

2026 Pulse Report

Hear from real guests on booking drivers,
loyalty, and the growing role of AI

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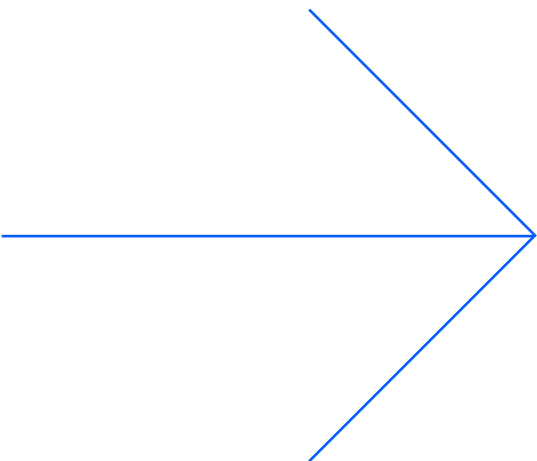
Welcome to ROLLER’s 2026 Pulse Report

We're back with another Pulse Report, and this year we're focused on three big questions: what drives guests to book and come back, how to capture loyalty you're currently leaving on the table, and how AI is already changing the way guests find and choose you.

To kick things off, one stat that stood out to me is that **86.80%** of guests expect to visit attractions the same amount, or more often, in the next 12 months. That's a rallying cry for our industry. Even in a time of economic uncertainty, guests want to get out there and have unforgettable experiences. The demand is real, and it's growing.

The 2026 Pulse Report is built to help you connect with those guests and uncover what actually resonates. We surveyed 1,500 attraction visitors from around the world to find out what they really think, want, and expect.

Here's what's inside:



01 — Why there's an untapped loyalty gap between repeat visits and membership sign-ups	02 — How AI is already changing the way guests discover, compare, and book	03 — Why experience beats price, convenience, and rewards as the #1 reason guests return	04 — How reviews and ratings filter decisions before guests even click through	05 — What guests expect from your website in the first 60 seconds
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Think of this as a guide to help you make smarter decisions about what your guests actually want, and how to deliver on it. We hope you enjoy reading it as much as we enjoyed putting it together!



BRETT SHERIDAN
General Manager, ROLLER

About Brett Sheridan



Brett has decades of experience owning and running attractions businesses, from founding the first OTA in the southern hemisphere, to building and operating multiple FEC, indoor skydiving, and VR venues across APAC. He also managed the iconic Luna Park on Sydney Harbour. He now helps ROLLER customers implement technology that empowers teams and elevates guest experiences.

The operator insights throughout this report are informed by Brett's experience owning, operating, and advising attraction businesses.

All of the data in this report was collected through a survey commissioned by ROLLER and conducted via Pollfish, an independent platform that enables us to reach real guests around the world anonymously.

The responses come from 1,500 participants across the USA, UK, and Australia, providing a broad view of guest behavior across key markets. Pollfish uses a randomized, double opt-in approach to ensure the data is high quality and reliable.

Each respondent is a regular attraction visitor, having indicated they visit attractions every few months or more frequently. This ensures the insights reflect the behavior and preferences of active guests.

Participants were asked to select one answer for each multiple-choice question, choosing the option that best reflected their view or behavior. They were also invited to share open-ended responses in their own words. The anonymous guest quotes featured throughout this report come directly from those responses, in guests' own words.

What drives guests to visit, return, and recommend

01.

In this section, we explore why guests choose a venue, what makes the experience worth repeating, and how those insights can fuel your growth strategy.

Real guests on why they would visit or return to an attraction venue

“

The consistently good experience every time I go. I know exactly what I'm getting, the place is always well run, and I'm guaranteed to have a great day out without any hassle.

“

If the experience was genuinely fun and memorable, with engaging activities that made me feel immersed.

“

It's all about the experience. If an attraction venue keeps things fresh, offers new experiences, or has a killer atmosphere, I'd definitely consider going back.

“

Exceptional customer service and a welcoming atmosphere also make me want to come back.

Learn

01 — Why experience outweighs price, convenience, and rewards in guest decision-making

02 — What drives guests to recommend a venue to friends and family

03 — How atmosphere, staff, and service shape the decision to return

04 — Why speed and always-on availability influence where guests book

05 — What single improvement would make guests visit more often



Key insights

Before diving into the data, here's what stands out most about what drives guests to visit, return, and recommend you:

01

Experience leads decision-making

56.40% of guests regularly visit an attraction because it consistently delivers a great experience

02

Atmosphere and service are part of the experience

92.66% of guests say atmosphere and social vibe are important to their experience

03

Word-of-mouth follows great experiences

61.80% of guests regularly recommend venues to friends and family when they enjoy the overall experience

04

Variety keeps guests coming back

41.13% of guests would visit more often if attractions offered more variety in activities or experiences

05

Speed and ease of booking influence conversion

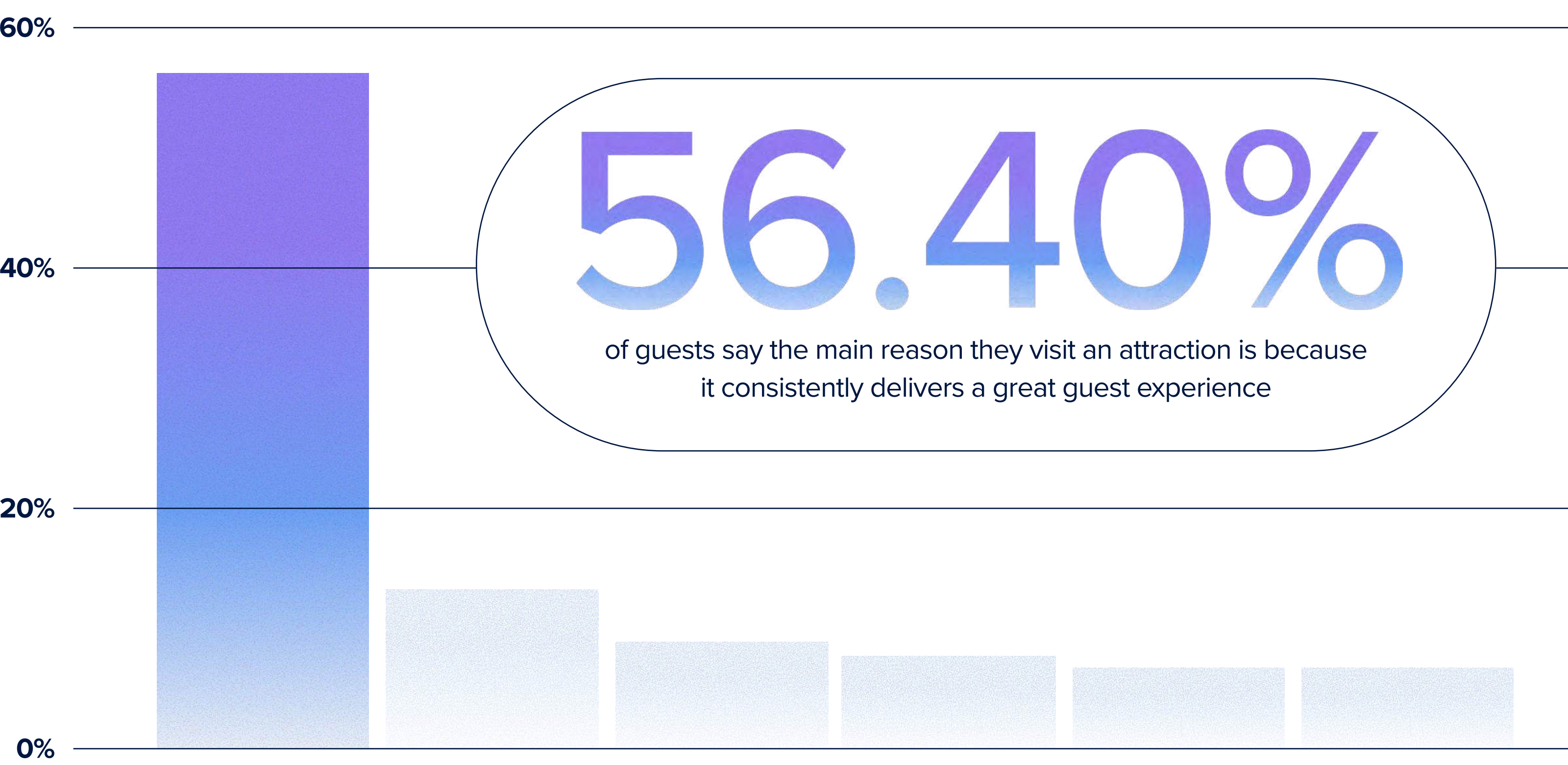
72.67% of guests would be likely to use an AI assistant if it could complete their booking faster than a human

06

Always-on availability is becoming part of the guest experience

43.20% of guests would be more likely to engage with a venue that offers a 24/7 AI assistant

Q. What is the single biggest reason you regularly visit an attraction venue?



More than half of guests say the main reason they visit an attraction is because it **consistently delivers a great experience**.

The next most common reason is social influence, with 13.47% saying they visit because family or friends prefer it. Convenience 8.93%, rewards 7.87%, staff 6.67%, and price 6.67% are all selected by a much smaller share of guests.

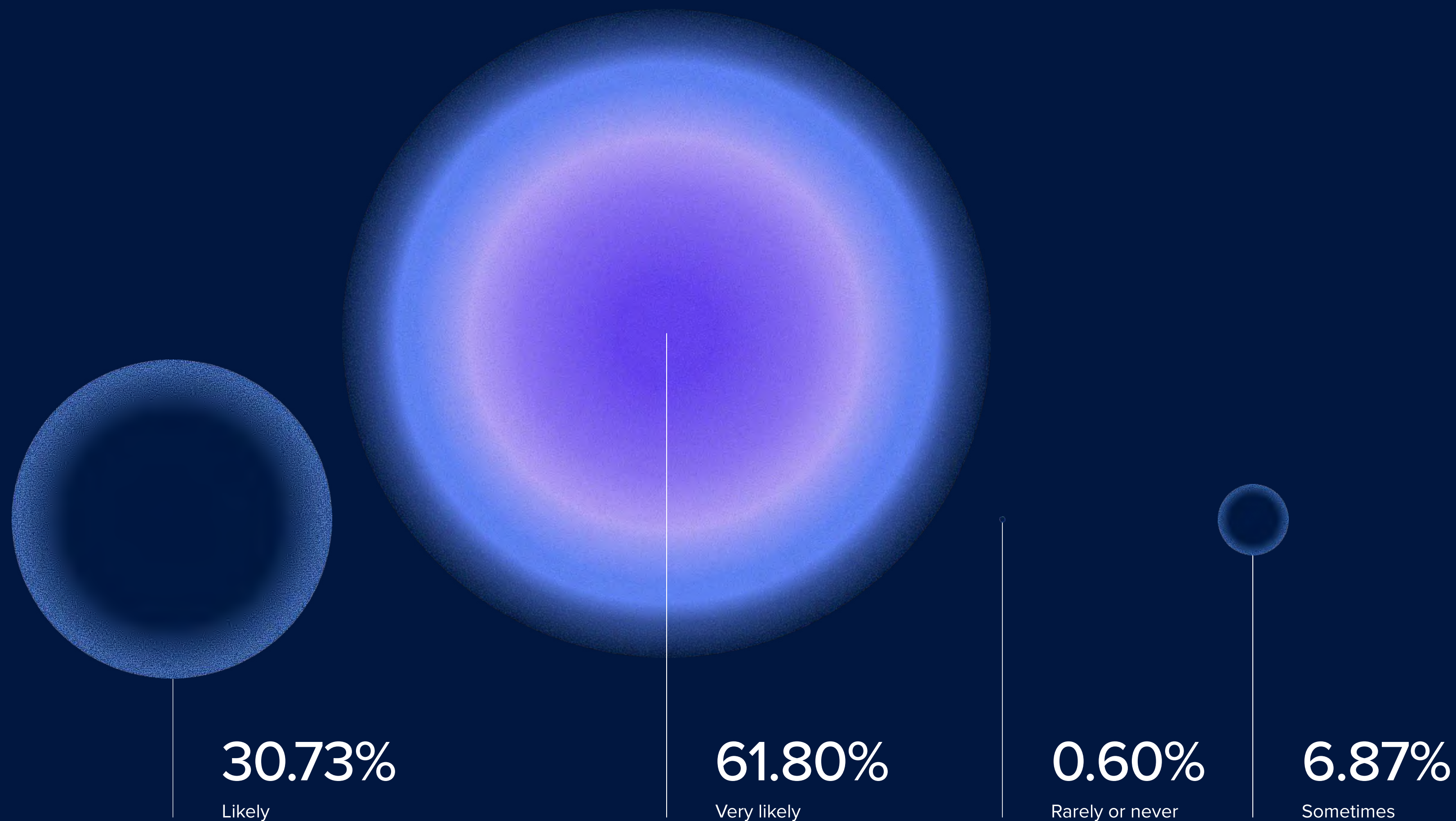
It consistently delivers a great experience	56.40%	I get rewards or perks for returning	7.87%
My family or friends prefer it, so I follow them	13.47%	The staff make me feel genuinely welcome	6.67%
It's the most convenient option near me	8.93%	The price is consistently good value	6.67%

Operator insight

Experience is what keeps guests coming back! It's more powerful than price, rewards, convenience, and staff combined.

Guests come back because your venue consistently delivers a great experience, and no amount of discounting or loyalty points will compensate for a visit that underwhelms. Get the core experience right first, then let your pricing and loyalty tactics amplify what's already working.

Q. How likely are you to recommend an attraction to a friend or family member, and what is the main driver of that recommendation?



A majority of guests say they are very likely to recommend an attraction, primarily based on the overall experience.

An additional 30.73% say they would recommend a venue based on value for money. Only 6.87% say they recommend venues depending on the situation, and less than 1% say they rarely or never recommend places.



Operator insight

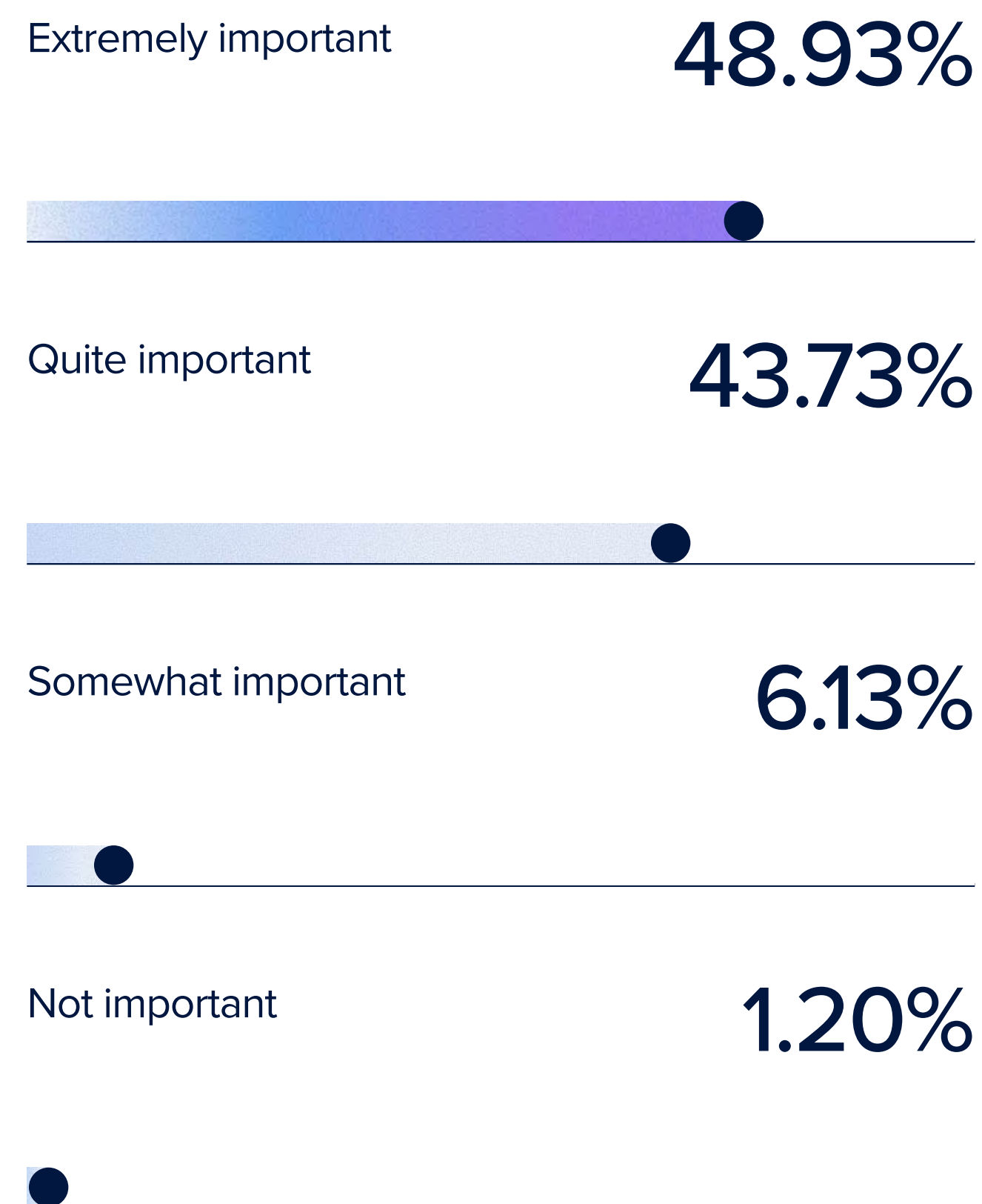
With less than 1% of guests saying they rarely recommend venues, word-of-mouth is one of the lowest-hanging fruits you've got.

The raw material is already there, you just need to give guests something worth talking about. You can focus on creating moments worth sharing, then encourage guests to share those experiences through reviews, referrals, and social media.

Q. Beyond the activities themselves, how important is the overall atmosphere and social vibe of an attraction to you?

90%↑

of guests say that **atmosphere and social vibe are important** to their experience.



Nearly half 48.93% say it's extremely important, and 43.73% say it's quite important. A smaller share say it's somewhat important 6.13%, while only 1.20% say it's not important.

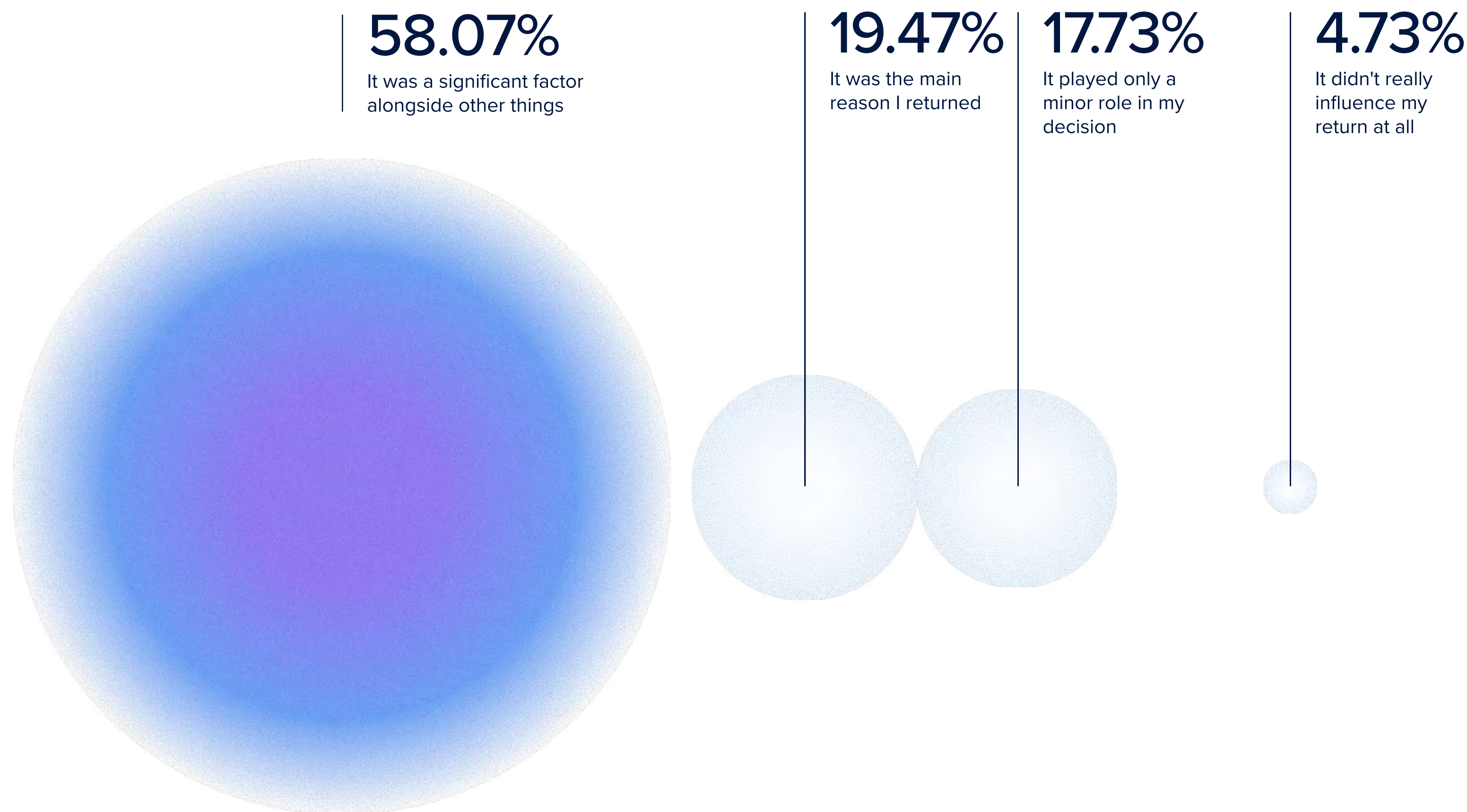


Operator insight

Guests remember how a place feels as much as what they do there.

Lighting, music, layout, the little touches at the entry, all of it shapes the memory they walk out with. If the activity is your headline, the atmosphere is the supporting cast. You need both working together in perfect harmony!

Q. Thinking about a venue you've returned to multiple times, how much did staff or service quality contribute to your decision to come back?



Most guests say **staff or service quality** influences their decision to return to a venue.

58.07% say it was a significant factor, and 19.47% say it was the main reason. A smaller share say it played a minor role 17.73%, while 4.73% say it did not influence their decision.



Operator insight

77.54% of guests say staff or service played a role in why they came back.

Think about that: your team is nearly as powerful a retention lever as the activity itself!

And unlike the venue build-out, this is one you can directly influence every single shift. Invest in training, empower your team to make decisions on the floor, and watch consistency like a hawk. Small moments of great service can turn positive visits into repeat ones.

Q. How important is it for staff to proactively engage with guests (e.g., check in unprompted, suggest activities, offer help) rather than wait to be asked?

84%

Most guests consider **proactive staff engagement** to be important.

44.33% say it is somewhat important, and 40.60% say it is very important. A smaller share are neutral 13.13%, while only 1.93% say it is not important.

Somewhat important — I appreciate it but don't necessarily expect it	44.33%
Very important — I love proactive, attentive service	40.60%
Neutral — I prefer to find staff myself when I need them	13.13%
Not important — I'd rather be left alone during my visit	1.93%



Operator insight

84.93% of guests value proactive service.

Translation: they don't want to chase your team down, they want you to come to them.

Train your staff to read the room (kids getting restless, a group looking lost at the waivers, a dad scanning the menu board) and step in before they're asked. And give them the tools to do it.

When ROLLER handles the admin in the background (waivers, bookings, check-ins) your staff can be on the floor, with guests, where the magic happens.

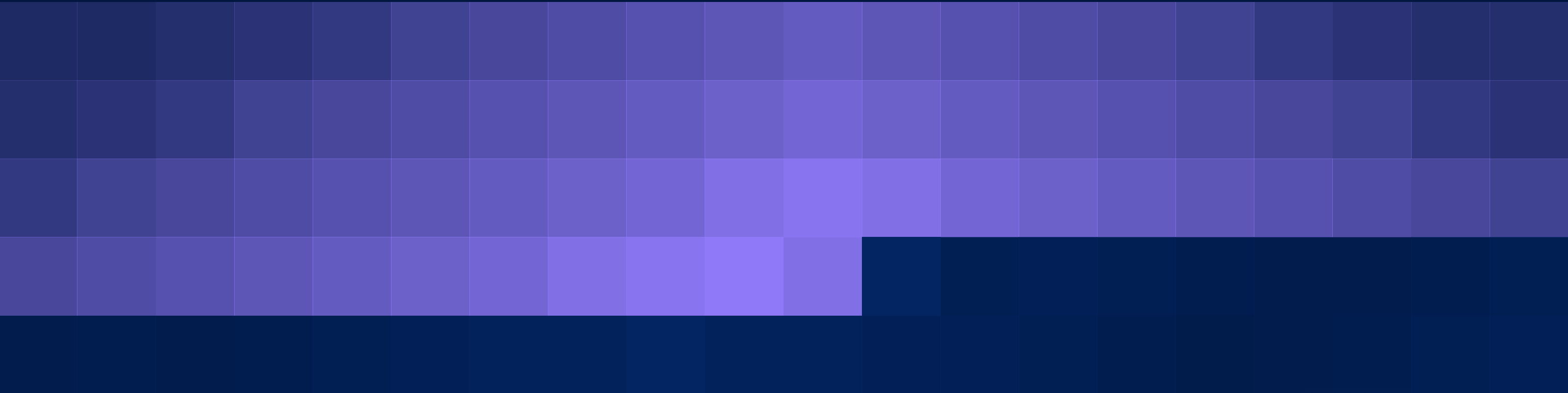
Q. If an AI assistant could complete your booking faster than a human, how likely would you be to use it?

34.47% of guests say they would be very likely to use an AI assistant if it could complete their booking faster than a human, and 38.20% say they would be likely.

Likely	38.20%
Very likely	34.47%
Neutral	18.73%
Unlikely	14.67%
Very unlikely	3.93%

70%

In total, over 70% of guests are positively influenced by speed, while only a small minority are unlikely to use it.



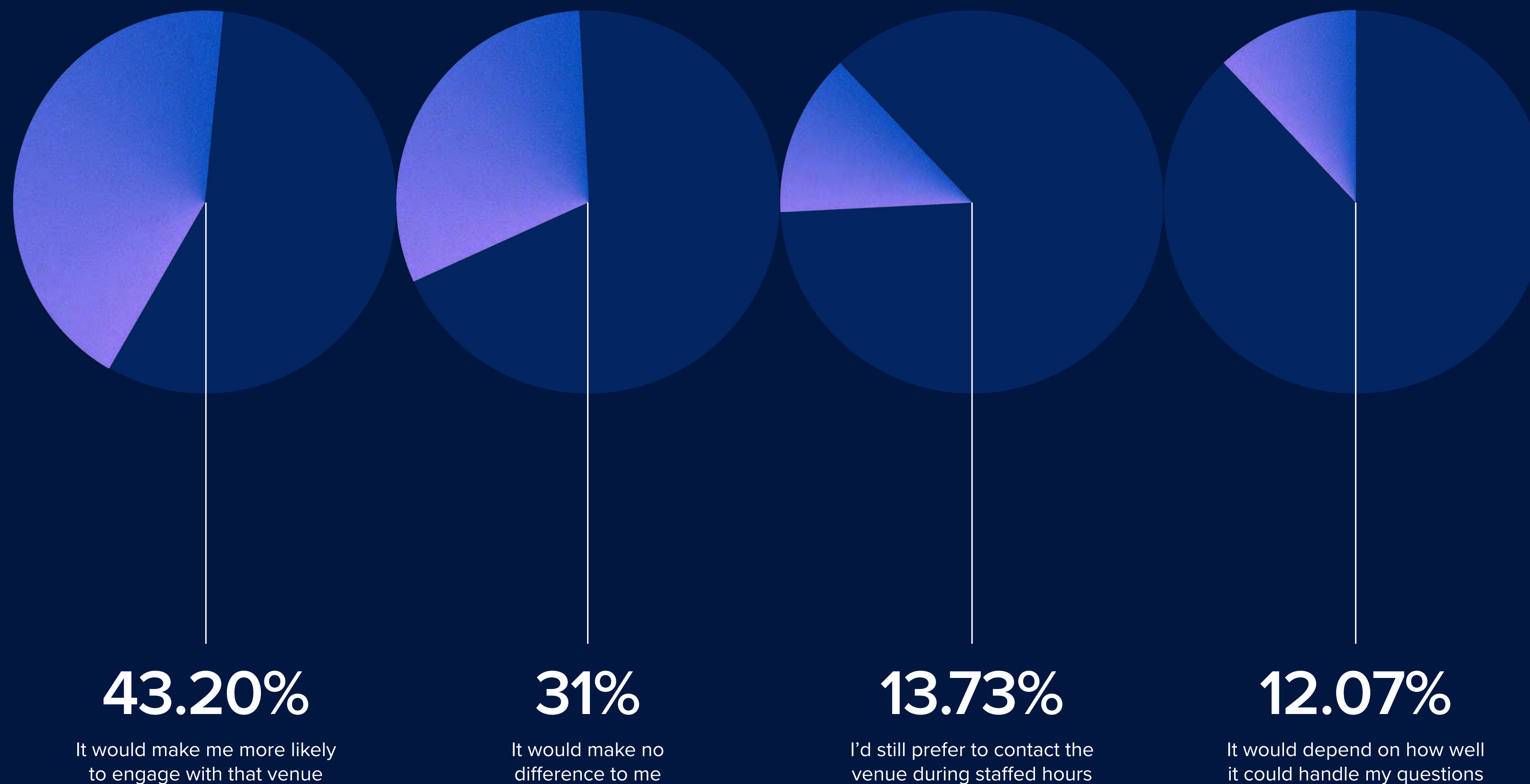
Operator insight

When it comes to booking, guests reward speed and punish friction.

Every extra step, every form field, every extra click is another chance to lose them.

That's exactly why AI-powered booking tools are becoming essential, so guests can move from inquiry to booking in a fraction of the time.

Q. If an attraction offered a 24/7 AI assistant for questions and bookings, how would that affect your experience?



43.20% of guests say that having a 24/7 AI assistant would make them more likely to engage with a venue, while 31% say it would make no difference.

A smaller share say they would still prefer to contact the venue during staffed hours 13.73% or that it would depend on how well the AI performs 12.07%.



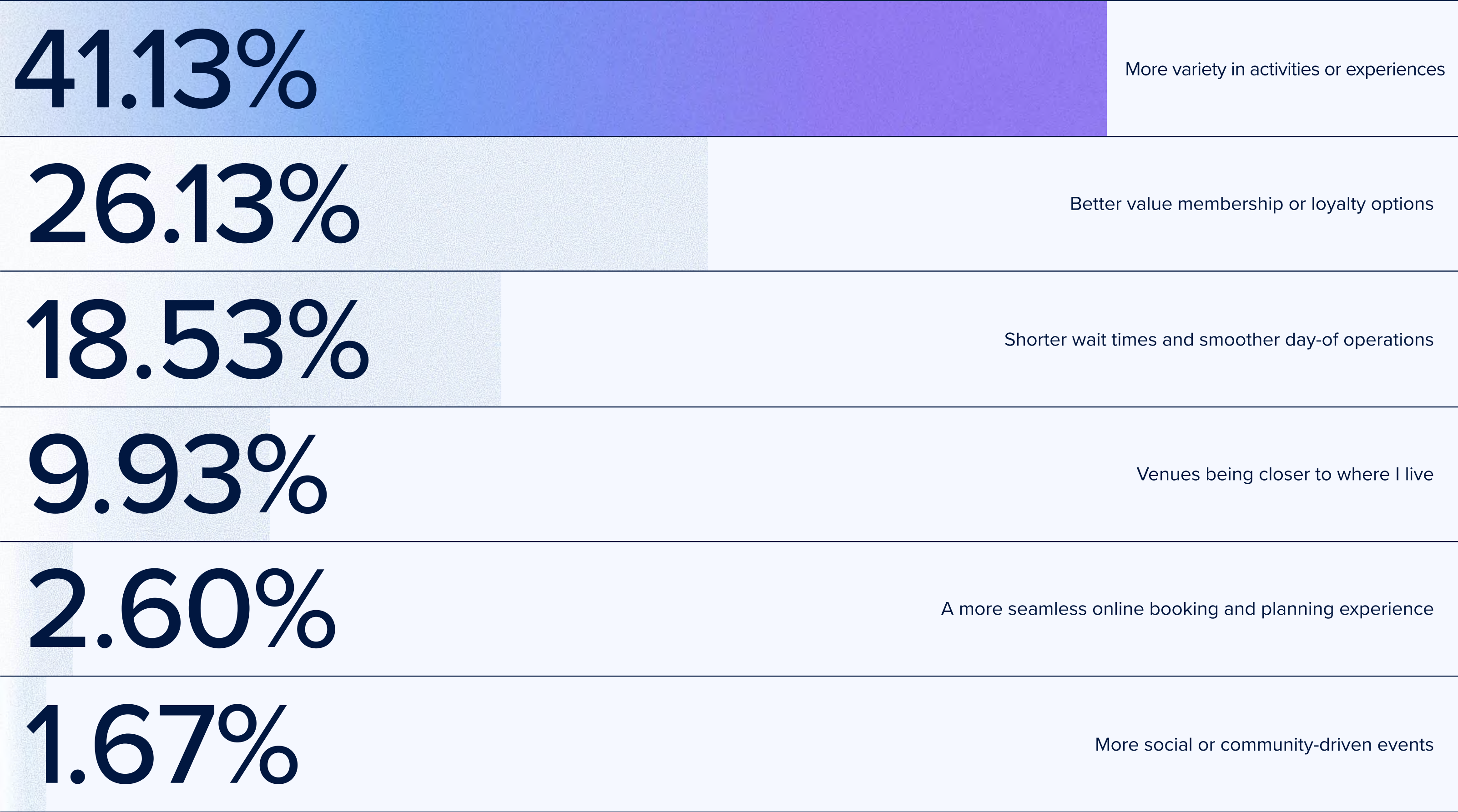
Operator insight

Guests don't plan their visits on a 9-to-5 schedule; nights, weekends, and early mornings are prime research and booking hours.

Every unanswered inquiry in those windows is a booking you might not get a second chance at.

That's why always-on AI chat is becoming a must-have: it can capture questions and convert bookings around the clock, even when your team's offline.

Q. What single improvement would most increase how often you visit attraction venues?



The largest group of guests 41.13% say that more variety would make them visit more often, significantly higher than any other factor.

Value 26.13% and operational improvements like wait times 18.53% also play a role, but variety clearly leads.

 Operator insight

When it comes to enticing return visits, variety beats pricing, location, and shorter wait times.

Here's how to turn variety into growth: rotate your activities, run limited-time experiences, refresh a corner of the venue, or even update some decorations. Keep giving guests a reason to ask “what's new?” That's how you turn a once-a-year visitor into a regular.

The cost of friction

02.

This section highlights the barriers that prevent guests from returning, from unclear information and pricing to gaps in the digital experience. Even small points of friction can cost you bookings, reduce repeat visits, and limit your venue's growth potential.

Real guests on the biggest pain points at attraction venues

“
Long wait times, for both starting the activity or waiting for F&B orders.

“
Disrespect of my time, especially around long or poorly managed wait times.

“
Unclean facilities and disengaged staff.

“
Untrained staff.

Learn

01 — What causes guests to stop visiting venues they once enjoyed

02 — How digital friction impacts trust and booking decisions

03 — The role of pricing transparency in building confidence

04 — Where small improvements can increase return visits



Key insights

Here's where friction breaks the guest journey, and what stops guests from booking or returning:

01

Friction can stop visits before they start

53.20% of guests have decided not to visit a venue due to a weak online presence

02

Price drives churn more than visits

26% of guests have stopped visiting a venue they once loved due to unfair price increases

03

Your digital presence builds (or breaks) trust

85.80% of guests expect to find key information on a venue's website within 60 seconds

04

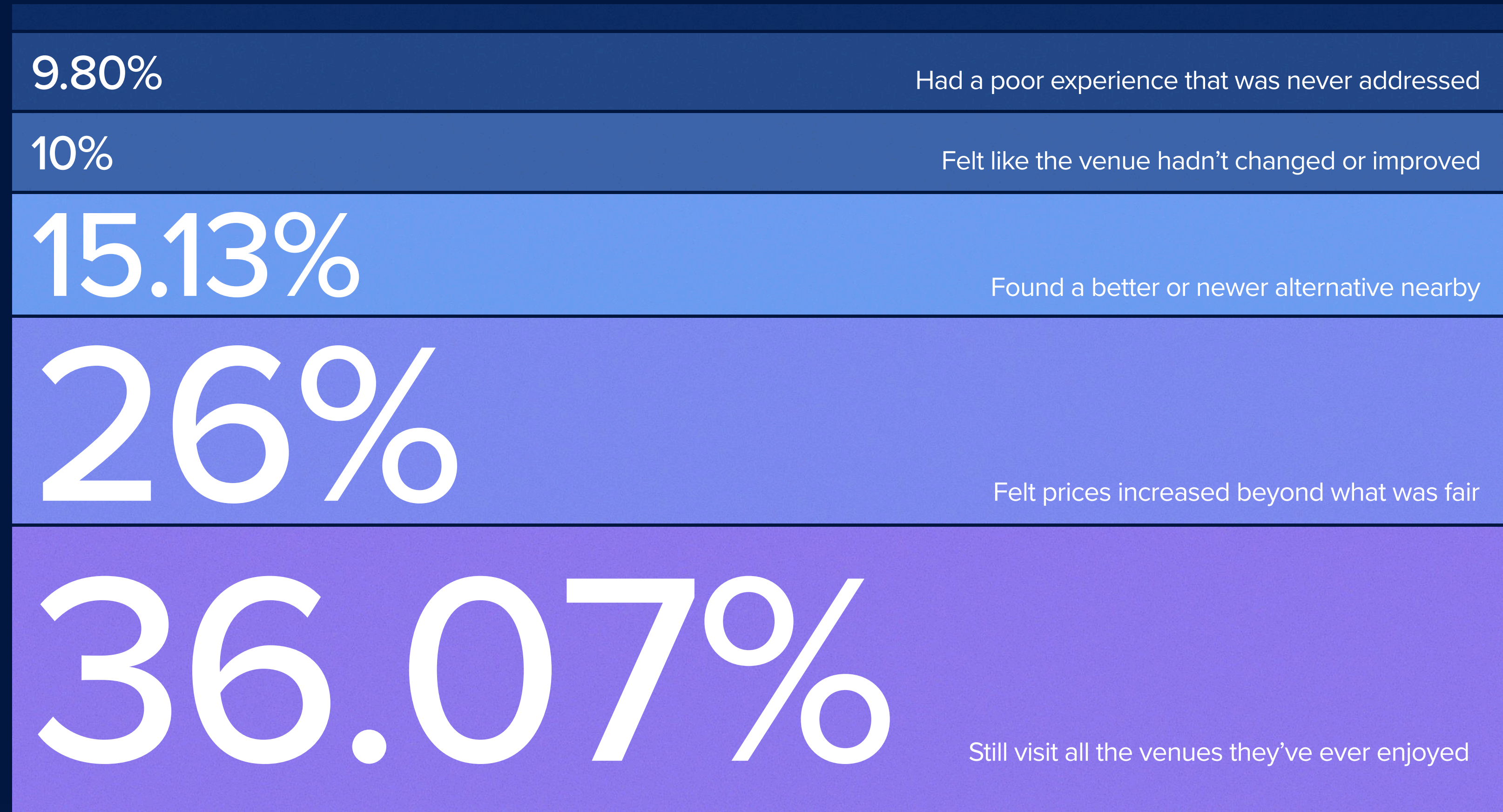
Unanswered inquiries lead directly to lost bookings

75.53% of guests would choose another venue if they couldn't get through to yours.

Q. Have you ever stopped visiting a venue you previously loved? If so, what was the main reason?

While 36.07% of guests say they continue to visit venues they enjoy, nearly two thirds have stopped visiting at least one venue. The most common reason is price increases 26%, followed by competition 15.13% and a lack of improvement over time 10%.

I still visit all the venues I've ever enjoyed	36.07%
Prices increased beyond what I felt was fair	26%
A better or newer alternative opened nearby	15.13%
I felt like it hadn't changed or improved	10%
A poor experience that was never addressed	9.80%
I didn't feel valued by the attraction	3%



Operator insight

Price doesn't bring guests in, but it absolutely pushes them out.

When the experience stops feeling worth what guests are paying, they'll leave, and you won't get a second chance to prove the value.

Review your pricing regularly alongside the experience, and when you raise prices, show your work. What's new? What's better? What are they getting now that they weren't before?

On-site friction hurts just as much. Long waits, chaotic check-ins, clunky F&B ordering, all of it chips away at perceived value.

Self-service kiosks, digital waivers, and mobile ordering can take friction out of the day-of experience, so guests feel like they're getting what they paid for.

Q. Have you ever tried to call an attraction or venue and been unable to get through?



19.87% of guests say they have often tried to call a venue and been unable to get through, while 54.07% say this happens occasionally. Only 16.07% of guests say they have never experienced this, and 10% say they don't typically call venues.

Yes, occasionally	54.07%
Yes, often	19.87%
No, never	16.07%
I don't typically call venues	10%

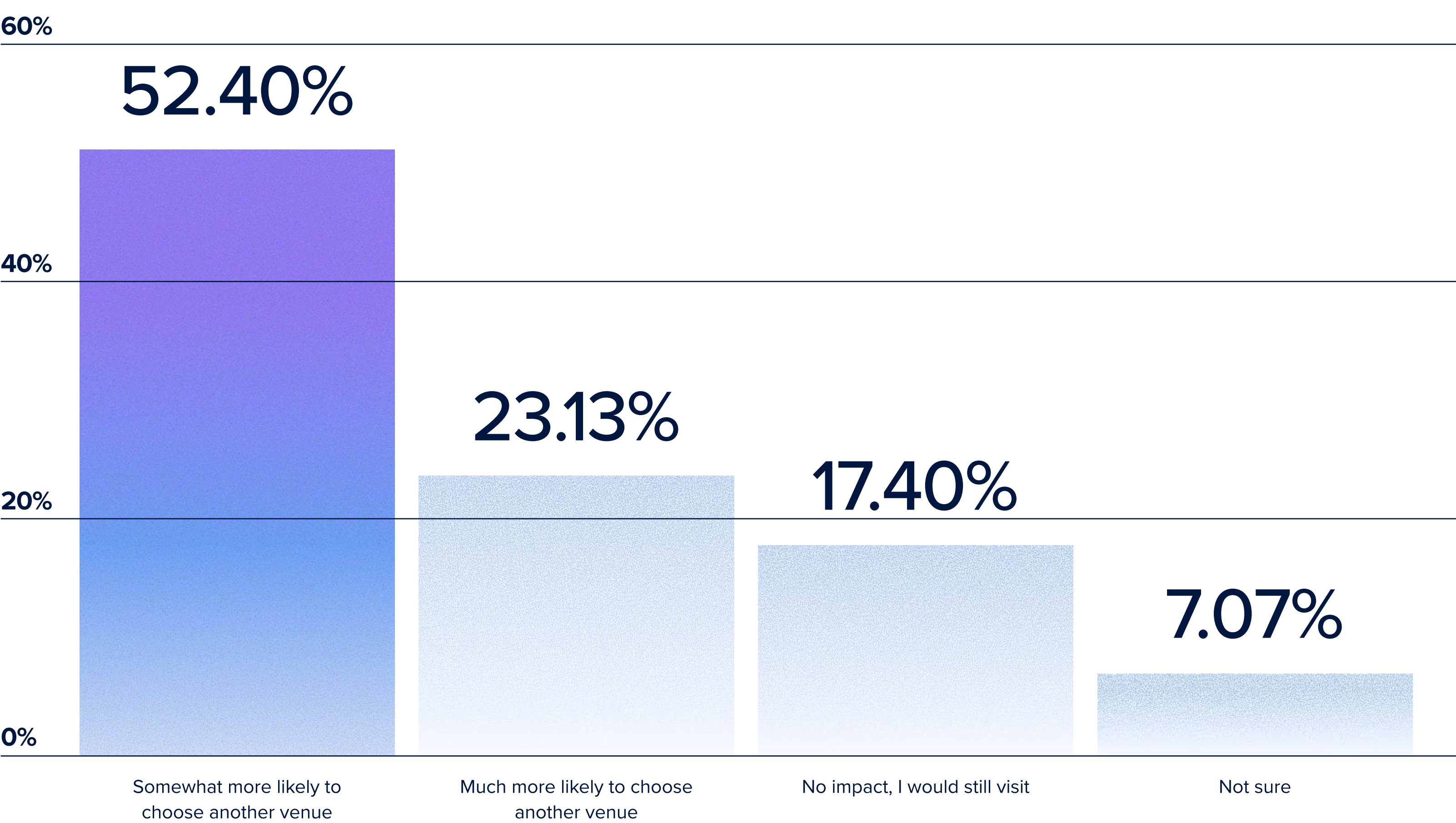
 Operator insight

Missed calls are missed bookings.

Every unanswered phone is a guest who was ready to act, and who may not try again. It's usually worse during peak periods, when your team is running between in-venue guests and the phone is the last thing on anyone's mind.

Those are exactly the moments you can't afford to lose and exactly where AI tools can help.

Q. If you couldn't get through to a venue, how would it impact your likelihood to visit?



23.13% of guests say they'd be much more likely to choose another venue if they couldn't get through, and 52.40% say they'd be somewhat more likely.

That means 75.53% of guests are more likely to take their business elsewhere. Only 17.40% say it would have no impact on their decision to visit.

 Operator insight

Missed calls don't just lose a single booking, they tip guests toward your competitors.

75.53% of guests say they'd be more likely to choose another venue if they couldn't get through to yours. That's three in four guests handing their booking to someone else!

This is where an AI assistant really earns its keep, picking up inquiries 24/7 so your team doesn't have to. Every inquiry captured is a booking protected.

Q. Have you ever decided NOT to visit a venue because their website or social media presence didn't give you enough confidence?



More than half of guests 53.20% have chosen not to visit a venue due to its online presence, and a further 27.87% say they've had doubts before continuing.

This means over 80% of guests have experienced some level of hesitation caused by a **poor online presence.**



Operator insight

Your digital presence is doing one of two things: building confidence or costing you bookings.

Even small gaps (outdated photos, missing pricing, broken links, social channels that haven't been touched in months) plant doubt. And doubt is usually enough.

Review your website and social channels on a regular cadence to make sure they're clear, current, and representative of the real experience guests will have.

Q. How quickly do you expect to find the key information you need (e.g., pricing, activities, how to book) on a venue’s website?

Over 80% of guests expect to find key information within a minute, and the largest group 40.13% expect to find it within 30 seconds. Only a small minority are willing to spend time browsing.

80%↑

Within 30 seconds	40.13%
Within 1 minute	40%
I don't mind spending time browsing — I enjoy researching	14.20%
Within 10 seconds	5.67%

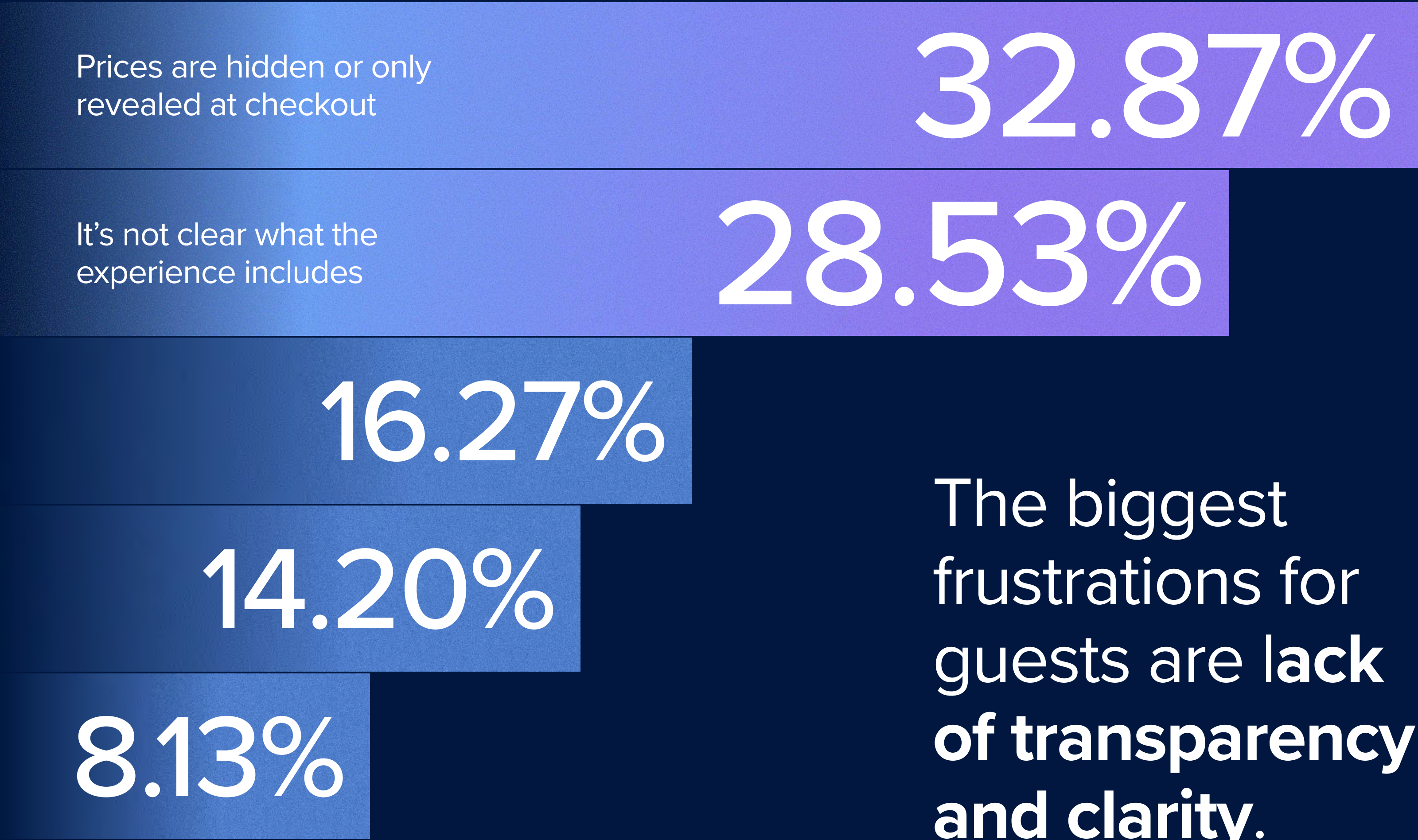
 Operator insight

Your website needs to answer key questions fast.

Guests expect pricing, activities, and booking options to be immediately visible, and they don't give you long before they move on. **Put the essentials front and center: what you offer, how much it costs, and how to book.**

Anything a guest has to hunt for is a guest you might not keep. For everything that isn't obvious at a glance, make sure guests have an easy way to ask and get an answer.

Q. What is the most frustrating thing about how venues present information online?



The biggest frustrations for guests are **lack of transparency and clarity.**

Prices are hidden or only revealed at checkout	32.87%
It's difficult to get a clear sense of what the experience includes	28.53%
The website is slow, cluttered, or hard to navigate	16.27%
There aren't enough recent photos, videos, or guest reviews	14.20%
Opening hours, closures, or availability aren't clearly communicated	8.13%

Nearly one third of guests 32.87% are frustrated by hidden pricing, and 28.53% struggle to understand what the experience actually includes.



Operator insight

Guests want clarity before they commit, and the #1 thing that frustrates them online is hidden pricing.

It feels like a trap; they've gotten excited, started the booking process, and then the number jumps at checkout. Most will close the tab and find somewhere more transparent.

Fix this upfront. Show pricing clearly, describe exactly what the experience includes, and use photos and video to back it up.

ROLLER's Online Checkout is designed around exactly this: transparent pricing, structured packages, and clear add-ons that show guests the value upfront, so conversion (and basket size) both go up.

Building trust with feedback and reviews

03.

This section dives into how reviews and feedback affect decision-making. From star ratings to how venues respond to criticism, these signals build confidence in your brand and influence whether guests choose to return.

Real guests on how reviews or ratings influence their decision to visit a venue

“
They strongly influence them in both directions, good or bad! I check reviews for most purchases/visits that I make.

“
A lot. I usually read both good and bad reviews, and they definitely shape my overall impression and decision.

“
I typically look at reviews from the last few months to see what the current trend of reviews is.

“
I won't even consider a venue if it's got bad reviews.

Learn

01 — How ratings impact whether a venue is considered

02 — How guests interpret and evaluate negative reviews

03 — Why how you respond to reviews matters

04 — How acting on feedback can bring guests back



Key insights

Here's how reviews and feedback influence whether guests choose to visit or return:

01

Ratings are a key decision filter

85.93% of guests require at least a 3.5-star rating before they'll consider visiting

02

Guests look for patterns, not perfection

66.20% of guests read more reviews to see if a negative issue comes up repeatedly

03

How you respond matters as much as the review itself

87.40% of guests say a thoughtful response to a negative review makes them more likely to visit

04

Acting on feedback strengthens trust and long-term perception

86.60% of guests are more likely to visit or return to a venue that collects and acts on feedback

05

Improving support can help recover lost guests

69.73% of guests would give a venue another chance after a poor experience if its support improved through AI

Q. What is the minimum star rating an attraction would need to have on Google or TripAdvisor before you'd seriously consider visiting?

Most guests use ratings as an initial filter, with nearly three quarters requiring at least a 3.5-star rating, and almost half 46.67% expecting 4 stars or higher. Only a small minority 7.40% say ratings don't influence their decision.



- | | | | | |
|--|---|--|---|---------------------------------------|
| ★ | ★ | ★ | ★ | ★ |
| 4.5 stars or above
Anything lower raises a red flag for me | 4.0 stars or above
A solid 4-star is enough to feel confident | 3.5 stars or above
I'm willing to give venues the benefit of the doubt | 3.0 stars or above
I'll judge for myself based on reading the reviews | I don't pay attention to star ratings |

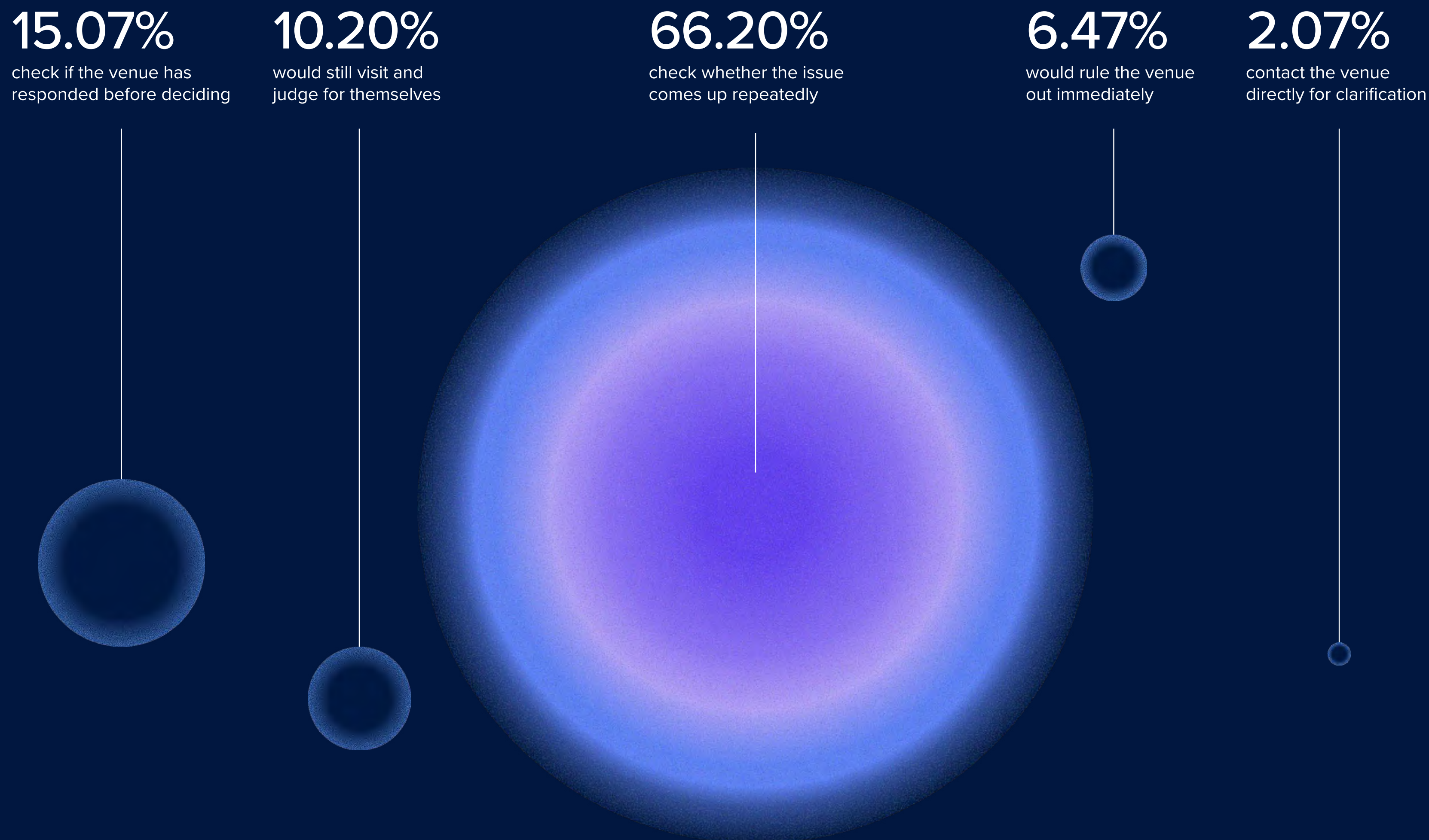
💡 Operator insight

Before guests visit, they look for signals they can trust.

If your star rating doesn't clear the bar a guest has set in their head, they won't even click through to see your photos, your pricing, or anything else.

That means you need to incorporate review management into your weekly operations. Track ratings across platforms, respond consistently, and address issues quickly before they compound. The operators who treat reviews as a revenue lever see it show up in the numbers.

Q. When you come across negative reviews of an attraction you're considering, what do you typically do?



Most guests say they read more reviews when they see a negative one. 66.20% say they look for patterns by checking whether the issue comes up repeatedly.

15.07% say they check whether the venue has responded before deciding, and 10.20% say they would still visit and judge for themselves. A smaller share say they would rule the venue out immediately 6.47% or contact the venue directly for clarification 2.07%.



Operator insight

One bad review won't sink you, but a pattern of them will.

Three reviews in a row mentioning long weekend waits or chaotic check-ins are a signal that the experience won't be up to scratch.

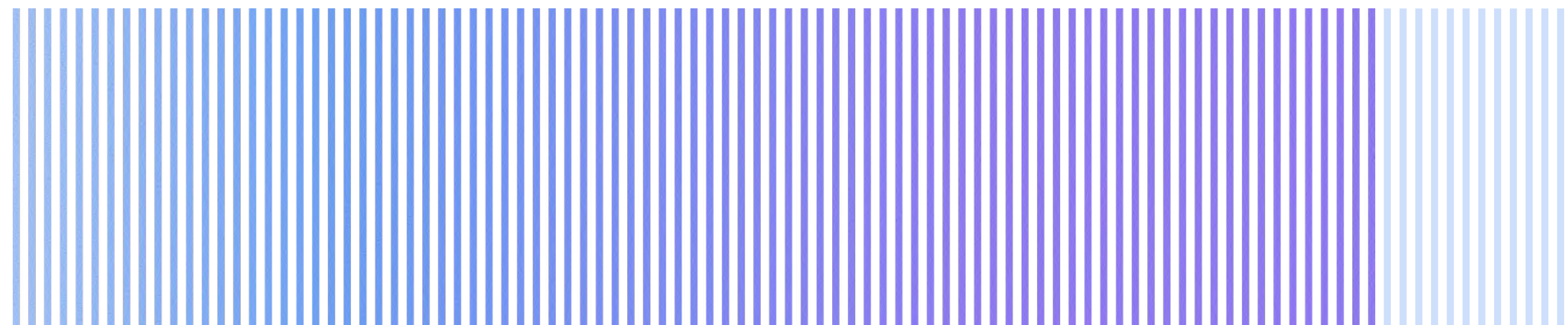
The operators who get ahead of this are the ones watching trends before they hit public reviews.

ROLLER's Guest Experience Score surfaces recurring issues in guest feedback early, so you're fixing the problem before it becomes a pattern your potential guests see online.

Q. If a venue has responded professionally and thoughtfully to a negative review, how does that affect your likelihood of visiting?

87.40%

of guests say that a thoughtful response to a negative review increases their likelihood of visiting.



53.07% say it makes them slightly more likely to visit, and 34.33% say it makes them significantly more likely. A smaller share say it does not change their view 10.47% or that it makes little difference 2.13%.



Operator insight

How you respond to a bad review says more about your venue than the review itself.

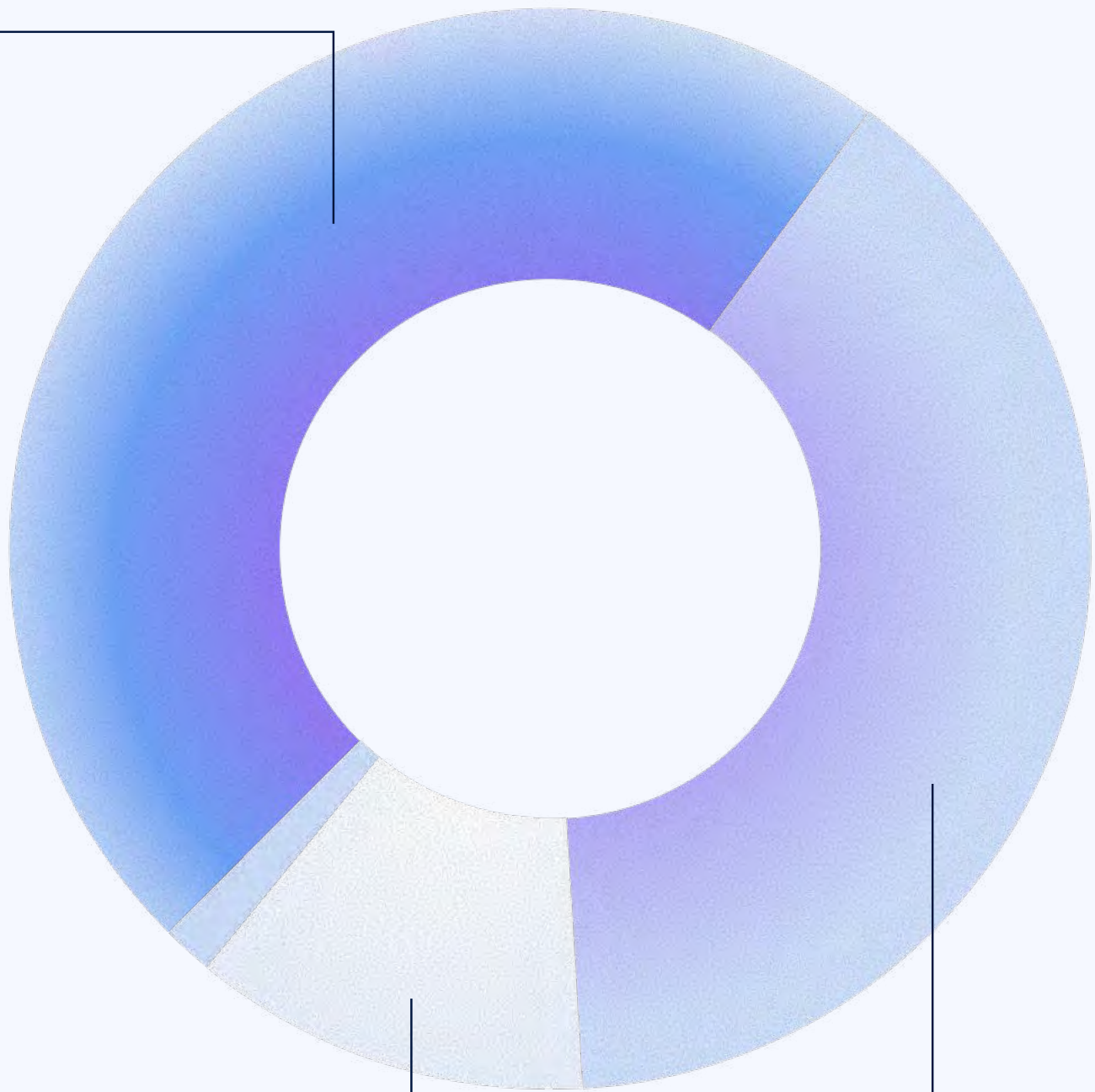
A thoughtful reply shows future guests that you take problems seriously, own your mistakes, and are the kind of business worth giving a shot. Done right, a negative review can work for you, not against you!

Keep responses prompt, human, and specific. “Thanks for flagging the long wait at 3pm last Saturday. We’ve added more staff to our busiest windows. We hope to see you again for a smoother experience!” is a trust builder.

Q. If you were aware that an attraction actively collected and acted on guest feedback, how would that affect your likelihood to visit or return?

47.60%

It would be a positive factor, but not the main reason I visit



11.87%

It wouldn't change my behavior — I assume venues do this anyway

39%

It would make me significantly more likely to visit

Most guests say that knowing a venue **collects and acts on feedback** would positively **influence their likelihood to visit or return.**

47.60% say it would be a positive factor, and 39% say it would make them significantly more likely to visit.

A smaller share say it would not change their behavior because they assume venues already do this 11.87% or because they do not think most venues act on feedback (1.53%).



Operator insight

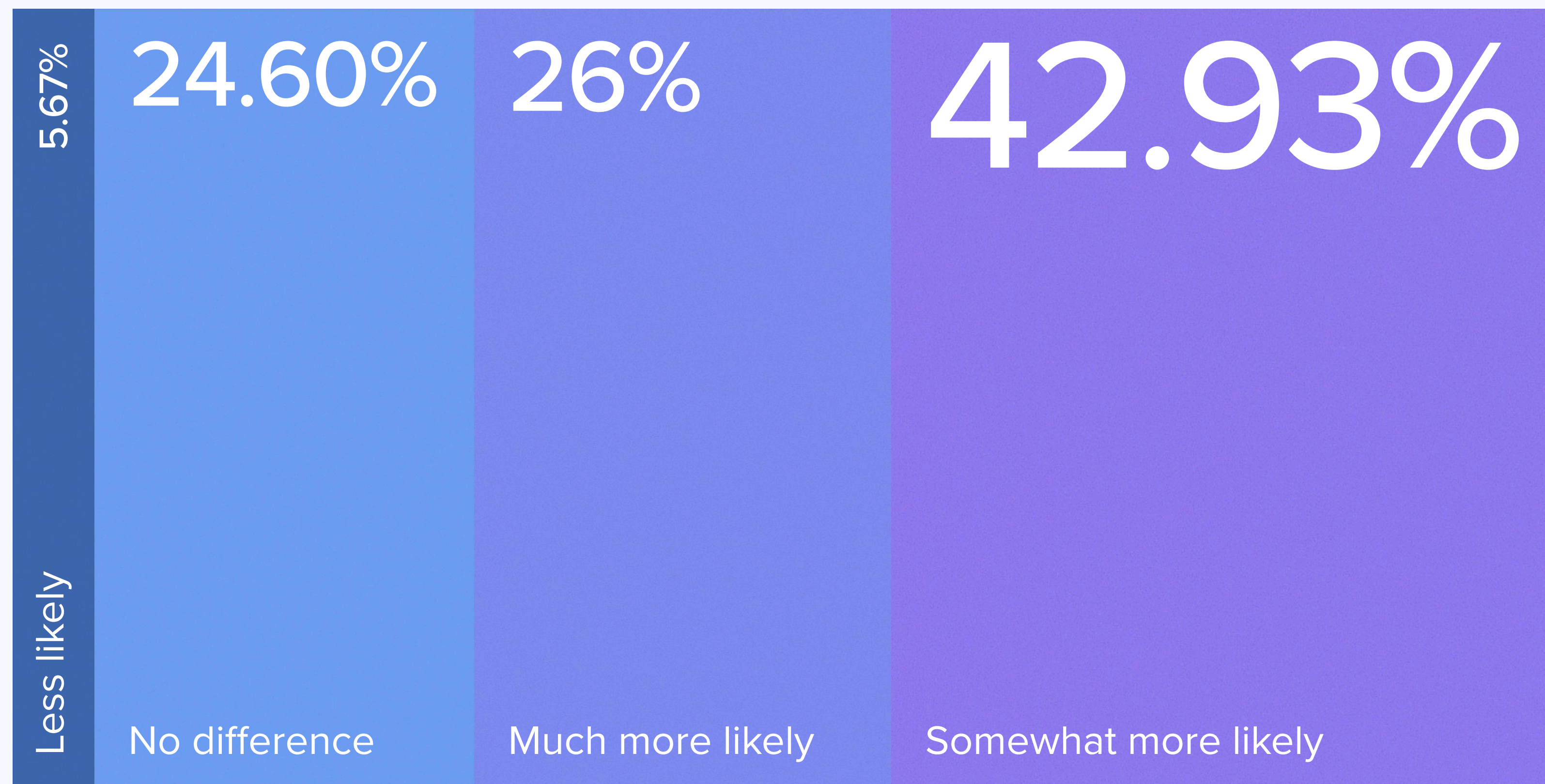
Guests expect venues to listen and improve, and they notice when you don't.

Making improvements is step one and telling guests about them is step two. The second step is the one most operators skip.

Turn your feedback wins into visible marketing moments. A simple sign next to the new slushie machine saying “Thanks for the suggestion, we listened!” does more than you'd think. It shows guests that their voice actually leads to change, and it positions your venue as one that treats feedback seriously.

ROLLER's Guest Surveys make this easy, capturing and analyzing feedback consistently so you can spot patterns early and make improvements worth talking about.

Q. If a venue improved its customer support using AI (e.g. faster responses, better help), how likely would you be to give the venue another chance after a poor experience?



26.80% of guests say they would be much more likely to give a venue another chance after a poor experience, and 42.93% say they would be somewhat more likely.

In total, nearly 70% of guests are positively influenced, while 24.60% say it would make no difference and 5.67% say they would be less likely.



Operator insight

Bad experiences happen, even at the best venues.

What matters is what comes next. A guest who flags a complaint on a Sunday night and hears back by Monday morning is far more likely to give you another chance. One who waits six days and gets bounced between emails? You've probably lost them for good.

AI changes the equation. It gives you faster response times, 24/7 coverage, and consistent quality, without adding headcount. That means fewer guests slipping away after a bad day, and more chances to win them back before they move on.

Turning guests into regulars

04.

In this section, we explore how often guests come back, why many aren't yet part of a membership or loyalty program, and how closing that gap can drive predictable, long-term revenue growth.

Real guests on why they would return to an attraction venue

“

The biggest reason I would return would be that there is a loyalty program or season passes available for my whole family.

“

Because I have a membership and there's too much to do in one day.

“

We are platinum members and go often. We get free games, discounts on bowling, and at the cafe.

“

It is close to where I live and I get loyalty points.

Learn

01 — How frequently guests return to the same venue

02 — What the gap between repeat visits and membership adoption means

03 — How loyalty programs influence booking decisions

04 — What guests expect from memberships and rewards



Key insights

Here's what stands out most about guest loyalty, and what operators might be leaving on the table:

01

There's a clear gap between visits and membership

41.20% of guests visit regularly without holding a membership

02

Loyalty programs influence choice at the point of decision

84.47% of guests say a loyalty program influences where they book

03

Guests need to see clear value before they'll sign up

47.93% of guests say saving money is the primary reason they'd purchase a membership or season pass

04

Personalization is expected (with transparency)

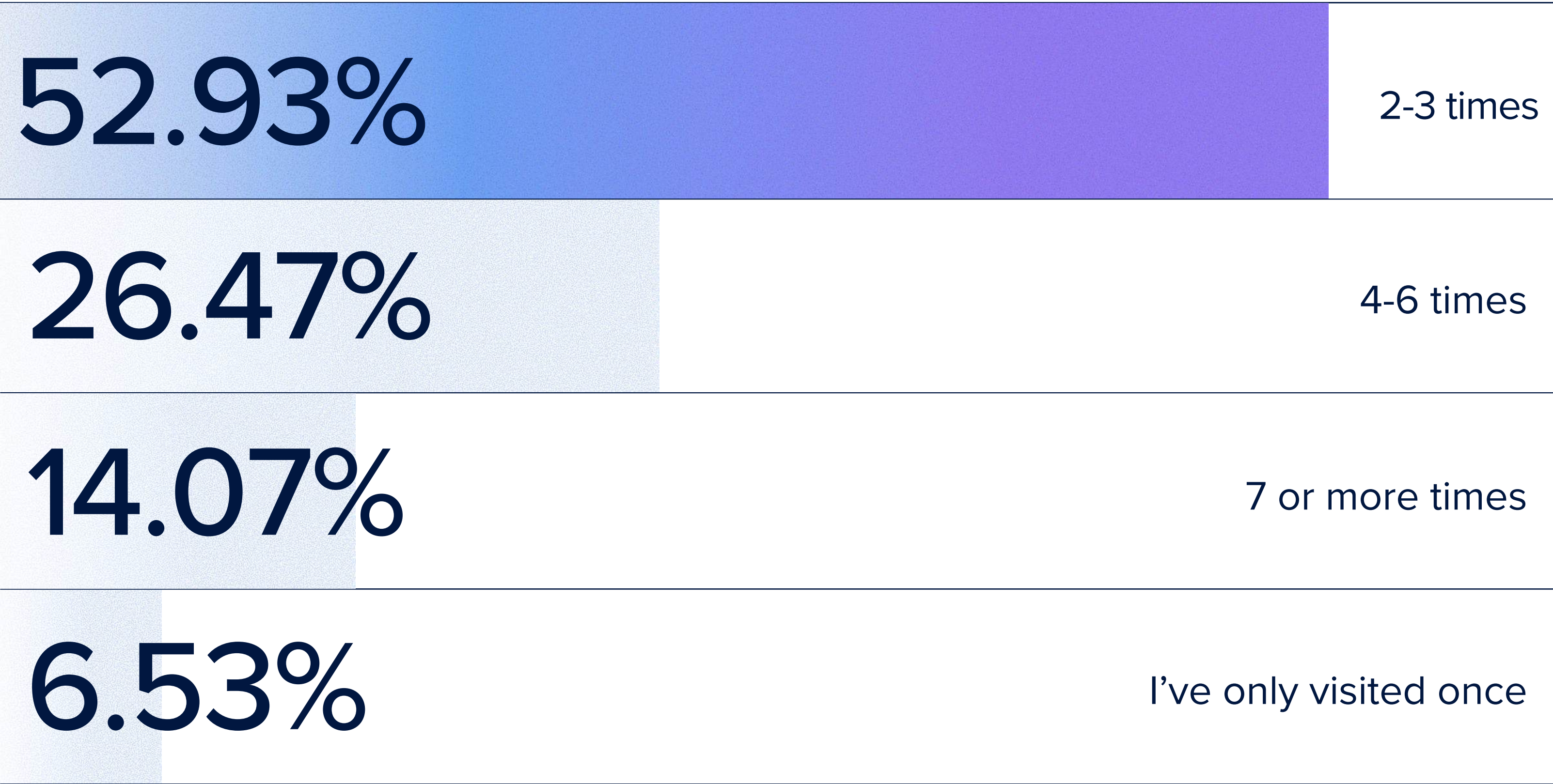
82.53% of guests are willing to share personal data in exchange for more personalized rewards

05

Simple, flexible models win out

41.53% of guests say unlimited visits for a fixed monthly or annual fee is the most appealing membership model

Q. How many times have you visited the same attraction venue in the past 12 months?



Most guests visit the same attraction **more than once each year.**

Over half 52.93% visit two to three times, while 26.47% visit four to six times and 14.07% visit seven or more times. A smaller share 6.53% say they have only visited once.

 Operator insight

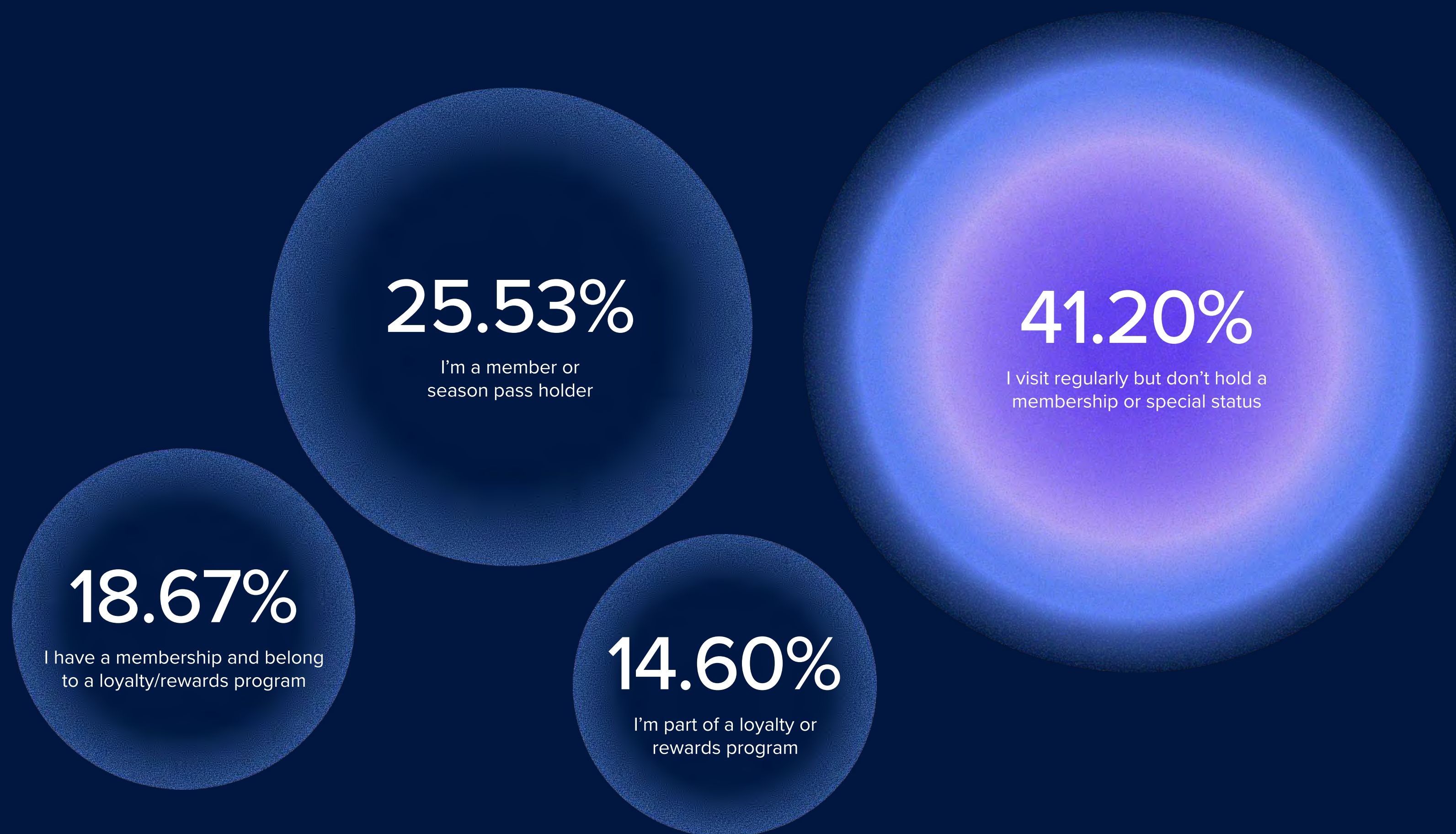
Guests are already coming back. That's the good news!

The question isn't whether they'll return, it's whether you're capturing that repeat behavior as structured revenue or treating each visit like a one-off.

93.47% of guests visit the same venue more than once a year, which means you've got repeat demand whether or not you're actively building for it.

The opportunity here is to think beyond one-off visits and focus on how to keep guests coming back regularly over time. This is where memberships and loyalty programs come into play.

Q. Which best describes your relationship with your most frequently visited attraction?



The largest group of guests 41.20% say they visit regularly but do not hold a membership or special status.

25.53% say they are a member or season pass holder, 18.67% say they have both a membership and belong to a loyalty or rewards program, and 14.60% say they are part of a loyalty or rewards program only.



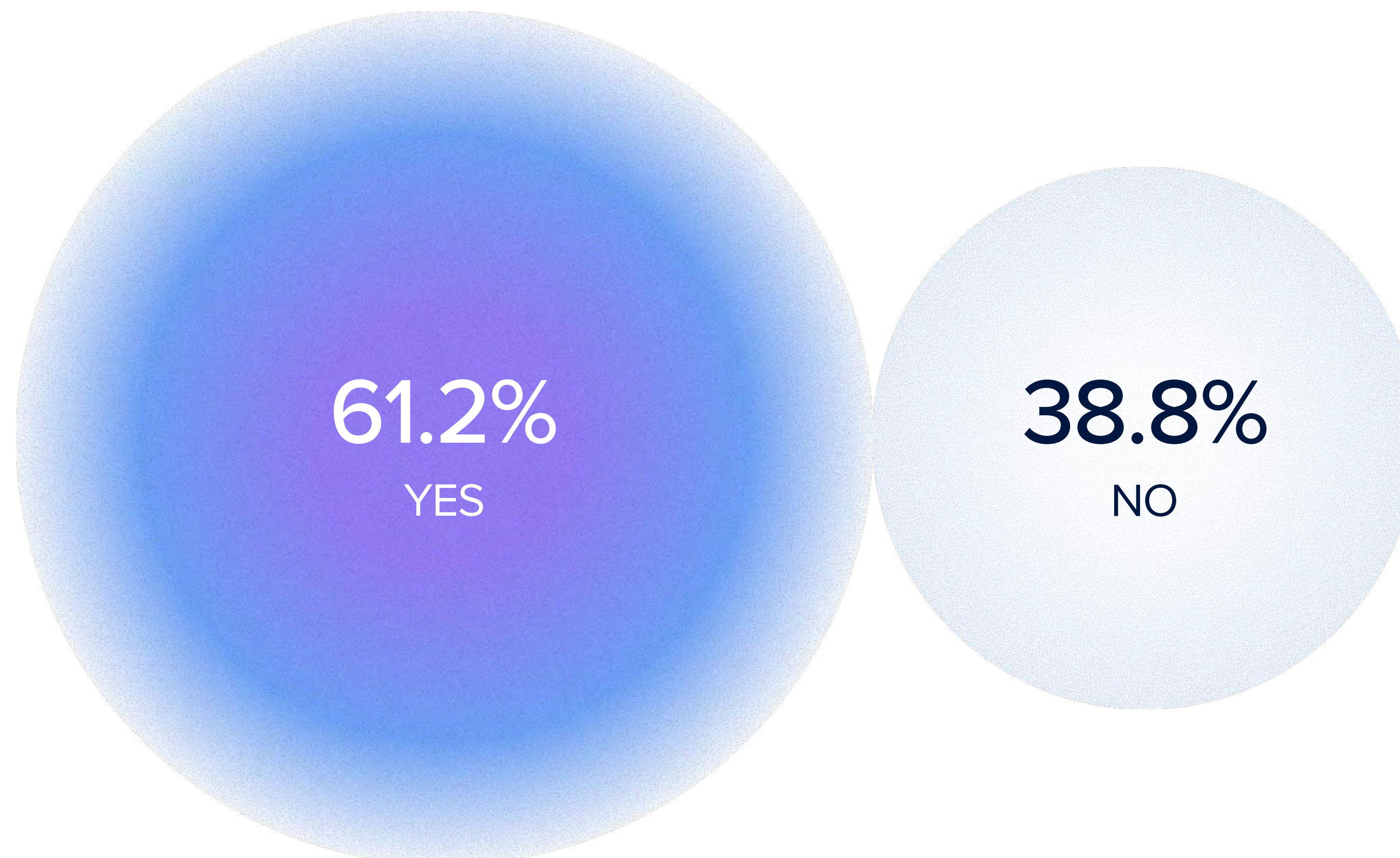
Operator insight

Think about the regulars at any bar or coffee shop.

The server knows their order, they have a preferred seat, they come in two or three times a week. Now imagine that same bar has no loyalty card, no tab system, no way to recognize those regulars beyond a smile. That's how a lot of attractions are operating right now.

Your frequent visitors are already behaving like members. They just don't have the card to prove it. Your job is to spot them and show them the math on how a membership saves them money or gives them something they already want. **Make signing up simple!**

Q. Do you currently hold a membership, season pass, or subscription with any attraction venue?



Most guests currently hold a membership with **at least one venue.**

32.67% say they hold memberships with multiple venues, and 28.53% say they hold one membership. 20.47% say they have had a membership in the past but do not currently hold one, while 18.33% say they have never had one.



Operator insight

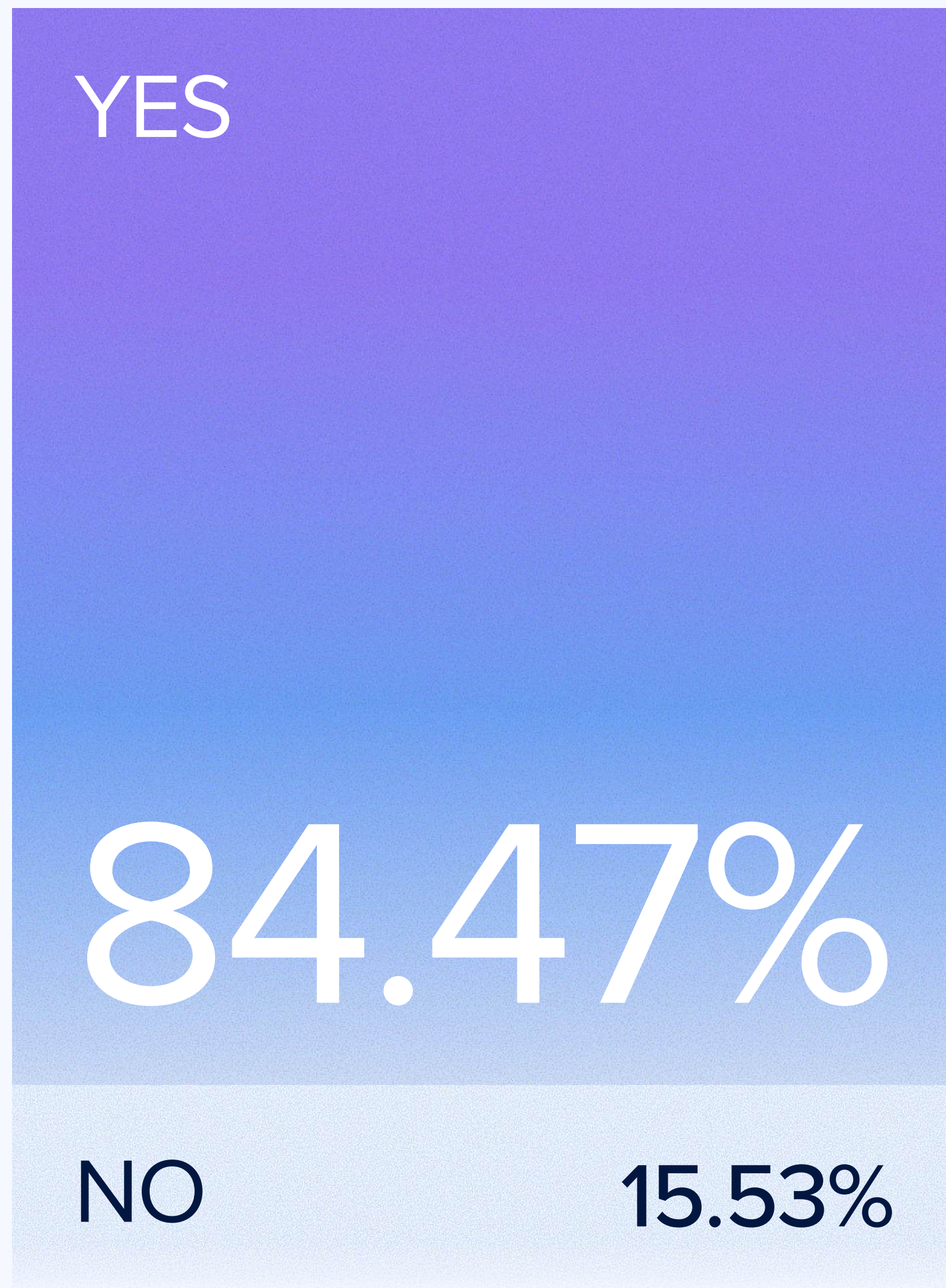
Many guests have memberships at multiple venues; they're collecting passes the way they collect streaming subscriptions.

If your venue isn't in that mix, it's not because they've hit their limit. It's because they haven't been given a good enough reason to add yours.

Then there's the 20.47% who used to hold a membership but let it lapse. These are guests who already said yes once. Something changed — maybe the value didn't feel worth it anymore, maybe they just forgot to renew.

Either way, they're a warmer audience than someone who's never signed up. You can run a simple “we miss you” email with a returning member offer to draw those guests back in.

Q. When choosing between two similar attractions, does the presence of a loyalty or rewards program influence where you book?



Most guests say **loyalty programs** influence their booking decision.

52.87% say a loyalty program is a bonus that would influence their choice, and 31.60% say they actively prefer venues that offer one. A smaller share say loyalty programs do not influence their decision 14.93% or that they are skeptical of them 0.60%.

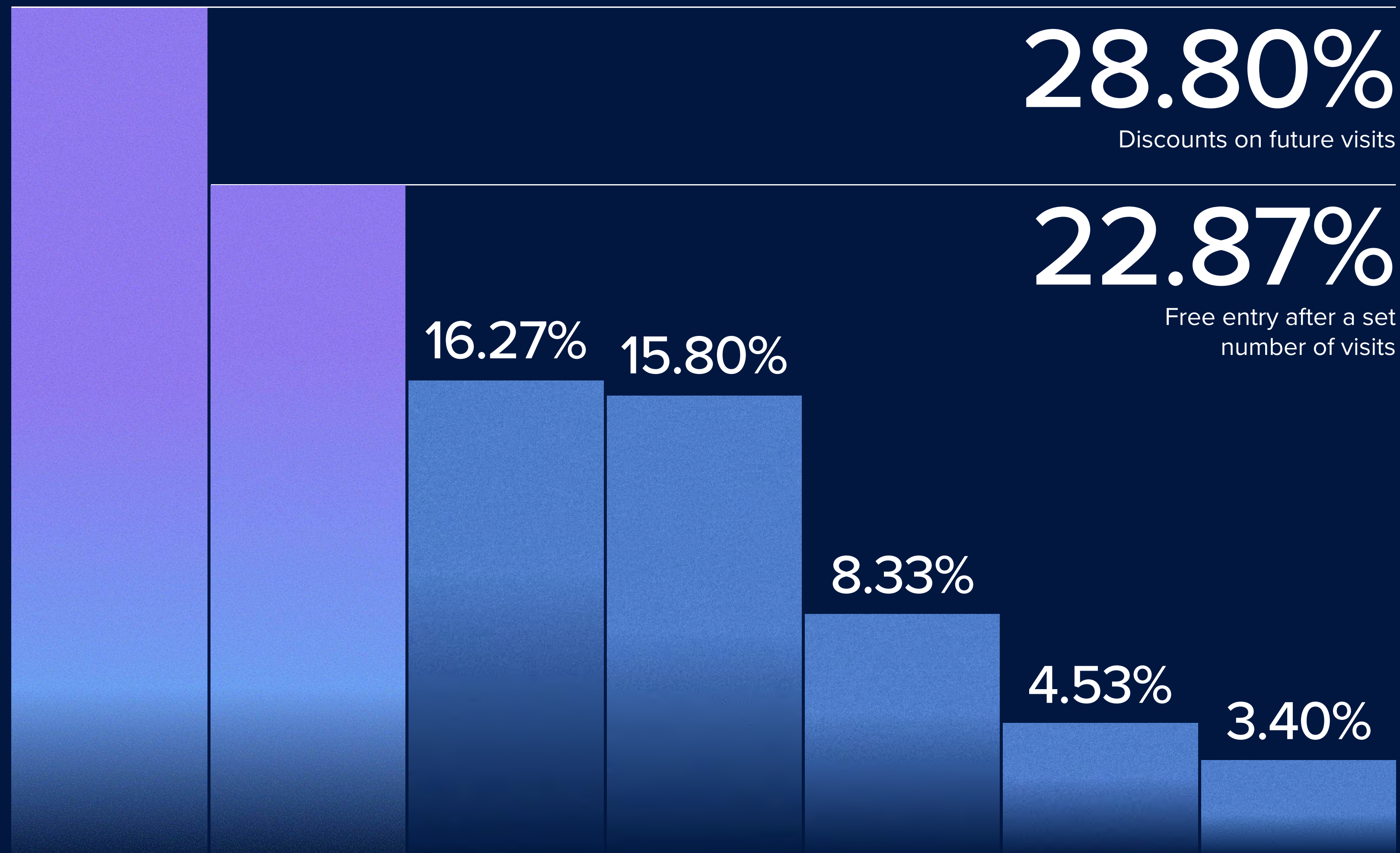


Operator insight

When two venues look similar on paper, a loyalty program is your tiebreaker.

Even a simple program can do the work. What matters is that the value is obvious. Whether that's free entry after ten visits, early access to new experiences, or a birthday perk, if a guest can see the benefit in five seconds, you've won the decision!

Q. How would you most prefer to be rewarded for your loyalty to an attraction?



Guests most commonly prefer discounts on future visits 28.80% and free entry after a set number of visits 22.87%.

Other preferences include early access to new experiences 16.27%, points that can be redeemed 15.80%, exclusive events 8.33%, birthday or anniversary perks 4.53%, and recognition from staff 3.40%.



Operator insight

There's a lot of power in being upfront. Guests want to see the value in your rewards program instantly.

The two things they overwhelmingly prefer are the simplest: discounts on future visits and free entry after a set number of visits. Both are tangible, both are easy to understand, and both turn repeat behavior into a visible win.

Q. What is the primary reason you would consider purchasing a membership or season pass?



Saving money is the strongest driver for membership purchase 47.93%, followed by perks 24.40% and convenience 20.13%. Very few guests say they wouldn't consider a membership at all.

To save money if I visit frequently	47.93%
For exclusive member perks and benefits	24.40%
For the convenience of not needing to book each time	20.13%
To support a venue I love	5.40%
I would not consider purchasing a membership	2.13%



Operator insight

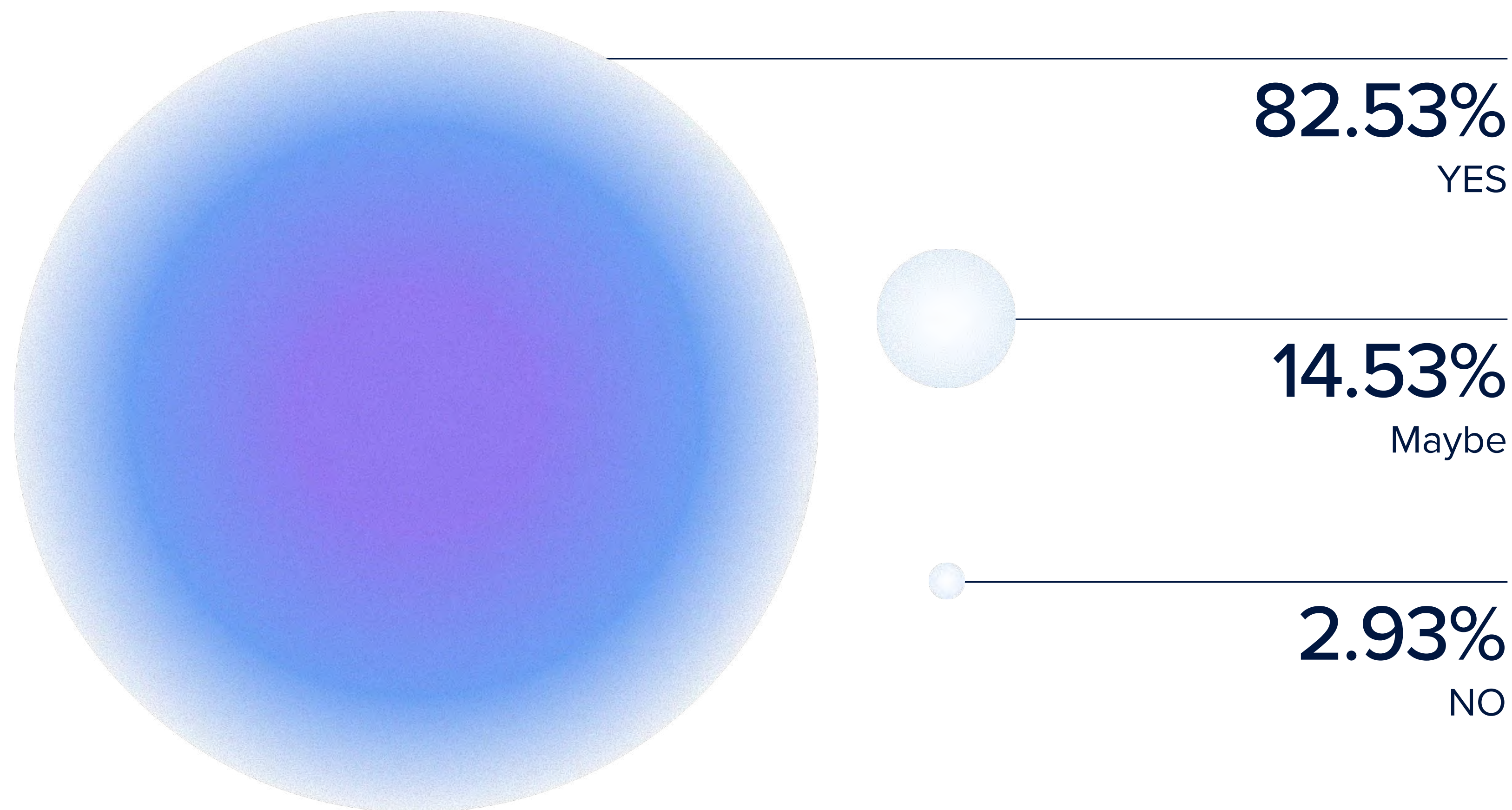
Guests sign up for memberships for one main reason: to save money on visits they were already going to make.

Perks and convenience help sweeten the deal, but the math has to work first.

Start by showing guests how much they would have saved already. A family that's visited three times in six months can look at a membership and see the savings they left on the table, turning "maybe someday" into "I'll sign up today." That's the moment you're after!

ROLLER tracks that visit history for you, so you can send personalized offers that make the savings obvious and the decision easy.

Q. Would you be willing to share your personal data in exchange for more personalized rewards?



Over 80% of guests are open to sharing their data in exchange for better, more personalized rewards, provided there is transparency around how that data is used.

43.13% say they would be willing, and 39.40% say they would be willing if they understand what data is being collected. 14.53% say they might be willing depending on the value of the rewards, while only 2.93% say they would not be willing.



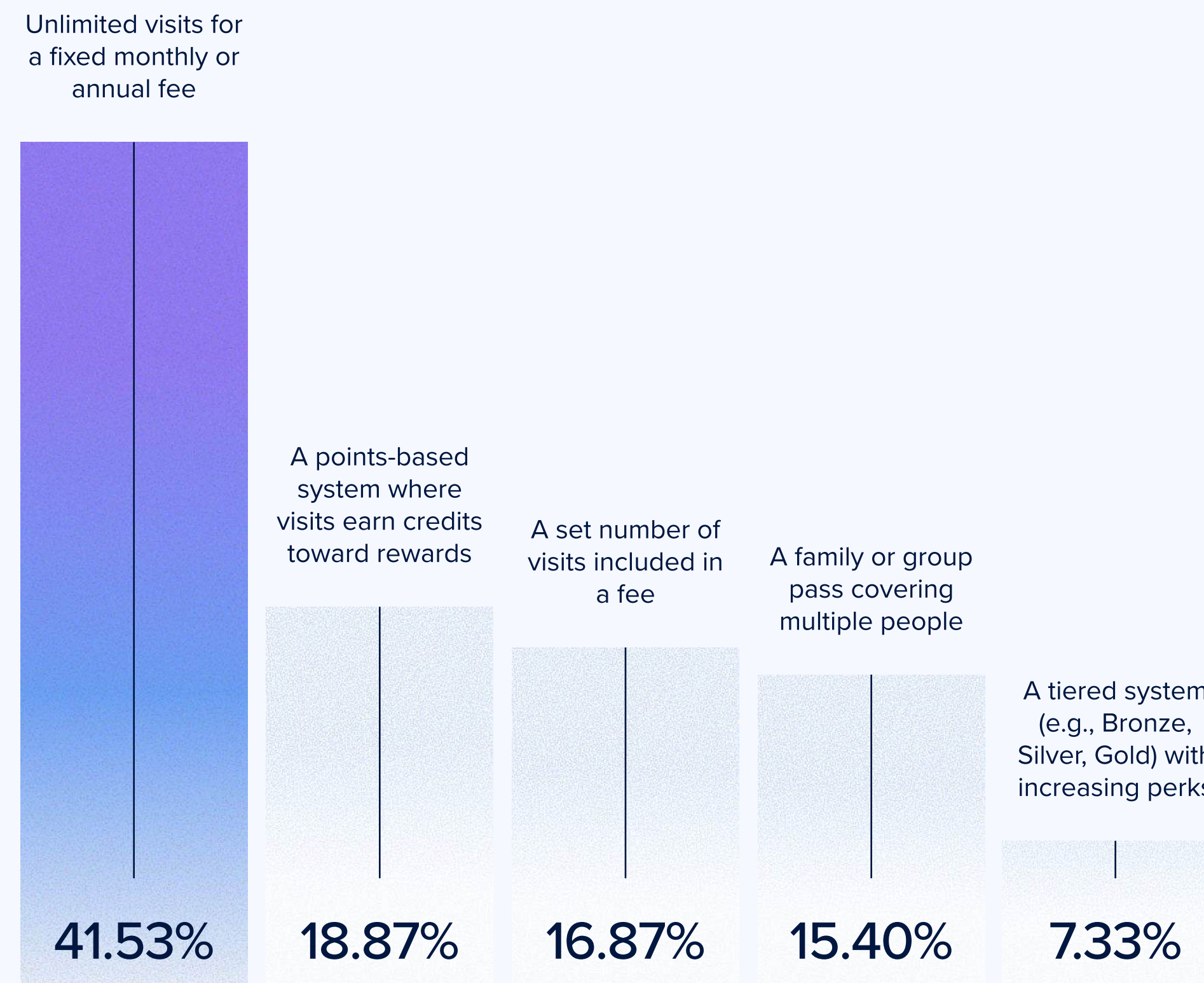
Operator insight

Guests will trade their data for a better experience, but only if they understand the deal.

Trust breaks down when collection feels opaque or when the benefits aren't obvious. Be upfront. Tell them what you collect, why you collect it, and exactly what they get in return ("sign up for birthday rewards, a free game on us, and first access to new experiences"). Don't bury it in a privacy policy. Make the trade so clear it feels like a no-brainer.

Q. Which membership or access model appeals to you most?

The most appealing membership model is unlimited visits for a fixed fee 41.53%.



Other options include a points-based system 18.87%, a set number of visits 16.87%, and a family or group pass 15.40%. A smaller share prefer a tiered system with increasing perks 7.33%.



Operator insight

Guests don't want to solve a puzzle to understand your membership. They want to know what they get and what it costs, fast.

A good rule of thumb is to offer no more than three options. Here's why: given two similar options, guests often pick the cheapest. But with three choices, the psychology shifts. The most expensive option sets an aspirational high point, making the lowest-priced option look a bit less appealing — and suddenly that middle tier looks like the best value.

Add a “Best Value” tag or a slightly different design to make it stand out, and you've got a subtle nudge that can naturally increase your basket size.

The future of discovery and guest expectations

05.

This section explores how guest behavior is already shifting, and how AI is changing the way guests search, decide, and engage with attractions. Understanding these shifts now can help you stay visible, keep up with what guests expect, and plan for what's next.

Real guests on how they feel about using AI tools

“
Positive. Especially if it can bring together useful info like categories, locations, websites, and reviews in one place. It can be a really helpful tool, and it is getting better at it.

“
Happy to use it, typically would use it to build a shortlist of places to visit and then we can do some more research into those and make a decision.

“
I already use it! When I am visiting a city, I will use it to list the top FECs, or restaurants, etc.

Learn

01 — How discovery is evolving across search, social, and AI

02 — How comfortable guests already are with AI-powered booking

03 — What builds (and breaks) trust in AI interactions

04 — What guests expect from personalization and data use



Key insights

Here's how guest behavior is evolving, and what it means for how they discover, choose, and engage with attractions:

01

Discovery is expanding across multiple channels

44.33% of guests start their research on a search engine when looking for a new attraction

02

AI adoption is already underway

54.07% of guests have already used an AI assistant to help plan or book a visit

03

Guests expect speed and flexibility from AI interactions

81.60% of guests expect a response from an AI chat function within a minute

04

Trust is the biggest barrier to AI adoption

31.33% of guests say incorrect or misleading information is their biggest concern about AI

05

Guests expect a balance between AI and human support

84% of guests say it's very or extremely important that an AI assistant can escalate them to a human staff member

Q. When researching a new attraction to visit, where do you go first?

Search engines remain the primary starting point for discovery, used by 44.33% of guests, followed by social media at 28.87%. Review platforms still play a role 14.53%, while AI tools are beginning to emerge at 7.73%.

A search engine (Google, Bing, etc.)	44.33%
Social media (Instagram, TikTok, Facebook, etc.)	28.87%
A review platform (TripAdvisor, Google Reviews, Yelp)	14.53%
An AI assistant (ChatGPT, Gemini, Perplexity, etc.)	7.73%
I ask friends or family directly	4.53%

💡

Operator insight

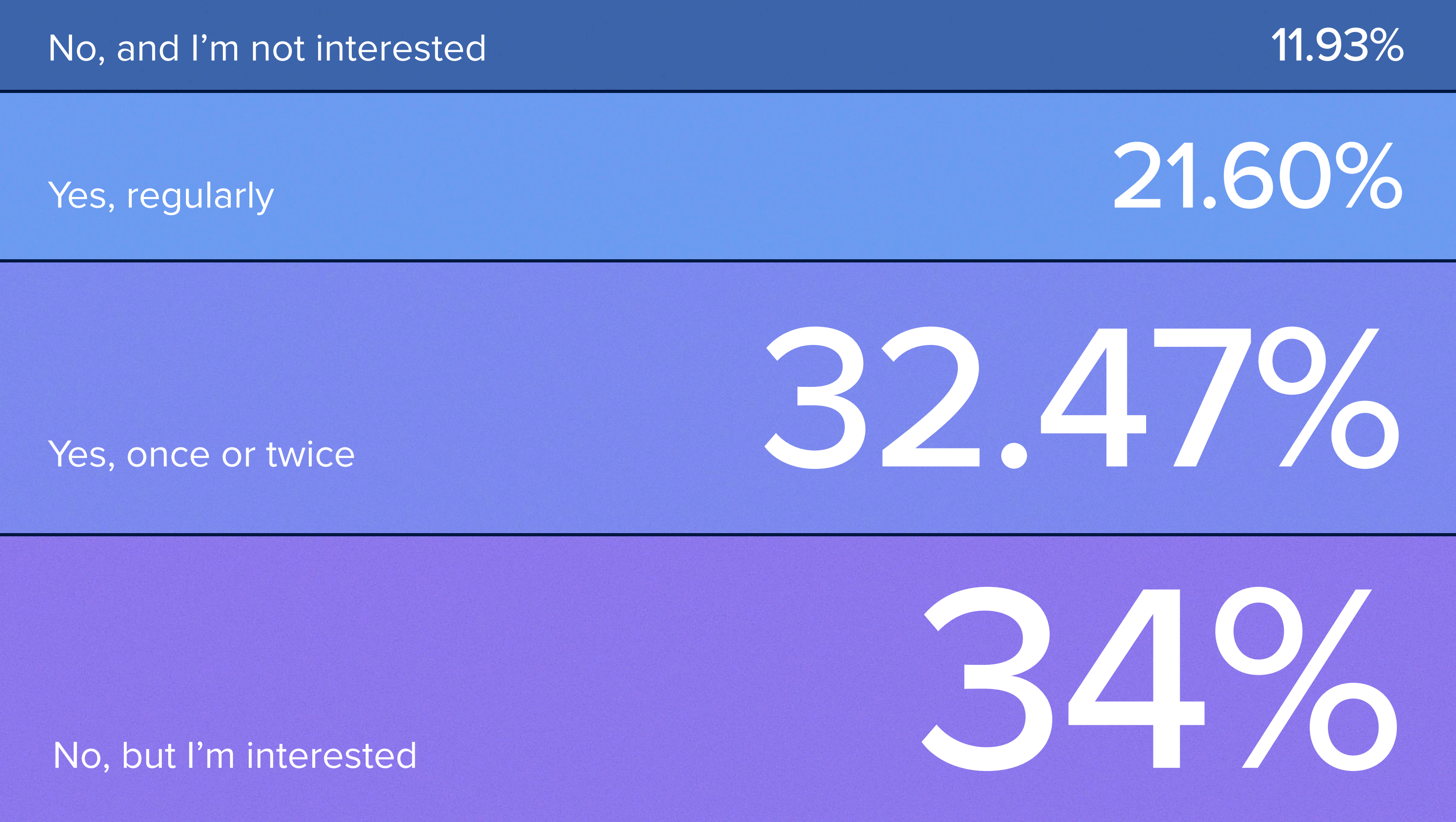
Discovery isn't linear anymore. Guests are jumping between Google, Instagram, TikTok, review platforms, and now AI assistants and AI-powered search to decide where to spend their time.

If your information isn't consistent across all those surfaces, you're invisible on at least some of them.

Think about what happened during the early .com era: the operators who showed up first with clear information and easy booking experiences had a massive advantage over everyone still catching up.

The same thing is happening now with AI. The venues that make themselves easy to find, accurate across platforms, and simple to understand will get surfaced first. The rest will wonder why the demand is going somewhere else.

Q. Have you ever used an AI assistant (e.g. chatbot or voice assistant) to help plan or book a visit to an attraction?



AI usage is already well established, with 21.60% of guests saying they use AI assistants regularly and 32.47% saying they have used them once or twice.

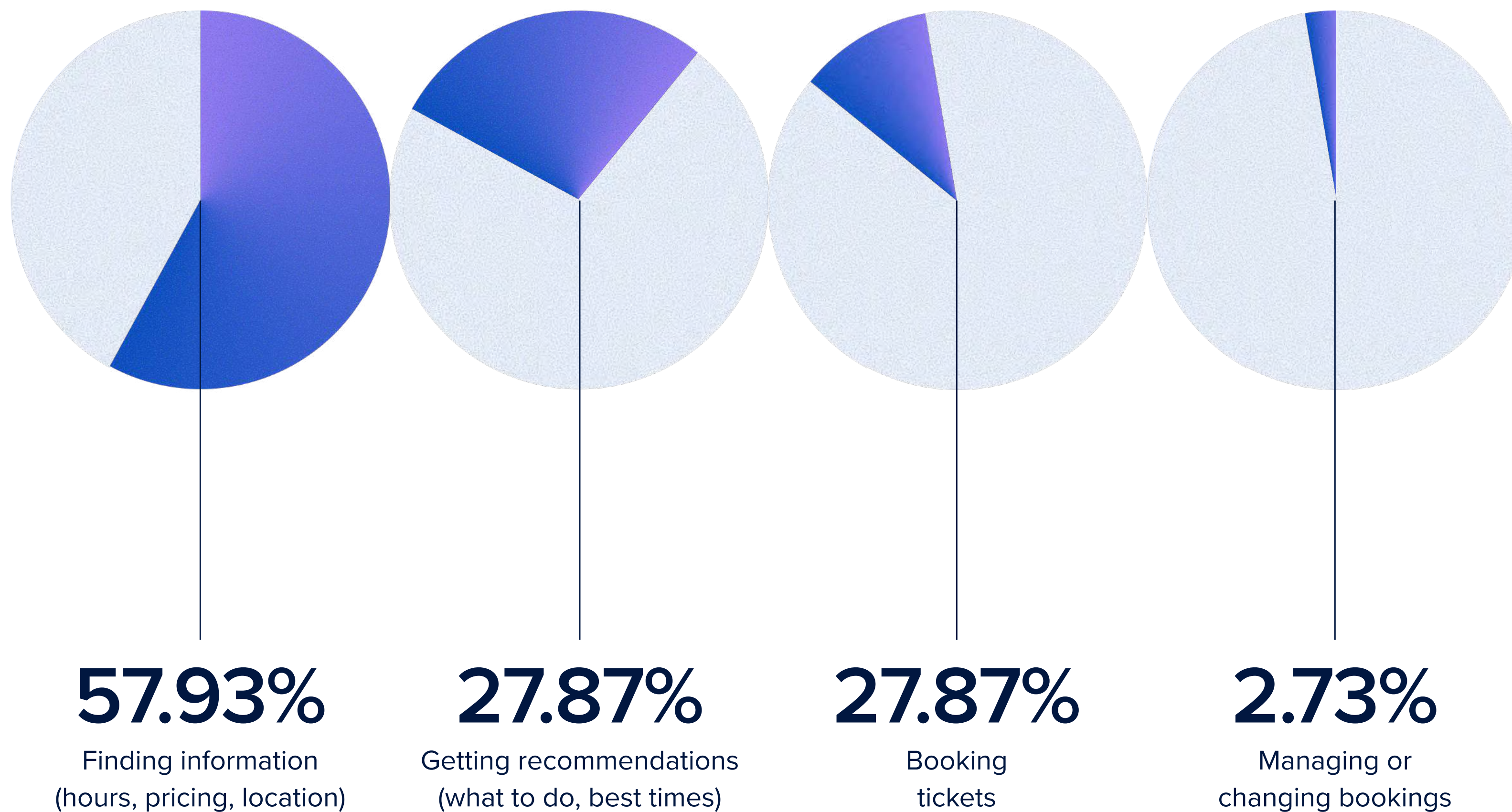
A further 34% of guests say they have not used AI yet but are interested, while only 11.93% say they are not interested.

 Operator insight

The AI conversation has moved past “will guests use this?” Most already do, and the ones who haven't yet are waiting for the right experience to nudge them across the line.

That changes the question for operators. It's no longer about whether AI belongs in your guest experience, it's how fast you can get ahead of the curve. The operators who move first will set the bar for everyone else!

Q. What would you most likely use an AI assistant for?



57.93% of guests say they would use an AI assistant to find information such as hours, pricing, or location. 27.87% of guests say they would use it to get recommendations, while only 11.47% would use it to book tickets and just 2.73% to manage or change bookings.



Operator insight

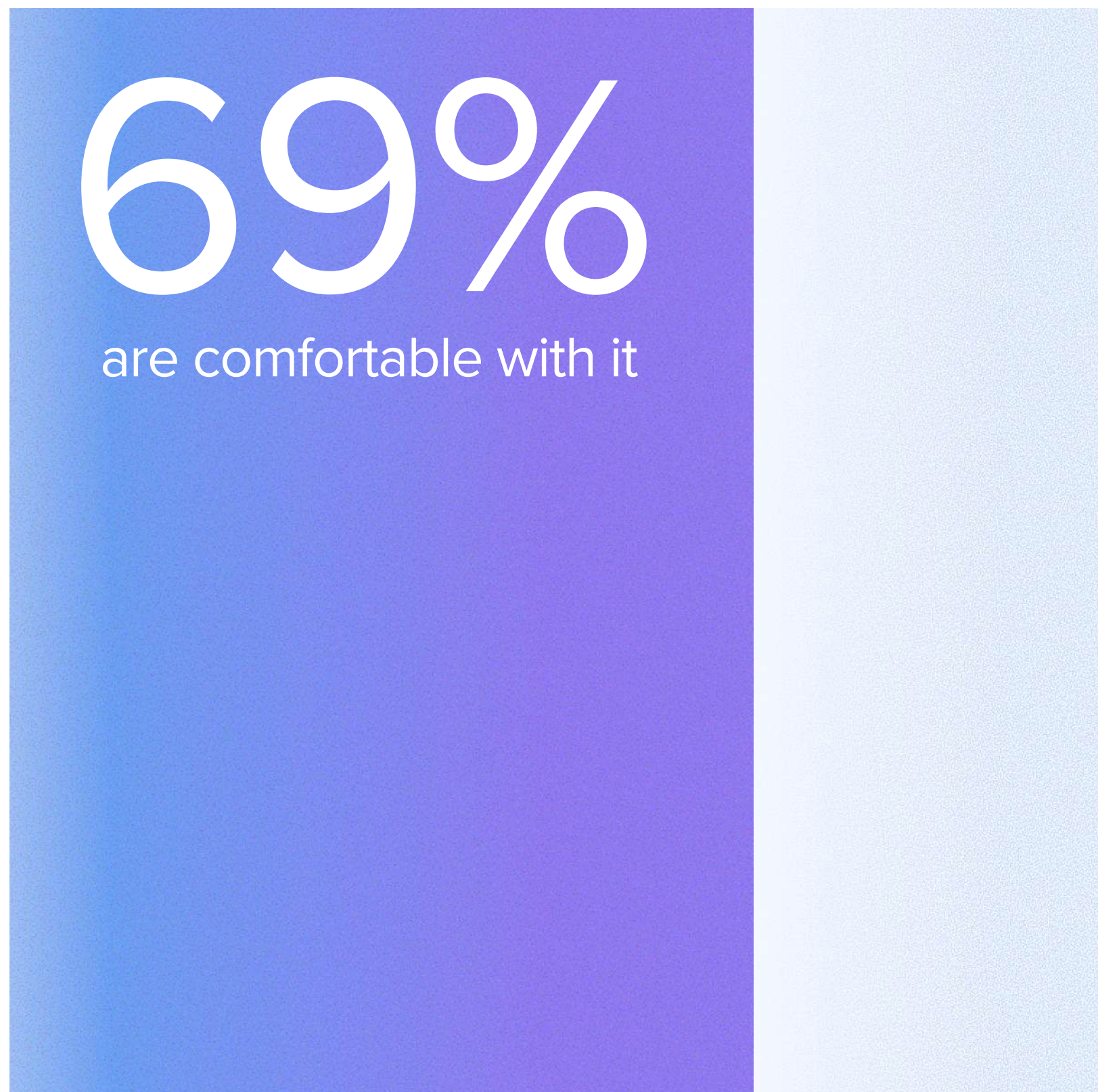
Guests are using AI to get answers before they commit.

That's a huge opportunity at the discovery stage. If your AI experience can answer “when are you open?”, “how much does it cost?”, and “is this worth my Saturday?” clearly and quickly, you've essentially got a 24/7 information desk working for you.

But there's an awareness gap on the booking side. Most guests don't yet expect AI to handle the actual transaction, which is why the numbers drop off for booking and managing tickets. That expectation will shift fast as the experience improves.

Q. How comfortable would you feel using an AI assistant to book tickets for an attraction?

Most guests **feel comfortable using AI** to book tickets for an attraction.



30.60% of guests say they feel very comfortable, and a further 38.40% say they feel somewhat comfortable. 17.60% of guests feel neutral, while only a small minority express discomfort, with 9.13% feeling somewhat uncomfortable and 4.27% very uncomfortable.



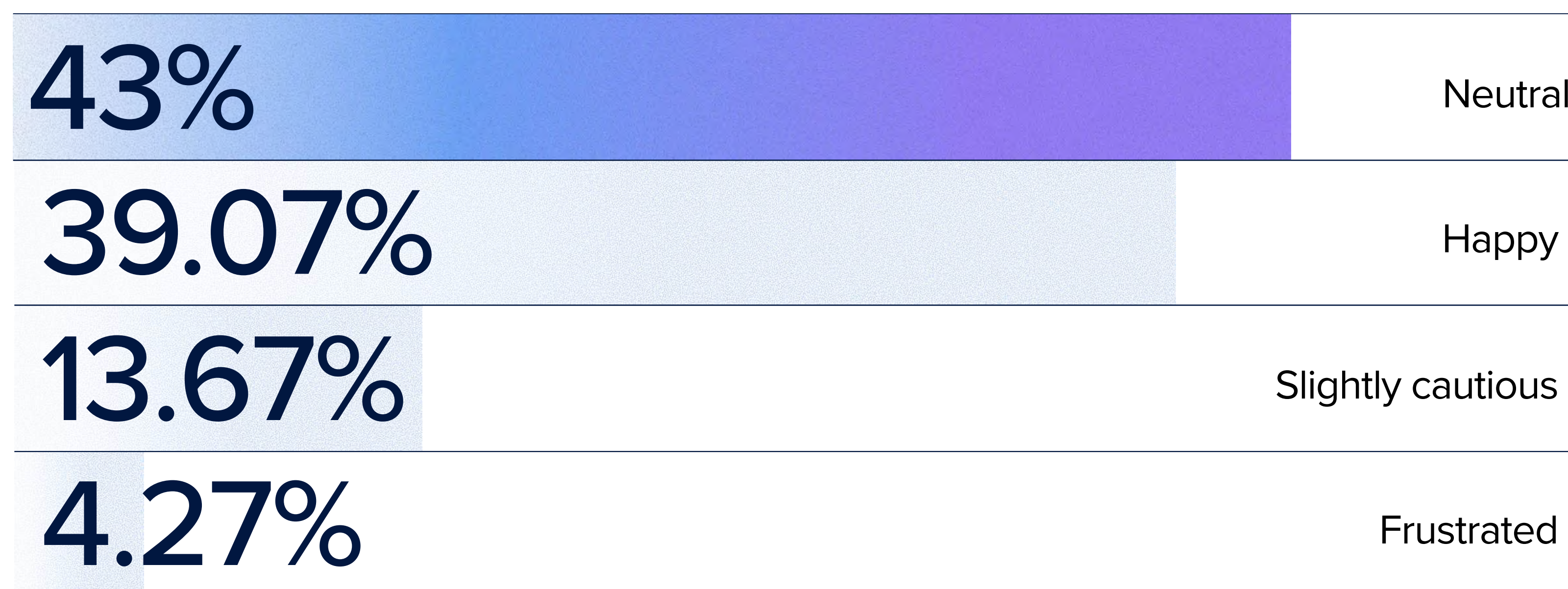
Operator insight

Guests are already using AI and their comfort levels are even higher than the adoption rates.

That tells you something important: the demand is there before the supply.

Many venues are still debating whether to add AI to their booking flow. Meanwhile, nearly 70% of their guests are already saying “yeah, I’d use that.” We know there’s demand. The real question is who will meet it first!

Q. If you searched for an attraction and the first result was an AI-generated summary rather than the venue's own website, how would you feel?



82.07% of guests say they would use an **AI-generated summary** in some way.

43% say they would use it and then check the venue's website, and 39.07% say they would be happy to use it because it is quicker. A smaller share say they would feel cautious and want to verify the information 13.67% or would prefer to go directly to the source 4.27%.



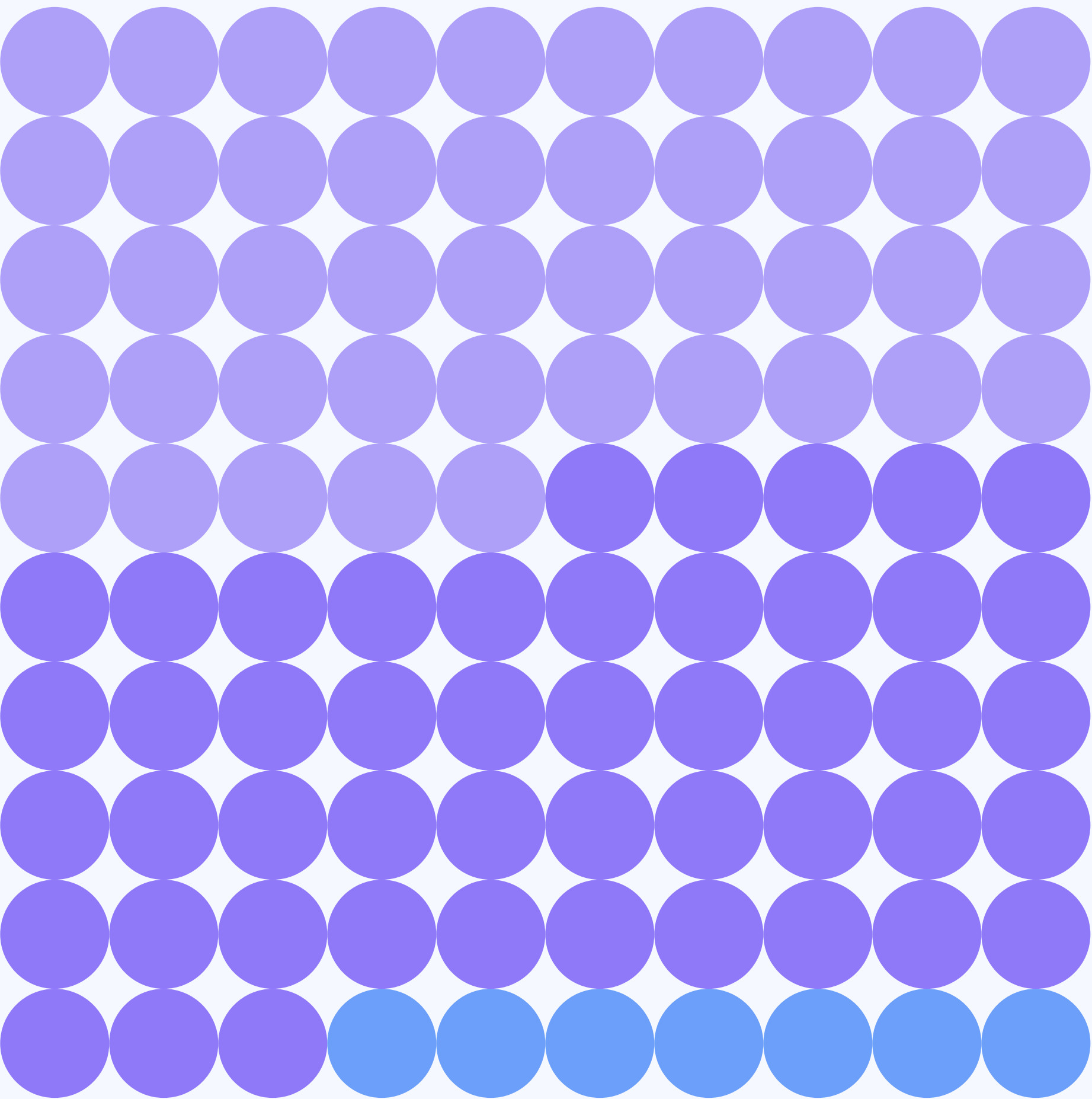
Operator insight

The AI summary is often the only thing guests see before they decide.

It's pulling from your website, your listings, and your reviews. If the underlying information is wrong, outdated, or inconsistent, the summary will be wrong too. And you won't know it happened because the booking never shows up.

That means your digital hygiene matters more than ever. Your hours, pricing, activities, and address all need to be accurate across every platform AI pulls from.

Q. Which format would you prefer when interacting with an AI assistant?



● Text chat (typing)

45%

● A mix of both

47.60%

● Voice (speaking)

7.40%

Guests show a clear preference for **flexible interaction formats** when using AI.

47.60% of guests prefer a mix of text and voice, while 45% of guests prefer text chat alone. Only a small share 7.40% prefer voice-only interactions.

 Operator insight

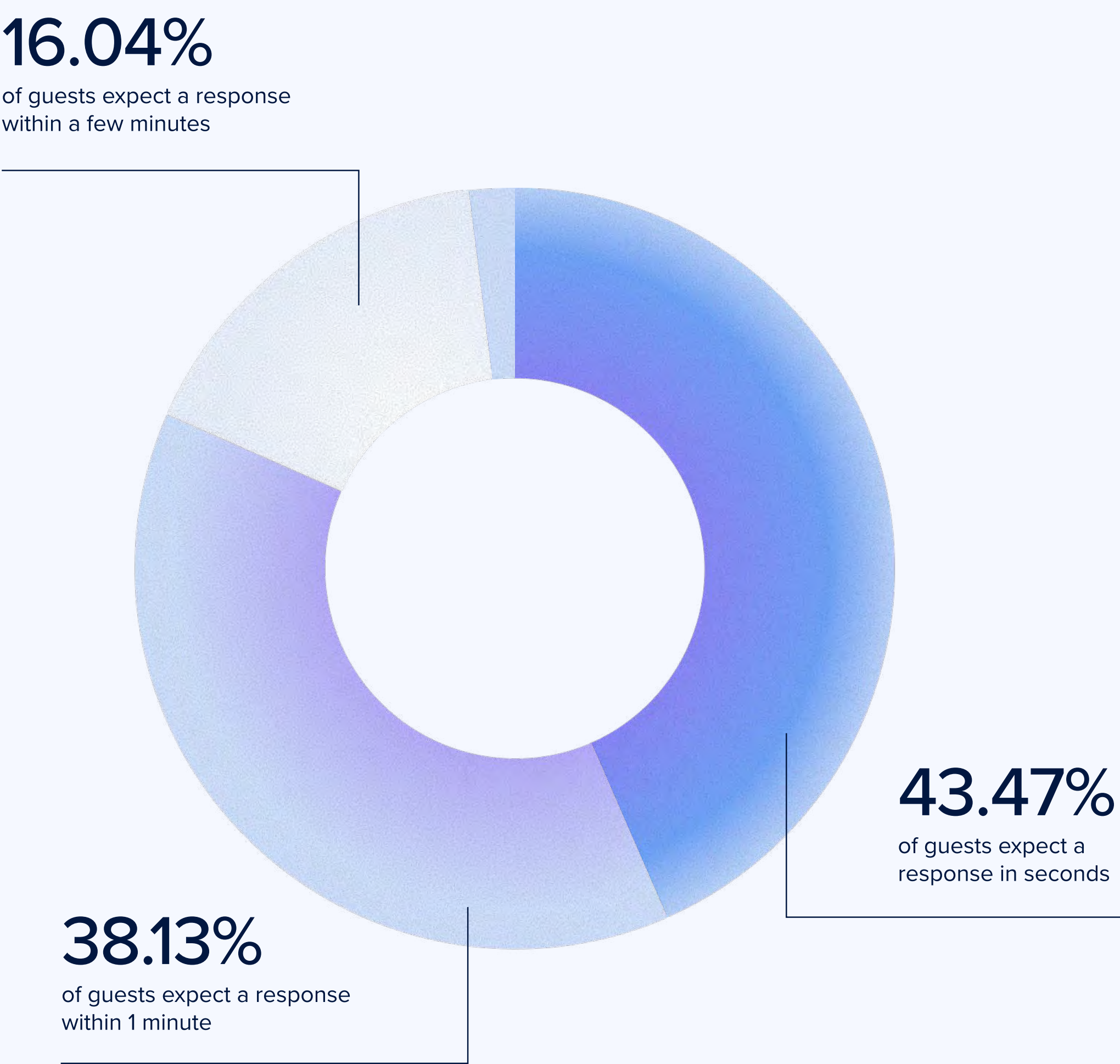
Guests want flexibility.

They want to type a quick message at the office, talk to their device while cooking dinner, and switch between both depending on what's convenient. Forcing them into one format or the other adds friction where there should be none.

The takeaway for operators isn't to choose chat or voice, it's to pick AI tools that support both natively. Whichever format a guest reaches for in the moment, the experience should feel natural, responsive, and quick. That's the bar now.

Q. How long would you expect to wait for a response from an attraction’s chat function or chatbot?

Over 80% of guests **expect near-immediate replies**, while only 2% say they do not mind waiting longer.



43.47% of guests expect a response instantly (within seconds), and a further 38.13% expect a response within one minute.

Instantly (within seconds)	43.47%
Within 1 minute	38.13%
Within a few minutes	16.04%
I don't mind waiting longer	2%

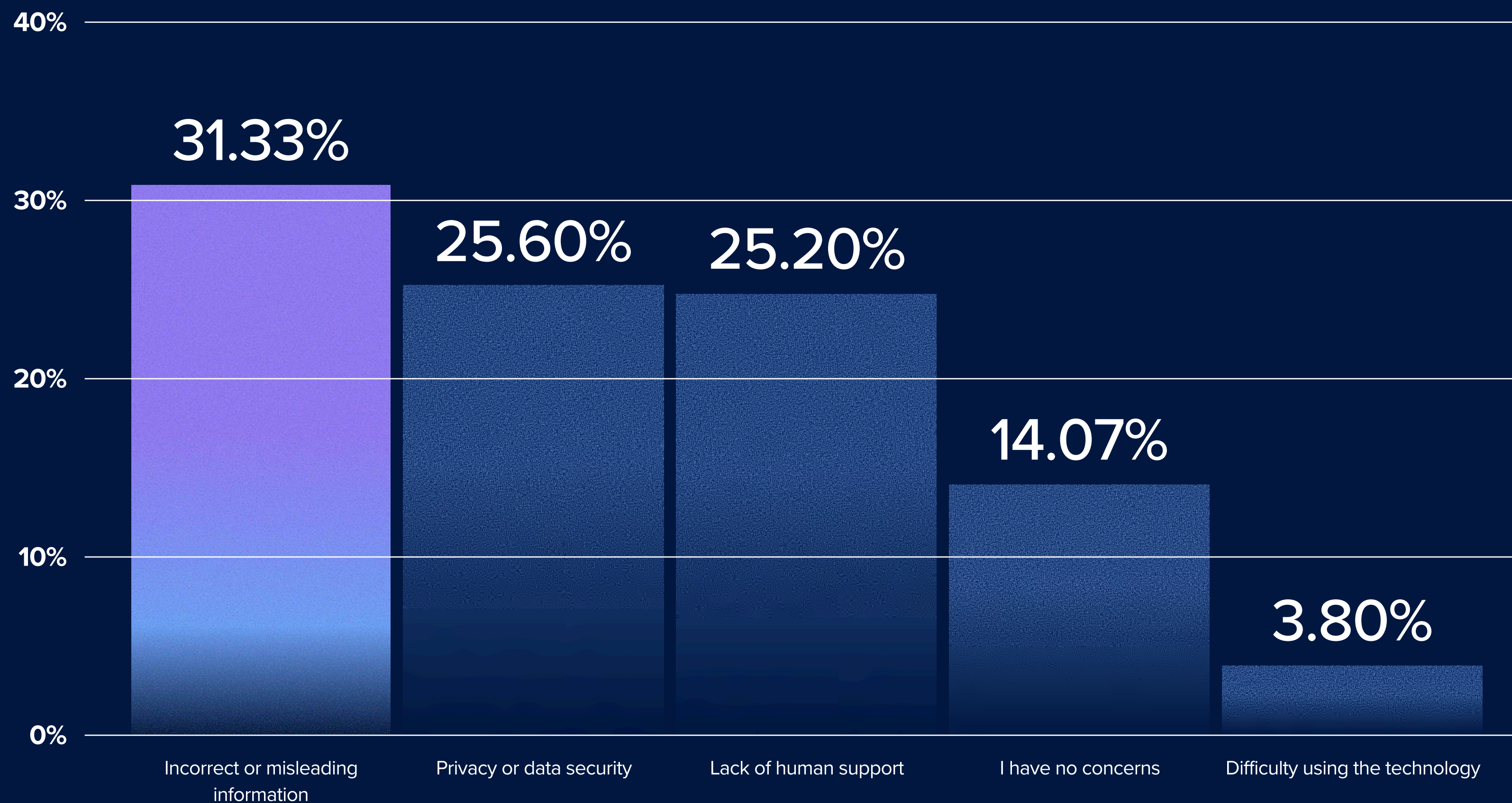
 Operator insight

Guests are used to instant responses in other areas of their lives, and they now expect the same from your venue.

If a guest hits your chat at 9pm on a Friday asking “are you open tomorrow?” and gets a reply three minutes later, you might think that's pretty good. But in their head, they've already Googled it, found a competitor, and moved on.

AI chat tools are built for exactly this: instant replies, around the clock, without your team needing to be glued to a screen.

Q. What is your biggest concern about using an AI assistant for making a booking or gathering information?



31.33% of guests say their biggest concern about using an AI assistant is incorrect or misleading information, while 25.60% are concerned about privacy or data security and 25.20% about a lack of human support. Only 14.07% of guests say they have no concerns.



Operator insight

Trust is the biggest barrier to AI adoption.

Guests need to feel confident that the information they receive is accurate, secure, and backed by real support.

This is where the quality of your AI setup matters. A generic chatbot pulling from outdated FAQs won't cut it. But an AI assistant that's built into your booking platform can pull details straight from the source and give guests accurate, real-time answers every time.

Q. How important is it that an AI assistant can escalate you to a human staff member if needed?



49.20% of guests say it is extremely important that an AI assistant can escalate them to a human staff member if needed, and a further 34.80% say it is very important. In total, more than 80% of guests expect a clear path to human support.

Extremely important	49.20%
Very important	34.80%
Moderately important	11.73%
Slightly important	2.47%
Not important	1.80%

 Operator insight

Guests want AI to be fast and easy, but they also want to know a real person is there if they need one.

This is especially important for building trust. They're more comfortable engaging with AI when they know they won't reach a dead end.

Build AI into your operations as the first line, not the only line. Make the handoff to a staff member obvious and frictionless, so guests never feel trapped in a loop with a bot that can't help them. Done right, this actually increases AI usage because when guests know they can reach a human when they need one, they're more willing to try AI in the first place.

Conclusion

06.

Key takeaways

01

Experience is the biggest driver of visits

Guests choose where to go, and whether to return, based on the quality of the experience above all else. It consistently outperforms factors like price, convenience, and rewards, making it the single biggest factor in whether guests visit, and whether they come back.

ROLLER helps operators deliver consistently great experiences by streamlining operations and freeing your team to focus on the guests in front of them.

56.40% of guests return because the venue delivers a great experience

61.80% of guests recommend venues based on experience

02

Clarity and confidence drive decisions

Even a great venue can lose guests who experience friction during the research and booking process. When information is unclear or hard to find, guests move on.

Platforms like ROLLER help reduce friction and improve conversion by making it easier for guests to understand and complete their booking.

53.20% of guests have decided not to visit a venue due to a lack of confidence in its online presence

85.80% of guests expect to find key information on a venue's website within 60 seconds

03

Trust is built through reviews and responses

Guests rely heavily on reviews to evaluate venues, but they also look at how feedback is handled. Thoughtful responses and visible improvements build confidence, and can tip a guest toward booking.

ROLLER makes it easier to capture guest feedback in real time, so you can identify issues early and continuously improve the experience.

85.93% of guests require at least a 3.5-star rating to consider a venue

86.60% of guests are more likely to visit when a venue actively collects and acts on feedback

04

Loyalty and membership programs are underutilized

Repeat visitation is already a strong behavior, but many guests are not part of structured programs. This is a missed opportunity to turn regular visitors into committed members.

ROLLER helps operators identify repeat visitors and convert them into members through targeted offers and clear value messaging.

41.20% of guests visit attractions regularly without a membership

84.47% of guests say loyalty programs influence their booking decision

05

AI is reshaping how guests discover, choose, and book

Guests are beginning to adopt AI tools across the entire journey, from discovery to booking and support.

ROLLER is investing in AI to help operators move faster, make smarter decisions, and automate routine work.

69% of guests feel comfortable using AI to book tickets

75.53% of guests would choose another venue if they couldn't get through to yours.

Ready to grow your business? We're here to chat!

You've seen what matters most to today's guests, what they expect, what disappoints them, and what keeps them coming back. Now it's time to put that knowledge to work!

ROLLER's all-in-one platform is built to help you meet rising guest expectations while simplifying your operations. Whether you're running a single venue or managing multiple locations, ROLLER gives you the tools to create unforgettable experiences, streamline operations, and boost revenue.

Ready to exceed guest expectations?

Reach out to our team by scanning the QR code or [visit us online](#).



For even more insights, you can download ROLLER's [2026 Attraction Industry Benchmark Report](#).

It's packed with data from thousands of venues worldwide and will supercharge your growth strategy.



