ARIVAL
ELEVATE

INSIGHTS. CONNECTIONS. HIGHER GROWTH.

UNLOCKING B2B GROWTH

How to Grow Without Losing Control

Thursday, 17 September 2026

4pm BST • 5pm CEST • 11am EDT • 8am PDT
11pm SGT • 1am AEST (Fri 18 Sep)

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A little about me

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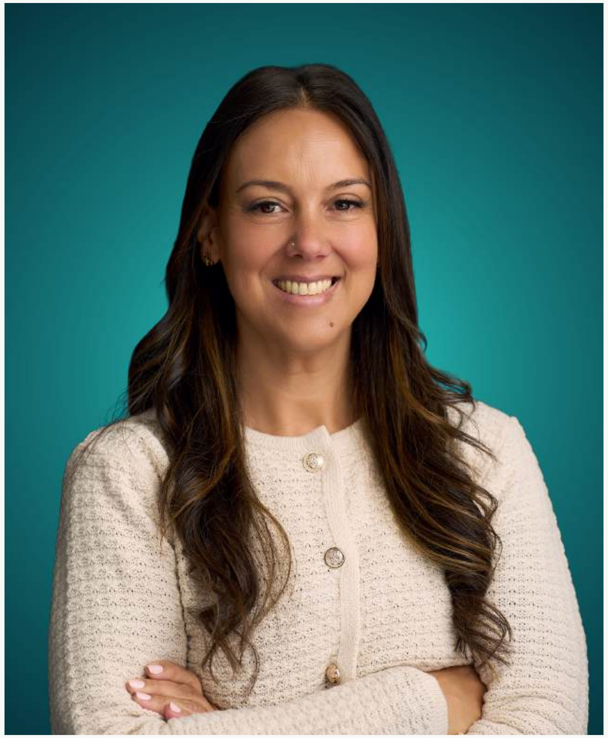
Based in London • Originally from Spain

HOSPITALITY & THEME PARKS	→	THINGS TO DO & LOCAL	→	MULTI-ATTRACTION PASSES
B2B distribution		Supply + Assortment		Global Trade Sales



Go City is the world's largest multi-attraction pass business, operating across 28 destinations worldwide.

Do you have a distribution strategy — or simply a collection of distribution contracts?

A partner should have a job

Before adding a partner, ask:

What problem am I asking them to solve?

NEW SOURCE MARKET	NEW CUSTOMER SEGMENT	INCREMENTAL DEMAND
INTERNATIONAL REACH	OFF-PEAK DEMAND	PACKAGING / OPACITY

Otherwise, you can quickly end up with a collection of contracts rather than a distribution strategy.

LIVE POLL 01

When you think about B2B distribution for your business, which channel comes to mind first?

- OTAs
- Tour operators / wholesalers
- Travel agencies / DMCs
- Specialist resellers / passes
- Other travel partners
- We don’t currently use B2B distribution

B2B is an ecosystem — not a synonym for OTAs

OTA

B2B is an ecosystem — not a synonym for OTAs

ONLINE / RETAIL DISTRIBUTION

- **OTAs**
- **Travel agencies**
- **Retail**

B2B is an ecosystem — not a synonym for OTAs

TRADITIONAL TRADE

OTAs

Online / retail

Tour operators

Wholesalers / bedbanks

DMCs / incoming operators

Travel agencies

B2B is an ecosystem — not a synonym for OTAs

SPECIALIST DISTRIBUTION

- OTAs
- Tour operators
- Wholesalers / bedbanks
- DMCs / agencies
- Multi-attraction passes
- Specialist resellers
- Affiliates

B2B is an ecosystem — not a synonym for OTAs

Online / retail

OTAs · agencies · retail

Traditional trade

Tour operators · wholesalers · DMCs

Specialist

Passes · specialist resellers · affiliates

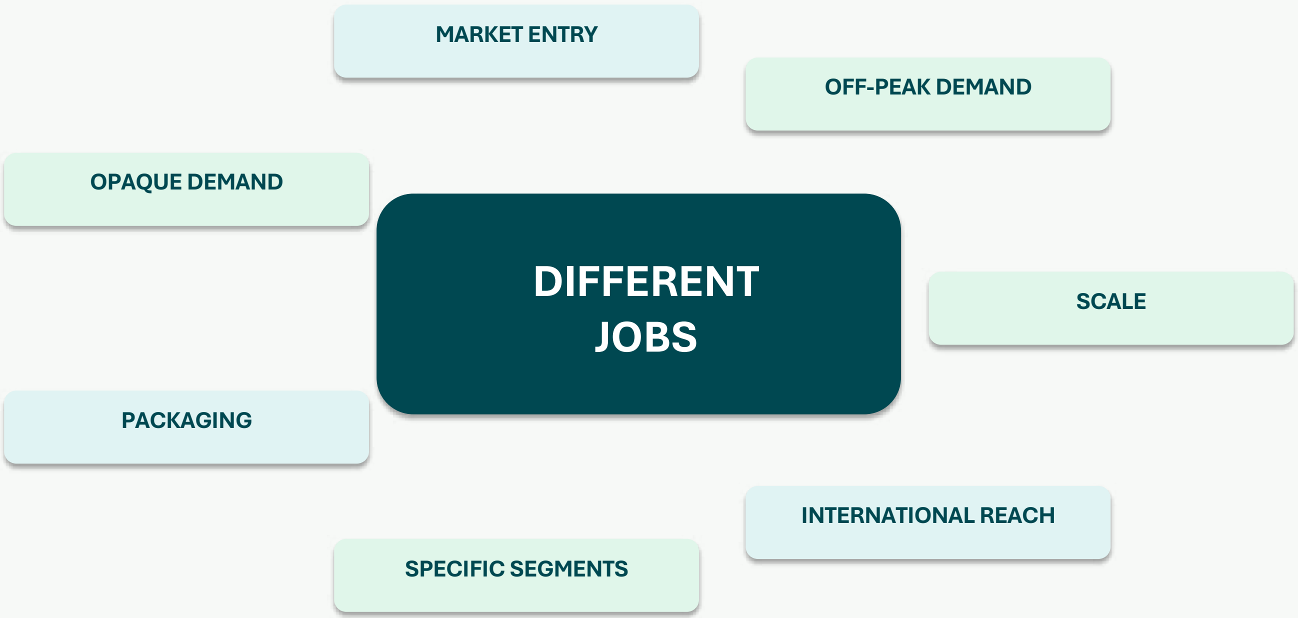
Other travel verticals

Hotels · airlines · transport · cruise

Alternative / closed

Loyalty · affinity · employee benefits

These channels don’t all solve the same problem



The question isn’t:
“Which B2B channel is best?”

It’s: “What role should each channel play in my distribution mix?”

More partners ≠ more diversification

20 partners = diversified? **Not necessarily.**

PARTNER

How dependent are you on individual relationships?

CHANNEL

Are you diversified across routes to market?

SOURCE MARKET

Where does the underlying customer demand originate?

There isn't a magic number. Measure exposure, not partner count.

LIVE POLL 02

Where do you think your biggest B2B distribution risk sits today?

- Too dependent on one / a few partners
- Too dependent on one channel type
- Too dependent on one source market
- Not enough B2B distribution yet
- I’m not sure

The concentration test

If your biggest distribution partner disappeared tomorrow...

How much REVENUE would disappear?

How much DEMAND would disappear?

DEMAND DISAPPEARS

Partner owns access to customers or markets you cannot efficiently replace.

BOOKING CHANNEL CHANGES

Customer may migrate to Direct or another reseller.

Revenue concentration ≠ always demand dependency.

Direct versus Trade?

DIRECT

VS

TRADE

The better question is where each creates the most value.

Entering a new source market

OPTION A | BUILD DIRECT

Localised content
SEO / SEM
Payments
Customer service
Brand awareness
Local market knowledge

OPTION B | USE EXISTING DISTRIBUTION

Partner may already have:
Audience
Language
Payments
Trust
Customer relationship
Market reach

Where should you invest first?

Test → Build → Scale

TEST → **BUILD** → **SCALE**

TEST

Use Trade to access demand.

BUILD

Learn the customer, market and economics.

SCALE

Evolve Trade + Direct as the opportunity matures.

Sometimes the fastest way into a new market isn’t finding the customer.

It’s finding the partner who already has the customer.

LIVE POLL 03

When assessing a B2B partner, what do you focus on most today?

- Commission / margin
- Revenue / booking volume
- Incremental customers or markets
- Total cost of the relationship
- Strategic value / reach

B2B commercial model = commission?

Not always.

Commission model

OPERATOR SETS RETAIL PRICE → PARTNER SELLS → PARTNER RETAINS %

Common in OTA distribution

Greater retail-price control

Supports dynamic / seasonal pricing

Simple headline economics — but not necessarily simple total economics.

NET rate / free-market model

OPERATOR SETS NET → RESELLER ADDS MARKUP → MAY RESELL AGAIN → CONSUMER PRICE

TRADITIONAL TRADE
Common use case

ASIA
Often more prevalent

MULTIPLE LAYERS
Less retail visibility / control

STATIC RATES
Often seasonal / contracted

PACKAGING
Strong fit for forced inclusion

Flight + Hotel + Transfer + Experience → consumer may never see an individual experience price.

Headline commission ≠ cost of distribution

15% Is that my cost of distribution? **NO.**

COMMERCIAL MARGIN + MARKETING INVESTMENT + CONNECTIVITY + OPERATIONAL COST + PAYMENT / RISK

TRUE COST OF DISTRIBUTION

Marketing is part of distribution cost

COMMISSION OR **NET RATE** + **MARKETING**

- Co-op marketing
- Paid placement
- Campaign contribution
- Sponsored visibility
- Promotional funding

Judge the relationship on incremental contribution — not on whether the invoice says "commission" or "marketing".

Connectivity is part of distribution cost

PARTNER A

X% commission

Partner → Direct API → You

PARTNER B

X% commission

Partner → Channel manager → You

Same headline commission.

Same economics?

NO.

What are you actually getting in return?

Instead of only asking:

“How much margin am I giving away?”

Ask:

“What am I getting in return?”

Incremental demand	New source market	New customer segment
Higher intent	Off-peak demand	Marketing reach
Packaging / opacity	Connectivity	Lower acquisition cost

Higher commission = worse partner?

Not necessarily.

PARTNER A | 15%

Lower headline commission

Demand substantially overlaps with customers who may otherwise buy Direct.

PARTNER B | 20%

Higher headline commission

Unlocks an incremental international market you cannot efficiently acquire Direct.

Which is more profitable? You need the full economics to know.

The incrementality test

01 **Would this customer have bought from me anyway?**

02 **Did the partner unlock a customer, market or occasion I couldn't efficiently reach?**

03 **What is the net contribution after all distribution costs?**

Signals: source market • segment • booking window • package context • seasonality • acquisition route

Distribution maturity

ACCESS	→	DIVERSIFY	→	OPTIMISE	→	MANAGE
Who can reach customers I can't efficiently reach?		Where am I exposed?		Which relationships create incremental, profitable growth?		Where should I invest, expand, renegotiate, maintain or exit?

As your business grows, the question changes:

"How do I get more distribution?" → "How do I build and manage the right distribution?"

Distribution becomes a portfolio

INVEST

EXPAND

RENEGOTIATE

MAINTAIN

EXIT

Every partnership has an opportunity cost:

time • margin • inventory • technology • attention

Know when to say no

- No new customer / market
- Little incremental demand
- Economics don’t justify value
- Operational complexity
- Brand / CX mismatch
- Payment / cancellation risk
- Channel conflict

SAYING NO

is part of the strategy

LIVE POLL 04

After today, where does your distribution strategy need the most attention?

- ACCESS — reach more customers / markets
- DIVERSIFY — reduce concentration
- OPTIMISE — improve economics / incrementality
- MANAGE — invest, renegotiate or exit
- I need to define the strategy first

Distribution Strategy Audit

WHY	Why does this partner exist?
EXPOSURE	Where am I concentrated?
CUSTOMER	Who does this partner unlock?
MODEL	How am I selling?
ECONOMICS	What is my true cost of distribution?
ACTION	Access, diversify, optimise, manage — or say no?

If you can't explain a partner's strategic role in one sentence, start there.

THE GOAL ISN'T MAXIMUM DISTRIBUTION.

IT'S THE RIGHT DISTRIBUTION.

The right partners

The right purpose

The right customers & markets

The right economics

And the right distribution will evolve as your business evolves.

WANT TO GO DEEPER ON DISTRIBUTION?

ARIVAL 360 | SPOKANE

12–15 October 2026

Including a practical, hands-on workshop focused on distribution.

Q&A

time