Guest Experience Trends for the New Normal

Insights for visitor attractions

The COVID-19 pandemic has hit attractions harder than most businesses. From mitigating the physical and psychological impact of lockdowns to dealing with changing economic circumstances for guests, attractions have had to rethink their business models and restructure revenue goals in an incredibly short time.

While the pandemic has created new trends, in many cases, it has also accelerated existing ones. From changing consumer demographics to evolving guest expectations, COVID-19 has highlighted the need for many attractions to modernise their experiences and better meet the demands of today's customers.

This accelerated change can be seen through increased reliance on technology. Embracing digital solutions allows attractions to adapt to new challenges like social distancing and jump ahead of growing customer movement towards seamless, end-to-end experiences. In the future, the digital guest journey will play a large part in enticing visitors back to their favourite attractions.

In summary, it's not all bad news. As the COVID-19 pandemic accelerates technological adaptation for attractions, well-planned adaptation will also help recover lost revenue, support future growth, and revitalise attractions for new generations of guests.

Mark Locker
Founder & CEO, Attractions.io

Looking for the Silver Lining In Social Distancing

As long as COVID-19 poses a threat to people's health, adapting to social distancing remains the number one priority for attractions. However, even if it disappeared tomorrow, the COVID-19 pandemic has changed consumer attitudes, behaviours, and purchasing habits, possibly for good. Adaptation to this new normal is not only necessary but can bring permanent benefits to attractions.

Done right, implementing social distancing measures also means getting ahead of a permanent shift in how your guests expect your attraction to operate.

Today's safety concerns will become tomorrow's expectations

Long after the threat from COVID-19 diminishes, your guests will still expect a low contact, friction-free experience. This is backed up by a recent global consumer sentiment survey from McKinsey & Company.

> "Consumers are adopting and intensifying digital and reduced-contact ways of accessing products and services. As we look more granularly, this digital trend is magnified for Gen Z and millennials."

For tomorrow's guests, visiting your attraction in a reduced-contact way is something they'll not only expect for their safety but also want for their convenience.

Meeting these desires means getting the basics right...

At its most basic level, a reduced-contact experience for attractions means two things:

Cashless Payments.
Cash withdrawals have [decreased by over 60%](#) in the UK. As well being more convenient for many guests, being able to go cashless is more hygienic.

Reduced Crowds.
Being able to remain physically distant from other guests is your customers' no.1 priority as they re-enter your attraction. This means reduced queues in areas such as admissions and at rides and shows as well as being able to buy food and beverages without having to enter a crowded space.

And getting the message across that your attraction is safe

A [recent survey](#) conducted by the consultancy firm A Different View, asked consumers what information on a visitor attraction website would persuade them to visit after lockdown. Here's what they said:
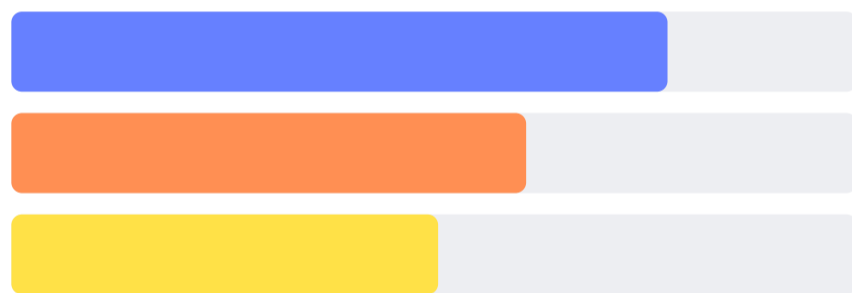
71% What physical distancing measures they have in place.

61% Clear policy statements about what will happen when you are there.

49% How they deal with food and drink supplies.

Social distancing is a quality standard

Guests will judge attractions based on the effectiveness and visibility of their social distancing measures. Beyond just meeting legal requirements, social distancing also signals to consumers that brands care about their wellbeing.

Communication Has Never Been More Important

One notable trend that has emerged during the COVID-19 crisis is that receiving clear and practical information has made people feel safer.

Regardless of whether it's government guidelines or how to visit their local shop, people feel reassured when they aren't left in the dark. For attractions, transparent, accurate communication is key to making guests feel safe and building positive brand association.

According to the McKinsey & Company report, "consumers want extra reassurance to resume day-to-day activities outside their homes."
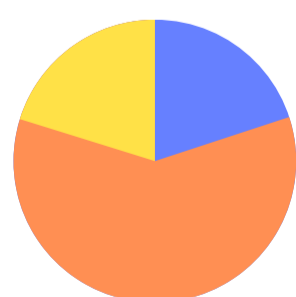
Information makes guests feel safer

In a recent study by A Different View, members of the public were asked when they plan on returning to indoor and outdoor attractions:

Outdoor

- **30%** want to return as soon as possible.
- **55%** said they would "wait and see."
- **15%** don't think they'll return until a vaccine is available.

Indoor

- **21%** want to return as soon as possible.
- **59%** said they would "wait and see."
- **20%** don't think they'll return until a vaccine is available.

This shows that, for guests on the fence about returning to attractions, information is key to getting them across the line, particularly for indoor attractions.

Reassure your guests with clear communication

Your guests want to see with their own eyes what you're doing to keep them safe. They also want to know how they should behave too. Use your social media channels, advertising, PR, and website to show guests exactly what visiting your park looks like.

★ ★ ★ ★ ★

An excellent day out — fun, safe and clearly pulling out all the stops for customers.

We visited today — our first day trip for many months. We were uncertain how it would feel, but the park have done a trememdous job of balancing safety and fun.

The staff have clearly put a huge amount of effort into providing a very high level of customer service — they absolutely deserve every success. Thank you!

– Trip Advisor, 16 Jul 2020

Reach your guests on the channels they trust

Communicate with your guests through the channels they use. Let them know what your opening hours and days are, what to expect when they visit, and what restrictions they'll face on site. In a recent survey of consumers conducted by Eagle Eye Solutions:
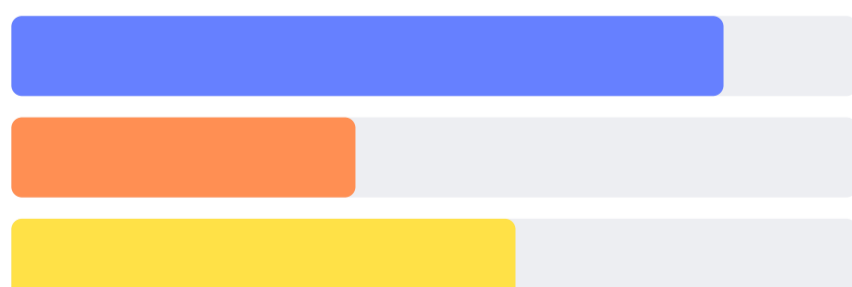
84% said they visit a business' website to get accurate safety information.

29% would go to a business' mobile app if it had one.

57% check social media for safety information.

Consumers reward caring brands

Research has shown that consumers will remember businesses that were compassionate, transparent, and responsive during and after lockdowns.
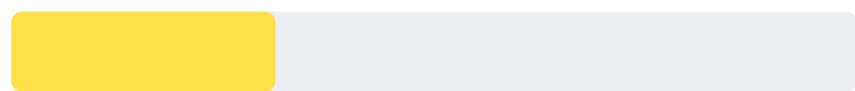
In a recent EY study on the behavioural trends of nearly 5,000 consumers across the US, UK, EU, and Canada:

65% of consumers said that they found businesses that supported their community, staff, and frontline workers more trustworthy.

62% said they would be more likely to purchase from companies that they feel are doing well for society.

29% would pay a premium for brands that contribute to the community.

For attractions, bringing positive and caring messages to the fore is key to maintaining their guests' trust.

Be ready to pivot your messaging

While the core tenets of good communication are likely to remain the same for the near future, consumer sentiment is still shifting. As your visitor's demographics and needs keep changing, historic visitor profiles will quickly go out of date. To stay in the loop, check in with your guests regularly and don't assume that their communication needs have stayed the same. Keep your communication efforts fluid.

Get Ahead of Changing Guest Demographics

The COVID-19 pandemic has changed your guest demographics on several levels, including where guests come from, how much they have to spend, and what they feel comfortable doing.

Geographic

In the short term, travel restrictions resulting from COVID-19 may impact where your guests come from. But even when guests can travel as far away from home as they want to, many of them may not want to.

According to McKinsey & Company study,

> "...even though many countries have lifted stay-at-home restrictions, most consumers still feel the pull toward a homebody economy."

The extent of the economic fallout from the COVID-19 pandemic remains to be seen. While hopes of a rapid economic recovery remain, the near term financial situation might still be quite bleak and further limit foreign travel for many people.

For attractions, this might mean pivoting marketing efforts towards local customers.

Economic

Wells Fargo believes that "this is the end of the beginning of the coronavirus impact, not the beginning of the end."

While it's likely that tighter financial conditions will impact attraction attendance figures, that impact may vary by attraction. During the 2008 recession, attractions with regional customer bases fared a lot better than destination theme parks.

Age

As your guest demographics are changing, so are their spending habits, expectations, and comfort level with technology. While many older guests have been forced by circumstances to become more familiar with technology, younger generations will be increasingly digitally adept. Millennials now make up the largest consumer group in society while the digitally native generation Z are close behind them.

- **78%** of millennials would rather spend money on experiences than things.
- **2026** is the year that digital natives will make up the majority of all consumers

	Baby Boomer	Generation X	Millenials	Generation Z
Date of Birth	1940-59	1960-79	1980-94	1994-2010
Attitude	Idealist, Revolutionary	Materialistic, Individualistic	Globalist, Self-centered	Pragmatic, Connected
Level of tech comfort	Low digital literacy	Technologically adept	Highly digitally literate	Digitally native

Nevertheless, it pays to take into account the habits of older guests and address their concerns directly as you entice them back into your attraction.

- **75%** of guests aged 55+ are concerned about "how they"ll operate toilets" compared to an average of 62% across other age groups.
- **8%** of retirement age respondents in a recent VisitBritain survey intend to take more UK short breaks compared to 37% of families.

Consumer sentiment surveys indicate that older guests may be slowest to take leisure trips and return to attractions after lockdown restrictions end. Post lockdown, the average guest for many attractions is likely to be younger than before.

Loyalty pays across all demographics

As many as 95% of millennial consumers say they want brands to court their loyalty. Inspiring loyalty from your guests is key to staying ahead of demographic trends and rebounding from the COVID-19 crisis.

You may already know that getting an existing customer to return costs five times less than acquiring a new one. However, it's also worth noting that, when a customer is loyal to a brand:
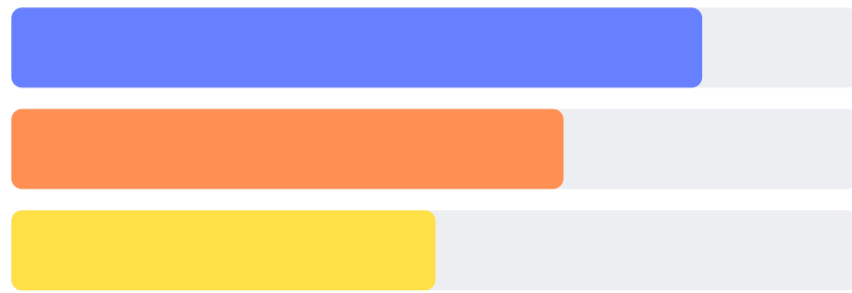
86% will recommend a company to friends and family.

66% are likely to write a positive online review after a good experience.

46% will remain loyal even after a bad experience.

Five ways to encourage customer loyalty in your attraction

1. Reward season pass holders to let them know you value them.

2. Use a tier system to reward initial loyalty and encourage more visits.

3. Keep your communication clear and consistent and follow up with guests post-visit.

4. Encourage guest feedback and act on their concerns.

5. Use social media to create a thriving and engaged guest community.

Personalise Your Attraction

Instead of one-way interruption, personalisation is about delivering value just at the moment that a user needs it.

For guests, personalisation has become a fact of life. From what shows they watch on Netflix to what kind of advertisements they see online, personalised end-to-end experiences have become ubiquitous, and increasingly, expected.

For attractions, incorporating personalisation is essential to attracting new guests and retaining regular ones.

Personalisation Trends

- **91%** of consumers say they are more likely to shop with brands that provide offers and recommendations relevant to them. Accenture.

- **63%** of consumers won't buy from brands that use poor personalisation strategies. Smart Insights.

- **70%** of consumers say a company's understanding of their personal needs influences their loyalty. Salesforce.

- **72%** of consumers will only engage with personalised marketing messages. Smart Insights.

Use technology to become your guests' digital concierge

Attractions that integrate technological solutions can leverage personalisation through demographic and location-based segmentation.

Personalised purchase and experience recommendations, based on who and where guests are within your attractions, are part of the next generation attraction experience.

These kinds of personalised interactions give guests an end-to-end digitised experience where personalisation is present throughout. For example, a guest who always likes to visit a particular ride can be given a loyalty code or a virtual queue jump pass.

By delighting guests with personalisation, you can turn regular visitors into loyal customers and brand champions.

Allow guests' desire for value to increase your revenue

Now more than ever, guests are driven by what they perceive as value for money. They tend to look for offers and deals that suit their needs exactly. By offering your guests personalised value and deals, you increase their spending opportunities before, during, and after their visit.

- **38%** is the average increase in transaction size for mobile food ordering compared to walk up sales, thanks to personalised in-basket cross-sell and upsells

When guests get the opportunity to take advantage of a low cost added extra, like an offer of a personalised basket upgrade in their food order, they see a chance to get value for money.

Gain long term benefit from data

Personalisation can be a two way street for attractions. As your guests get to know you better, their data enables you to get to know them better.

This allows you to figure out what works — and what doesn't — across your attraction. By gaining guest demographic and location information, you can arrange your attraction to maximise guest experience, retention, and revenue generation opportunities across your attraction space.

Reduce Friction

Before COVID-19, we were already seeing instant gratification become the norm for guest expectations. While most guests might still be willing to wait in queues, the fact that they have to wait makes them increasingly less satisfied regardless of what the end experience is like.

As next day delivery and instant gratification become the norm across the rest of their lives, consumers expect attractions to be the same way.

By digitising queues, you can improve the overall guest experience

According to the Association for Consumer Research, waiting

> "produces substantial irritation and less satisfaction with the service proper. [...] The waiting environment and objective waiting time were found to be the most influential factors on the perceived duration of waiting."

Social distancing has made large, slow-moving queues a non-runner for attractions. In turn, attractions are fast-forwarding their adoption of new technology to reduce the physical footprint of queues.

Digitisation is an end-to-end solution for attractions...

You can reduce friction by integrating smart technological solutions, such as wearables and smart guest apps, across your attraction. The benefits of technological solutions include:

Virtual Queuing.
Free from being restricted to physical queues, guests are free to explore your attraction. This often leads to increased spending opportunities.

Mobile Food Ordering.
Guests can order food and collect it at a time and place of their choosing.

Cashless Payments.
Mobile payments are quicker and more convenient than carrying cash for guests. They also reduce processing time for attractions.

Location-Based/Real-Time Messaging.
Two-way communication with your attraction increases message relevance and allows customer queries and concerns to be dealt with in real-time.

And a universal one

A comprehensive technological solution means wrapping up a full functionality suite into a consistent, seamless experience for your guests. This keeps the guest experience coherent and cuts down on the amount of disruptive interactions with multiple systems that your guests need to do, when they could be having fun. A connected technology solution, such as a guest app, should be an enabler for the experience, not a distraction. If you get this right, your solution becomes an ideal platform for growth.

Conclusion

Getting ready for the new normal

The reality of the new normal isn't outside your control. By understanding the trends, solutions, and potential benefits of technological adaptation, you can shape a sustainable future for your organisation regardless of external circumstances.

Attractions are faced with unprecedented challenges but not insurmountable ones. As the writer Leon C. Megginson said,

> "It is not the strongest of the species that survives, nor the most intelligent, but the one most responsive to change."

How does your technology measure up?

Getting the right technology in place to connect the entire guest journey and give you the full picture is vital to enable you to respond to changing guest expectations and ensure success.

So how do you get started?

Stay tuned for our on-demand webinar to discover how to implement a connected technology approach that demonstrates leadership and can help differentiate you from your competition

Alternatively, download our eBook to learn why a mobile guest app is one of the best ways to join the dots and create a connected, future proof guest experience that delights your guests, supports future growth and helps revitalise your operations, ready for new generations of guests.

How To Launch A Successful Mobile App For Your Visitor Attraction

Download eBook

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