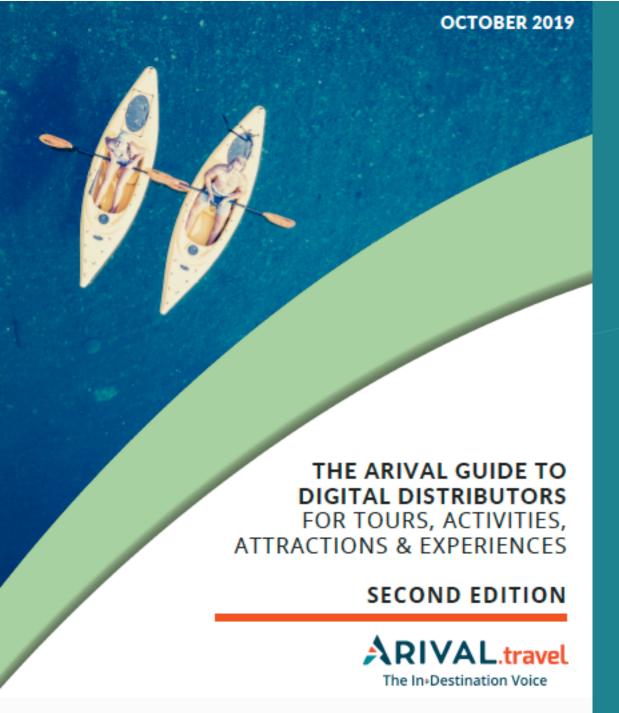












There are more than 120 OTAs for tours and activities. See this Arival directory (it's free).



### Online activity bookers who used an OTA

All Travelers
65%
Travelers
aged 18-34

81%







### So What?

- 1. Ignore OTAs at your peril (we're not saying you should use them, but you should learn about them and understand the risks and impact of both working with them, and not).
- 2. Check out the <u>Arival Guide to</u> Working with OTAs



### 7) Google Has Big Plans

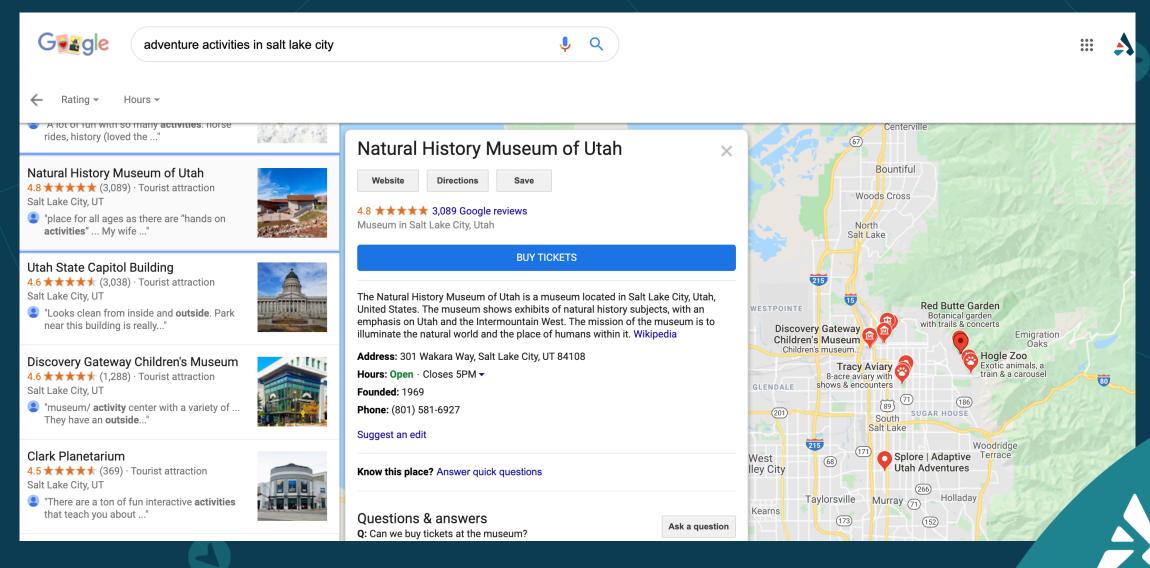


### What is Reserve with Google?

- Google is going deeper into tours and activities, just as it has with flights and hotels.
- Reserve with Google enables travelers to book some tours, tickets and experiences directly in Google.
- This booking is facilitated by either OTAs or some of the reservation booking systems.
- See the next page.



### "Buy" Button on Reserve with Google



### So what?

- 1. Right now, operators cannot list directly. But your products could already be bookable on Google.
- 2. Operators should track their Google listings on search and maps closely.
- 3. Learn about Google My Business and keep your listings up-to-date.
- 4. Encourage customers to leave reviews on Google.
- 5. Read this <u>overview at Arival.travel</u>. It covers everything you need to know about Reserve.







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The In•Destination Voice

See all of our research (it's free!) at arival.travel/research

