

# Travel Experiences Trends

*Tours, activities, attractions & the opportunity for destinations*

**ETOA –  
Destinations Exchange Europe**

*June 2025*

*Ramon Pons*

*Head of Partnerships*

The ARIVAL logo, featuring a stylized 'A' composed of two overlapping triangles (one red, one blue) followed by the word 'RIVAL' in a bold, white, sans-serif font. The logo is set against a dark blue background that curves upwards from the bottom right corner of the slide.

**ARIVAL**

# You know Experiences

[www.arival.travel](http://www.arival.travel)



# “Tours & Activities”

Ancillary

Extra

Add-on





Stays

Flights

Cars

Packages

Things to do

Cruises

1 room, 2 travelers ▾

 Going to

 Check-in  
Feb 26

 Check-out  
Feb 27

☐ Add a flight

☐ Add a car

Search

# no longer an “Add-on”

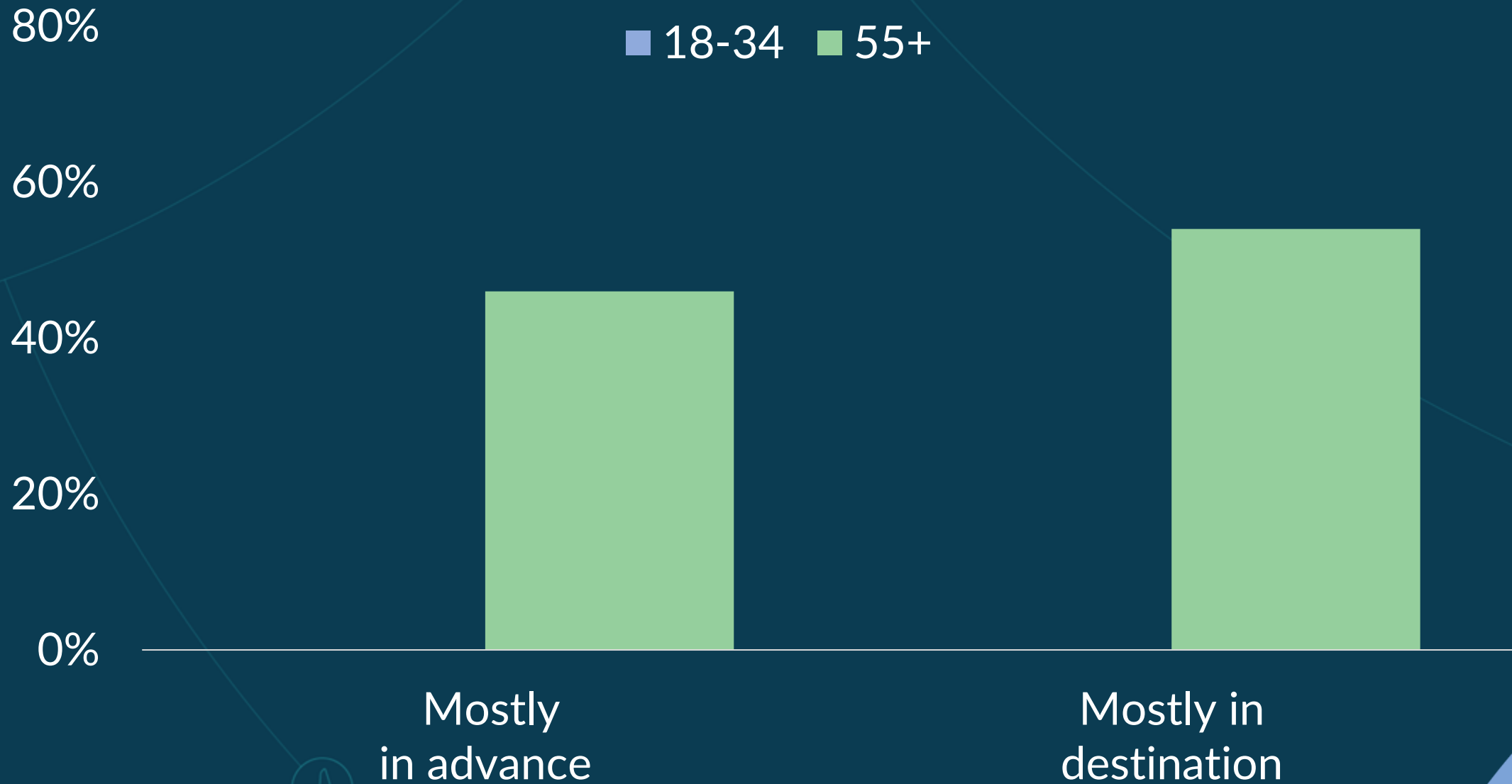




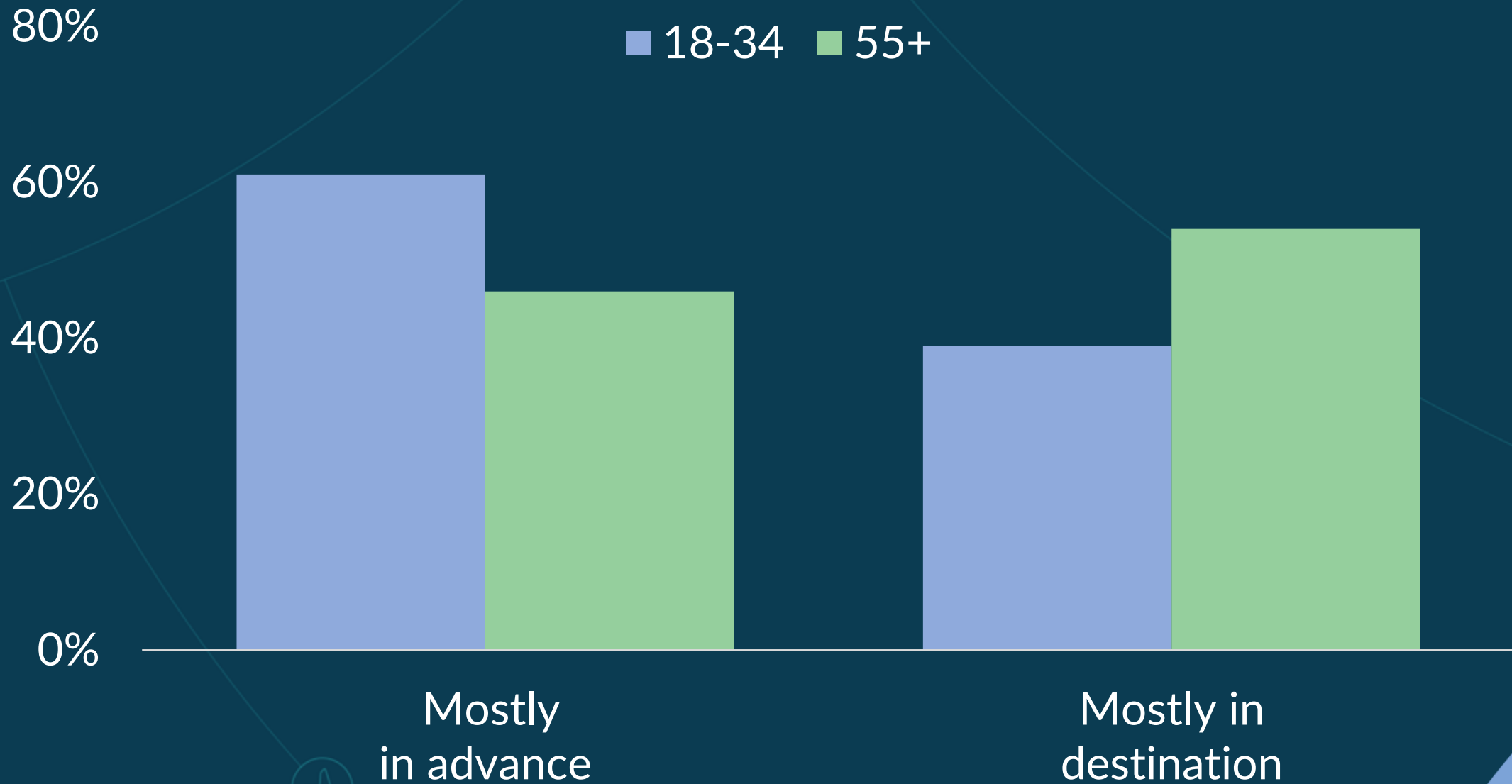
65% say  
experiences  
influence  
where to go



# When Travelers Plan Experiences



# When Travelers Plan Experiences



# Things to Do

## The Reason to Go

## The Why of Travel







# The Best Part of Travel





# Experiences sector

(Tours, Activities, Attractions, Events)



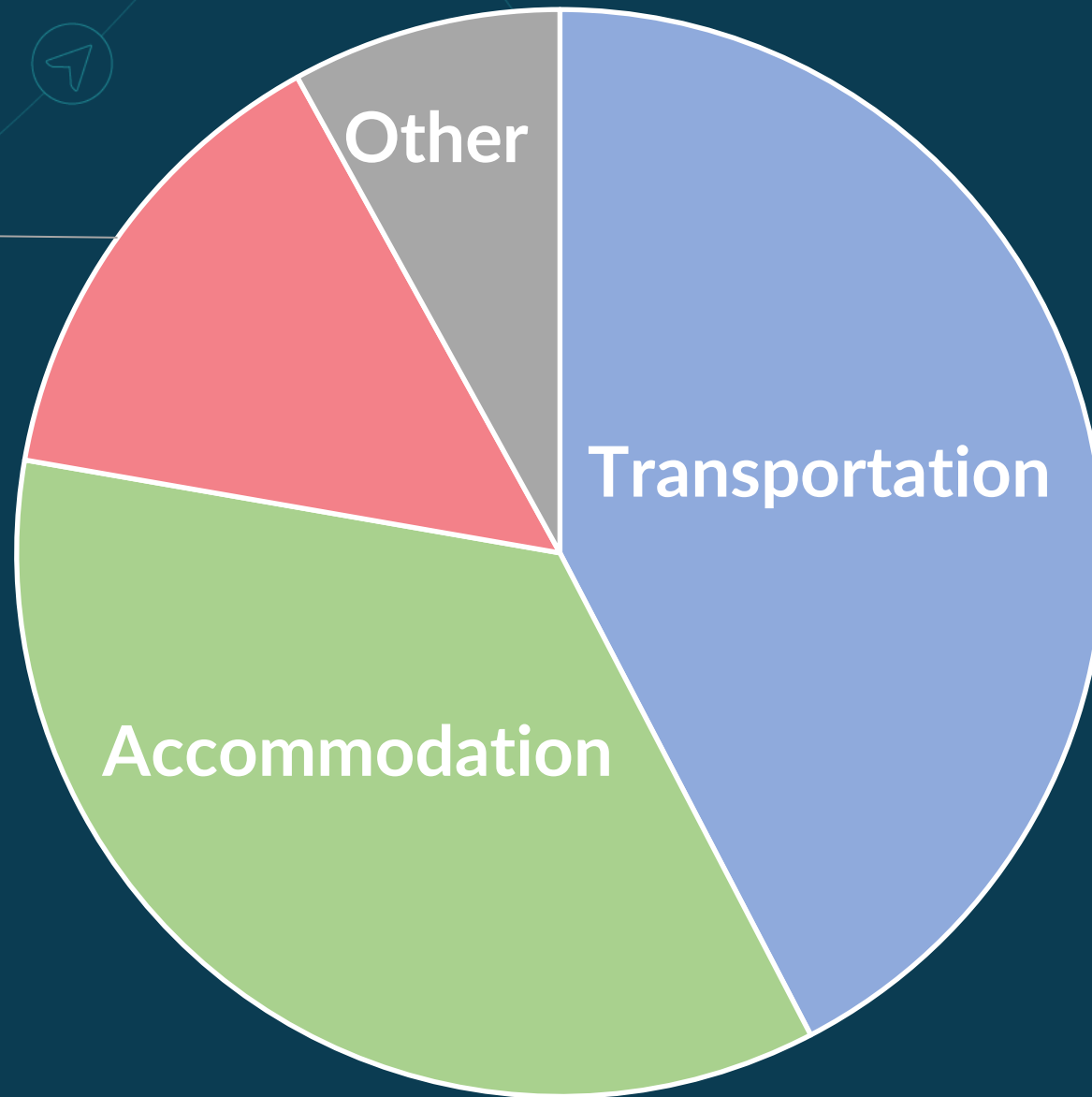
# 1) It's Big



~\$265 Billion  
(2024)



Experiences



Accommodation

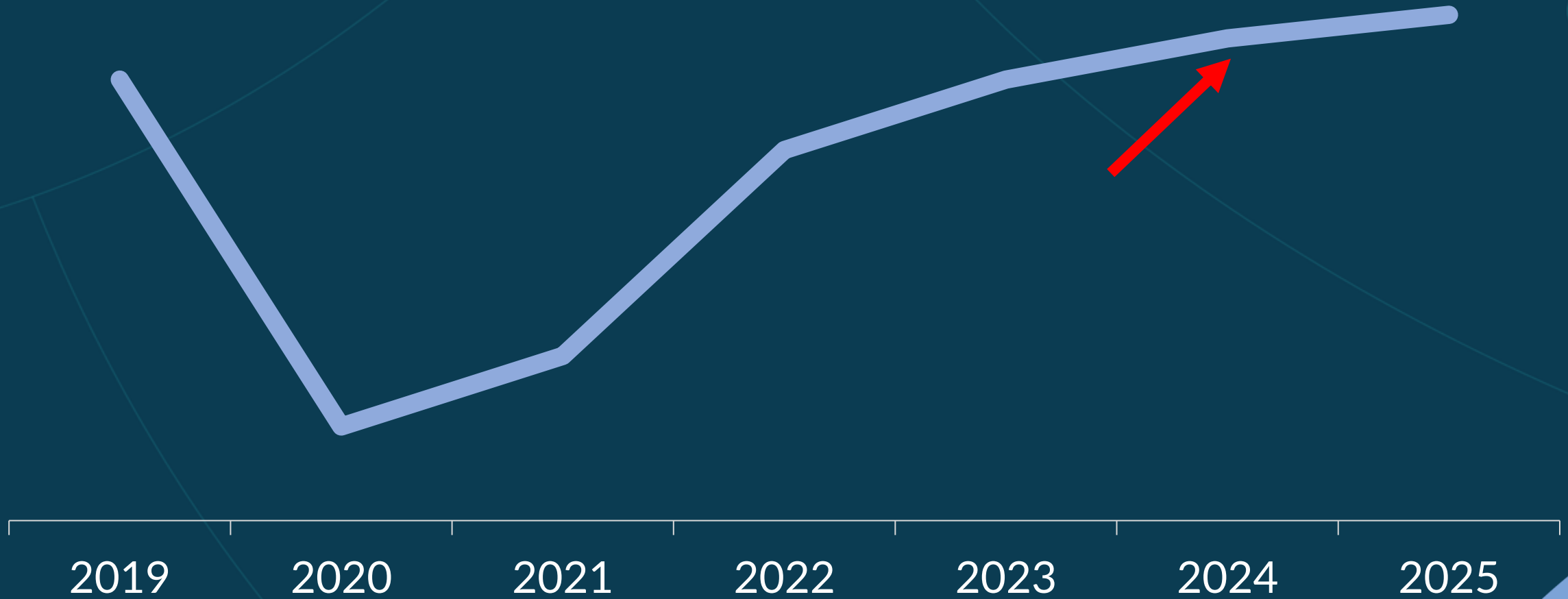
Transportation

Other





# European Experiences Bookings



## 2) It's Fragmented



# Lots of operators...







8 in 10  
are SMEs  
( $< \$1\text{M}$  in sales)





...and categories

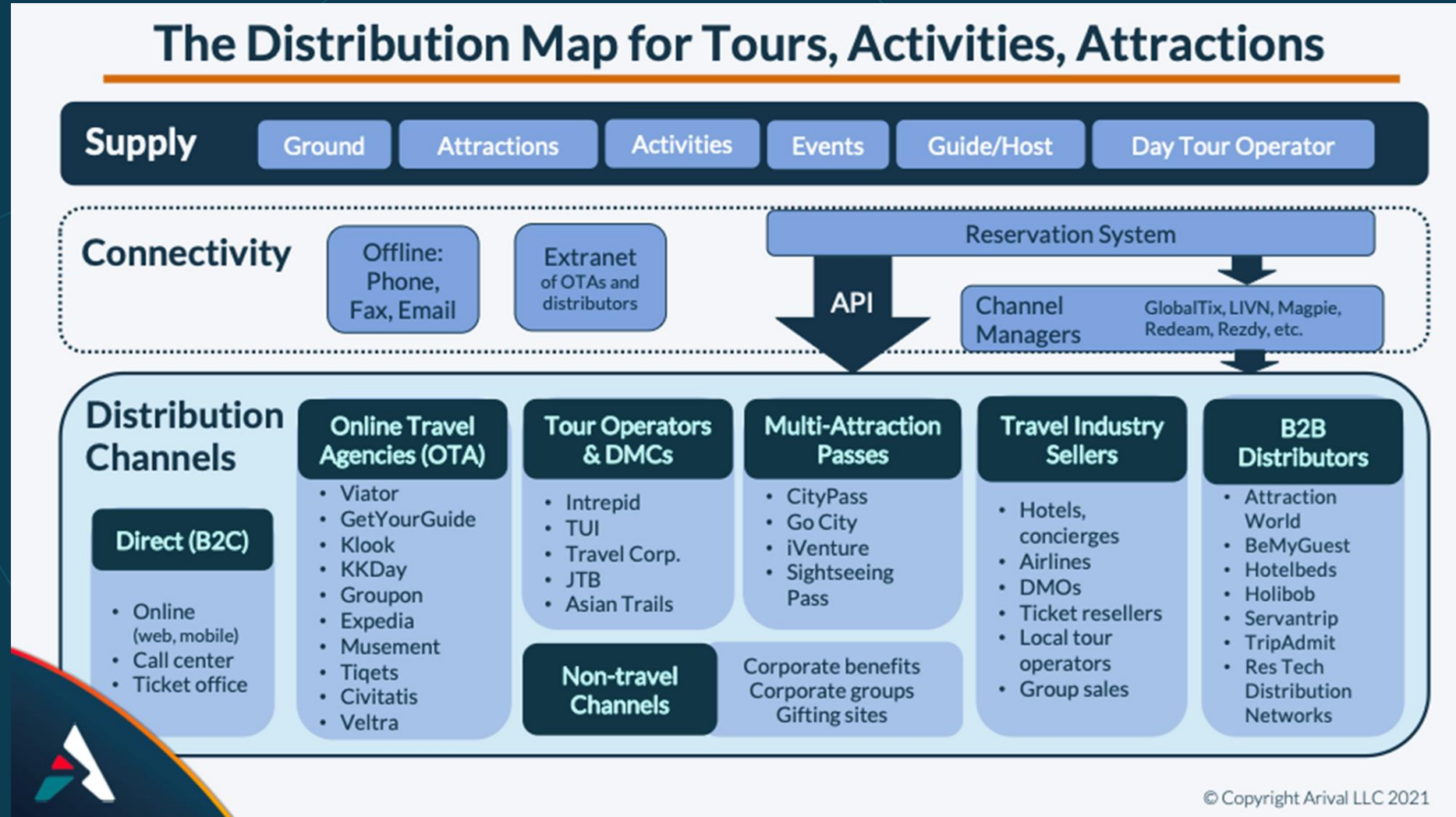


# >150 Industries

Four-Wheel Drive (4WD) Tours & Excursions Dolphin & Whale Watching Parasailing & Paragliding Adrenaline & Extreme Tours Duck Tours Photography Tours Air Tours Eco Tours Private Tours Ancient Ruins Factory Tours Rail Tours Antique Stores Fashion Shows & Tours River Rafting & Tubing Aquariums Fishing Charters & Tours Room Escape Games Archaeology Tours Food Tours Running Tours Art & Music Tours Gear Rentals Safaris Art Galleries Ghost & Vampire Tours Scavenger Hunts Art Museums Ghost Towns Scenic Railroads ATV & Off-Road Tours Golf Courses Science Museums Auto Race Tracks Gondola Cruises Scooter & Moped Tours Ballets Helicopter Tours Scuba & Snorkeling Balloon Rides Hiking & Camping Tours Segway Tours Battlefields Historic Sites Self-Guided Tours & Rentals Beer Tastings & Tours Historical & Heritage Tours Shark Diving Bike Tours History Museums Shooting Ranges Boat Rentals Hop-On Hop-Off Tours Shopping Tours Boat Tours & Water Sports Horse-Drawn Carriage Tours Sightseeing Tours Bus Tours Horseback Riding Tours Ski & Snow Tours Bus Transportation Hot Springs & Geysers Skydiving Canyoning & Rappelling Tours Kayaking & Canoeing Specialty Museums Castles Lessons & Workshops Speed Boats Tours Caverns & Caves Lighthouses Stand-Up Paddleboarding Children's Museums Marinas Surfing City Tours Military Museums Swim with Dolphins Classes & Workshops Monuments & Statues Theme Parks Climbing Tours Motorcycle Tours Tours Club & Pub Tours Movie & TV Tours Walking Tours Coffee & Tea Tours Multi-day Tours Water & Amusement Parks Concerts & Shows Museums Water Parks Cooking Classes National Parks Waterskiing & Jetskiing Cultural Tours Natural History Museums Windsurfing & Kitesurfing Cycling tours Nature & Wildlife Tours Wine Tours & Tastings Dams Night Tours Wineries & Vineyards Day Trips Observation Decks & Towers Zipline & Aerial Adventure Parks Dinner Theaters Observatories & Planetariums Zoos Distillery Tours Off-Road & ATV Trails



# In-destination experiences sector ecosystem: Distribution, commercialization and connectivity



# 3) It's Low Tech



**2 in 5 operators**  
(Don't use a booking system)

**12% of operators**  
(Say they are using Generative AI  
actively in their operations)





# 4) It's Changing

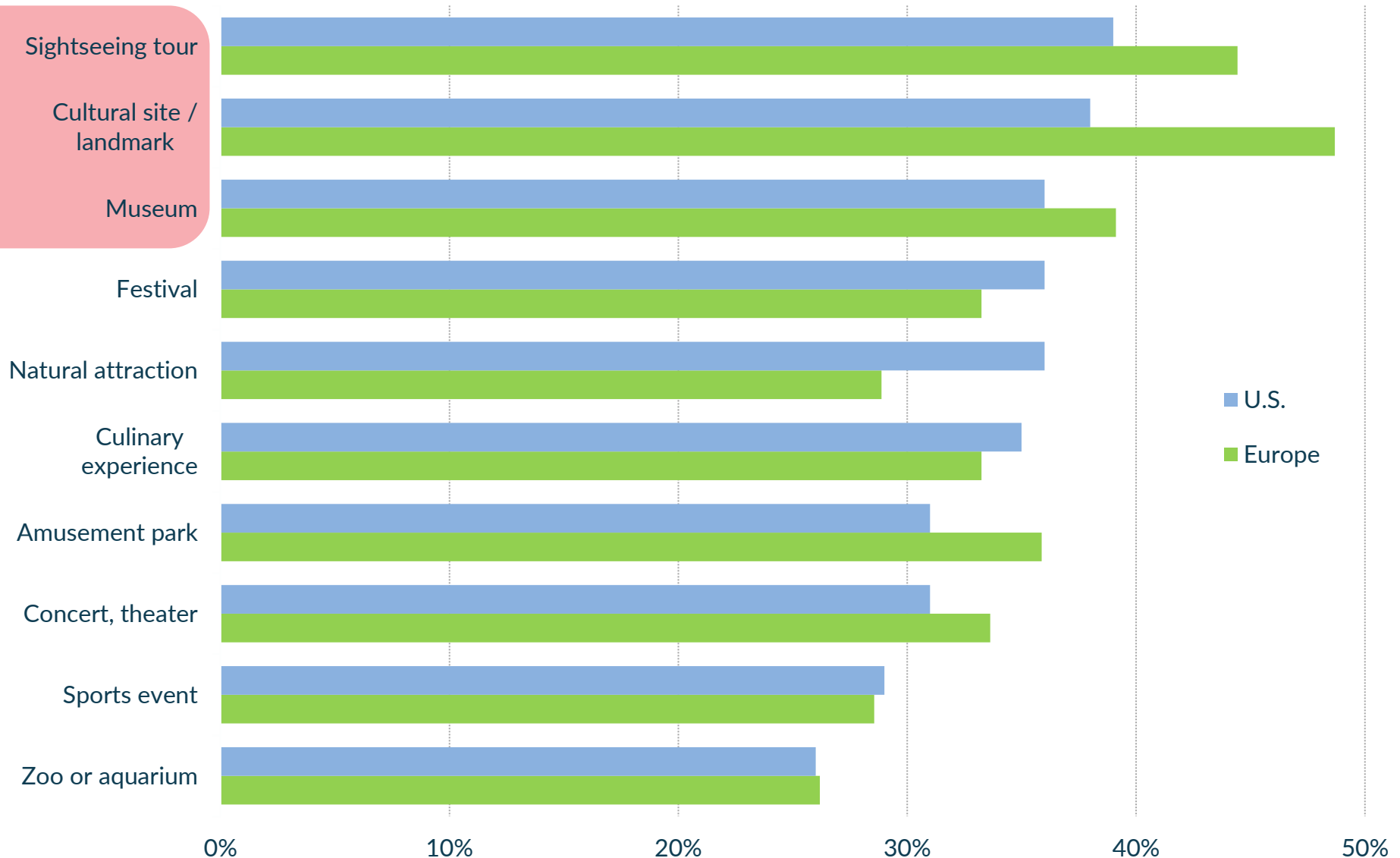


# Seeing Isn't Enough



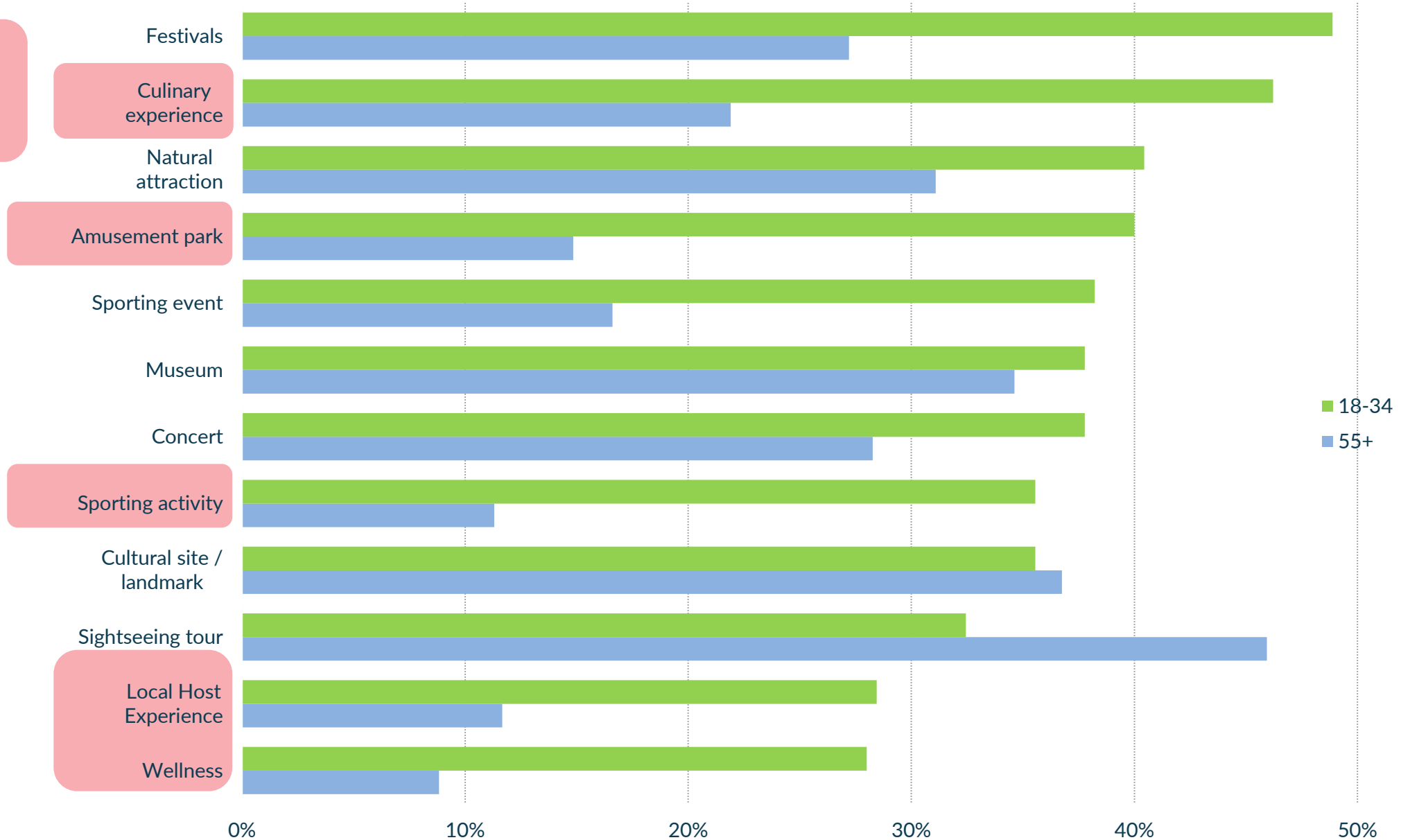
# The Top Ten Experiences Booked, All Travelers

## Attractions, Sightseeing on Top



# The Top Experiences Booked, by Age

## Immersive Experiences



# The Fastest-Growing Experience Categories



Wellness



Culinary



Experiences with Locals



Festivals



Sporting Events

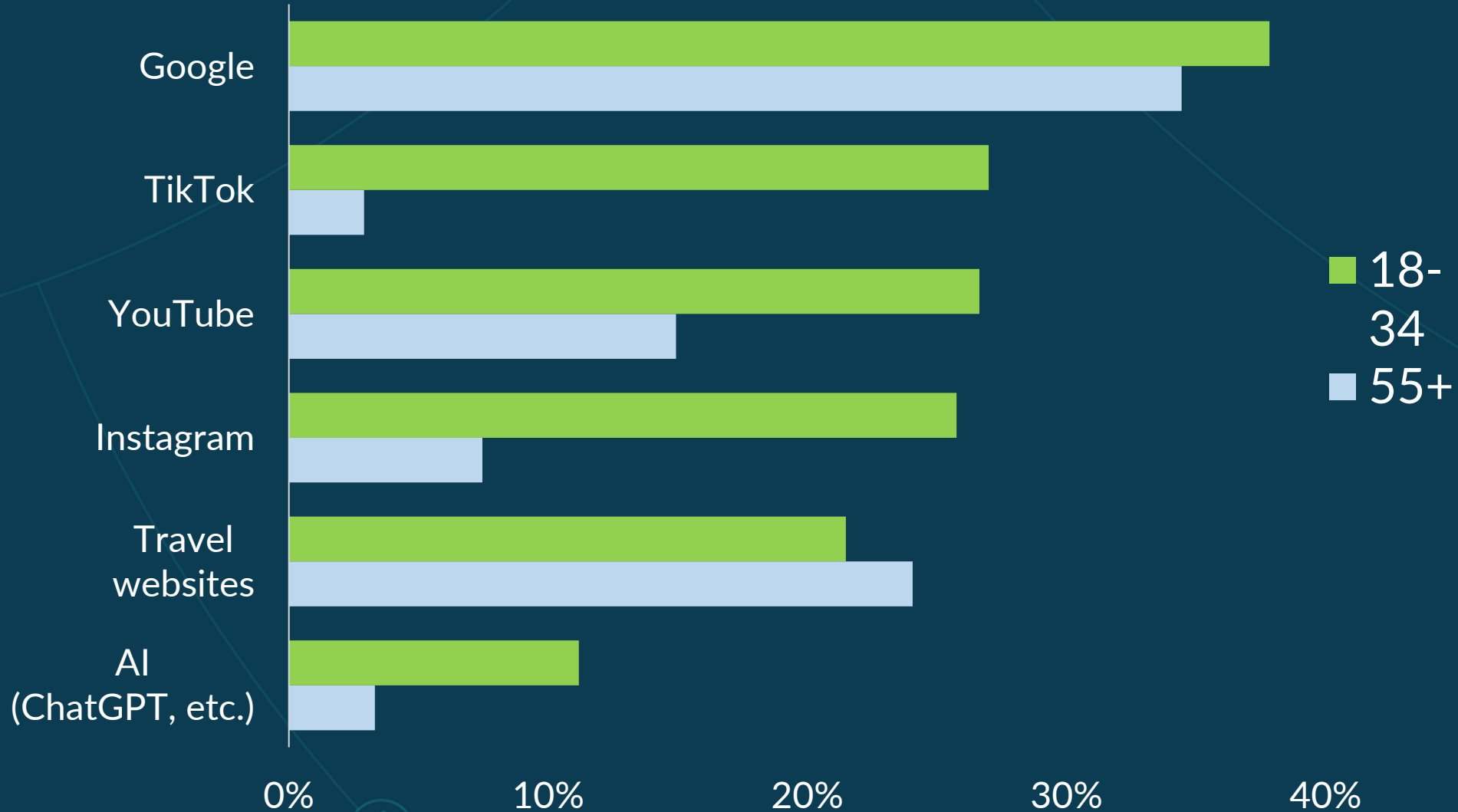


Thematic Tours



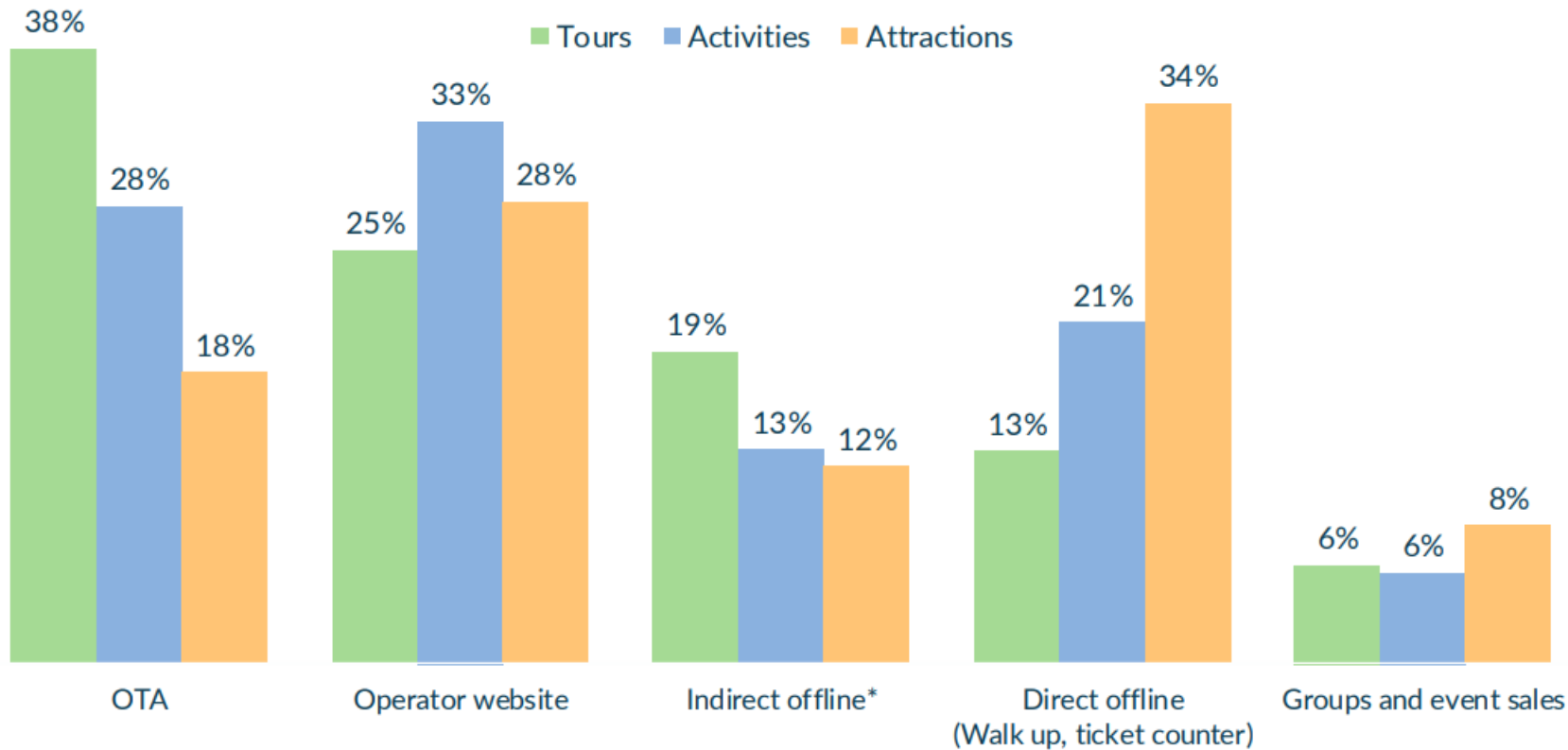


# How They search



# How They Book – by channel

## How They Book: Channel Mix by Experience Type (2024)



\* Travel trade (tour operators, travel agents, wholesalers, etc.)



# 5) It's Low DMO



# Fewer than 1 in 5 operators

Say they work with their DMO



# Key Recommendations for DMOs

- ❖ Develop strategic planning models to provide greater support to experience suppliers
- ❖ Offer assistance for the digitalization of their businesses — support and visibility
- ❖ Create strategies to reduce overtourism in certain destinations / Work to extend the tourist season to reduce pressure on peak periods
- ❖ Use data to encourage different visitor flows than the current patterns.







**The Best Part of  
Travel**

[www.arrival.travel](http://www.arrival.travel)