

The logo for ARIVAL features a stylized 'A' on the left, composed of a red triangle pointing up and a teal parallelogram pointing down. To the right of this icon, the word 'ARIVAL' is written in a bold, white, sans-serif typeface. The entire logo is centered horizontally against a dark teal background. Faint, thin white lines and small circular icons with arrows are visible in the background, suggesting a map or travel theme.

# ARIVAL

@arivaltravel



# Tours, Activities & Attractions: Travel's Next Big Thing



**DOUGLAS QUINBY**  
Co-founder & CEO, Arival

**World Travel Market**  
5 November 2019

**Arival advances the business of creating amazing in-destination experiences through events, insights and community for creators and sellers of Tours, Activities & Attractions.**

**Learn more at  
[www.arival.travel](http://www.arival.travel)**





# ARIVAL

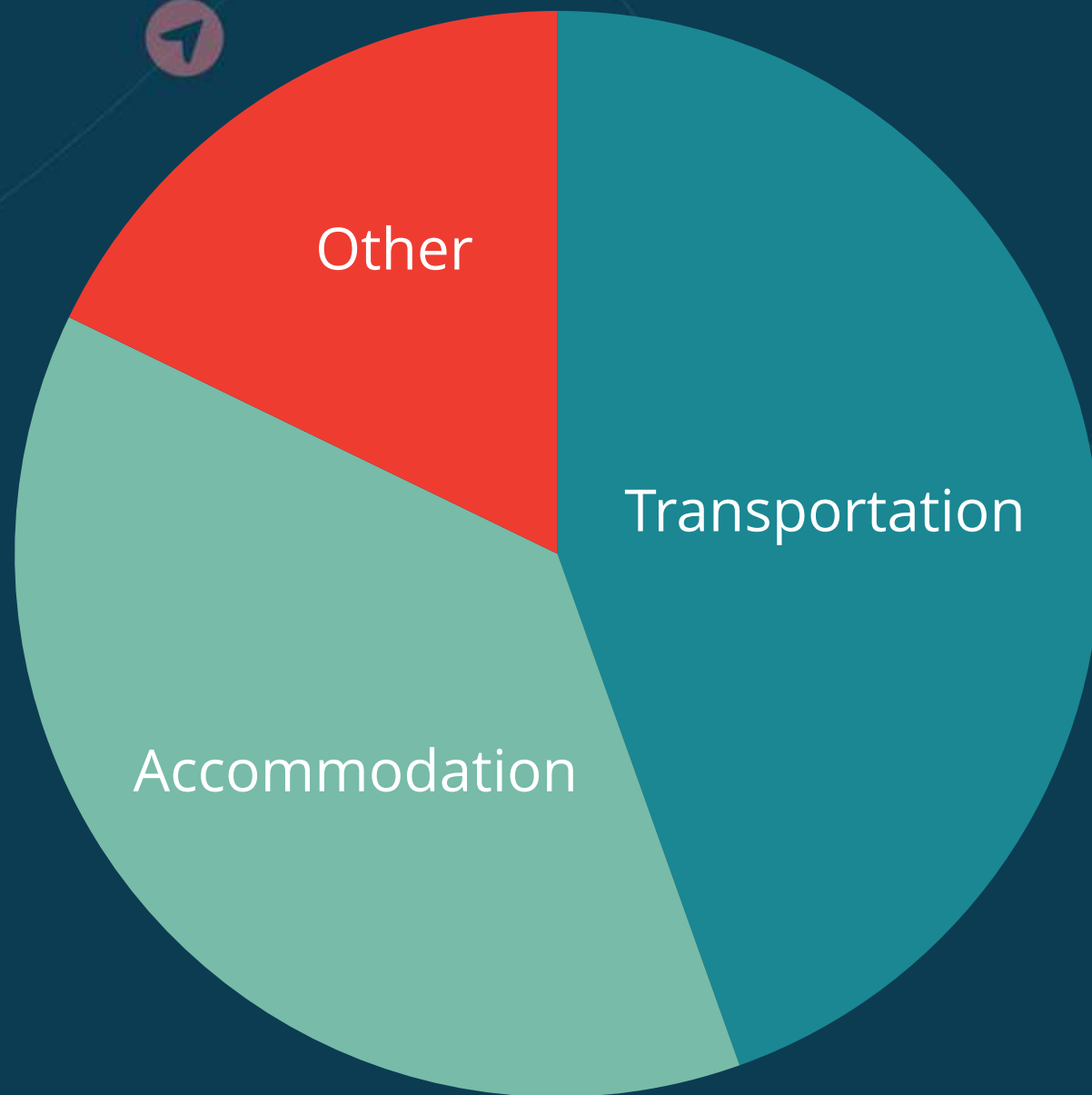


Super Early Bird  
registration includes  
one free room night  
at host hotel.

*available through 30 Nov.*

**1-3 March 2020**  
[arivalevent.com/berlin](http://arivalevent.com/berlin)





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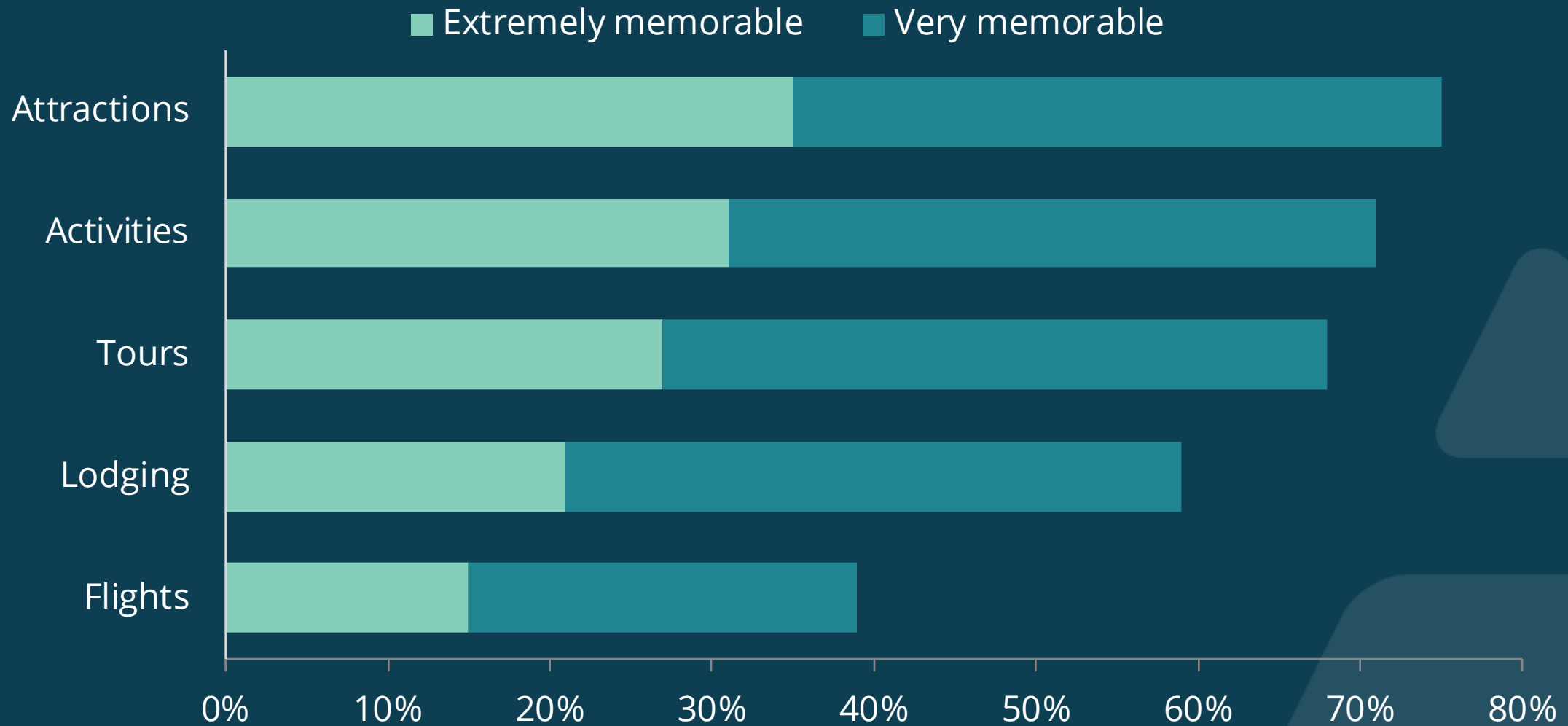


# Ancillary

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# What Matters Most







# The Best Part of Travel





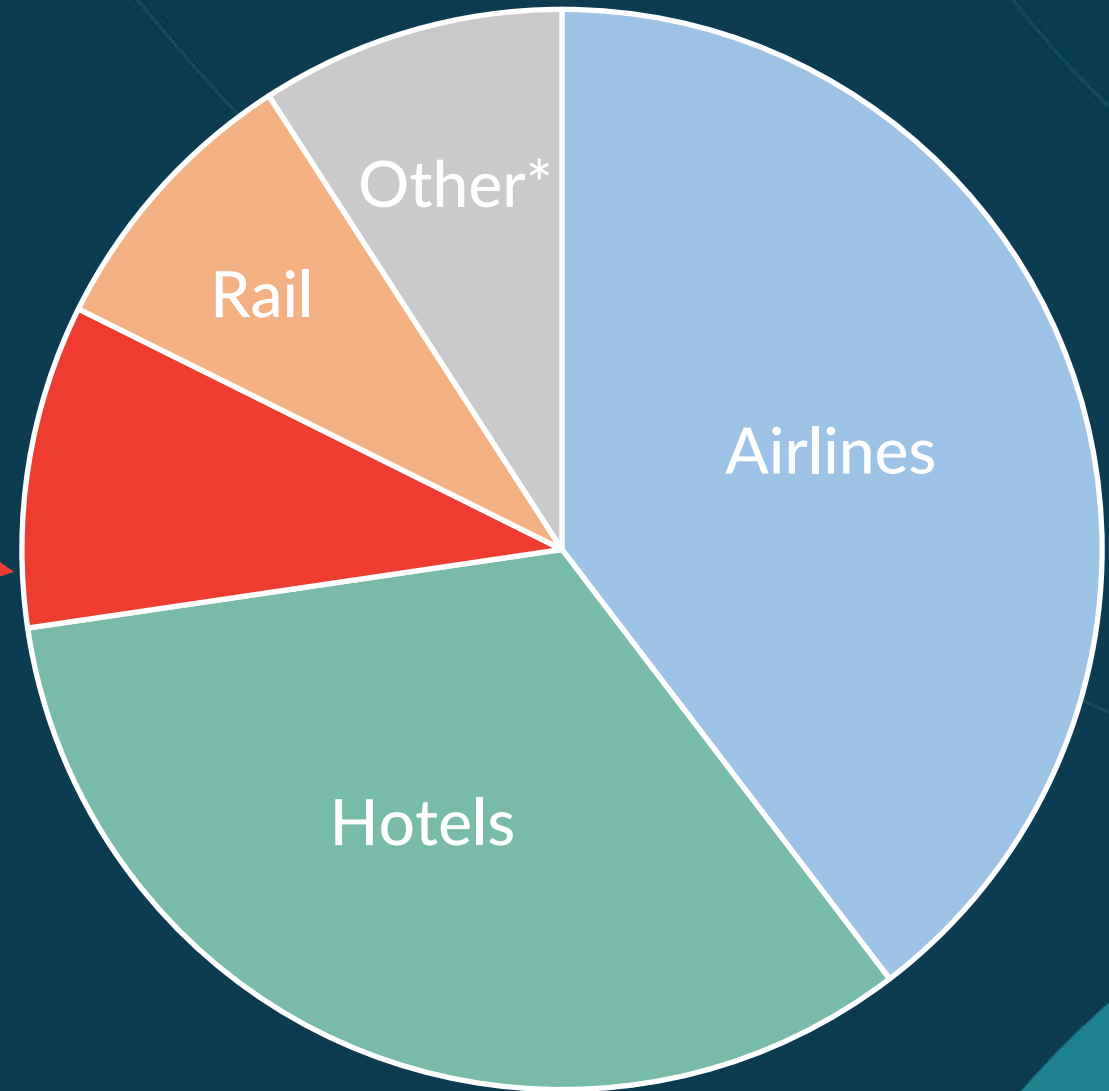
# The Biggest Opportunity

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**That's Us!**

**\$180B**





# Everyone Does It







U.S.  
97%

U.K.  
97%

France  
98%

Germany  
97%



It's Growing  
Faster

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# Boomers

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# Gen-Z & Millennials

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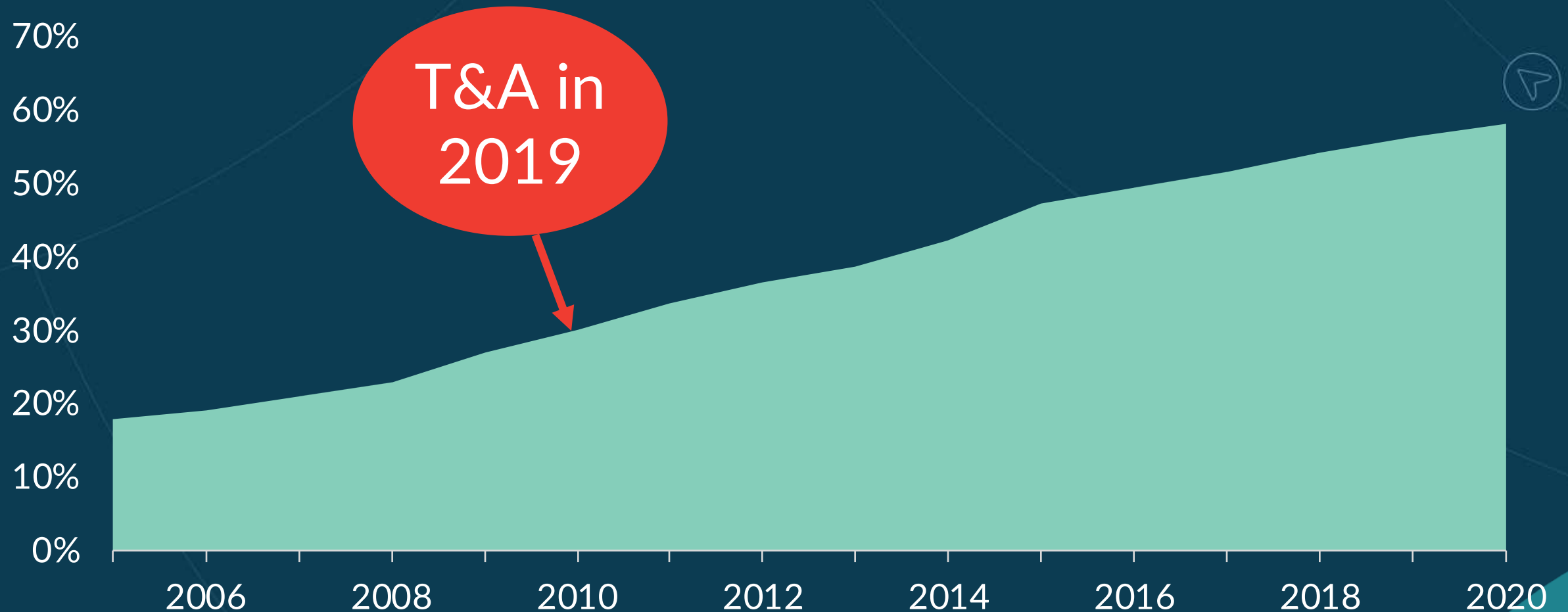
It's Offline  
(mostly)

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# Share of Travel Booked Online in Europe



# US\$1.9B Raised Since 2017



\$525M



\$26M



\$10M+



\$12M



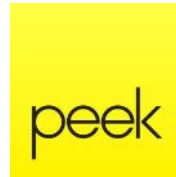
\$7M



N/A



\$559M



\$33M



\$12M



\$9M



Redeem

\$8M



lokalocal

N/A



\$100M



\$26M



BeMyGuest®

\$6M+



rezdy

\$5M



\$2.6M



GUIDDOO  
WORLD

N/A



# Why Now?

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Let's start by asking  
different question:  
**Why has it taken  
so long?**



**We are well into the third decade of  
online travel, and interest in tours  
and activities is only starting now.**

**Why?**







1) It is **super**  
**fragmented**



# Operators worldwide:

>1,000,000

Most are very small,  
with gross bookings of  
less than

\$250,000



But for many, it's less than  
**\$50,000**

## 2) It's super complicated

Tours & Activities is  
**not** a vertical:  
It's comprised of hundreds  
of 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





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Sabirama



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**HACKETT.**  
SENTOSA







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3) That makes it  
super hard



# What's Different Now?

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# Plumbing (Technology)

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**Hundreds of companies are wiring up supply, providing accessible reservations and business management technology.**

**They are bringing all of this fragmented supply into the online travel ecosystem.**

# Our Customers Are Already There

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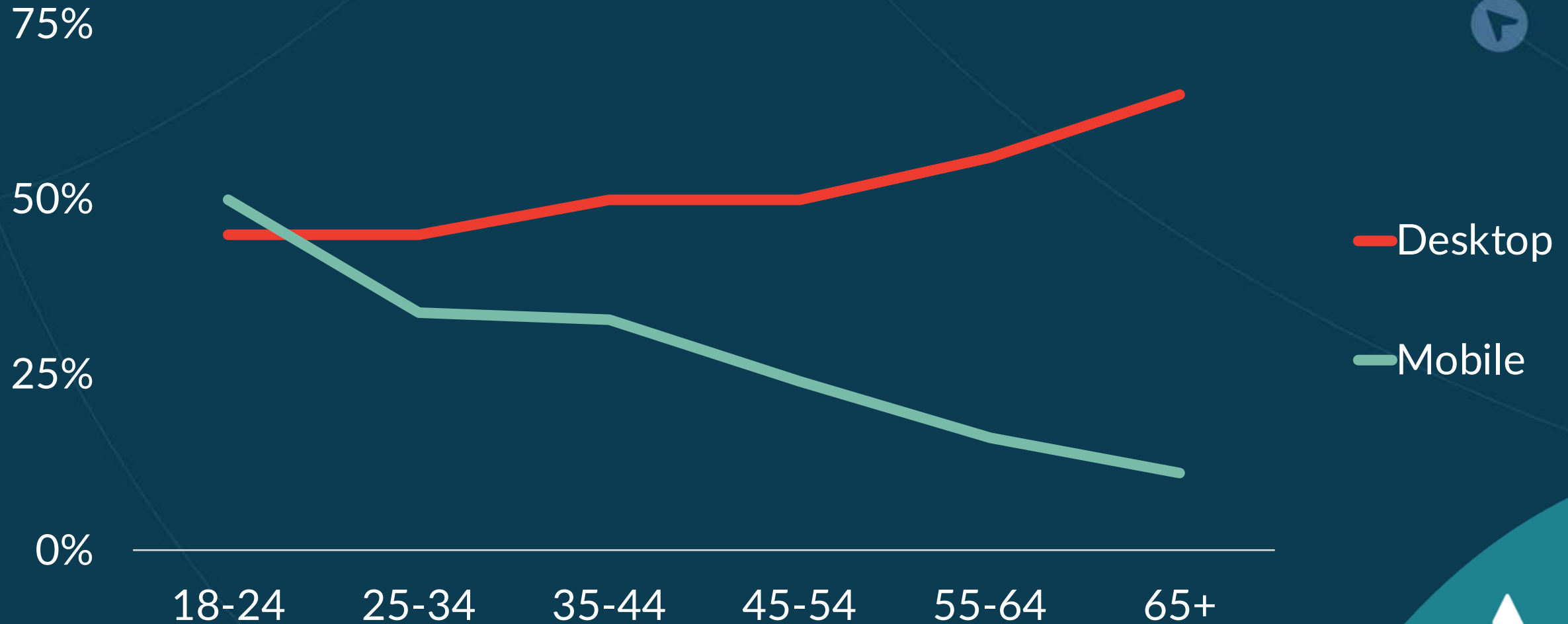


# Planning & Shopping for Attractions





# How Travelers Research Attractions



How do we get  
there?

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# 1) Tours & Activities



Hotels



Hotels + Homes

Flights

Airport transfer

Today's deals

agoda homes

...

Car rentals

Things to do

Tokyo

1,542 choices

2 Jul 2019

Tuesday

6 Jul 2019

Saturday

1 adult

1 room

SEARCH

Popular

Your budget

Stars

Area

More

What are you looking for?

Hotels + Homestays

Hotels

Family Friendly

Homestays

Family mode

OFF

SEE MAP VIEW

Hurry! Over 49% of properties are fully booked!

Reserve yours now before prices go up.

01

02

00

40

day

hours

minutes

seconds

SORT:

BEST MATCH

LOWEST PRICE FIRST

TOP REVIEWED

SECRET DEALS

Hi Douglas, these properties were selected just for you.

Show properties with free breakfast

Newly built

another TOKYO

Excellent

11 reviews

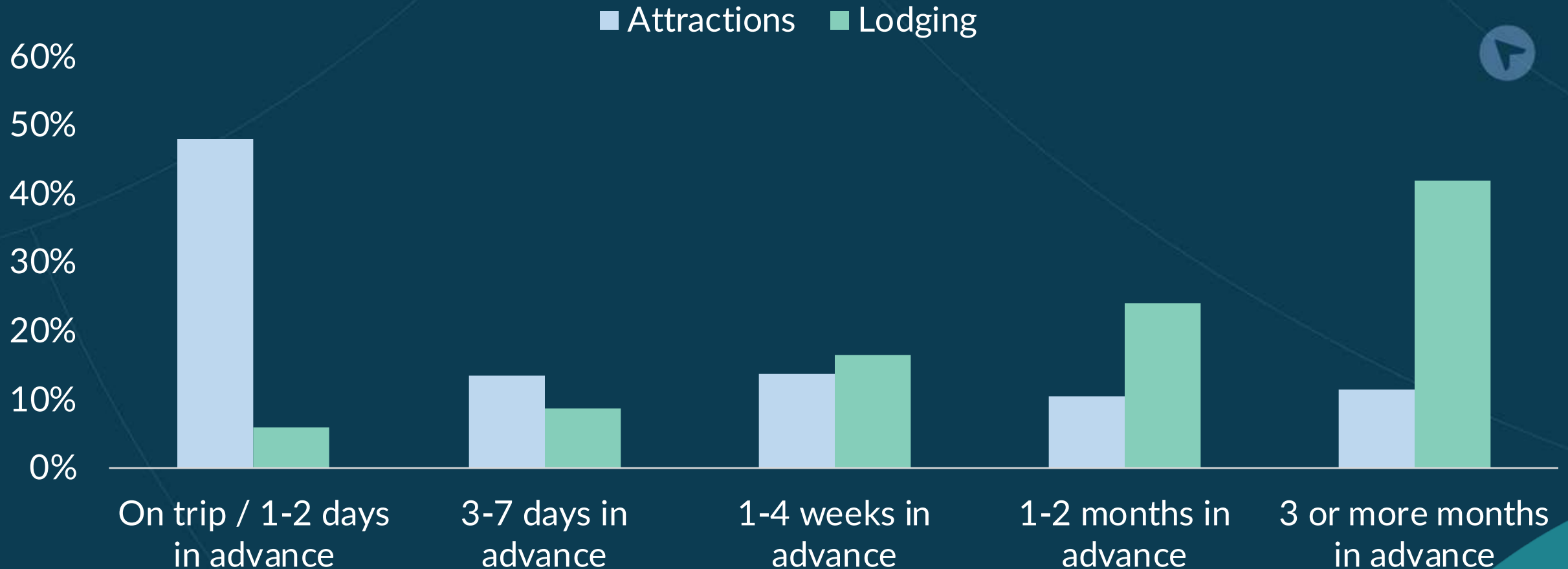
8.7

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The Agoda logo, a stylized white 'A' on a dark blue background.



# Lodging + Attractions Booking Windows



2) It has to be  
bookable



...when they want  
to book





# Tour Takers (18-34)

Booked within  
7 days

73%

within 2 days

46%



U.S. Travel Association  
**National Council of  
Attractions and Experiences**

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Get insights on the Best Part of Travel at



The InDestination Voice

[arival.travel/research](https://arival.travel/research)





# Thank You!

## Join us in Berlin!

Co-founder & CEO  
douglas@arival.travel

@arivaltravel