Marketing Unforgettable Experiences in the U.S.

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The State of In-Destination

The State of Digital for Tours, Activities & Attractions

#arivaltravel

Oct. 9, 2019
What Is Arival?
Conferences & Insights for the Best Part of Travel: Tours, Activities, Attractions & Experiences

www.arivalevent.com

www.arival.travel
Today’s Speakers

Douglas Quinby
Co-founder & CEO
Arival

Bob Hofmann
Vice President
Broadway Inbound

Robert Graff
Vice President, Sales & Marketing
Bindlestiff Tours
Today’s Agenda

1. The State of Tech & Digital
   • Where are we, and where’s it headed
   • Traveler expectations
   • The distribution map

2. Panel Discussion & Q&A
State of In-Destination

A multi-market survey of traveler attitudes, ambitions and behavior for tours, activities, attractions and events

Markets: U.S., U.K., France and Germany

Method: Online survey

Sample: 1,000 travelers from each market (adults, 18+) who have traveled 100 miles from home in the past year, including an overnight stay and qualifying activity or attraction, with a focus on the inbound U.S. travel market.

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Douglas Quinby
Co-founder & CEO
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Where are we?
What Travelers Say:
How They Book Tours & Attractions (2018)

<table>
<thead>
<tr>
<th>Method</th>
<th>Tours</th>
<th>Attractions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Offline*</td>
<td>33%</td>
<td>41%</td>
</tr>
<tr>
<td>Computer</td>
<td>24%</td>
<td>27%</td>
</tr>
<tr>
<td>Travel Trade**</td>
<td>21%</td>
<td>19%</td>
</tr>
<tr>
<td>Phone (booked online)</td>
<td>12%</td>
<td>8%</td>
</tr>
<tr>
<td>Hotel</td>
<td>10%</td>
<td>5%</td>
</tr>
</tbody>
</table>

* Purchased at ticket office or over a phone call directly with the tour or attraction operator. The vast majority of these bookings (90%) are made in person. ** Travel trade includes traditional travel agencies, tour operators and destination visitor centers or ticket offices. It does not include online travel agencies.
Where are we going?
The Next Big Sector for Online Migration

Hotel (Leisure) 75%
Tours & Activities 25%

Source: Phocuswright
## US$1.8B Raised Since 2017

<table>
<thead>
<tr>
<th>Company</th>
<th>Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>KLOOK</td>
<td>$525M</td>
</tr>
<tr>
<td>MY REAL TRIP</td>
<td>$26M</td>
</tr>
<tr>
<td>kkday</td>
<td>$10M+</td>
</tr>
<tr>
<td>PLACEPASS</td>
<td>$12M</td>
</tr>
<tr>
<td>ROLLER</td>
<td>$7M</td>
</tr>
<tr>
<td>bookingkit</td>
<td>N/A</td>
</tr>
<tr>
<td>GET YOUR GUIDE</td>
<td>$559M</td>
</tr>
<tr>
<td>peek</td>
<td>$33M</td>
</tr>
<tr>
<td>Withlocals</td>
<td>$12M</td>
</tr>
<tr>
<td>GLOBALtix</td>
<td>$9M</td>
</tr>
<tr>
<td>Redeem</td>
<td>$8M</td>
</tr>
<tr>
<td>lokalocal</td>
<td>N/A</td>
</tr>
<tr>
<td>Tiqets</td>
<td>$40M</td>
</tr>
<tr>
<td>IF ONLY</td>
<td>$26M</td>
</tr>
<tr>
<td>BeMyGuest</td>
<td>$6M+</td>
</tr>
<tr>
<td>ready</td>
<td>$5M</td>
</tr>
<tr>
<td>vidi</td>
<td>$2.6M</td>
</tr>
<tr>
<td>GUIDDOO WORLD</td>
<td>N/A</td>
</tr>
</tbody>
</table>

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How do we get there?
1) Plumbing
(Technology)
Insert 100+ logos
2) Connectivity
Connectivity Terms

a. Offline
b. Extranet
c. API (application programming interface)
d. Channel manager
The In-Destination Distribution Map

Supply
- Ground
- Attractions
- Activities
- Events
- Guide/Host
- Day Tour Operator

Technology
- Reservations Tech Connectivity

Distribution/Resellers
- Direct (B2C)
- Online (web, mobile)
- Offline

Online Sellers
- TripAdvisor
- Expedia
- GetYourGuide
- Klook
- Groupon
- Tiqets
- Veltra

Wholesalers/Packaging TOs
- TUI
- Travel Corp.
- Hotelbeds
- JTB

Attraction Passes
- CityPass
- Sightseeing Pass
- Leisure Pass
- iVenture

Travel Industry Sellers
- Hotels, concierges
- Airlines
- DMOs
- Ticket reseller
- Local tour operators

P2P Platforms
- Airbnb Experiences
- Eatwith
- Withlocals
- Tours By Locals
- City-Unscripted

Corporation benefits (e.g. EBG, Blueboard)
3) Delivery
Younger Travelers, Mobile Reshaping the Booking Landscape

Research & Booking Windows for Attractions, All Markets by Age

Arival's 2019 State of In-Destination: Active travelers: US – 574, UK – 169, FR – 137, DE – 127; August 2018
Three Insights Papers Available to US Travel Members:

Access your papers now at www.ustravel.org/research/ncae-arival-study
Q&A

Access the full research now at www.ustravel.org/research/ncae-arival-study

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NCAE’S IN-DESTINATION STUDY

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All four white papers are now available online. (U.S. Travel login required).

Questions? Email NCAE@ustravel.org
Join us at Arival in Orlando
The Event for the Best Part of Travel: Tours, Activities, Attractions & Experiences

Oct 28-31, Orlando, FL, at the Gaylord Palms Resort & Convention Center

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www.arivalevent.com
Thank you!

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