



# EVENT HORIZON

## The Role of Performing Arts and Sporting Events in Travel and Tourism



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Presented by



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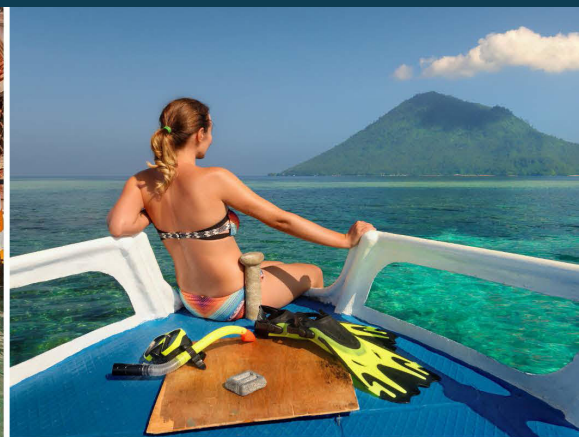
## ABOUT ARIVAL

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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.

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





## ABOUT TICKET EVOLUTION

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Ticket Evolution operates the largest global B2B ticketing exchange with up to \$4 billion in sports, theater and concert inventory running through its platform at any given time. Ticket Evolution's innovative white-label solutions power inventory and fulfillment for more than 300 leading websites and apps, providing real-time execution, clearing & settlement.

Learn more at [www.ticketevolution.com](http://www.ticketevolution.com).





## **WHY YOU SHOULD READ THIS**

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Catching an unforgettable concert, seeing the hottest Broadway show, or finally taking in a game at a stadium you've always dreamed of checking out. Events are quickly becoming an important driver of the decisions travelers make.

The in-destination sector – tours, activities, attractions and events – represents the travel industry's third-largest and fastest growing sector. The travel industry has begun paying more attention to tours, attractions, and activities, and is getting much better at marketing and delivering those services to travelers. But events, especially performing arts and sporting events, remains an underserved part of the sector.

This often-overlooked subset of the in-destination experience generates destination visitation and is a key component of travel planning decisions. The travel industry seems to often ignore the impact that events such as concerts, festivals, and sporting events have on the purchasing decisions of U.S. travelers. Simply put, the travel industry is leaving money on the table.





## WHY YOU SHOULD READ THIS

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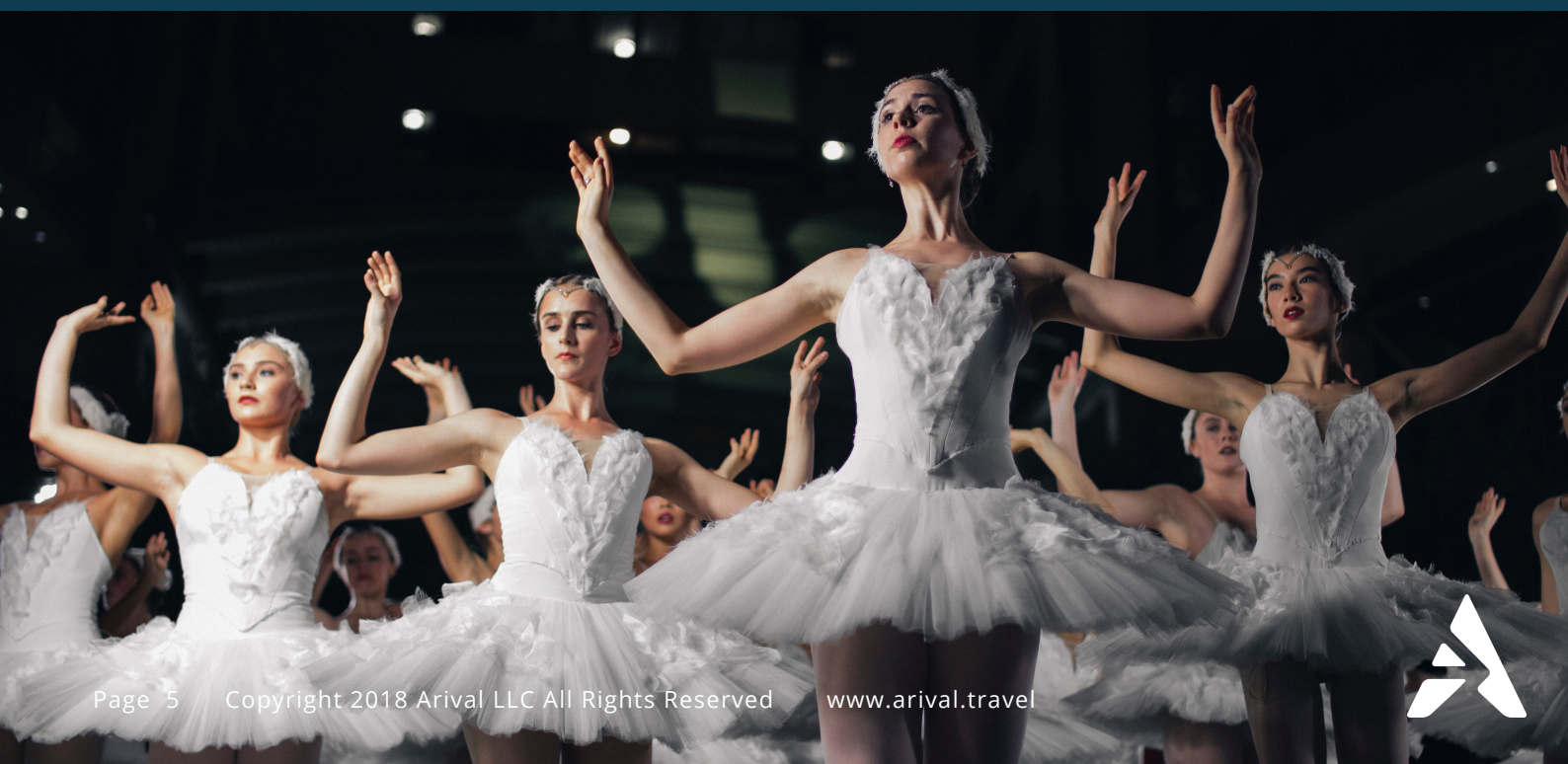
This new Arival Guide presents an in-depth picture of events and how they factor into the overall decision-making of the U.S. traveler. Here are three things you'll learn in this report:

- The role of events in travel
- How travelers plan and book events (the path to purchase)
- How travel brands can capitalize on the U.S. event travel opportunity

## OUR METHODOLOGY

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In August 2018, Arival undertook a comprehensive study to provide insights on the in-destination experience to help creators and sellers of attractions, activities, events, and tours understand the key trends and drivers around traveler behavior. In this study, we conducted an online survey of 1,000 U.S. adult travelers (18+) who took a trip 100+ miles from home, included an overnight stay, and engaged with a qualifying in-destination experience.





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## SIX KEY TAKEAWAYS

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1

Events are a key component of the in-destination experience, with over 40% of U.S. travelers incorporating events into their travel plans.

2

For event travelers, the events are the most important component of the trip-planning process.

3

Digital is key to research and booking, but the ticket window still plays a big role.

4

Travelers book events far more in advance than they do for tours and activities, because of the schedule and capacity constraints of events.

5

Just 1% of travelers who attend events on trips purchase their tickets through travel sites or apps, a huge missed opportunity for the online travel industry.

6

Travelers seek convenience and best pricing in choosing a booking channel for event tickets.





# ROLE OF EVENTS IN TRAVEL AND TOURISM

In-destination experiences are generally focused on three main categories: attractions, activities, and tours. However, there is a significantly overlooked sector of the in-destination experience that deserves a closer look: events.

## What Are Events?

Events cover a wide array of in-destination experiences. Events refer to scheduled, ticketed performances, such as performing arts or sporting events, where the traveler is a paying spectator. (Sporting activities where the traveler is the participant, such as in fishing or playing golf, is grouped in Activities.) They include the following:

### TYPES OF EVENTS

**Musical performances (rock, pop, classical, jazz, etc.)**

**Festivals (Coachella, Aspen Jazz Festival, etc.)**

**Theater (plays, musicals)**

**Dance or ballet performances**

**Professional or collegiate sporting events**

Most attendance at events is by locals. This study looks at the role events play in travel. Arival defines an event traveler as someone who has traveled at least 100 miles from home with an overnight stay over the past year and attended an event on a trip.





## Almost Half of All Travelers Attend Events

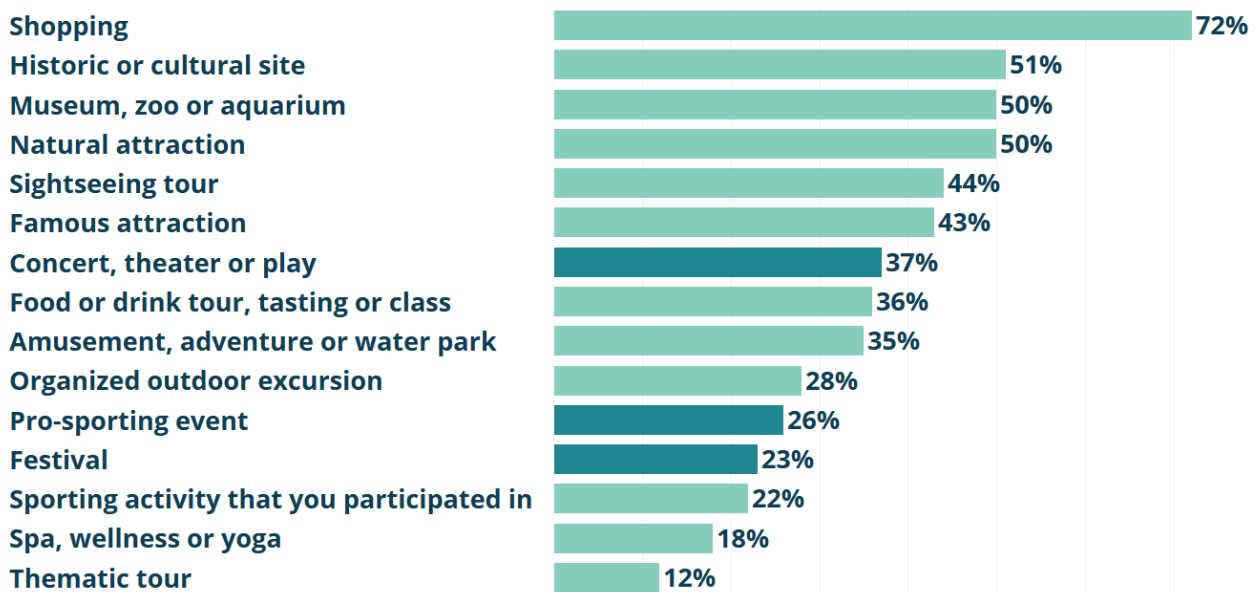
Events factor significantly into the trips of U.S. travelers:

- Nearly two in five U.S. travelers attend a concert or theatrical performance when traveling.
- One in four travelers attend a professional sporting event.
- Nearly one in four attend a festival on a trip

Event attendance is especially prominent among leisure travelers under 35 years old, as well as among business travelers.

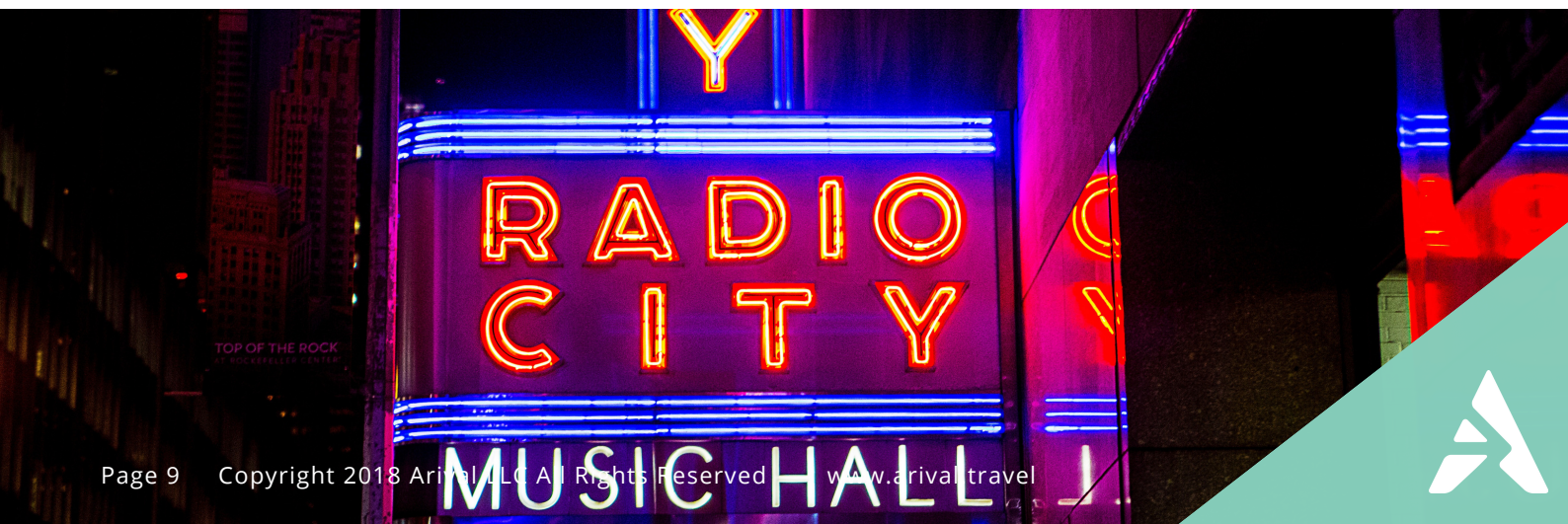


**Figure 1: Activities Undertaken in the Last Year, Any Trip**



Arival Traveler Insights 2018: 1,001 U.S. active travelers, August 2018

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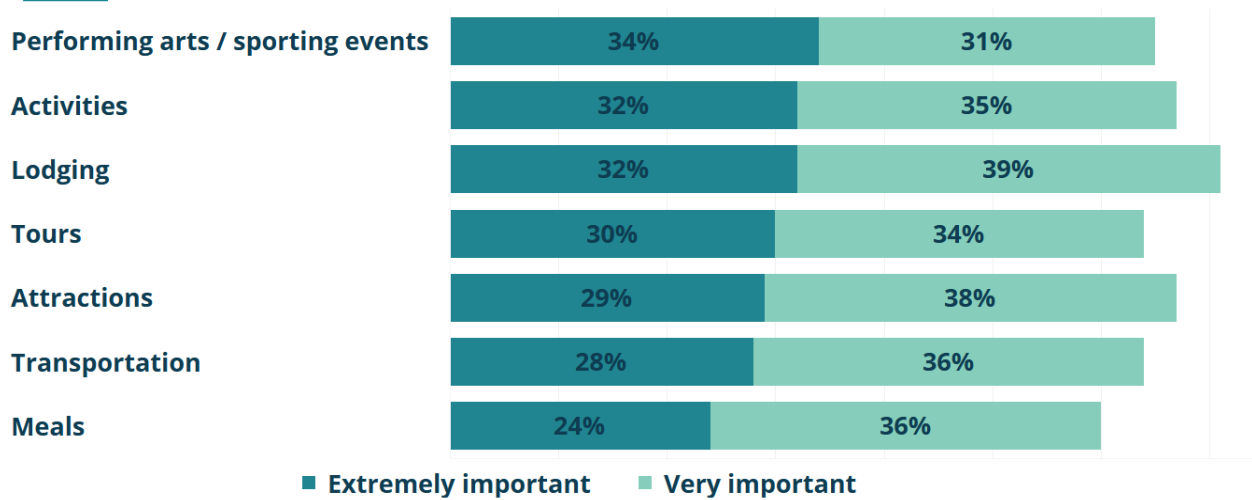




Events are a significant influencer on the travel habits of attendees. One in three U.S. travelers indicated that events were extremely important in their overall trip planning, more so than any other component of the trip, including the flight, hotel or other activities.



**Figure 2: Importance of Trip Components**



Arival Traveler Insights 2018: 1,001 U.S. active travelers, August 2018

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For many trips, events can play a significant or even a defining role in overall trip planning. Performances and sporting events are date and time specific, often with limited seating capacity. A traveler looking to attend a specific event such as the Indy 500, the U.S. Open, or Coachella plan their trip around specific dates that are announced months in advance. Events such as popular Broadway shows may be sold out for weeks in advance. This means trips for these events are driven by ticket availability.

While many events require advance planning due to scheduling and ticket scarcity, there are other events that travelers can add last minute to their trips. For example, a cultural performance such as a luau, or a nightly entertainment show in a leisure destination such as Las Vegas or Orlando can often be added as a last-minute activity, as could walk-up tickets to a Major League Baseball game.





# DIGITAL DOMINATES THE PATH TO PURCHASE

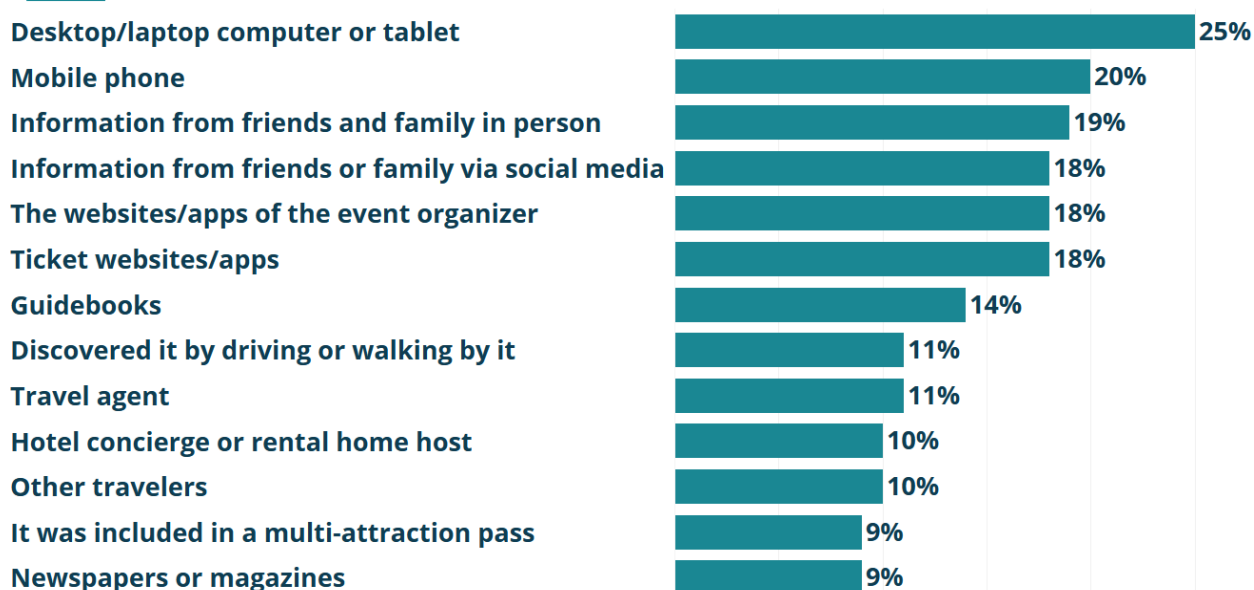
There is a clear traveler path to purchase for events. As with other in-destination experiences, digital channels are leading the way for discovery, shopping and purchasing. This section examines what this path to purchase looks like for events, how it differs from the other in-destination activities and provides key recommendations for brands to tap into the event opportunity.

## How Travelers Research Events

U.S. leisure travelers predominantly use online resources to research the events they plan to attend on their trip. When researching events online, U.S. travelers rely heavily on their computers or tablets and mobile devices (25% and 20%, respectively). In addition to leveraging online resources, U.S. travelers utilize several offline sources of information in their research process. In-person recommendations from friends and family lead the offline resources (19%).



**Figure 3: How Travelers Research Events**



Arival Traveler Insights 2018: 409 U.S. active travelers, August 2018

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When going online to research events, U.S. travelers use a variety of resources. Like most other in-destination experiences, Google and TripAdvisor searches are prevalent. However, travelers seeking events tend to go directly to the websites or apps of event organizers (e.g. a Broadway show or Major League Baseball) as well as the websites or apps of secondary ticket marketplaces (e.g. RazorGator, StubHub, etc.) for their research.

## **How Travelers Purchase Events**

Similar to their research methods, travelers rely on a mix of online and offline purchase processes. They predominantly use computers or mobile phones to book their event tickets. Event attendees use online booking channels at a higher rate than other in-destination experiences. The primary online channel for booking event tickets is online via computer (29%).

Some 14% of U.S. travelers use their mobile device to book event tickets. Events have the highest incidence of mobile device bookings of the four in-destination experience categories – higher than tours, activities, and attractions. While mobile adoption lags computers usage, it will grow aggressively because mobile usage is higher among younger travelers (35 and younger), who are also more likely to attend events.

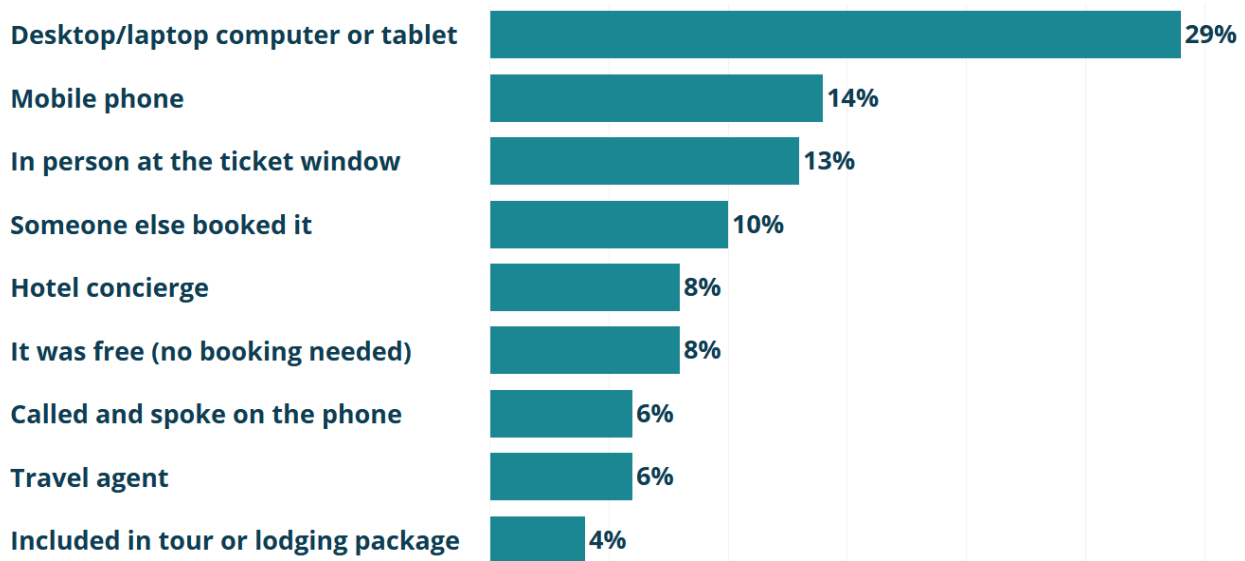




While online bookings play a significant role for events, the ticket window cannot be ignored. Like other in-destination experiences, the ticket window generates a significant portion of bookings through direct sales (13%).



**Figure 4: How Travelers Purchase Event Tickets**



Arival Traveler Insights 2018: 409 U.S. active travelers, August 2018

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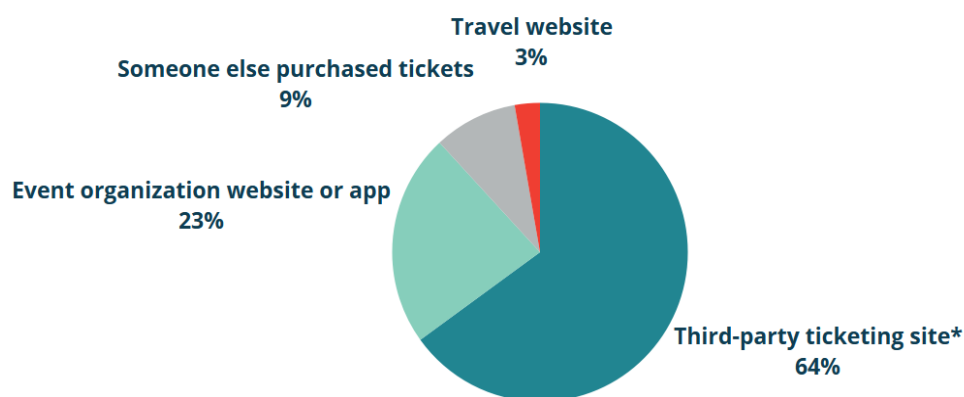


## **For Event Booking, Travel Websites Are Nowhere to Be Found**

U.S. travelers going online to book event tickets for their trip do not use the same websites they did when purchasing travel. Nearly one in four (23%) of travelers book their festival, arts or sporting event tickets directly through the event organizer's website, while the vast majority of online bookers purchased their tickets through event ticketing websites or apps such as Ticketmaster, Tickets.com or StubHub.



**Figure 5: How Travelers Purchase Event Tickets Online**



\* A website dedicated to selling event tickets, such as Ticketmaster or StubHub  
Arival Traveler Insights 2018: 409 U.S. active travelers, August 2018

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Travelers may use some travel sites in their event research, but very few use them for purchasing. Just 3% of online purchasers said they got their tickets from a travel website such as Expedia or TripAdvisor. Since only 43% of travelers purchase their event tickets online, this means that just 1.3% of all travelers who attend events on a trip use a travel website to book those tickets. (3% of the 43% who purchase online). The event sector is a significant component of the in-destination experience. However, travel sites are essentially a non-factor in purchasing.



## Fitting the Event Square Peg in Travel's Round Hole

Most travel sites do not offer event tickets, with the limited exception of a few distinct types of events typically associated with travel, such as major theatrical and entertainment shows in major travel destinations (e.g. Broadway musicals in New York, shows in the major Las Vegas casino hotels etc.). There are an array of hurdles to overcome. Most sporting and performing arts events are one-time events, whereas travel services are designed to offer access to supply with consistent and recurring availability over long periods.

Another concern is the confusion and competition in the event ticketing sector around primary and secondary markets. The former represents ticket sales by the event organizer or authorized reseller, while the latter represents the large network of ticket brokers and resellers, where pricing can vary significantly depending on demand. These challenges, along with significant competition from numerous online ticketing sites, can give pause to any new entrant in the sector.

**The online travel industry may be missing out on a tremendous opportunity.** Price and convenience are the main drivers for consumer's booking-channel choice, and lack of awareness of current events and performances is a major inhibitor to event attendance. Travel sites have a built-in advantage in knowing where and when their customers will be traveling and could deliver personalized event booking options that could appeal to the business and leisure traveler alike.



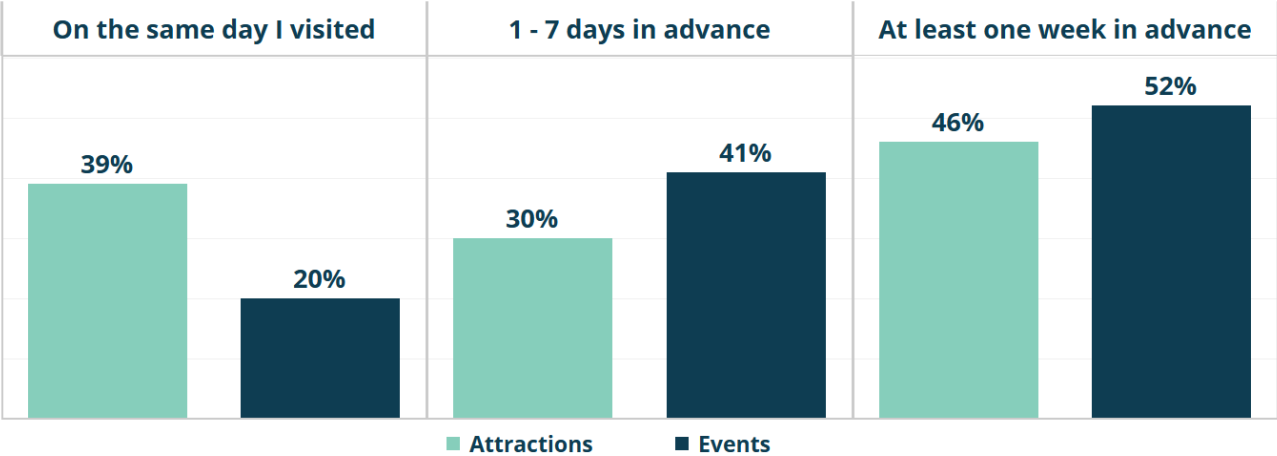


Events' Longer Advance Booking Window

Date-specific events with fixed seating capacity warrant early planning and booking. So it's no surprise that U.S. travelers generally plan and book the event components of their trip in advance. Some 57% of event travelers researched their events at least one week in advance of travel, and 52% purchased their ticket at least a week ahead of time. This is significantly higher than attraction ticket booking, which is much more likely to happen the same day or close to the visit.



Figure 6: Booking Window for Attractions and Events\*



\*Totals exceed 100% because some travelers attend multiple attractions and events.  
Arival Traveler Insights 2018: 409 U.S. active travelers, August 2018



The greater level of advance planning and booking for events suggests that events are more important in the overall trip-planning process. Indeed, events may influence other travel decisions, including transportation, accommodation as well as other in-destination experiences.



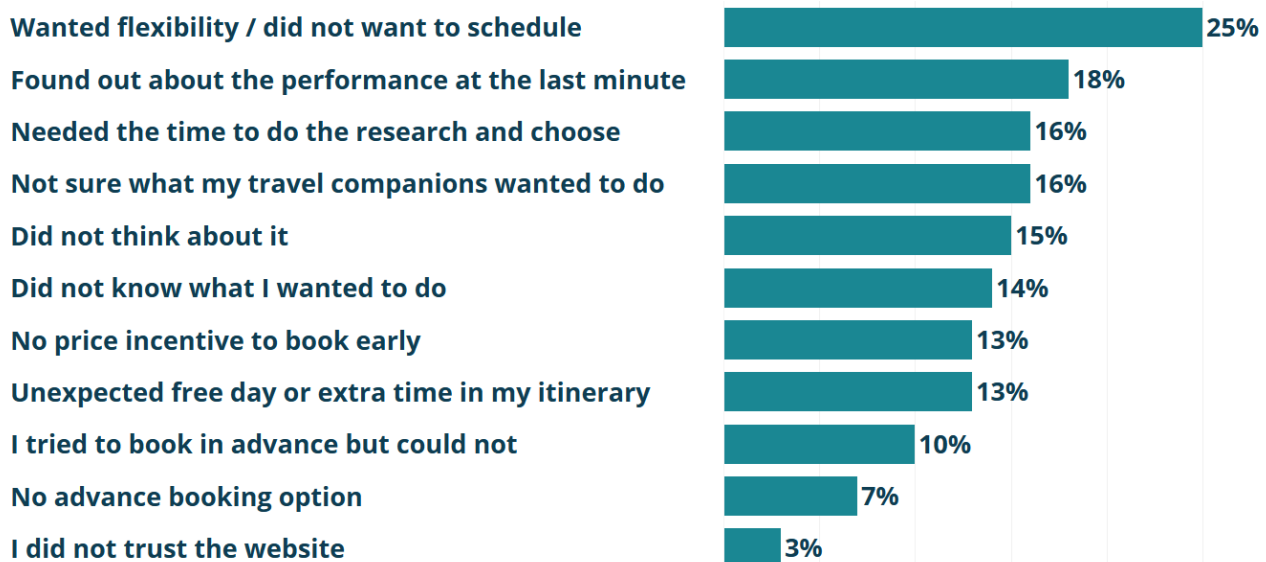
## Not Every Event Is Booked in Advance

Most events are time-specific with limited seating. So why are travelers not booking all their event tickets in advance?

The advance purchase of tickets is driven somewhat by the level of importance that the event has within the trip decision. Those travelers that did not purchase tickets in advance of their trip primarily cited wanting more flexibility. The other prominent hurdle to advance purchase is simple awareness. 18% of event travelers only found out about the performance last minute, while 15% and 14% did not think about and did not know what they wanted to do, respectively. This lack of discovery offers an opportunity that travel brands may be best positioned to capitalize on, as it is they – not ticketing sellers – who know when and where their customers are traveling.



**Figure 7: Reasons Events Not Booked In Advance**



Arival Traveler Insights 2018: 216 U.S. active travelers, August 2018

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## KEY RECOMMENDATIONS

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Events represent a missed opportunity for travel brands, which sell a paltry amount of event tickets in relation to the travel demand they generate.

Travel brands must plan for events in two ways:

**Events drive travel** – they are a primary motivator for travel and influence the purchasing of transportation, accommodation and other travel services.

**Consider offering event tickets** – travelers seek booking convenience, and the ability to access events and other experiences could enhance customer stickiness to a travel brand.





**Events aren't easy**, and they are not like most travel products. The products, pricing, availability for events can change daily, unlike the customer travel product (hotel or tour) which is more or less the same and recurring.

**Travel brands must develop flexible approaches and partnerships** to accommodate the distinct parameters of event ticket shopping and booking. This is easier than ever with many event ticket resellers offering APIs and other solutions to enable event ticket distribution.







The InDestination Voice

## Insights that Matter for the Best Part of Travel: Tours, Activities & Attractions



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