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2024 Digital Guest Experience Report



| Executive Summary



Today's attraction operators have a golden opportunity to harness technology, transforming their businesses and guest experiences alike. By embracing innovative solutions, they can draw fresh audiences to their venues, significantly enhance visitor satisfaction, and unlock new revenue streams.

Most consumers now expect some form of technology before, during, and after the experience, but...

Roughly a third of attractions' guests believe that current digital offerings need to be expanded.

We recently conducted a study to better understand the role of technology in our industry. We surveyed over 1,000 guests and more than 200 operators to see how guests' expectations for technology align with digital leaders' planned investments. This report includes our findings, as well as trends and statistics from other significant studies.

The research revealed a 30% gap between what guests want and what operators are delivering.

The advantages of investing in technology include a considerable boost in trust, greater satisfaction, repeat visits, higher ticket prices, and a deeper brand connection. The detailed data around each element are on page 26.

But technology must be done right to feel right. Roughly a quarter of those surveyed believe technology can detract from enjoying a live experience.

We, as an industry, have significant opportunities ahead. More personalized and targeted offers, the application of AI in all aspects of our businesses, and the balance between technology and human experience are all critical to growth.

Closing that 30% gap may demand a specific focus on developing future-based technology solutions to streamline basic planning and purchasing experiences, while investing in technology that can elevate and enhance the pre, during and post guest experiences in ways that delight guests. As an industry responsible for delivering some of the most entertaining and fun experiences to the world, we should consider it our obligation to be leaders in innovation not only to better satisfy our guests but also to ultimately create stronger brand loyalty, repeat visits, word-of-mouth marketing, and increased sales.

Note: As this is the inaugural edition of our report, we're excited to continue expanding and enhancing it in the coming years, ensuring it delivers even greater value and deeper insights with each edition.



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How we conducted this study

To better understand the opportunities for attractions operators to invest in digital experiences, we researched consumer and operator perspectives on how to use technology experiences throughout the guest journey—today and into the future.

The research panel included more than 1,000 English-speaking consumers across North America, the UK, and Western Europe. Here is a high-level overview:



64% North America
16% UK
20% Western Europe



36% households with kids
51% with teens

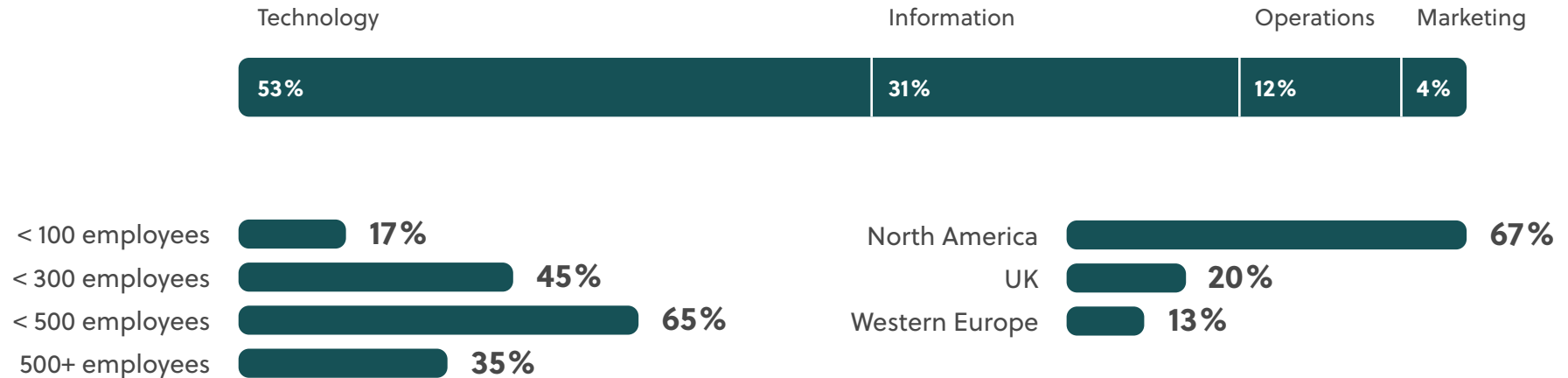


26% \$100K+
73.8% <100K

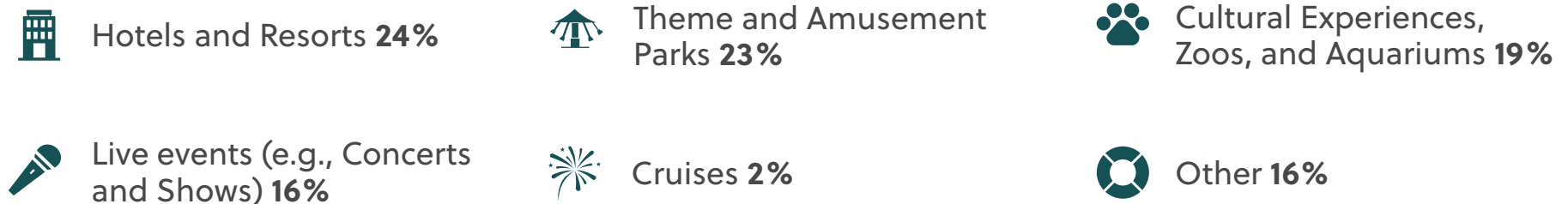


49% 18-45
46% 46+

In addition, we polled 200+ English-speaking attractions operators representing the same countries and the following job functions and internal company profiles



The types of attractions the research covered:



What today's guests expect from experiences

The excellent news for our industry is that 93% of all attractions' guests plan to invest in activities with at least as much frequency as last year, and 42% plan to visit even more attractions.¹ The International Association of Amusement Parks and Attractions (IAAPA) predicts that consumer spending in the North American theme and amusement park market will increase to \$32 billion in 2024, surpassing the pre-pandemic level.

93%

of guests plan to invest in activities with at least as much frequency as last year

42%

of guests plan to visit even more attractions

Technology plays a crucial role in every aspect of the attraction experience. It enhances everything from pre-visit planning to on-site navigation, photo opportunities, loyalty programs, and gamification features that encourage repeat visits.

In fact, digital engagement begins immediately with **78% of travelers booking their trips online.**

The importance of digital experiences in attracting and retaining guests cannot be overstated. For example, according to a 2022 survey by Hospitality Technology, **73% of travelers are “likely or very likely”** to return to a hotel that meets their technology expectations. Furthermore, **40% of consumers are loyal to great experiences rather than brands.**



78% of travelers booking their trips online



73% of travelers are “likely or very likely” to return to a hotel that meets their technology expectations



40% of consumers are loyal to great experiences rather than brands



30%

of guests believe that what's currently being offered is too limited

23%

of those surveyed say that digital experiences are not easy to find and access

How do guest expectations align with operator investments...

Operators are discovering that technological investments extend beyond front-line guest experiences. Tools such as AI automation and machine learning for personalization, alongside mapping technology for self-service navigation, create new opportunities to understand visitors' preferences and behaviors. These technologies also enable operators to cross-sell experiences and products, enhancing the overall visitor experience at venues.

However, nearly a third (30%) of guests believe that what's currently being offered is too limited.

Plus, 23% of those surveyed say that digital experiences are not easy to find and access.

This gap presents a significant opportunity for operators to better understand and meet guest needs. Ensuring your team has the skills necessary to meet guest expectations is crucial. This may involve upskilling existing staff or bringing in external partners who can act as value-added extensions of your team, enhancing the overall visitor experience at venues.

Our survey revealed that the quality of digital experiences greatly impacts guest perception. If an organization offers a high-quality digital experience:

72%

believe that a great digital experience will contribute to the entire family's or group's satisfaction

65%

of consumers will trust a brand more

64%

will visit more often

63%

will pay more for tickets

63%

will have a deeper connection with the brand

A poor digital experience impacts attendance. Research done by IAAPA reveals that **50% of destination guests won't attend** a particular attraction because of perceived difficulties navigating the digital experience.

Apps and systems must be valuable to guests. About a quarter (26%) of those surveyed believe **digital experiences can detract from the live experience**, so operators must balance innovation with humanity and practicality and ensure their use and design of technology efficiently does its job in the moment so guests can get back to taking in the experience they paid for.

Privacy and data security are top concerns for today's consumers. Of the guests we surveyed, only **33% felt confident attractions handle data security** and sharing appropriately. This highlights a challenge: guests want more personalization, yet few are comfortable sharing the information needed to make it happen.

² Pew Research, Americans and Privacy, 2019



Exceeding expectations tip #1

Build trust through transparency by clearly explaining how guest data enhances their experience. For example, show how providing location data can unlock personalized attraction recommendations or queue time updates.

Then consider offering granular opt-in options for different types of data sharing. Clearly communicate what each option enables, allowing guests to make informed decisions about their data.

The four pillars: food, rewards, loyalty, and delight

Our survey studied what your guests want you to spend on.

Interestingly, food and beverage topped the list. This tells us that guests, once again, desire efficiency in any of the elements of their visit that aren't the main attractions. For example, they want every efficiency available to make the food ordering process as quick and seamless as possible so they don't have to waste too much time on their visit away from the attraction itself.

42%

believe food and
beverage lines are
too long

29%

believe slow service
is a crucial issue

23%

believe errors in
orders is the most
frustrating issue

As in many other consumer businesses, people appreciate being rewarded and incentivized for loyalty and spending frequency.

Digital enhancements can also be used to build awareness of unique and special experiences at venues, and a quarter of respondents want technology that brings those opportunities to the forefront.

33% want to see investment in food & beverage ordering

26% want to see investment in offers and rewards

26% want to see investment in incentives for repeat visits

25% want to see investment in surprise and delight



Exceeding expectations tip #2

What if revolutionizing your food and beverage service became your secret weapon for creating passionate advocates and surpassing your competition?

Imagine a world-class zoo that transforms its culinary offerings: By implementing a cutting-edge, technology-driven food and beverage experience, they elevate more than just meal times. Their commitment to efficiency—through innovations like mobile ordering, smart pickup lockers, and AI-powered queue management—creates deeply satisfied and loyal visitors.

The guest journey and ways to meet guests where they are

The reality today is that your guests use digital tools to inform their decision making at every stage of the guest journey.

The planning process is complex but meaningful

Most consumers today start planning local and destination experiences using some level of technology in their exploration and reservations.



Exceeding expectations tip #3

Take a moment to step into your guests' shoes. Navigate through your own website and booking process as if you were a first-time visitor. This simple exercise can reveal unexpected challenges in the user experience.

By identifying and addressing these issues, you'll streamline the planning process for your guests, potentially boosting bookings and enhancing overall satisfaction. Remember, a smooth digital experience sets the stage for a great visit.

Questions your digital experience should answer

How easily can visitors plan a personalized itinerary based on their interests, group size, and time constraints?

Does the platform provide real-time updates on queue times, crowd levels, and any operational changes?

How seamless is the process for booking tickets, making reservations, and purchasing add-ons or upgrades?

Is there an engaging way for visitors to preview the experience, such as virtual tours or augmented reality features?

How well does the digital experience integrate with on-site technology for a smooth transition from online to in-person visit?

A photograph of a person wearing a light-colored straw hat with a dark band, looking down at a swimming pool. The pool's surface is a vibrant teal color with visible lane lines. The person's hair is visible at the bottom right.

27%

of guests say their pre-visit digital experiences made the experience better

23%

of guests say digital experiences are not easy to find or access



Operators should be alerted to the fact that the guests surveyed reported their pre-visit digital experiences “as expected.”

Though only 10% believed the experience was worse than anticipated, operators may want to consider if a “passing” grade is the benchmark they feel comfortable with.

Enhancing digital experiences to drive bookings

Ease of the planning process for a trip is a crucial factor in decision-making. Operators should consider that as non-attraction experiences raise guests' digital expectations, staying competitive requires aligning with guests' universal experience standards.

Think about other digital experiences outside our industry. Consumers have become accustomed to technology that enables them to immerse themselves in a wide range of shopping and dining experiences prior to experiencing them in the physical world. From 3D tours of homes to VR that enables us to try on different fashion styles to Netflix trailers (along with customized recommendations and simple ways to buy online) people have become accustomed to technologies that offer them accurate and compelling "sneak previews."

55%

of consumers will leave a site and book with another provider if they become frustrated with a travel site or app



Exceeding expectations tip #4

4 Create pre-visit digital experiences that captivate potential visitors, setting expectations for an extraordinary on-site adventure. These innovative previews distinguish your attraction and transform casual browsers into eager guests.

For example, the Rock & Roll Hall of Fame's virtual tour offers a tantalizing glimpse of each floor's exhibits, swiftly converting mild interest into confirmed bookings. By showcasing your unique offerings digitally, you build anticipation and drive engagement, turning curiosity into committed visits.



Create your own guest journey map

This map is a visual representation of the entire guest experience—from the moment people start researching a destination or category of attraction through their return home.

It outlines each touchpoint, interaction, and emotion a guest encounters through the experience.

It helps us understand guests' needs, desires, and pain points at every journey stage.

By creating a journey map, you can evolve your organization's mindset to more of a customer experience brand (with digital experiences as just one lever to pull) that just happens to deliver through thrill rides, animal conservation, hospitality, etc.—whatever your guest experience entails.



A great guest journey map is:

Customer-centric

You can tailor your technologies and offerings to meet specific needs.



Geared to problem-solving

By identifying pain points and bottlenecks, you can prioritize investment in friction-causing areas while still driving operational efficiency.



A source of innovation

You'll uncover opportunities to build or enhance technology that delivers meaningful personalization, a better overall guest experience, and streamlined processes for both your brand and the consumer.



Shifting guest expectations can transform their relationship with your brand from transactional to emotional, creating a more elevated and lasting connection.



Exceeding expectations tip #5

Consider conducting voice-of-the-customer research with your audiences to determine exactly when and how these experiences can be improved or developed.

Ensure teams from across the organization regularly engage with your digital experiences firsthand and collect and act upon that data.

What guests look for when they arrive

IAAPA research underscores the critical role of digital media for attraction visitors. Mobile apps emerged as the most vital digital tool, with **57% of visitors deeming them essential**. This was followed by **mobile ticketing and contactless payments at 43%**, while **digital maps were considered crucial by 34%** of respondents.

With this in mind, it's clear that visitors are seeking a digital experience that acts as an enhancement for their visit, rather than an additional source of stress. Technology should seamlessly integrate into the visitor journey, providing convenience and enriching the overall experience without becoming a distraction or a hindrance.

57%

of guests in the study believe that current digital solutions are either distracting or disappointing.

Devices have become essential for many functions:



Booking on-site reservations



Checking in



Gate and room access



Interactive wayfinding



Getting special deals by scanning codes



Researching wait times



Taking, purchasing, and sharing photos



Providing feedback during the visit



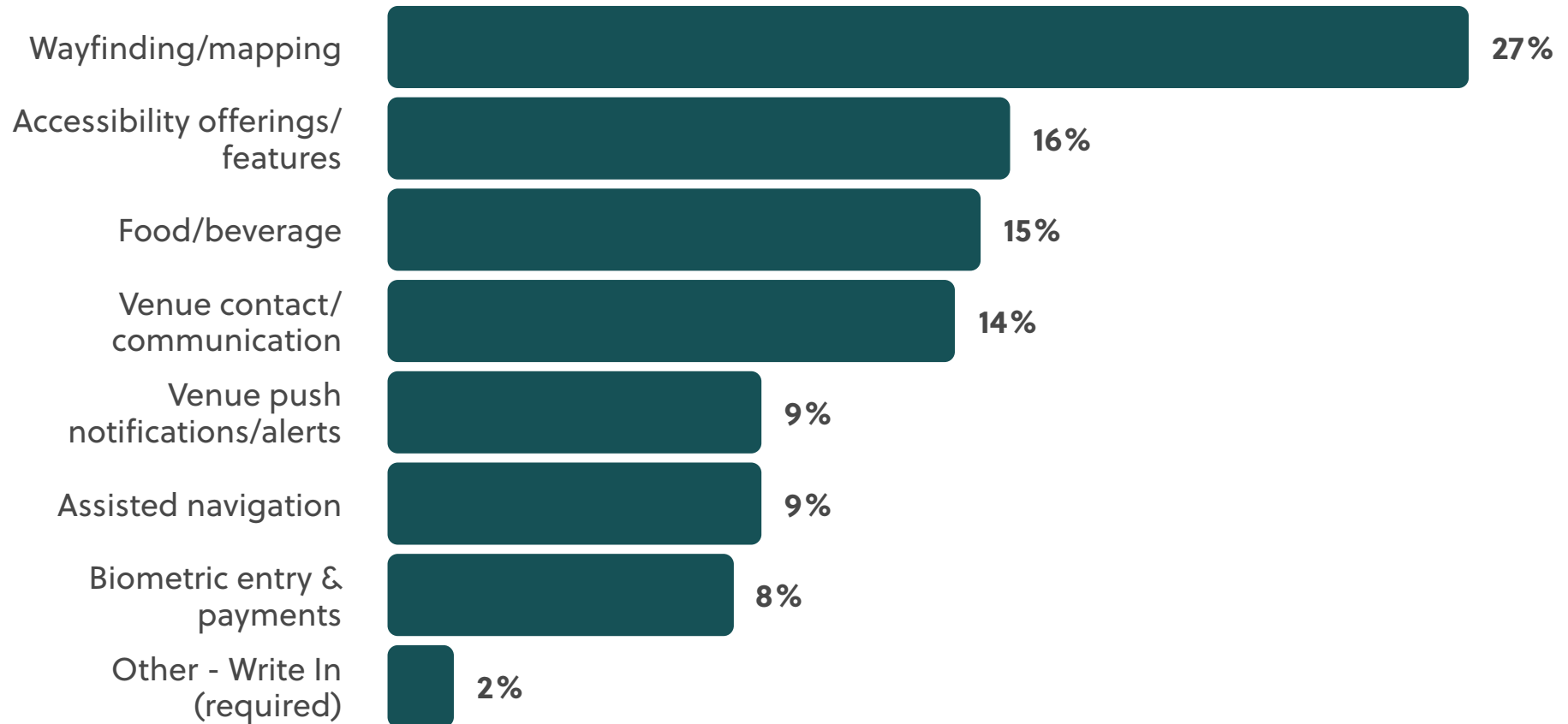
Contacting travel companions



Leveraging rewards programs

What guests look for on-site

Wayfinding and mapping took the lead when asked which digital functionality was most important to them as attraction guests.





But only 15% of the operators polled plan to invest in wayfinding!

Closing the gap between what's important to guests and how operators invest in digital innovations can result in consumer delight, repeat visits, loyalty, and greater spending.

What guests look for post-visit

As noted earlier, 63% say a positive digital experience builds a deeper connection and empathy with an attraction venue, and 64% are willing to visit or buy more from an attraction if they have a quality digital experience.

Even after guests leave your venue, their digital interaction with your brand can reinforce a positive experience, make them aware of new opportunities, and compel them to return.

63%

say a positive digital experience builds a deeper connection and empathy with an attraction venue

64%

are willing to visit or buy more from an attraction if they have a quality digital experience



Creating simple ways for guests to provide feedback can help operators fine-tune their processes, training, and investments.



Making photos and merchandise readily available online post-visit aids in awareness-building and generates revenue.



Offering incentives for re-booking or sharing reviews is a powerful way to build guest loyalty.

Programmatic and personalized marketing and relationship cultivation make guests feel valued, ultimately resulting in them returning, choosing other venues in your brand's portfolio, and spreading the word to friends and family, often using digital media!

What are guests' expectations of AI?

While many attraction operators feel confident in their ability to adapt to technological changes (**48% completely prepared, 37% mostly prepared**), our research reveals potential gaps between visitor expectations and operator investments.

Visitors are increasingly seeking personalized experiences and rewards, yet some operators may still be developing more generalized offerings. This disconnect presents an opportunity for attractions to refine their approach.

AI is revolutionizing planning, marketing, and data-gathering across the industry. However, with only half of operators feeling completely prepared for this shift, there's significant room for learning and adopting new technologies.

59%

of operators are focusing on digital concierges to help their guests

58%

of operators are focusing on virtual reality and immersive experiences



26%

of guests feel a clear desire for more personalized experiences and incentives for repeat visits

AI adoption: a financial and experience imperative

AI is another area where operators and guests may not completely agree on the development focus. Consumers would like to see it applied to more sophisticated wayfinding systems. In contrast, operators may be investing more in systems that will reduce expenses and may need to be more focused on consumer needs.

A recent McKinsey Digital study revealed that **investments in AI resulted in as much as a 25% improvement in bottom-line results versus companies that are not adopting AI.**⁵

Within organizations, different functional areas may be less confident in their ability

to keep pace with technology. For example, **marketers feel 30% less prepared to adapt to technology changes than technology and technology functions (18% versus 48%).** Theme parks and live events also feel less prepared than the overall research sample.

In short, market and consumer research (see above) is critical in understanding what digital enhancements are viewed as most beneficial by both guests AND operators so that resources can be applied to those innovations that will result in guest delight and a more robust bottom line.



Exceeding expectations tip #6

Embracing AI and new technologies is now a financial and customer experience imperative. Effective operators are implementing AI to create micro-efficiencies, allowing team members to focus on strategic data-driven actions. This shift promises to enhance visitor experiences significantly.

Imagine reducing data reporting time and accelerating personalization by a third. This could lead to more tailored visitor

communications and experiences, potentially boosting revenue and customer acquisition.

By leveraging these technologies, you're positioning your attraction to deliver exceptional, personalized experiences that drive visitor satisfaction and loyalty.



What will the future hold?

The experience economy continues to show resilience, offering promising opportunities for our industry. While facing various challenges, there's reason for cautious optimism.

Encouragingly, consumers are increasingly receptive to digital enhancements in the attractions landscape. Many believe that well-implemented technologies and personalized solutions have the potential to enhance their visits, making them more enjoyable and streamlined. This openness to innovation presents a valuable opportunity for attractions to evolve and adapt to changing visitor expectations.

We predict that the most successful operators will...



Continue to invest in research to understand what their consumers want and need from their experience, studying each market segment to unearth new opportunities and trends. As the population ages, visits to attractions have become intergenerational and developing solutions for ALL key markets becomes even more critical. Improving experiences by reducing friction—especially during wayfinding and ordering food—will help guests have a better experience. Operators should look at each step of the guest journey and look holistically at where technology can add value (to both the customer and their own bottom line).



Combine AI-assisted services with high-quality human experiences so that every guest feels like a valued guest. Technology can free-up attractions staff to focus on the customer experience rather than performing operational tasks.



Prioritise visitor privacy and data security while responsibly using insights to enhance experiences. Balance personalization with discretion, ensuring data benefits visitors without exploitation. Innovate with tailored offerings, always maintaining transparency and consent in data practices.



Stay on top of new innovations that enhance the customer experience. For example, virtual and augmented reality can help in the marketing process to attract new guests and can be used within attractions to enhance experiences.⁶ **AR and VR in the global hospitality industry is expected to grow at a CAGR of 34% between 2022 and 2028.**⁷ Wearables is another category that some operators have incorporated into their experiences. Although most cannot afford proprietary devices (like those used at Disney), apps that can be used on smartwatches are convenient for guests.



Partner with other types of businesses to develop activations that provide a true “wow factor.” This begins in the physical world but translates into the digital arena. For example, when hotels partner with local attractions to create integrated vacation and entertainment experiences for guests, they can provide revenue-generating opportunities for all parties and streamline the planning process. Privacy is critically important, so sharing guest information with other entities must be done carefully.



Build an internal talent base with the skills and curiosity needed to compete in an everchanging digital world. Invest in those people by encouraging them to get the training they need to keep pace. Encourage them to look to other consumer experience industries for new technologies and applications.

The majority of experiences will soon have a digital component.

Success lies in subtly using technology at the optimum points in the guest journey to create moments of delight, drive loyalty and reward loyal guests.



Key findings and recommendations

The following chart is intended to represent the most salient research findings and how operators can apply them to their planning and immediate actions.



A 30% gap exists between guest expectations and operator investments

- Map your guest journey to identify friction points
- Survey guests to understand their needs for a smoother experience
- Invest strategically in tools that address these identified pain points



Wayfinding is critically important to 27% of guests

- Ensure your digital maps are up to date and easy to navigate
- Prioritize investment in wayfinding technology (only 15% of operators currently invest here)



Accessibility is important to 16% of survey respondents

- Choose digital agencies and development partners that prioritize ADA-compliant design from the outset
- Ensure your app offers an accessibility-focused experience at every stage of the visitor journey, so guests know what to expect before they arrive



Food ordering and service is a priority for 15% of guests

- Partner with third-party companies that provide technology-driven ordering solutions
- Conduct “mystery shopper” audits of your food service areas to ensure a high-quality guest experience
- Explore opportunities such as self-service kiosks or simplified menu options to expedite the dining process



Operators must plan for and invest in the future

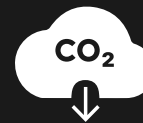
- Embrace AI’s ability to quickly surface information and solve key challenges for guests
- Stay in tune with AR/VR applications
- Train/upskill your team to be future-ready



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