Outlook for Leisure Travel and Attractions

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Outlook for Attractions

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Consumers Speak, We Listen

Online survey fielded September, 2014, among 1,000 households across the U.S.

- Ages 18-60; mix of gender and family composition; minimum HH income $25K;

- Qualified sample: Have a 7-10 interest in visiting at least one of the following:

  Theme Park, Amusement Parks, Indoor or Outdoor Water Park, Zoo, Aquarium, Museum, Cultural Center, Historical Sites, Family Entertainment Center, Sports Park or Extreme Sports Park.
Who Are We?
Demographics

- 52% female
- 19% - 30 or younger
- 47% - 31-44
- 34% - 45-60
- 45% families with children under 18 at home

HH Size
- Single person HH: 13%
- 2 people: 14%
- 3 people: 20%
- 4 people: 21%
- 5 or more in HH: 32%
Propensity to Vacation

- HH Income
  - $25K-$49.9K: 19%
  - $50K-$74.9K: 32%
  - $75K-$99.9K: 21%
  - $100-$149.9K: 29%
  - $150K plus: 23%

- Took an Overnight Getaway or Vacation
  - 1-3 nights: 15%
  - 4+ nights: 35%

- None: 25%
  - 1: 50%
  - 2: 75%
  - 3: 100%
Interest – Respondent Personally

<table>
<thead>
<tr>
<th>Category</th>
<th>10 - Extremely Interested</th>
<th>9</th>
<th>8</th>
<th>7</th>
<th>6 or below</th>
</tr>
</thead>
<tbody>
<tr>
<td>Theme Parks</td>
<td>37%</td>
<td>11%</td>
<td>13%</td>
<td>18%</td>
<td>22%</td>
</tr>
<tr>
<td>Zoos</td>
<td>36%</td>
<td>14%</td>
<td>14%</td>
<td>18%</td>
<td>21%</td>
</tr>
<tr>
<td>Aquariums</td>
<td>34%</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
<td>20%</td>
</tr>
<tr>
<td>Museums</td>
<td>34%</td>
<td>17%</td>
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<td>15%</td>
<td>20%</td>
</tr>
<tr>
<td>Amusement Parks</td>
<td>39%</td>
<td>13%</td>
<td>10%</td>
<td>10%</td>
<td>20%</td>
</tr>
</tbody>
</table>
Interest – Respondent Personally

Outdoor Water Park: 50% (10% Extremely Interested, 14% 9, 12% 8, 12% 7, 12% 6 or below)
Family Ent. Center: 54% (11% Extremely Interested, 12% 9, 12% 8, 10% 7, 12% 6 or below)
Indoor Water Park: 58% (8% Extremely Interested, 12% 9, 12% 8, 13% 7, 13% 6 or below)
Cultural Centers: 54% (11% Extremely Interested, 12% 9, 12% 8, 13% 7, 10% 6 or below)
Specialty Sports Parks: 68% (8% Extremely Interested, 9% 9, 8% 8, 7% 7, 7% 6 or below)
Extreme Sports Parks: 79% (7% Extremely Interested, 8% 9, 7% 8, 3% 7, 3% 6 or below)
Among the 76% who are interested*…

- Theme Park
  - As a day trip: 24%
  - Overnight vacation/getaway: 20%
- Amusement Park
  - As a day trip: 30%
  - Overnight vacation/getaway: 16%

* They or someone in the household has a 7-10 interest in visiting theme or amusement parks
Strong Intent to Visit Next 12 Months

**Theme Parks**

- Visited last year:
  - Will visit less: 17%
  - About the same: 49%
  - Will visit more: 34%

- Did not visit:
  - Will visit less: 79%
  - About the same: 21%

Among those interested in theme or amusement parks
Show Me the Value

49% of those who visited last year, 40% of those who did not, mentioned price / price-value as a reason for not visiting (again).

“Too expensive to wait in line 90-120 minutes for a 2 minute ride.”

“Already visited this year. It is too expensive and similar to do every year.”
New Attractions (and Stories) Appreciated…

It’s all about the rides, shows, exhibits or activities – theming is inconsequential

38%
31%
31%

Story is everything – I like well-themed attractions

I like that I can take my family to the same attraction I visited twenty years ago

22%
28%
51%

Attractions should be constantly updated with new content
But Be Sure To Keep a Good Mix

I like a mix of coasters, less thrilling rides, and shows

- 43% prefer coasters
- 25% prefer less thrilling rides
- 32% prefer shows

Interactive experiences are not a substitute for thrill rides

- 32% prefer interactive experiences
- 32% prefer thrill rides
- 36% prefer more fun than thrill rides

The more roller coasters, the better

Interactive experiences are more fun than thrill rides
Detailed Planners the Minority…

I’m fine with the experience as is without revealing more about myself

53%

I like to decide what I want to do once I get there

52%

I’m willing to give out my personal information if it means getting a more personalized experience in return

23%

I like to plan our day down to the minute

26%
… But Most See Value in Reservations

Making ride reservations reduces stress

- 47%
- 26%
- 27%

Making ride reservations takes away the spontaneity

- 27%

I want to put down the smartphone / tablet for the day and just enjoy the attraction

- 50%
- 23%
- 27%

I want to be able to use my digital device to enhance the attraction experience
Front of the Line: Profitable, but Polarizing

I would pay double the price of admission for FOL access to all the attractions

- 22%
- 24%
- 53%

I would never pay for front of the line access

Some guests paying for FOL access ruins the entire experience for others

- 49%
- 26%
- 25%

FOL access is one of the best features attractions have added
Indoor / Outdoor Water Parks
Among the 63% interested* …

26% Visited Both

Indoor WP
- 7% Both
- 14% As a day trip
- 11% Overnight vacation/getaway

Outdoor WP
- 28% Both
- 10% As a day trip
- 10% Overnight vacation/getaway

* They or someone in the household has a 7-10 interest in visiting indoor/outdoor water parks
### Intent as Strong as AP and TP

<table>
<thead>
<tr>
<th>Outdoor Did Visit this Year</th>
<th>19%</th>
<th>47%</th>
<th>34%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indoor Did Visit this Year</td>
<td>22%</td>
<td>45%</td>
<td>33%</td>
</tr>
<tr>
<td>Outdoor Did NOT Visit</td>
<td>74%</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>Indoor Did NOT Visit</td>
<td>84%</td>
<td></td>
<td>16%</td>
</tr>
</tbody>
</table>

- **Will visit less**
- **About the same**
- **Will visit more**

*Among those interested in indoor or outdoor water parks*
Stiff Competition for Water Parks

Heavy competition and location matters. So does the age of kids.

- 42% of non-past year visitors – but someone still interested – prefer beach, lakes.
- 17% of past year visitors.

Price and price-value only cited by 29% of those who visited in the past year, 20% of those who did not.
Parents vs. Kids

“We don't have any very close by and we prefer to go to the ocean instead (which also happens to be free).”

“Even though they had it at Busch Gardens, I'm just not a fan. My daughter wants to, but I let her do the pool instead.”

“Water parks do not seem clean to me. I only go to take my nephew. I do not get in the water myself.”
Zoos and Aquariums
Among the 80% interested*

- 41% visited zoos
- 29% visited aquariums
- 10% visited both as a day trip
- 13% visited both overnight vacation/getaway

40% visited both

* They or someone in the household has a 7-10 interest in visiting zoos or aquariums
Strong Intent – Especially Zoos

Among those interested in zoos or aquariums:

- **Zoos**
  - Did Visit this Year: 12% Will visit less, 52% About the same, 36% Will visit more
  - Did NOT Visit: 76% Will visit more, 24% Will visit less

- **Aquariums**
  - Did Visit this Year: 18% Will visit less, 52% About the same, 29% Will visit more
  - Did NOT Visit: 74% Will visit more, 25% Will visit less
38% of past year visitors and 31% of interested, non-visitors feel they have “been there done that.”

“Been there many times already, now we mostly go when we're taking friends.”

“You can only see so many aquariums without it getting dull.”

“We do it every two years. Exhibits don't change that often.”
The Vocal Minority

While there may be things that can be improved, I support our local zoo and enjoy visiting.

I will not visit or support zoos or attractions that keep animals in cages.
Limited Engagements Spur Visits

**We just go to zoos or aquariums to see the animals**
- 49% (40% green, 24% yellow, 27% blue)

**I visit when I want – not when something is passing through**
- 40% (33% blue, 27% yellow, 4% green)

**Waterparks or splash pads are very appealing at a zoo or aquarium**
- 24% (27% blue, 27% yellow, 4% green)

**Limited engagement exhibits encourage me to visit more often**
- 27% (33% blue, 27% yellow, 4% green)
What Else Matters?
Price-Value Top of Mind…

My schedule determines when I can visit, regardless of discounts

- 32%
- 24%
- 45%

I’ll never pay full price – if there isn’t a discount or offer, I’ll wait till there is

Admission is rising faster than the experience is getting better – I will likely visit less often

- 45%
- 30%
- 26%

While admission may be going up, I understand why and will continue to visit
…Resist Nickel and Diming

I prefer a low, general admission fee, then pay to add on experiences

- 60%
- 17%
- 23%

I prefer admission to include everything – no additional fees for experiences

I prefer to pay as I go

- 40%
- 26%
- 34%

I prefer all-inclusive packages where I can purchase everything in advance
Crowds A Deterrent...

Crowds are a show stopper – would rather stay home

- 47% would still have fun, even if it’s crowded
- 24% would rather stay home
- 29% don’t mind it at all

If the line is longer than 10 minutes, I’ll skip the attraction

- 49% would skip the attraction
- 25% would wait up to an hour if the line is moving
- 26% would wait up to an hour even if the line is moving
I'm not really interested in VIP or backstage experiences – the base experience is good enough

I'm willing to pay 2 to 3 times more than the price of admission for special experiences
The Basics Come First...

Given the number of people visiting, the attraction is bound to be a little dirty by the end of the day

25%

20%

55%

Cleanliness is non-negotiable – I expect the place to be pristine

I don’t care if the place needs a paint job, so long as all the rides and attractions are working

11%

14%

75%

Maintenance is a reflection of safety and safety is paramount
I expect to be treated with respect, but employee attitudes don’t influence my decision to re-visit

Employee attitudes can make or break the experience – it matters in whether I’ll re-visit
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