

# Attraction Ticketing

## *The Future of Access to Europe's Top Sites*

Douglas Quinby, CEO, Arival

In partnership with

# ETOA

*March 2025*



The Arival logo, featuring a stylized 'A' with a red and blue triangle and the word 'ARIVAL' in white capital letters on a dark blue background.



# Today's Agenda

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1. The Attractions Problem
2. State of Visitor Attractions
3. Distribution, Technology, Connectivity
4. Products Planned
5. Discussion!



A large crowd of people is gathered in front of the Colosseum in Rome. In the foreground, a train is visible with a security guard standing nearby. The scene is filled with people, some holding umbrellas, and the Colosseum's iconic arches are prominent in the background.

**>100M Guest Reviews**

**50K Destinations**



A large crowd of people is gathered in front of the Colosseum in Rome. In the foreground, there is a train and a security checkpoint. The scene is set in a park-like area with trees and a clear sky.

# Top 200 Markets

## 0.4% of Destinations



A large crowd of people is gathered in front of the Colosseum in Rome. In the foreground, there is a train and a security van. The scene is set in a park-like area with trees and a clear sky.

**0.4% of Destinations**

**48% of Reviews**



~700 visitor  
attractions worldwide  
Fielded 3Q 2024

Global Operator Landscape 3rd Edition

# The State of Visitor Attractions

The state of the industry and key trends in  
technology and distribution for visitor  
attractions

February 2025

By Anne Failing & Douglas Quinby  
Edited by Janelle Visser

The ARIVAL logo features a stylized 'A' icon composed of three overlapping geometric shapes in red, white, and blue, followed by the word 'ARIVAL' in a bold, white, sans-serif font.

ARIVAL

# Arival Global Operator Landscape *3rd Ed.*

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## Fielding Partners

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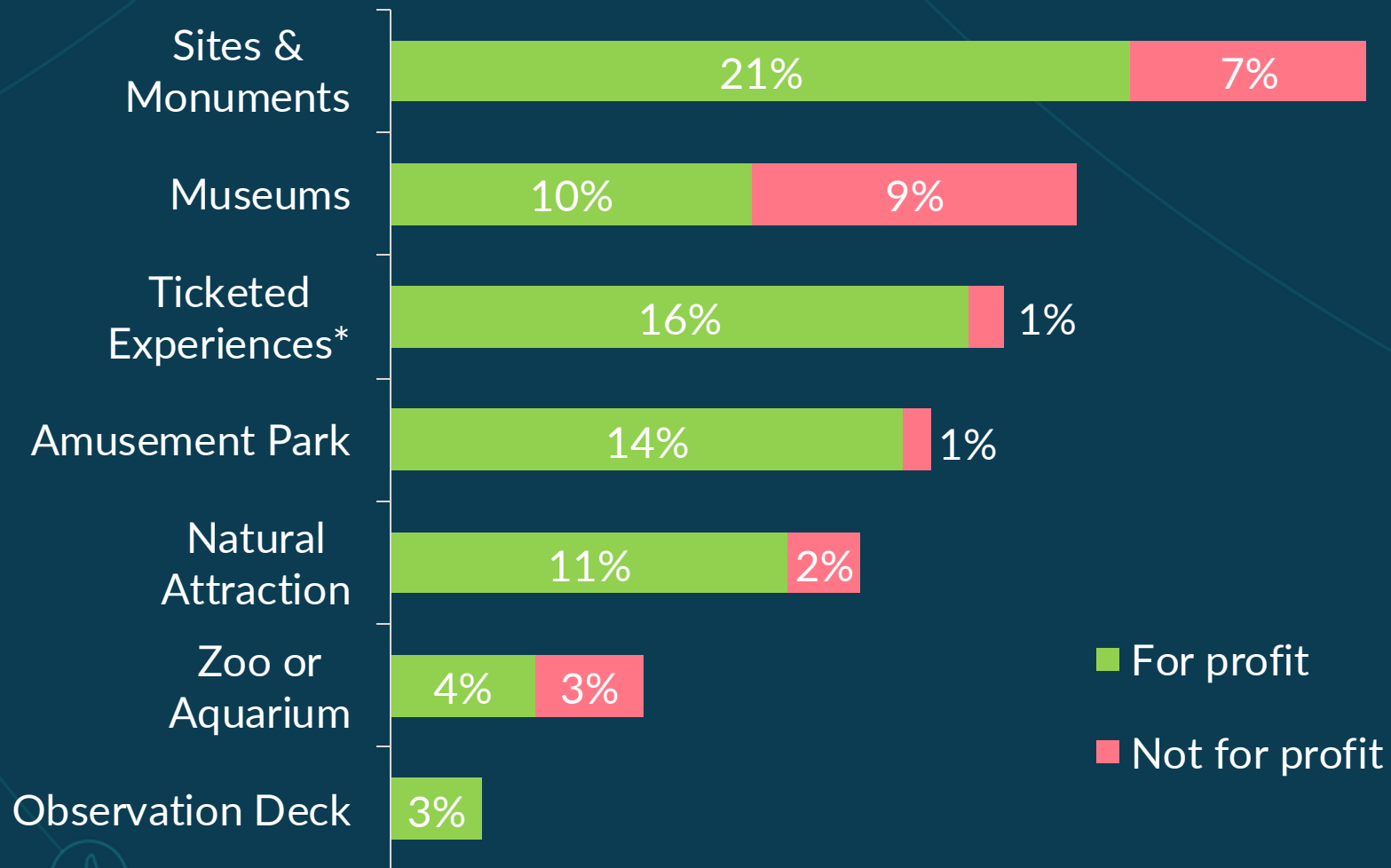
Activitar	ETOA	OtoTrak	TourReview
Adrenaline	Freedome	Palisis	TripShock
Asoview	Gotuuri	Priohub	UKInbound
BeMyGuest	Great France	Prioticket	Veltra
Bókun	Guruwalk	Redeam	ResPax
Byfood	HBX Group (formerly Hotelbeds)	Regiondo	Vox Tours
Ceetiz	iTicket/Visit Group	Sojern	Winerist
Checkfront	Latitur	TOItaly/Towns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



# The State & Structure of the Attractions Sector



# Arival Visitor Attraction Categories



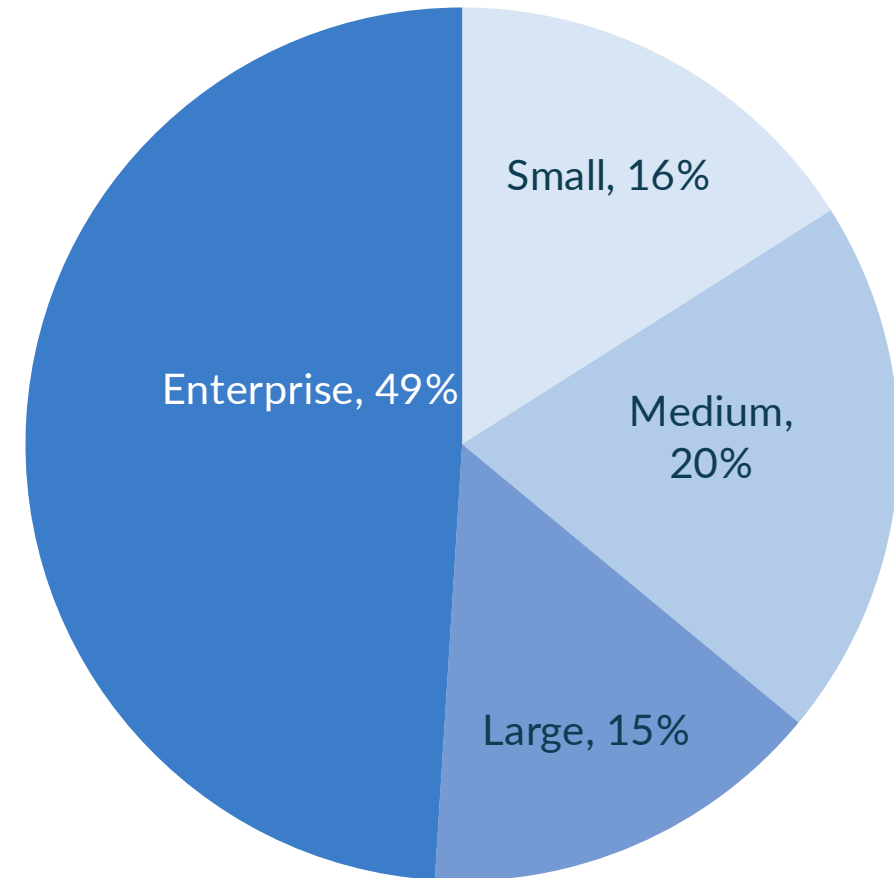
# Attractions Drive Tourism

Visitor attractions are key drivers of tourism demand to destinations. The attractions landscape is comprised of more large and enterprise-sized operations. Nearly half serve 50,000 guests or more each year.

**Attraction Segments by PAX:**  
(annual number of guests)

Small	up to 1,000
Medium	1,001-10,000
Large	10,001-50,000
Enterprise	50,001 and greater

## Attractions by Size

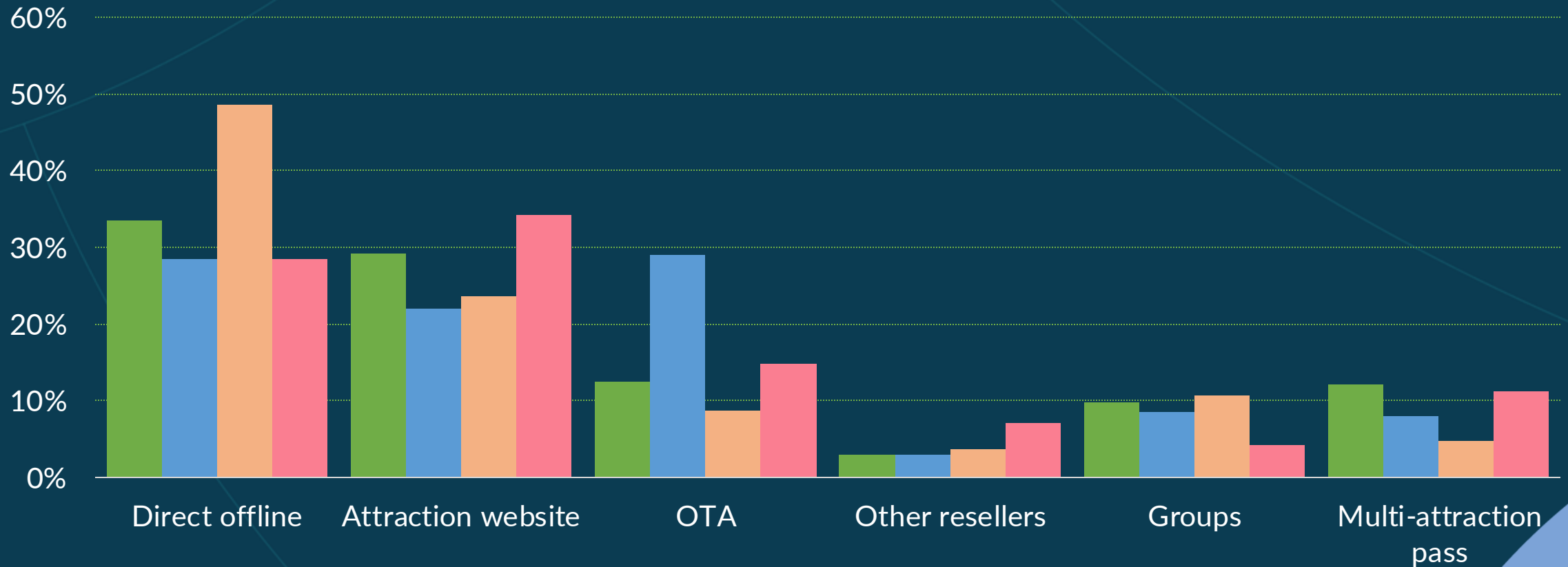


# Distribution



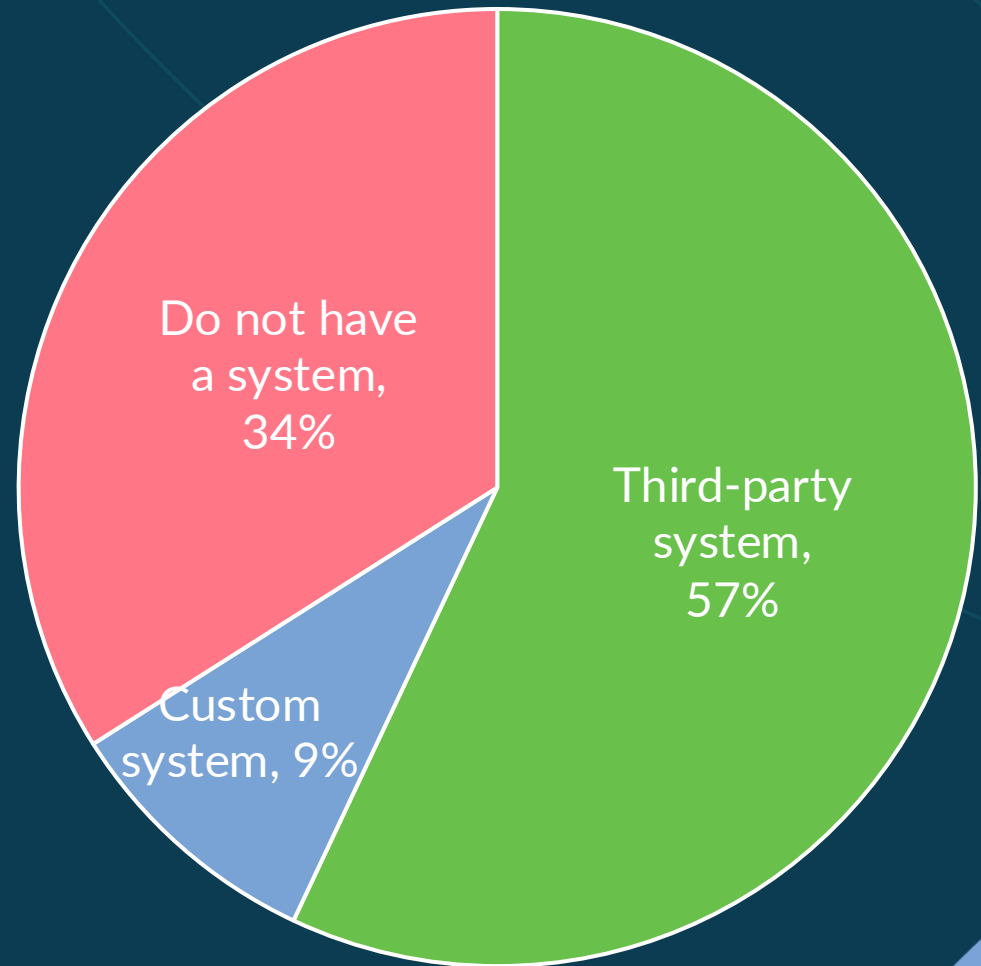
# Distribution Channels by Attraction Type

■ Theme parks ■ Sites & Monuments ■ Museums ■ Observation Decks





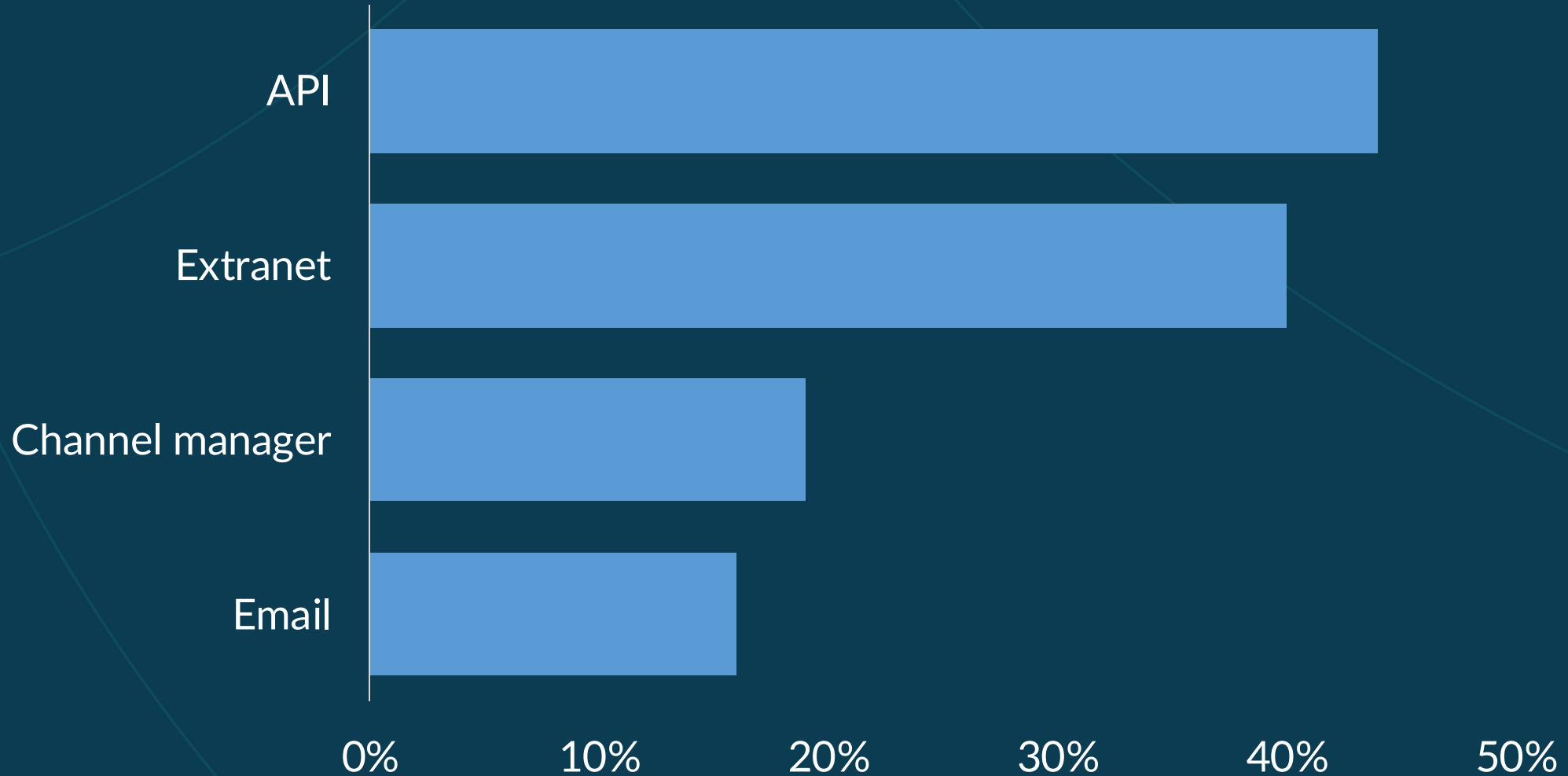
# Ticketing System Use



Camera Obscura



# How Attractions Connect to Distributors

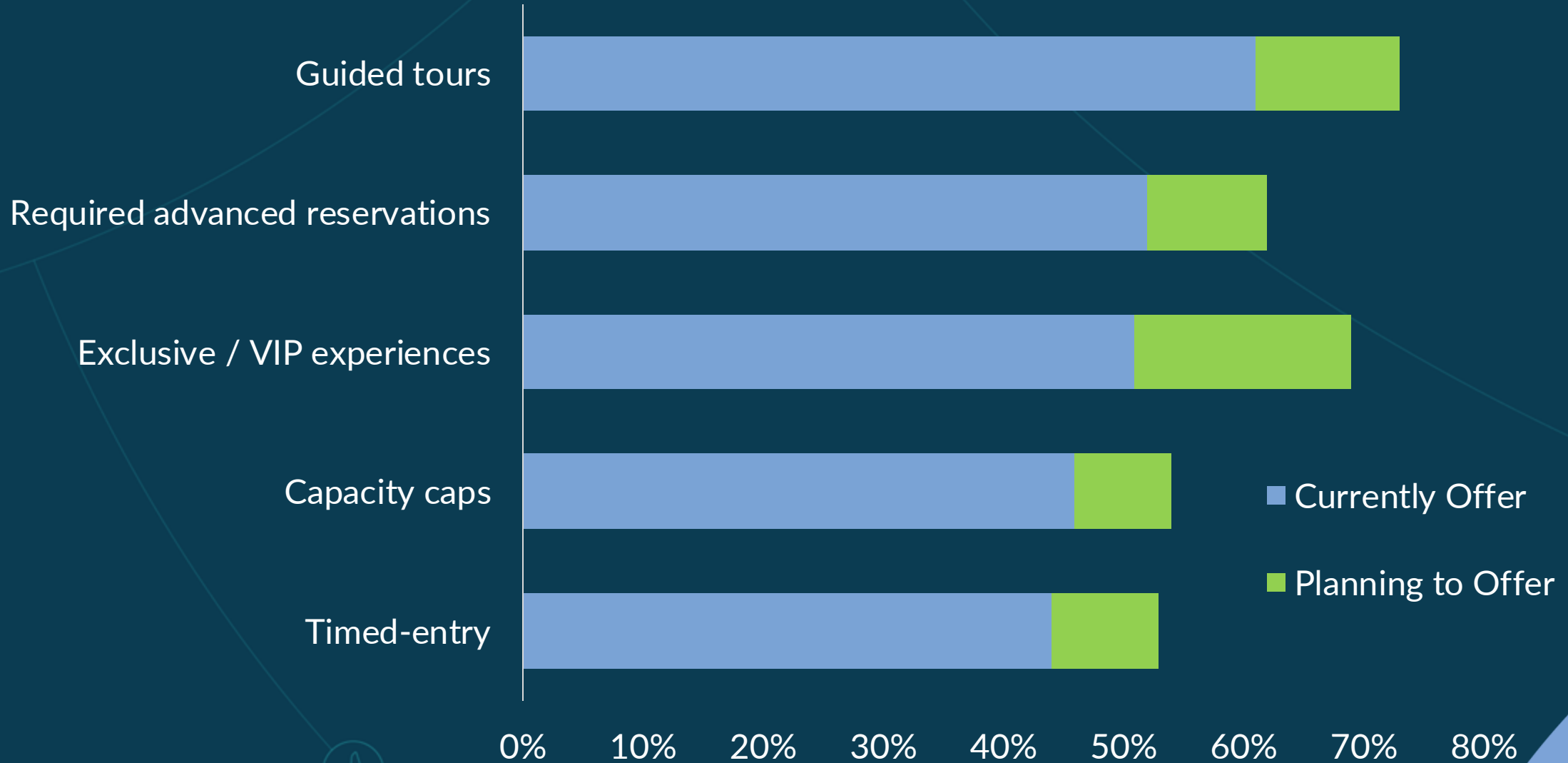




# Products



# Products Offered – and Planned



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# ARIVAL

## 360 VALENCIA

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# Discussion!

**Tim Fairhurst**

General Director, European  
Tourism Association (ETOA)

**Viktoria Lacroix**

SVP, Go City

**Ann Wilson**

Head of Sales, Historic Royal  
Palaces

