

The logo for ARIVAL features a stylized 'A' on the left, composed of a red triangle pointing up and a teal shape pointing down. To the right of the 'A' is the word 'RIVAL' in a bold, white, sans-serif font. The background is a dark teal color with a faint grid pattern and four circular icons containing a stylized 'A' shape, one in each quadrant.

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



ARIVAL

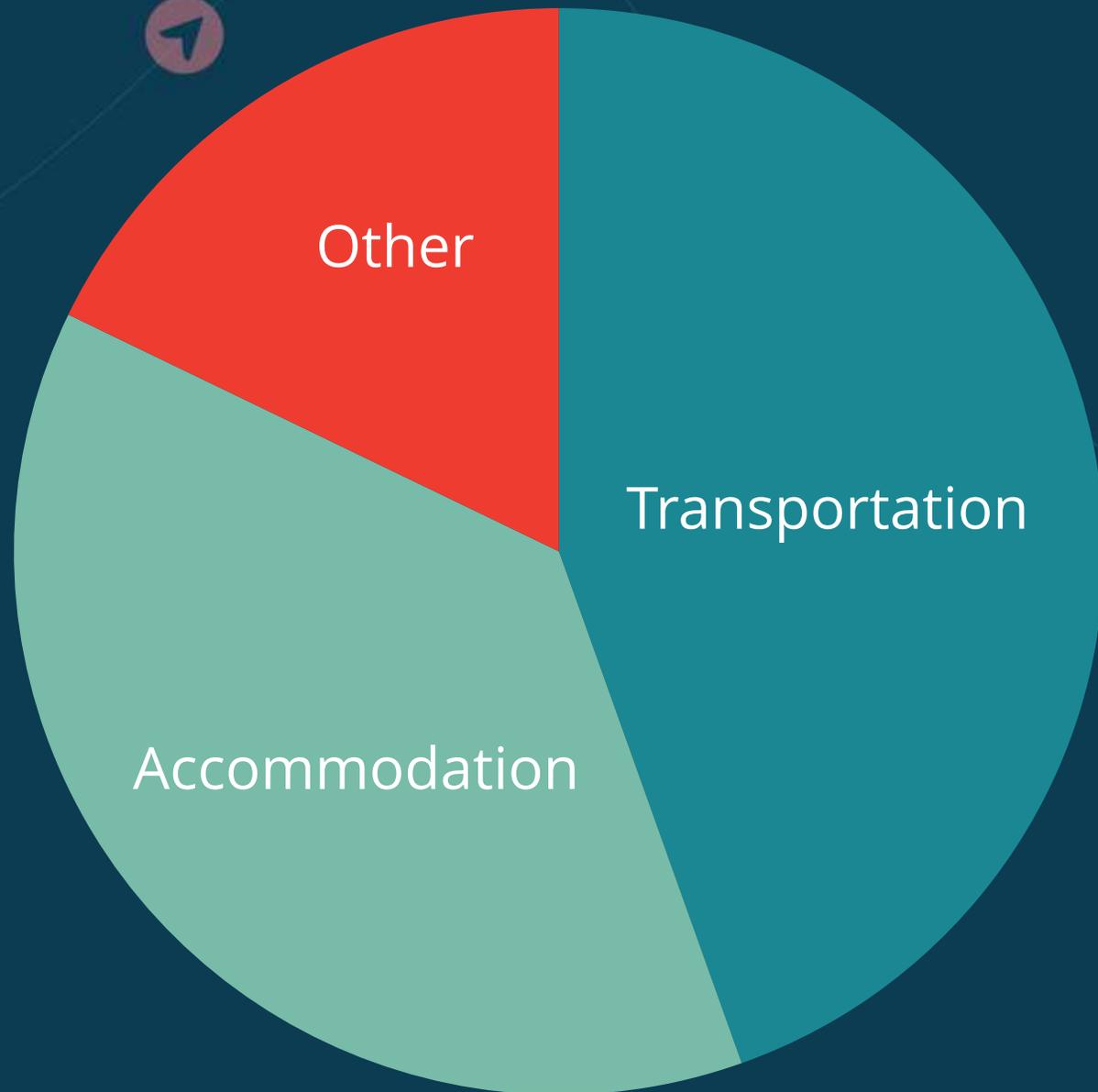


Super Early Bird
registration includes
one free room night
at host hotel.

available through 30 Nov.

1-3 March 2020
arivalevent.com/berlin





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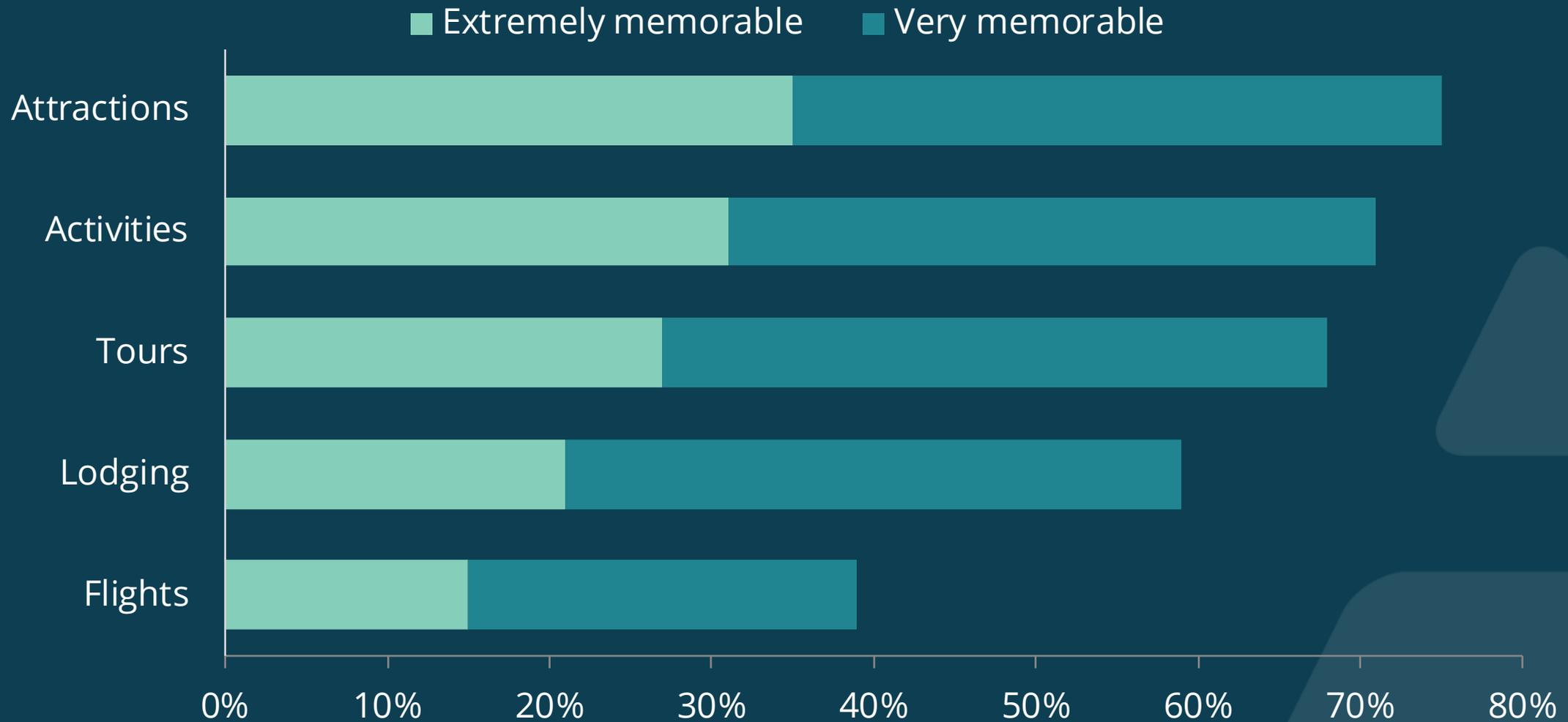


Ancillary

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What Matters Most





The Best Part of Travel



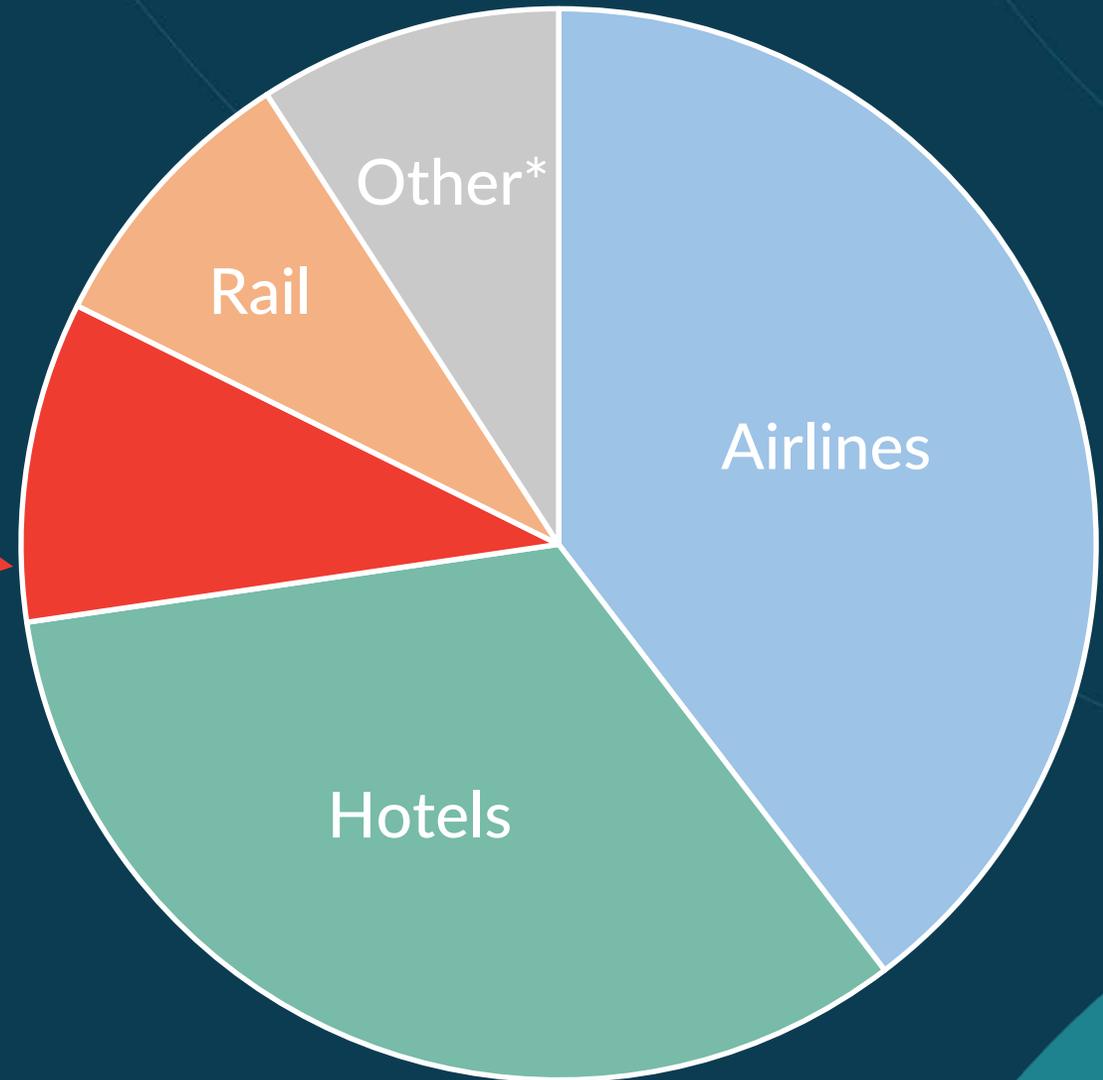
The Biggest Opportunity

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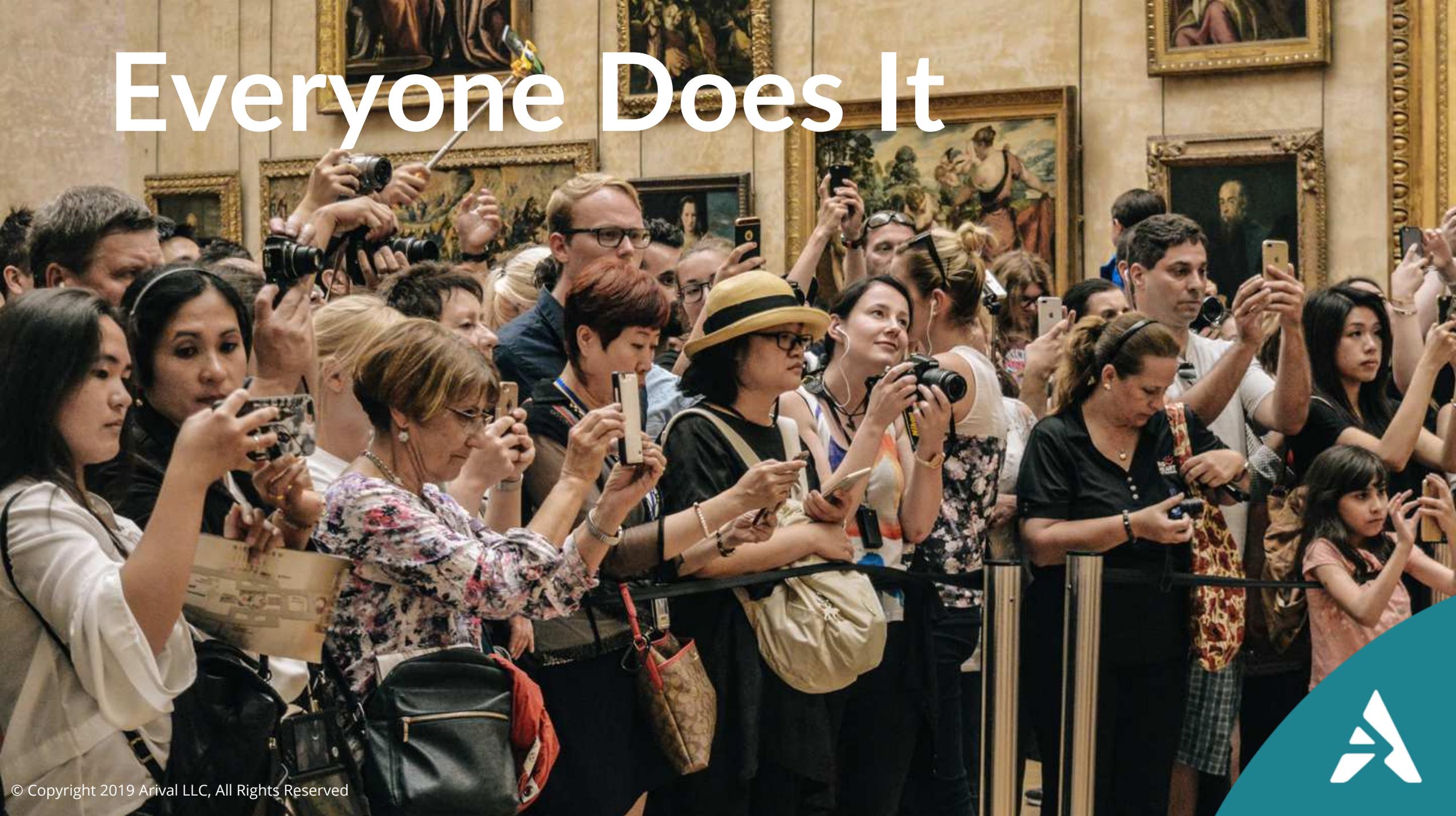


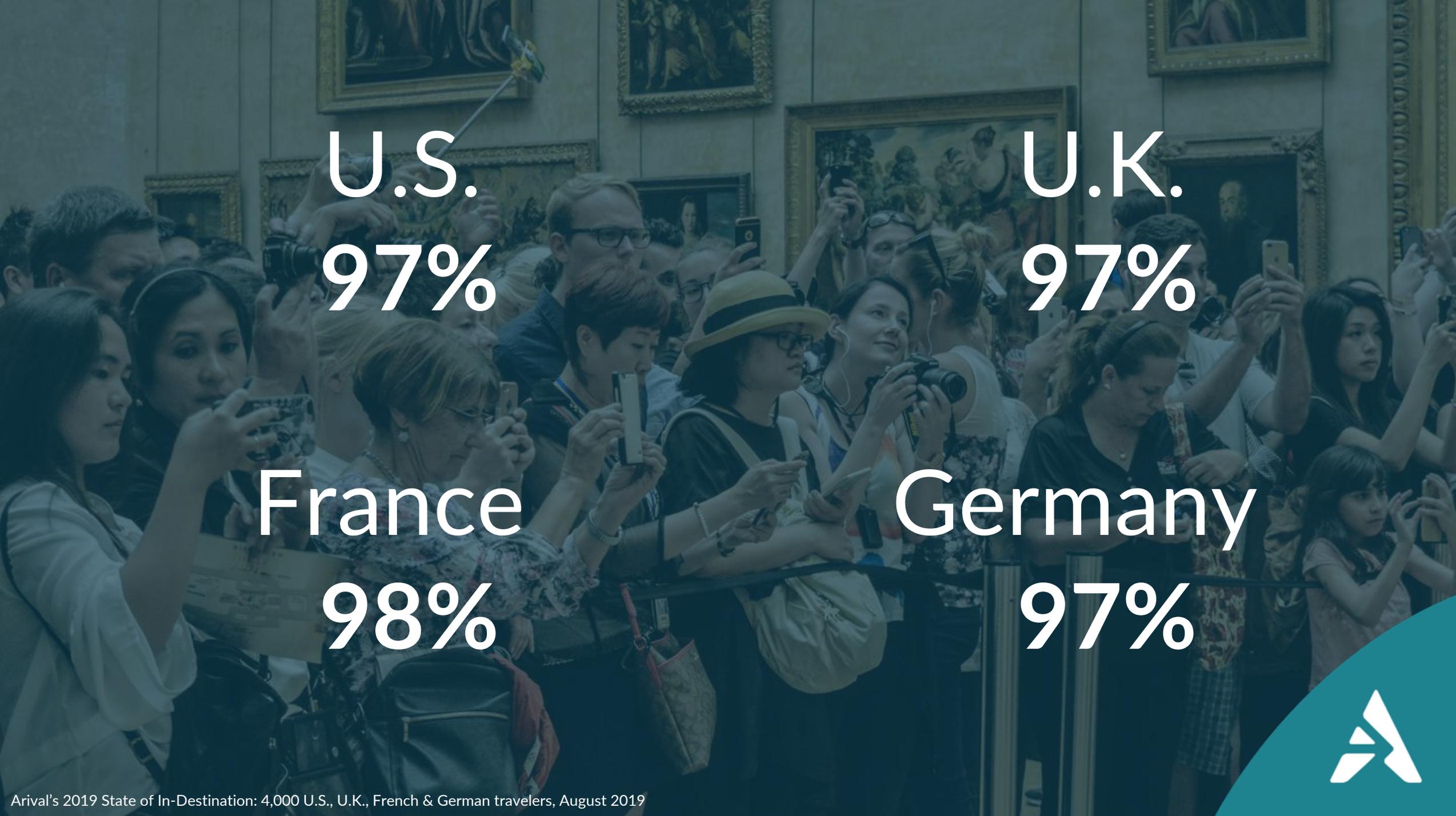
That's Us!

\$180B



Everyone Does It





U.S.
97%

U.K.
97%

France
98%

Germany
97%



It's Growing
Faster

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Boomers

@arivaltravel





URKUNDE

MUSEUM

ONK
M-5000R



Gen-Z & Millennials

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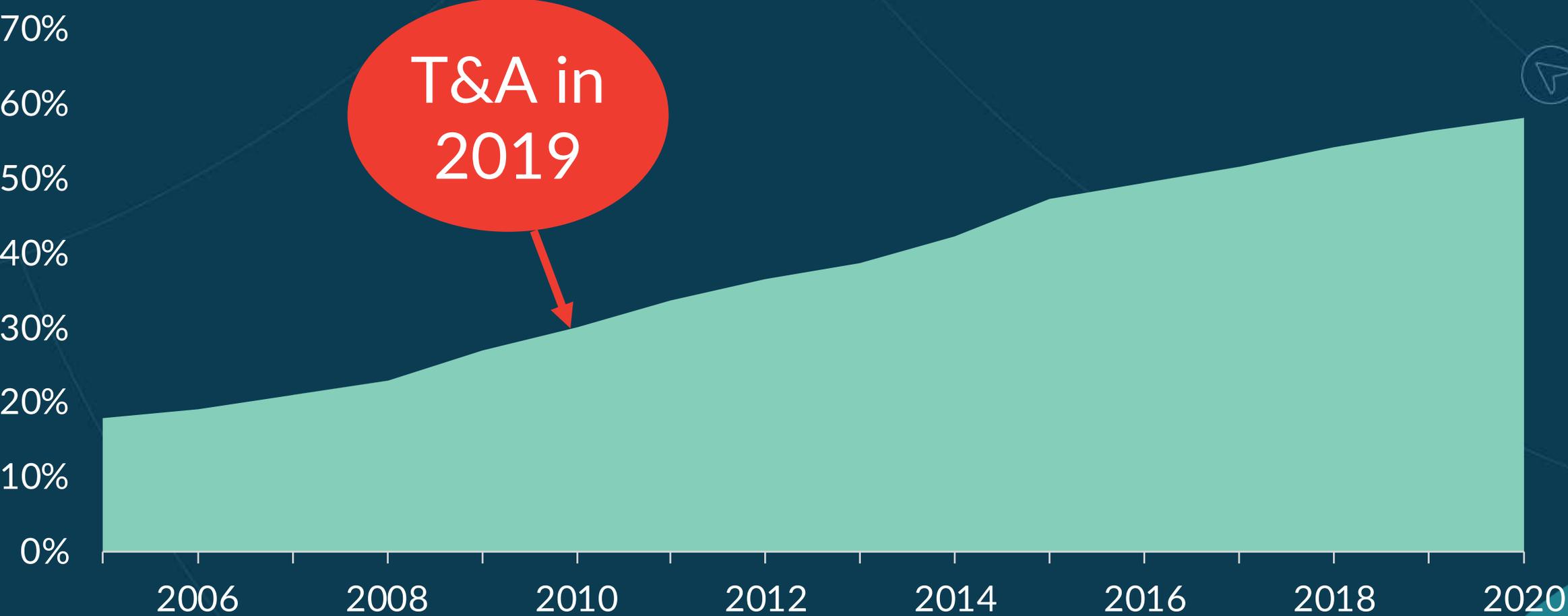


It's Offline (mostly)

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Share of Travel Booked Online in Europe



Source: Phocuswright



US\$1.9B Raised Since 2017

 KLOOK Yours To Explore	\$525M	 GET YOUR GUIDE	\$559M	 Tiqets	\$100M
 MY REAL TRIP	\$26M	 peek	\$33M	 IF ONLY	\$26M
 kkday	\$10M+	 Withlocals	\$12M	 BeMyGuest.	\$6M+
 PLACEPASS	\$12M	 GLOBALTIX YOUR TICKETING PARTNER	\$9M	 rezdy	\$5M
 ROLLER	\$7M	 Redeam	\$8M	 vidi	\$2.6M
 bookingkit	N/A	 lokalocal	N/A	 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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The logo for Hackett Sentosa, featuring a stylized 'H' and 'S' inside a blue oval, with the text 'HACKETT.' in blue and 'SENTOSA' in yellow below it.





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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.

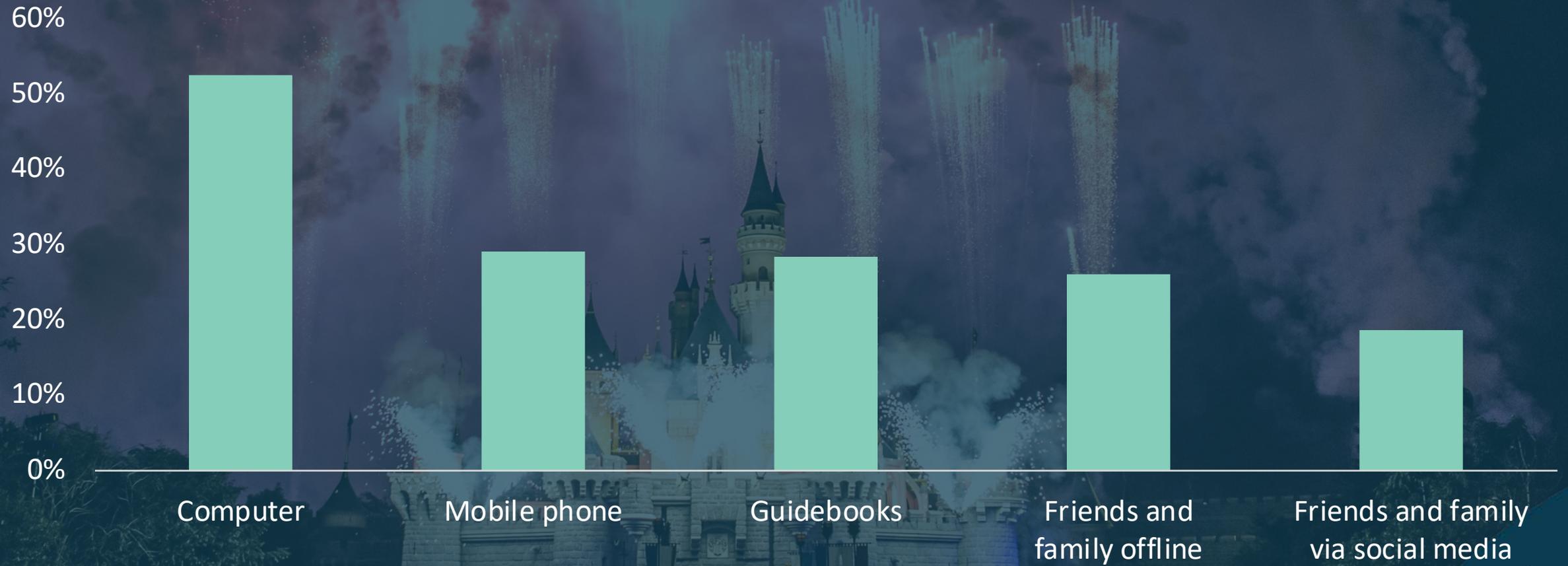


Our Customers Are Already There

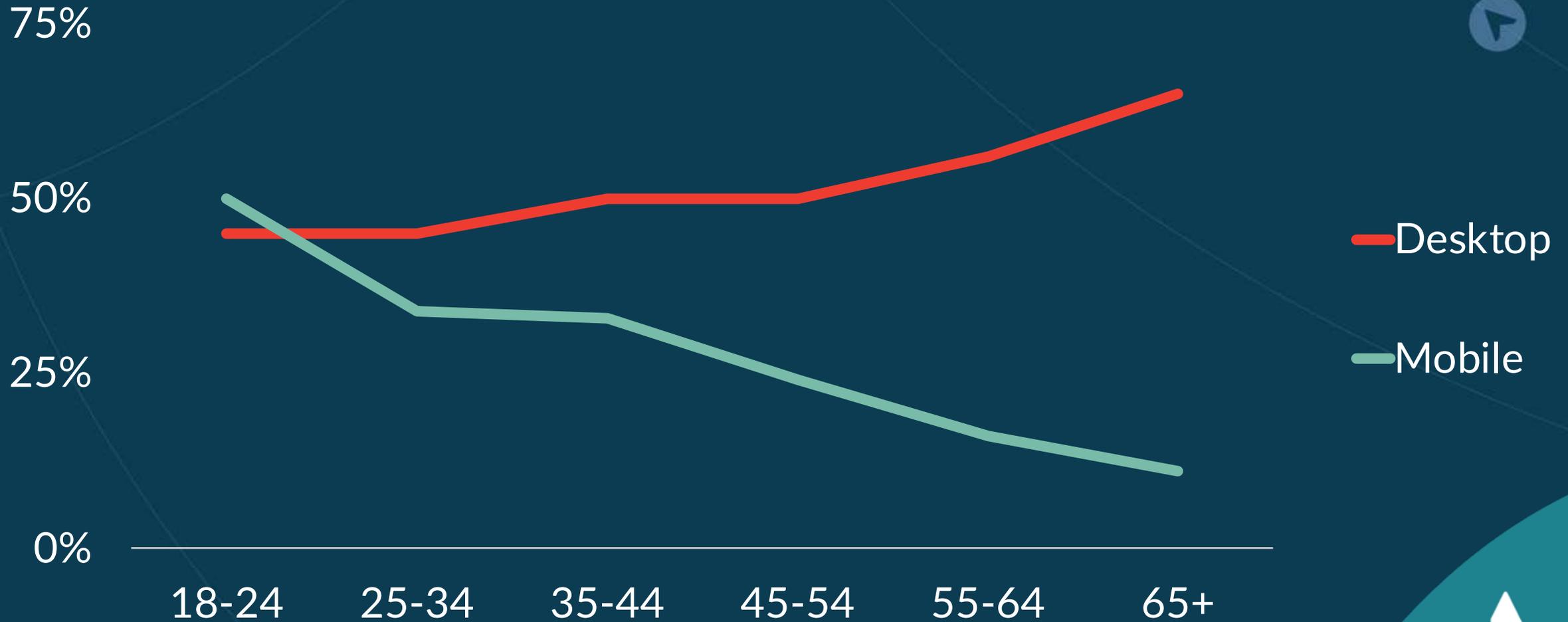
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Planning & Shopping for Attractions



How Travelers Research Attractions

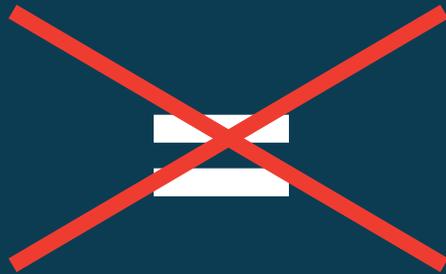


How do we get
there?

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1) Tours & Activities



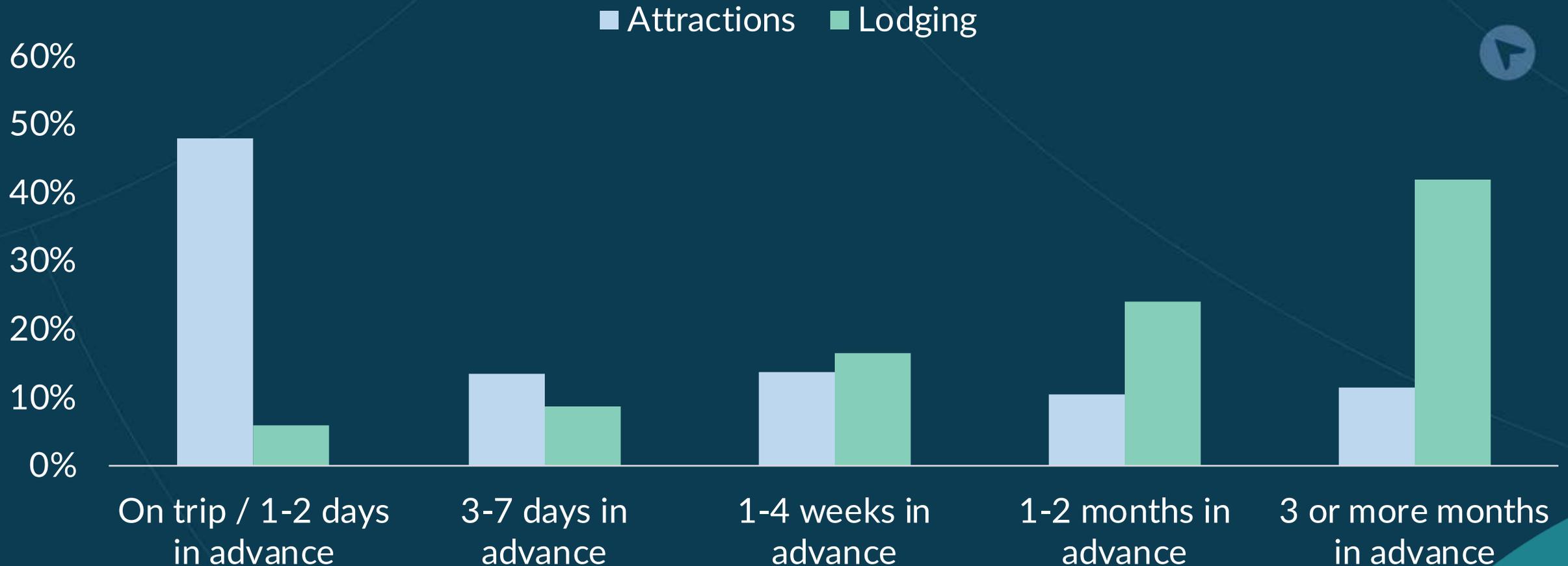
Hotels



Agoda search results for Tokyo from July 2nd to 6th, 2019. The page features a navigation bar with options like 'Hotels + Homes', 'Flights', and 'Car rentals'. A search bar is pre-filled with 'Tokyo' and dates. A red circle highlights the 'Things to do' dropdown menu. Below the search bar are filters for 'Popular', 'Your budget', 'Stars', 'Area', and 'More'. The main content area shows a map view, a 'Hurry! Over 49% of properties are fully booked!' warning with a countdown timer, and sorting options like 'BEST MATCH', 'LOWEST PRICE FIRST', 'TOP REVIEWED', and 'SECRET DEALS'. A personalized message reads 'Hi Douglas, these properties were selected just for you.' The first property listed is 'another TOKYO', which is newly built and has an 8.7 rating.



Lodging + Attractions Booking Windows



**2) It has to be
bookable**



...when they want
to book

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Tour Takers (18-34)

Booked within 7 days 73%

within 2 days 46%



Get insights on the Best Part of Travel at

 **ARIVAL.travel**

The In-Destination Voice

arival.travel/research





Thank You!

Join us in Berlin!

Co-founder & CEO
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@arivaltravel