

An Arival Industry Insights Study

The Global Operator Landscape

How Digital & Distribution Are Changing Marketing, Operations & Delivery for the In-Destination Industry



3Q19

Arival's Mission

To establish and inspire a diverse community of individuals and companies in the In-destination Industry by providing opportunities to gain insight, share knowledge and build connections.



In 2019, Arival is conducting its first global industry survey of tour, activity and attraction operators

Why We're Doing This

The in-destination industry – operators of activities, tours, and attractions – is experiencing enormous change. Operators need benchmarks and data to track their performance vs. the marketplace.

Arival will field a global survey in 3Q2019 to the entire global supply marketplace to establish clear benchmarks and best practices across marketing, sales, distribution, technology use, and more.



Operators Are Overlooked

Industry benchmarking is well established in all sectors of travel: airlines, hotels, vacation rentals, car rentals. It's time operators in the Best Part of Travel had access to key industry metrics to benchmark their own performance.

Arival's Global Operator Landscape Study will address

- Business firmographics (size, type, location, etc.)
- Sales and distribution channel trends (online, offline, direct, third-party, OTAs, etc.)
- Marketing activities, tools used, performance tracking
- Commercial benchmarks with third parties (commissions, T&Cs)
- Technology systems used, satisfaction and likelihood to change in the future
- Top challenges and concerns

Arival will examine these themes through several lenses:

- Industry segment (tour operator type, activity, attraction, experience, etc.)
- Size of operator
- Geography
- Performance (growth)

Attractions 2.0

Attractions Are a Big Deal

The study will have a unique module focused on Attractions - the “Big Head” of travel’s Long Tail of tours and activities. They include:

- Aquariums
- Adventure or water parks
- Amusement or theme parks
- Indoor playgrounds / trampoline parks / Fun centers
- Historic or cultural site or venue
- Monument, or landmark
- Museum
- Natural wonder or attraction
- Observatory
- Ski resort
- Zoo

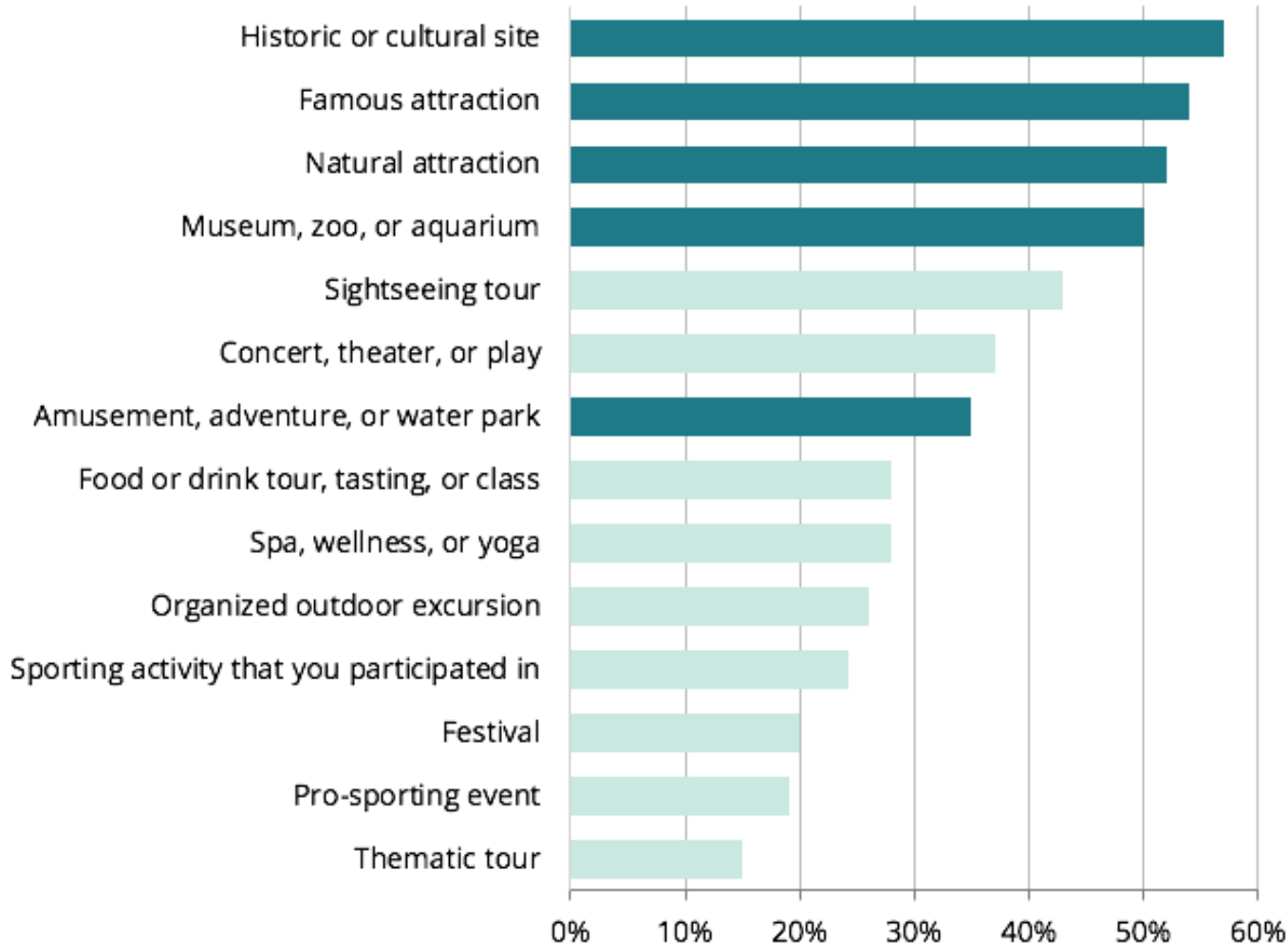


Attractions Are Overlooked

Most of the investment and media interest has focused on the long tail of this hot sector: the small operators and the new SaaS technology vendors attempting to serve them. Everyone is overlooking the technology players serving the biggest part of the market – large ticketed attractions.

Attractions Drive Tourism

Arival's 2018 *State of In-Destination* research of 8,000 travelers across the U.S. and seven countries in Europe found attractions are most popular



More than half of leisure travelers visit historic/cultural sites, famous and natural attractions or museums, zoos or aquariums.

Which of the following types of activities have you experienced on a trip in the last year?

Arival State of In-Destination 2018

Arival's Attractions 2.0 Will Delve Into

Distribution & the State of Connectivity for the Global Attractions Sector

Who's doing it, and doing it well, among tech vendors and attractions, including:

- Channel trends (online, offline, direct, third-party, OTAs, etc.)
- Platform trends (desktop, mobile)
- Benchmarks for distribution by channels, which are growing, which are not, what the future looks like
- Commercial benchmarks with third parties (commissions, T&Cs, data sharing, etc.)
- Connectivity – API adoption, channel management and the cost of connecting
- Pricing, merchandising and yield across multiple channels
- Redemption and reconciliation



Arival's Attractions 2.0 Will Delve Into

Attractions Tech

- Systems used
- The state of mobile sales and ticketing
- Pricing and yield management practices
- Key attitudes, challenges and priorities for technology and distribution



Arival will examine these themes through several lenses:

- Attraction type (museum, amusement park, historic site etc.)
- Size of attraction (visitor volume)
- Geography
- Performance (growth)

What You Will Learn

Arival's Global Operator Landscape will help the entire industry

- **Understand market size and trending** across online and offline distribution channels for each major segment of tours and activities
- Identify **key trends in technology** adoption and distribution
- Identify **performance benchmarks** across distribution and marketing
- Understand the top concerns and challenges
- **Identify strategies to engage with operators** to bring them into the digital distribution arena



All organizations seeking to better understand key trends in our industry should consider partnering with Arival, including:

1. Technology companies serving operators
2. OTAs & resellers seeking to better partner with operators
3. Operators seeking to understand industry benchmarks and best practices

How We'll Do It

1. Operator survey fielded with study partners
2. Desk research, interviews (minimum 10) and profiles of key attractions as models of best practice
3. Publish the most extensive global study of operators related to technology, distribution, sales and marketing:

Survey Modules :

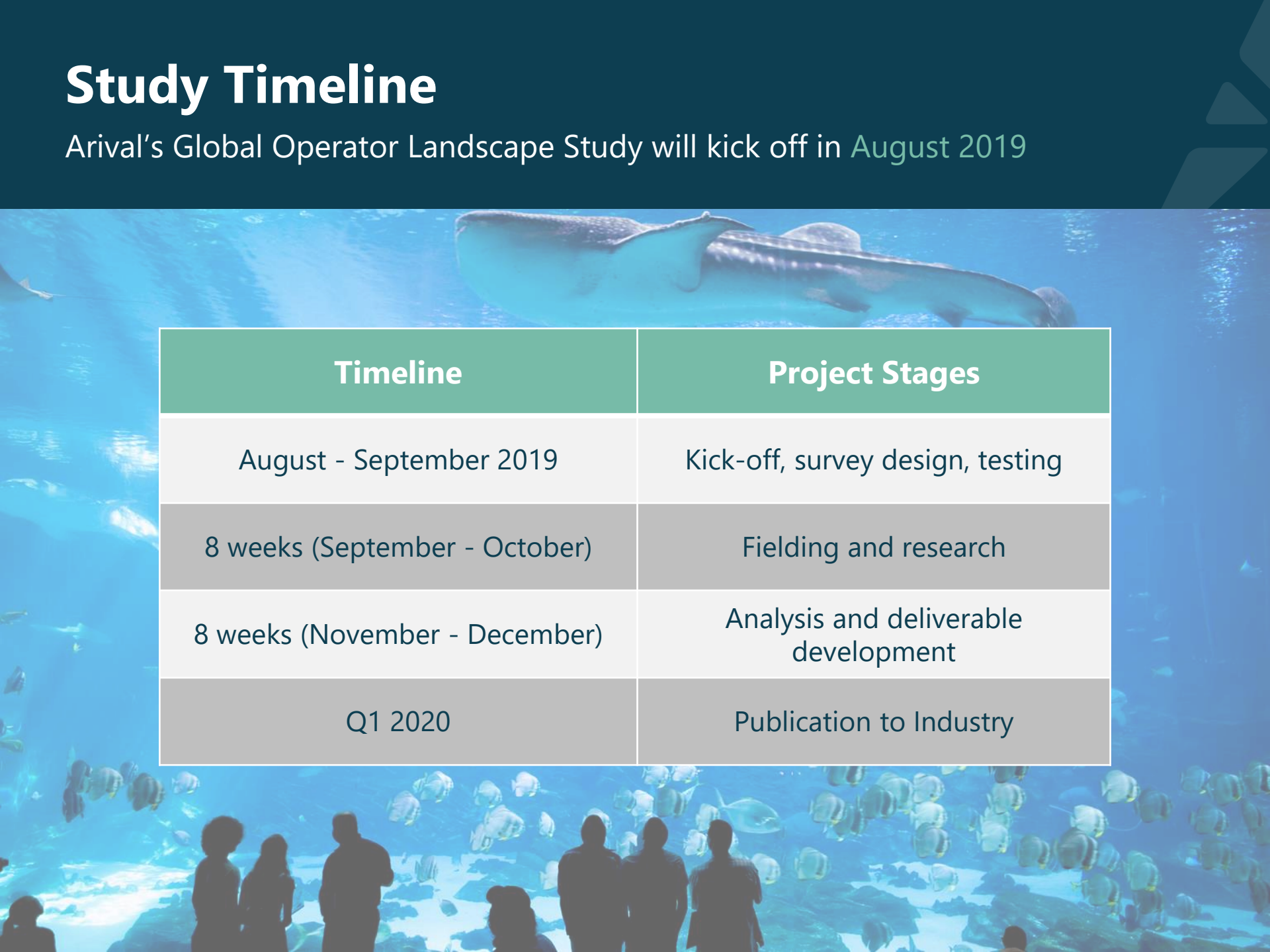
1. Operator firmographics
2. Sales & Distribution
3. Technology
4. Products and pricing
5. Challenges and trends

Key Segmentation:

- Operator Type
(tour, activity, attraction, etc.)
- Geographic Location
(by region and select countries)
- Company Size

Study Timeline

Arival's Global Operator Landscape Study will kick off in August 2019



Timeline	Project Stages
August - September 2019	Kick-off, survey design, testing
8 weeks (September - October)	Fielding and research
8 weeks (November - December)	Analysis and deliverable development
Q1 2020	Publication to Industry

Arival Seeks Partners

To complete this important research, Arival seeks partners to help field the survey and fund the study.

Arival offers two partner levels for the Global Operator Landscape Study

1. Launch Partners (two)
2. Insights Partners
3. Survey Fielding Partners



Launch Partner Benefits

Launch Partnership provides exclusive benefits for only two organizations for Attractions 2.0:

Research Insights Benefits

- Two **exclusive** custom questions on survey*
- **Exclusive:** Customized presentation deck including complete set of results and custom data tabulations
- Input on the survey process*
- Customized presentation deck including complete set of results and data tabulations
- Customized online presentation of the full set of results with the Arival team
 - In-person presentations available for an additional cost
- Strategic recommendations from the Arival Insights team based on the partners key points of interest

Branded Content & Thought Leadership Benefits

- Custom co-branded Arival Guide (10-15 pages)
- Arival produced webinar, with partner, to partner's clients and database
- Presentation of key findings at Arival Conference in Orlando, October 2019, with partner branding (all partners)
- Distribution of findings on Arival channels featuring partner branding for summary report (all partners)

* Arival retains final editorial control over question design and analysis to ensure findings are independent. "Launch Partners may have input on the questions, but not on the answers."

Insights Partner Benefits

Arival Partnership provides customized benefits for key partners for Attractions 2.0

Research Insights Benefits

- Customized presentation deck including complete set of results and data tabulations
- Customized online presentation of the full set of results with the Arival team
 - In-person presentations available for an additional cost
- Strategic recommendations from the Arival Insights team based on the partners key points of interest

Branded Content & Thought Leadership Benefits

- Presentation of key findings at Arival Conference in Orlando, October 2019, with partner branding (all partners)
- Distribution of findings on Arival channels featuring partner branding for summary report (all partners)

Optional Add-on: Exclusive Branded Content

- Custom co-branded Arival Guide (8-10 pages) OR Arival produced webinar, with partner to partner's clients and database

Partnerships Summary

Partner Features	Launch Partners (limited to 2)	Insights Partners
Custom presentation (slide deck) tailored to key areas of interest	✓	✓
Tabulated survey data (xls)	✓	✓
Co-branding on Attractions 2.0 reports, webinars and marketing	✓	✓
Input on survey development	✓	
Custom Questions (2 questions, exclusively for Launch Partner)	✓	
Exclusive Co-branded Arival Guide	✓	\$7,500 (optional add-on)
Webinar with insights deck	✓	\$7,500 (optional add-on)
Partner Fee	\$25,000	\$8,000

What is a Fielding Partner?

- **Help us field this survey (Aug-Sept 2019). All we ask is that you send out a link to the survey two times between August and September to your operator database.**
- **There is no cost.** Arival is not charging a sponsorship fee to fielding partners. We are seeking to develop comprehensive, important research and insights to benefit the entire In-Destination Industry
- **Get key insights to support your strategies** before the rest of the industry. Gain advance access to the Insights Report developed from the study: *Arival's Global Operator Landscape*.
- **Get your brand associated with market-defining industry insights published in *Arival's Global Operator Landscape*.** This report will be widely circulated and read by operators worldwide. Arival will provide partner acknowledgement and branding on all Arival publications and presentations stemming from this study.

How will we get operators to respond:

Each operator who fills out the survey or participates in an interview receives a free copy of *Arival's Global Operator Landscape*.

The Arival Research Team

Douglas Quinby co-founded Arival to fill the huge void in insights, information and conferences for travel's third-largest and most important sector: Tours, Activities & Attractions. Since its founding in 2016, Arival has become the defining platform for the sector, with three conferences worldwide, a series of definitive research reports and the Arival.travel media site and newsletter.

Prior to co-founding Arival he served as Senior Vice President, Research at Phocuswright, where he led seminal studies on numerous travel trends and sectors, including Tours, Activities & Attractions. He has deep experience in consumer and industry research with extensive background in both quantitative and qualitative methodologies, including consumer insights, surveys, and industry data analytics.

Douglas has also led event programming for the Phocuswright Conferences and is a recognized expert on online travel and travel distribution. He is frequently cited in leading media outlets including Bloomberg, CNN, *The New York Times*, *USA Today*, *The Wall Street Journal* and *The Washington Post*. He is a sought-after speaker and moderator, and has presented at numerous travel industry events around the world.



Douglas Quinby
Co-founder & CEO

The Arival Research Team

Anne Failing has over a decade of experience working in the travel industry and research and insights. She has led Arival's seminal research efforts, including Arival's *State of In-Destination 2018* and *Event Horizon*.

Prior to joining Arival, she worked as a market research consultant with a focus on the ski industry and economic development in mountain communities. As a lead analyst, she has developed projects that focus on product development, revenue management, strategic planning and market specific targeting decisions within the travel industry. Anne has extensive experience with both quantitative and qualitative methodologies, including consumer insights, surveys and industry data analytics.

Previously, Anne has worked for RRC Associates, Intrawest and Wisp Resort. She received a BA from Duke University and a MA from the Josef Korbel School of International Studies at the University of Denver.



Anne Failing
Research Analyst



Thank you

Ella Sopp

Business Development Manager

+44 (0) 7879 666033

ella@arival.travel