SUMMER TRAVELER PULSE

U.S. TRAVELERS' SUMMER PLANS FOR TOURS, ACTIVITIES & ATTRACTIONS IN 10 CHARTS

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You need to know the Tours, Activities & Attractions travelers are planning for their summer trips, and when they plan to book them. So Arival conducted a consumer pulse survey of U.S. adults planning a trip this summer to help give you an edge going into the all-important busy season.

ABOUT ARIVAL

Arival advances the business of creating awesome in-destination experiences through events, insights and community for Tour, Activity & Attraction providers.

Our mission: establish the Best Part of Travel as the major sector of the global travel, tourism and hospitality industry that it deserves to be.
The good news for operators is that U.S. travelers plan to travel often over the summer. Over half indicated that they are planning two or more trips (57%).

Most will travel within the U.S., however, 31% of travelers plan to go on an international trip. Mexico, the Caribbean and Central America as well as Europe are the most popular destinations.
ACTIVE EXCURSIONS, TOURS ARE TRAVELERS' TOP ACTIVITIES

The vast majority of travelers plan to experience some kind of Tour, Activity & Attraction during their summer trips. They are nearly equally interested in activities and tours. Active excursions (including organized hiking, biking, water activities, zip lines, etc.) are the most popular, followed by sightseeing tours of all types. One in three (34%) plans to visit a museum, zoo or aquarium and another 31% will visit an amusement or adventure park this summer.

Ticketed events also figure prominently in summer travel plans. One in four plans to attend a concert, theater or play and another 17% will attend a professional sporting event. We expect this figure to rise in the fall and winter as other sporting seasons start up.
Younger travelers are more predisposed to include amusement parks and sporting events within their plans. More than half of travelers ages 18-24 years old intend to visit an amusement park when traveling (54%). Among travelers aged 25-54 years old, more than one in three plans to visit an amusement or adventure park. This activity type clearly serves young adult travelers as well as young families on their summer trips.

Quick Take:
Young adult/family travelers have amusement parks in their summer plans
Tours factor heavily into the summer travel plans. Traditional sightseeing tours that take in the famous sites will be the most popular (49%). However, several non-traditional tour types will play a big role in travelers’ summer plans. Drink- and food-themed tours are popular, and nearly one in four say they plan to do an “off the beaten path” tour.

### The Types of Tours Travelers Will Take

- **Sightseeing tour**: 49%
- **Art, culture or history tours**: 31%
- **Beer, wine or drink-related tours**: 28%
- **Neighborhood tour “off the beaten path”**: 24%
- **Foodie / Culinary Tour**: 23%
- **Shopping tour**: 18%

* Totals exceed 100% because travelers may do multiple activities

Arival U.S. Summer Traveler Pulse: 500 U.S. adults planning summer trips, May 2018 (Google Surveys)
"EXPERIENTIAL TOURS" MORE POPULAR AMONG YOUNGER TRAVELERS

Younger travelers (18-34) are more interested in experiential tours than older travelers. They are less likely to do classic sightseeing, but more likely to seek out culture and culinary experiences. This is a clear signal as to where the future of touring is headed. Interest in art, culture and history tours drops off with 35-44-year-olds, suggesting less popularity with family travelers.

"Experiential Tours" Are More Popular Among Younger Travelers

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Beer, wine or drink-related tours</th>
<th>Art, culture or history tours</th>
<th>Foodie / Culinary Tour</th>
</tr>
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<tr>
<td>18-24</td>
<td>43%</td>
<td>46%</td>
<td>43%</td>
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<tr>
<td>25-34</td>
<td>38%</td>
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<td>35%</td>
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<tr>
<td>65+</td>
<td>18%</td>
<td>16%</td>
<td>31%</td>
</tr>
</tbody>
</table>

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Arival U.S. Summer Traveler Pulse: 500 U.S. adults planning summer trips, May 2018 (Google Surveys)
WALKING TOURS TOP
BOAT, BUS OR BIKES

Active excursions will be most popular this summer. More travelers are planning tours that involve activity. Walking tours are the clear favorite: half of U.S. travelers intend to take a walking tour.* Another 41% indicated they will include a hiking/running or biking/cycling tour in their plans. Water tours are also big: one in three travelers say some sort of boat or water tour will be a part of their summer travel.

The Types of Tours Travelers Will Take

- Walking tour: 50%
- Boat or water tour: 37%
- Hiking or running tour: 26%
- Bike or cycling tour: 15%
- Bus tour: 14%
- Plane or helicopter tour: 11%

* Totals exceed 100% because travelers may do multiple activities
Arival U.S. Summer Traveler Pulse: 500 U.S. adults planning summer trips, May 2018 (Google Surveys)

Just 14% of travelers say they will do a bus tour. But on an encouraging note, bus tours are most popular with the youngest travelers. Nearly one in four 18-24-year-olds indicate they would include a bus tour in their summer travels.

* The survey did not specify self-guided vs. paid tours, so some respondents may have included self-guided walking tours without a guide.
Famous sites, parks and attractions are a huge driver of travel, and that’s certainly the case this summer. Natural attractions and parks are the most popular attractions (52% of summer travelers). While popular across all age segments, natural attractions are most popular among older travelers - those 45 and up.

In addition to natural attractions, one in three will visit a zoo or aquarium, three in 10 plan to visit a famous attraction (such as the Eiffel Tower or Empire State Building) or art, cultural or historic museums. Another one in four will attend a theme or amusement park. As mentioned earlier, theme or amusement parks factor more significantly among younger travelers or travelers with young families.
ONE IN THREE ACTIVE TRAVELERS WANT A “LOCAL” EXPERIENCE

Activities feature heavily in summer travel plans. With travelers expressing the desire for more active travel plans, land adventures top the list. Younger travelers are most adventurous: 60% of 18-24-year-olds plan to include an active land excursion.

The Types of Activities Travelers Want

- **Land adventure (hiking, cycling, zipline)**: 40%
- **Unique tour or experience with a local**: 33%
- **Water adventure**: 28%
- **Spa, wellness, fitness or yoga**: 24%
- **Play a sport**: 22%
- **Educational - class to learn a new skill**: 17%

* Totals exceed 100% because travelers may do multiple activities

Arival U.S. Summer Traveler Pulse : 500 U.S. adults planning summer trips, May 2018 (Google Surveys)

“Travel like a local” has become an overused catchphrase in the travel industry over the past few years, popularized by Airbnb. But there appears to be something to it. One in three travelers planning activities are looking for a unique tour or experience with a local. The demand for experiential travel and “off the beaten path” travel experiences is clear, and it factors in the travel plans of all age groups. It is not just the stereotypical millennial seeking these experiences.

Quick take:
Adventure and "local" are the top activity themes this summer
LOVING LAST MINUTE: THREE IN FOUR WILL BOOK SOME ACTIVITIES WHEN THEY GET THERE

The demand for Tours, Activities & Attractions by U.S. travelers is quite robust this summer. Whether you operate or sell (or both), you need to know when and how travelers are planning so that you can provide the best booking experience and capture your share of the growing market. Only one in four travelers say they would book all their activities in advance of departure. This means that 76% of travelers – three in four – will book at least some of their Tours, Activities & Attractions when they get there.

Advance bookings are wonderful, but we all have to be ready to accept bookings when travelers are ready – including up to the last minute.
SIX ESSENTIAL KEY TAKEAWAYS FOR TOUR & ACTIVITY OPERATORS

1. Summer’s looking good! Most travelers will take at least two trips.

2. Nature and active excursions are topping the to-do lists for summer trips. Your customers want to get outside, and walk, bike and ride.

3. Sightseeing is alive and well. The classic sites are as big a draw as ever.

4. There really is something to this “local thing.” One in three travelers want a “local experience” and “off-the-beaten-path” tours.

5. Eat, drink and be merry. Tours and activities involving local treats and brews are more popular than ever. Work them into your experiences wherever you can.

6. Three in four travelers will purchase at least some activities in destination. You have to provide options for both advance and last-minute bookings to capture all the busy season has to offer.
SUMMER TRAVEL PULSE

Did you like this Summer Traveler Pulse study? Was it helpful? What else would you like to learn?

Please let us know. We want to help you grow your business and create amazing in-destination experiences. Send us your suggestions. We would love to hear from you.

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Join us at Arival in Las Vegas, Sept. 24-27, 2018. It is the only event dedicated to the Best Part of Travel: Tours, Activities & Attractions.

Hear from the brightest minds and biggest brands in Tours, Activities & Attractions.

Gain valuable insights from hands-on workshops on all things digital, distribution, sales and marketing, operational excellence and more. Come away with a list of actionable insights to accelerate your growth immediately!

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