

Attractions Revisited

How Visitor Attractions Can Adapt to the New Traveler Path to Purchase

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In partnership with

The logo for ARIVAL, featuring a stylized white 'A' with a red and blue triangle, followed by the word "ARIVAL" in white.

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What Is Arival?

Your Resource for the Best Part of Travel

Events, insights and community for creators and sellers of tours, activities, attractions and experiences.





All on one pass

“We’re on a mission to transform the way people see and experience the world’s greatest destinations.”



Incredible savings



Attractions for everyone



Freedom to choose



Introduction: Attractions Revisited

Visitor attractions of all shapes and sizes, from museums, zoos and aquariums to amusement parks, observation decks and cultural sites and monuments, have undergone extraordinary change since the onset of the pandemic in 2020. Shifting regulations and health and safety guidance along with profound changes in visitor planning and booking behavior have created new operational demands during a challenging time.

Based on exclusive new research of 1,000 U.S. travelers on their planned or intended travel over the next 12 months, this short presentation from Arival and Go City highlights the key trends in traveler behavior and expectations for ticketed attractions. This report also presents actionable recommendations that all attractions should consider as travel continues its recovery.

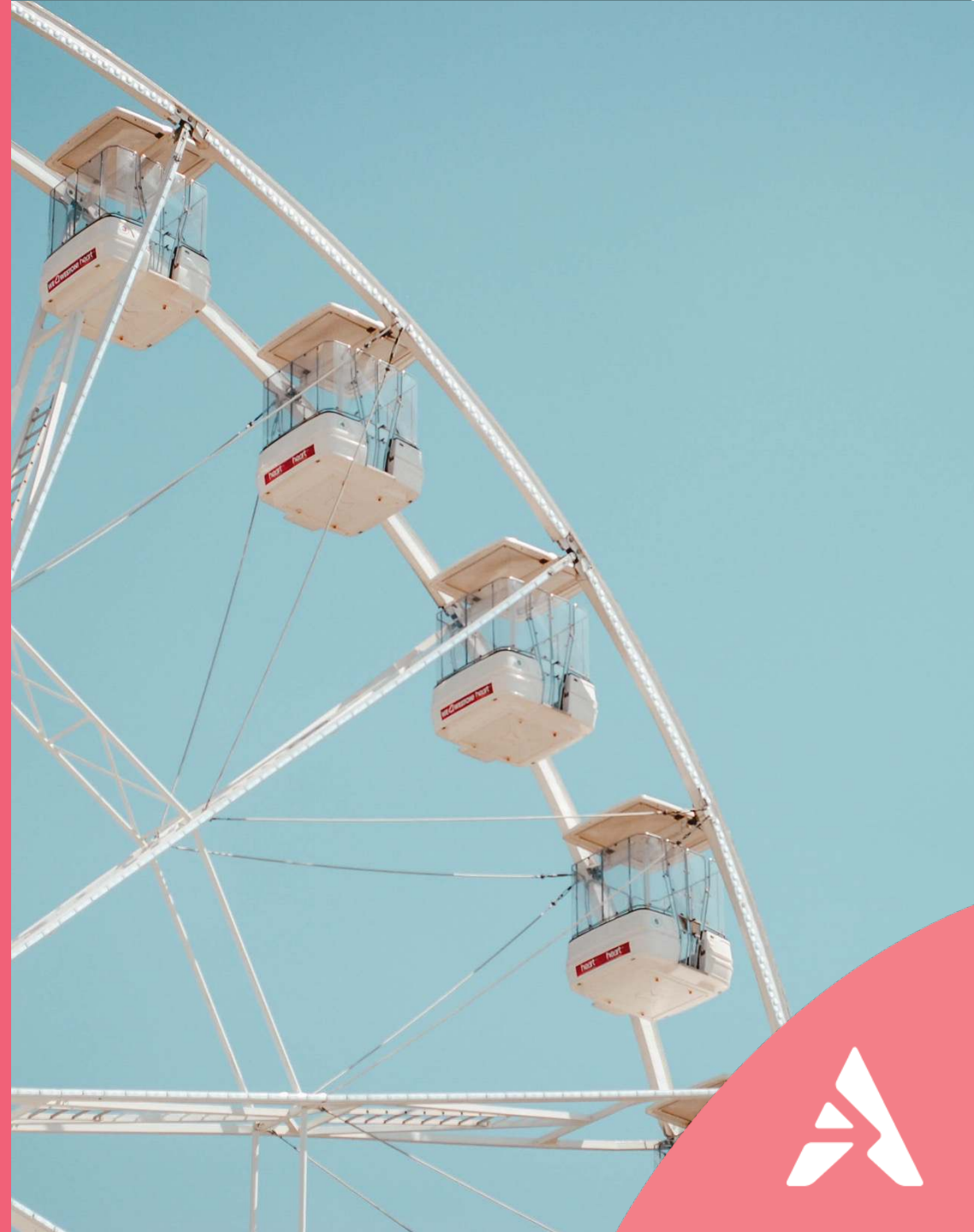
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What's in This Report

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About This Study

Arival surveyed 1,000 U.S. "active travelers" on their travel intentions for the next 12 months.

Active travelers are adults (18+) who have taken at least one trip 100 miles from home with an overnight stay since January 2019 and have engaged in a qualified tour, activity or attraction. They also have planned or intend to travel between July 2021 and June 2022.

Arival fielded in June 2021 and weighted for gender and age.

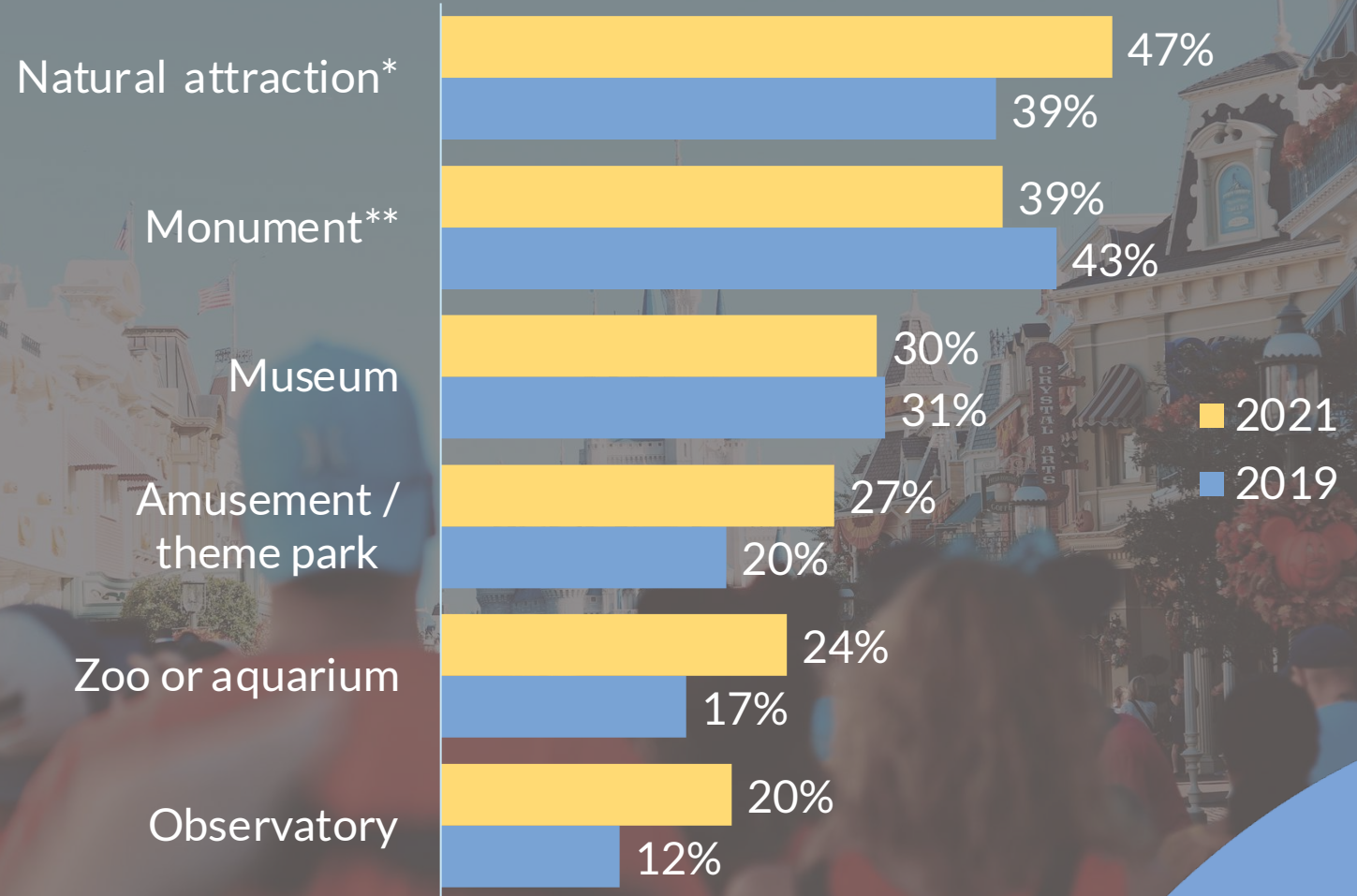


Outdoors, Fun & Family

The pandemic has driven a sea change in travel, as travelers stay closer to home and favor outdoor and leisure activities for family and friends. They are pulling back on visits to cultural sites and monuments as well as museums.

Visitation to natural attractions jumped eight points to 47%, while intent to visit amusement parks and zoos and aquariums rose seven points to 27% and 24% of all travelers, respectively.

Traveler Intent to Visit Attractions in 2021-2022 vs. 2019 Visitation



* A natural attraction is a naturally occurring landform or body of water such as parks, mountains, beaches and waterfalls that appeals to tourists and visitors.

** Monument includes buildings, sites, statues and other structures of historical or cultural significance.

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Spend Is Up, as Experiences Matter More

Attraction visitation by travelers overall remains below 2019 levels, due to fewer travelers taking less trips overall. However, when travelers do hit the road, those trips matter more than ever, and travelers are spending more.

Attraction recommendation:

Prioritize guest experience and explore upsell and cross-sell opportunities.

	Spend (2021)	Change (vs. 2019)
Trip*	\$3,210	+6%
Attraction Visitation	\$286	+31%

* Respondents were asked to answer for their most important planned trip within the next 12 months

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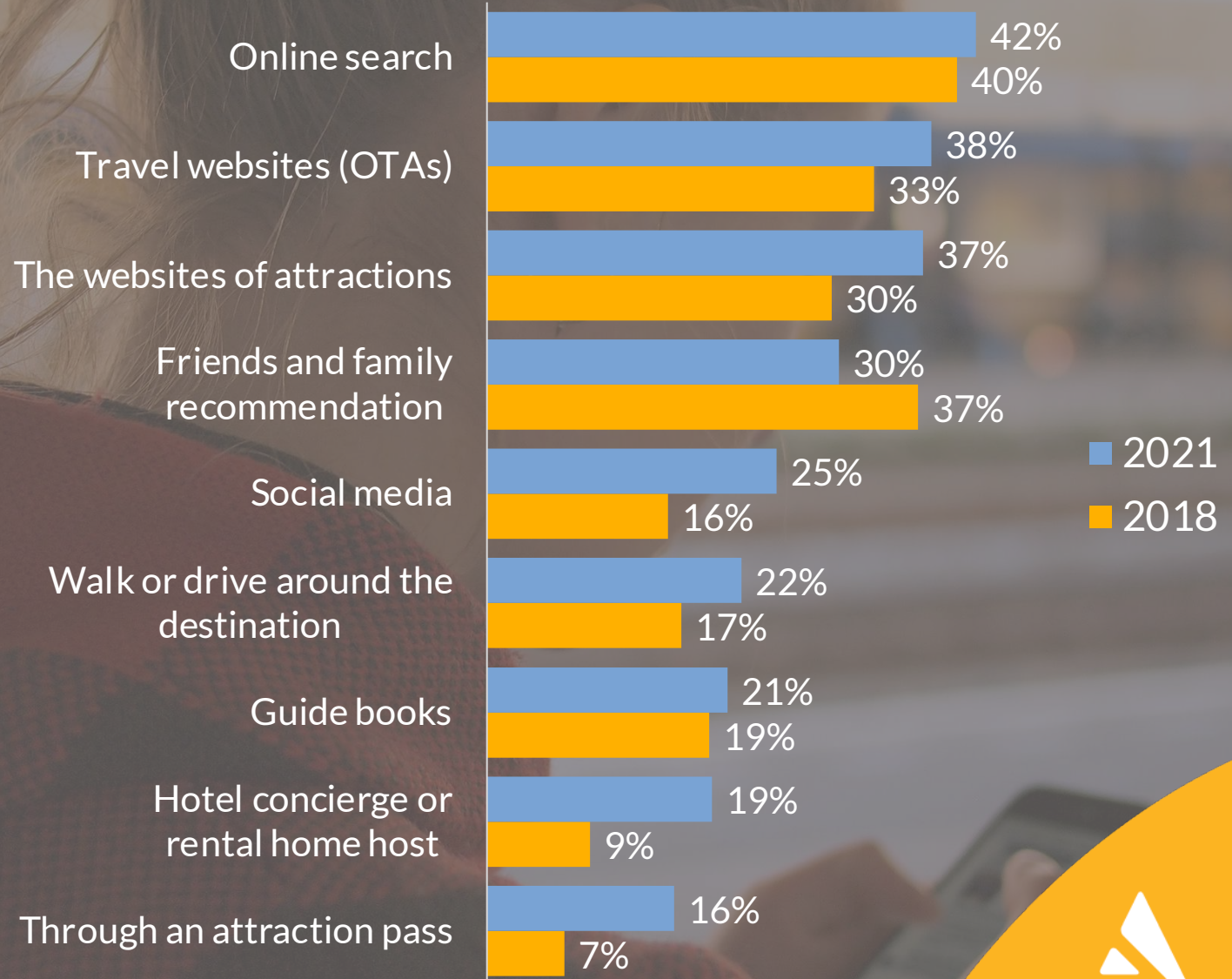


Planning the Visit: It's Moved Mostly Online

Pandemic-related travel concern and questions such as whether an attraction is open, or what the health and safety policies are have been driving travelers to plan further in advance and online. Traveler use of online travel agencies (OTAs), attraction websites and social media has risen considerably from 2018, especially for travelers 18-55.

Use of multi-attraction passes for activity planning has more than doubled among travelers to 16%, and is likely to be significantly higher in major urban destinations.

How Travelers Research Attractions



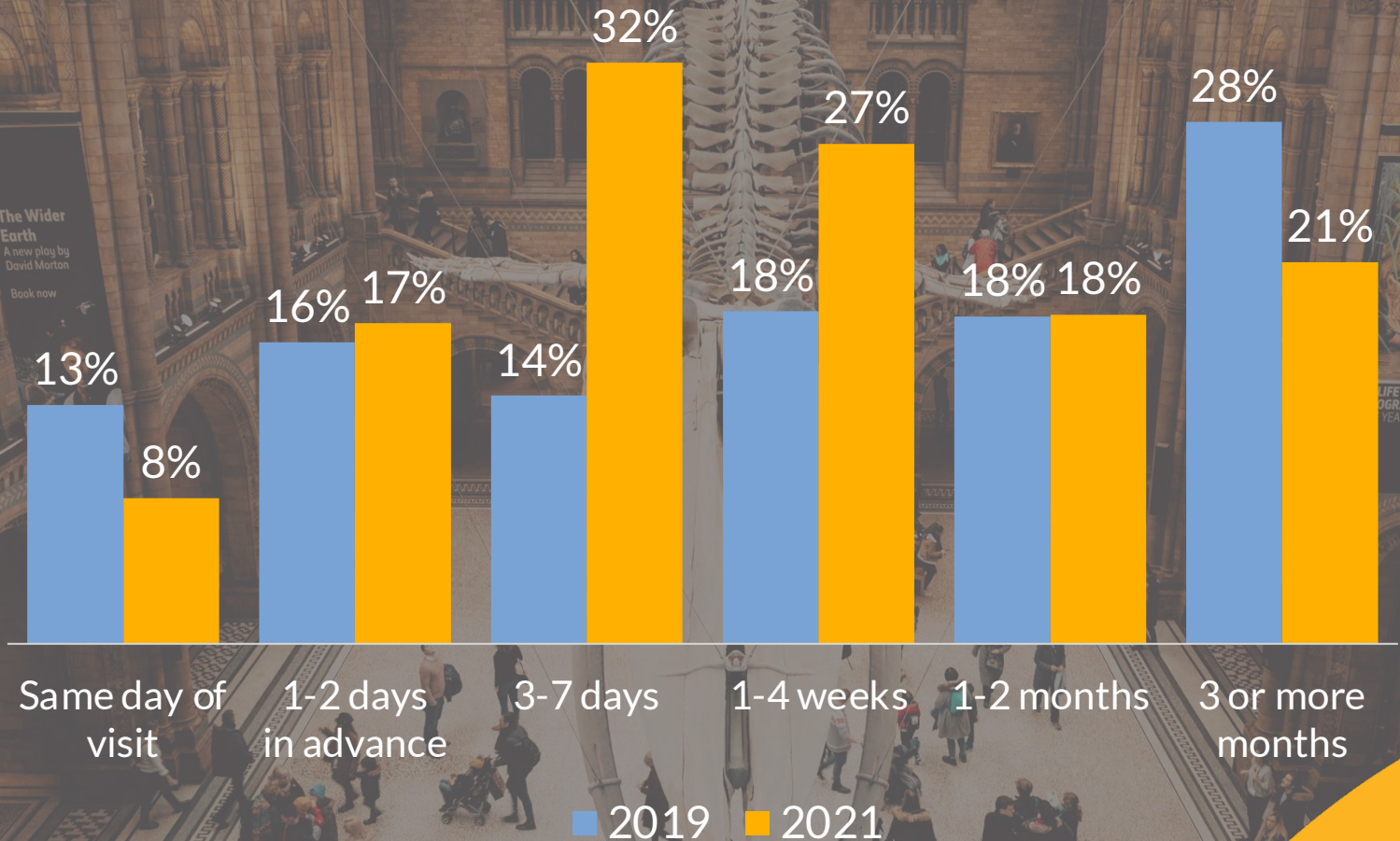
Planning Gets Earlier: They Want to Know Before They Go

Planning in advance has surged for two key windows: 3-7 days before a visit has more than doubled to 32% of all travelers) and 1-4 weeks in advance. More than three in four travelers now plan their attraction visits before they arrive in the destination.

Attraction recommendation:

The digital experience for future guests has never mattered more, and attractions need to be visible in multiple online (and still some offline) channels.

When Travelers Plan Their Attraction Visits (2021 vs. 2019)

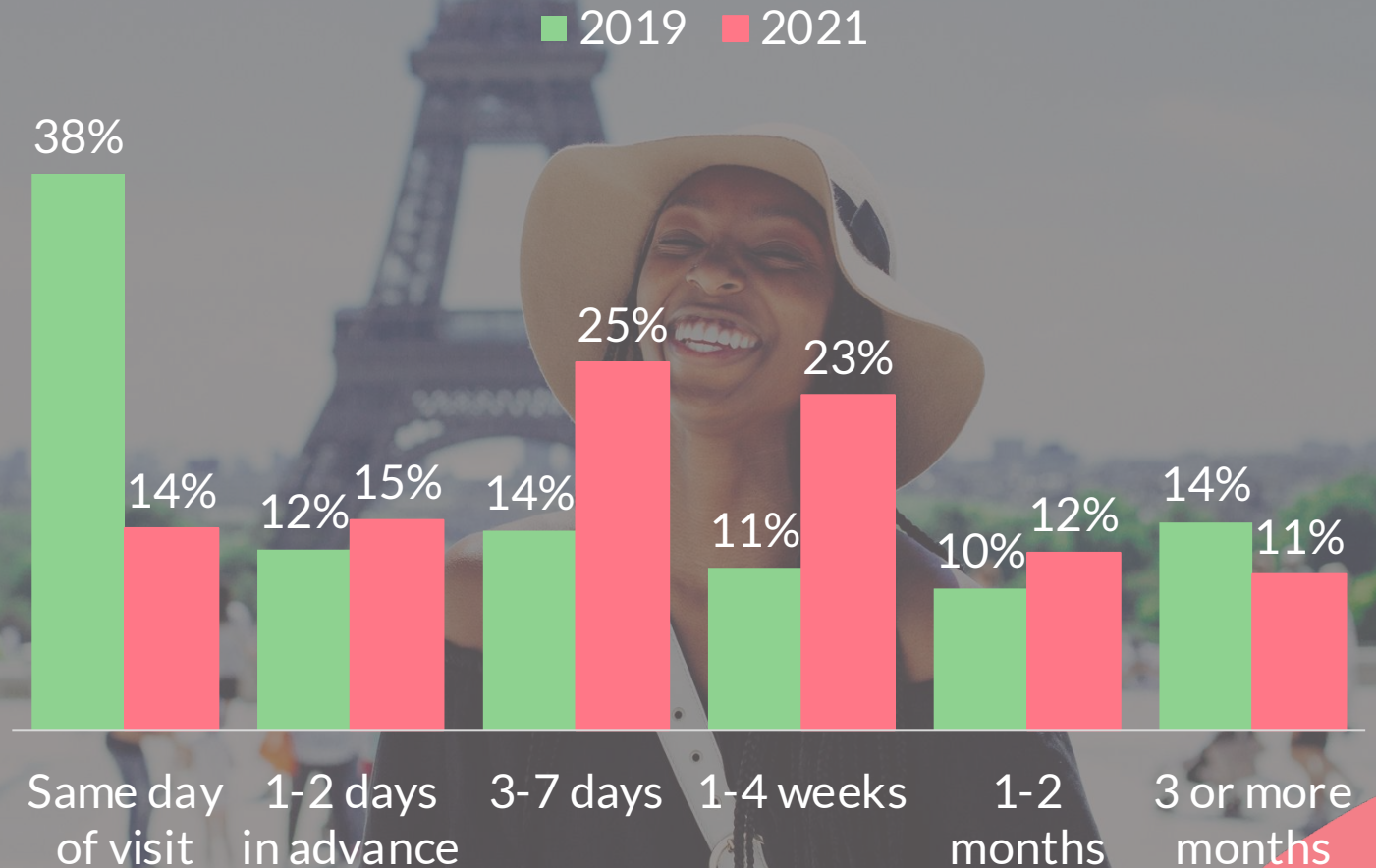


Buying Earlier: 9 in 10 Say They Plan to Book in Advance

Last-minute booking has fallen dramatically – or at least that’s how travelers say they plan to purchase tickets. Same-day purchasing intent fell from 38% to 14% as travelers seek to plan in advance and as attractions require online booking to maintain capacity control amid the pandemic.

The shift to advance booking may reflect intent and traveler mindset, but travelers will continue to make last-minute decisions in destination. However, this does indicate the heightened importance for attractions to reach travelers well in advance of arrival.

When Travelers Purchase Tickets (2021 vs. 2019)

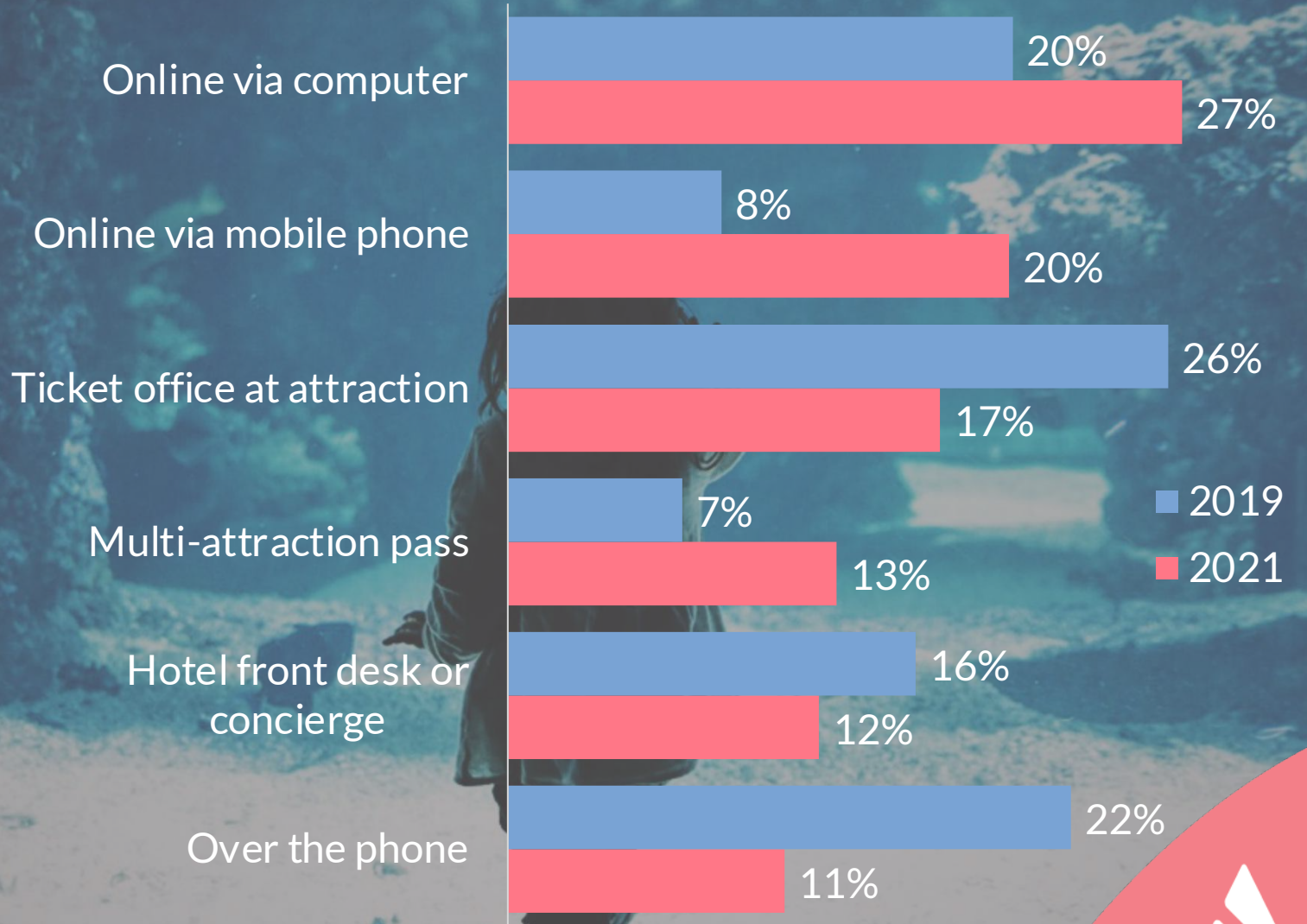


Online and Mobile Surge in Two Years

Almost half of all travelers intend to purchase their attraction tickets online this year, a nearly 20-point jump from before the pandemic. Multi-attraction pass purchases also rose to 13% of travelers, vs. 7% in 2018.

Key offline sales channels, attraction ticket office and phone sales, have dropped by 20 points to just 28% of travelers.

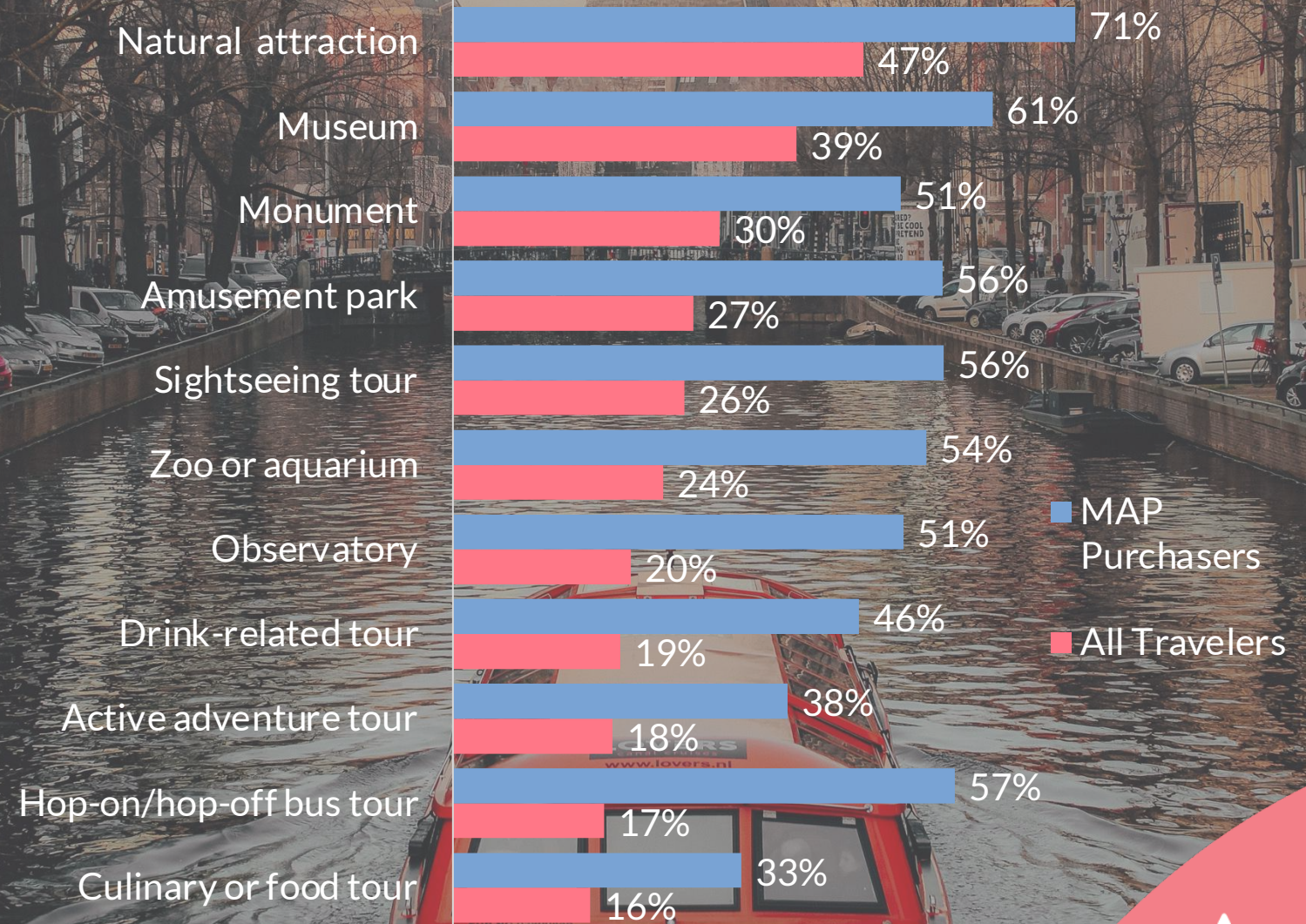
How Travelers Purchase Tickets (2021 vs. 2019)



MAP Users Are 2-3x More Likely to Book Attractions, Tours for a Planned 2021-22 Trip

Travelers who purchase multi-attraction passes, or MAPs, are much more active in destination. They intend to visit a range of attractions as well as different types of tours during a planned trip over the coming year at two to three times the rate of the typical traveler.

MAP Purchasers vs. All Travelers



■ MAP Purchasers
■ All Travelers



What Drives Booking Channel Selection (It's Not Always Price)

Why do travelers choose to purchase their tickets via one channel or another? It comes down to two critical factors:

- 1) ease of purchase 38% of travelers
- 2) best price 22% of travelers

Attraction recommendation:

Prioritize the digital guest experience and to make buying tickets as easy as possible.



Is Timed-Entry Here to Stay?

Many attractions have implemented timed entry and required online purchasing in advance to manage capacity during the pandemic. Although this provides business benefits (better visibility into future demand and customer data), travelers are less enthusiastic about it.

Travelers clearly rate flexibility in attraction choice and entry as very important, and 18% of travelers said they would be less likely to visit an attraction if they were required to visit within a specific time window.

Admission and Timed-Entry Passes

Visiting our museums and zoo



What to know **before** you visit:



If you're sick, stay home



Wear a face covering if not fully vaccinated



Free timed-entry passes required. Reserve in advance online

Museums and Zoo

Timed-Entry Passes

Tips & Guidelines

Accessibility

Admission

Free timed-entry passes required for most museums and the zoo. Passes are not required for outdoor exhibitions and...

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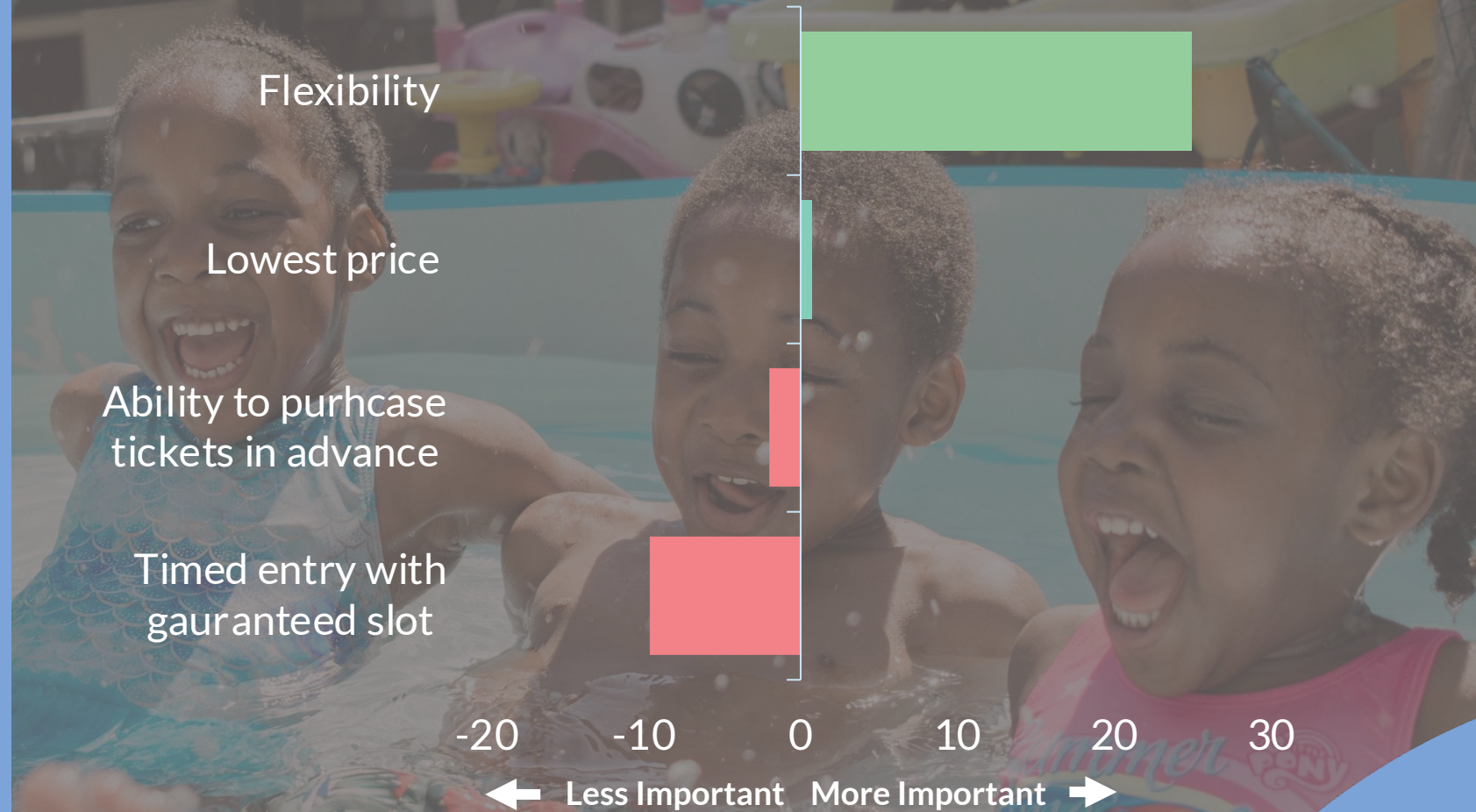


What Travelers Want Most: Flexibility

Despite the many restrictions and policies to emerge in response to the pandemic, travelers continue to prize flexibility in attraction choice and entry above price. Travelers rated the ability to book in advance or have a dedicated time slot as less important.

Travelers continue to rate cancellation flexibility as the most important among all pandemic-related policies regarding booking and health and safety.

The Importance of Key Attraction Ticket Attributes*



*Arival asked this as a MAXX-DIFF question to assess the relative importance of different attributes to a visitor attraction ticket. The results are indexed on a scale of -100 (least important for all travelers) to +100 (most important) for all travelers).



Recommendations for Visitor Attractions

1. Focus on fun, family and friends
2. Experience over price
3. Optimize for online, advance booking
4. Take a hybrid approach to timed entry and same-day walk-up

Four Recommendations for Attractions

1. **Focus on Fun, Family, Friends.** The pandemic has shifted travel priorities among U.S. travelers away from cultural, historical experiences and “seeing the great sites” to spending leisure time with family and friends and more time outdoors. Attractions should focus on these themes and explore both new experiences and messaging to serve this shift in attitudes.
2. **Provide better experiences and options, not promotional pricing.** Price is a secondary consideration for more travelers in 2021. The lack of travel over the past year as well as improving financial fortunes of U.S. travelers have increased travelers’ willingness to spend on better experiences and flexibility. Attractions should explore new upsell and cross-selling opportunities.
3. **Optimize for online, advance booking.** The past 18 months have brought about a sea change in planning and booking behavior, and most travelers are now booking activities well in advance. Attractions must prioritize creating an easy, compelling digital experience or risk losing those new-found digital gains to OTAs, especially as international travel resumes. But they should think carefully about requiring advanced booking and timed entry.
4. **Be flexible with timed-entry.** Attractions should take a flexible, hybrid approach to timed-entry as travel returns and operations return to pre-pandemic capacity. Don’t require advance purchase or timed entry if you don’t have to. Give travelers a choice. Most travelers prize the ability to make a last-minute decision on visiting an attraction.



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