



# Thinkwell's 6th Annual Guest Experience Trend Report

## ARTIFICIAL INTELLIGENCE

What you **watch**.

What you **buy**.

Even what you write in a **text**.



Artificial Intelligence (A.I.) is already deeply ingrained in the choices we make as consumers... assuming those choices can still be considered ours?

This year, Thinkwell's Guest Experience Trend Report looks at A.I. and how it can affect, adapt, and improve our visits to our favorite places. While A.I. itself will continue to evolve in many remarkable and unforeseen ways, people DO have a choice over how and where this technology is applied. There are many big ideas for how A.I. could transform the guest experience, but it will only become reality if guests choose that experience for themselves.

Because no matter how intelligent, A.I. only has as much control over our decisions as we collectively allow it to have.

# THE A.I. REVOLUTION IS ALREADY HERE.



53%

own at least one smart home device

COMFYLIVING



36%

have used a ride-hailing service such as Uber or Lyft

PEW RESEARCH CENTER



10%

of mobile responses in Gmail are assisted by Smart Reply

GOOGLE RESEARCH



46%

use digital voice assistant

PEW RESEARCH CENTER



35%

of Amazon's revenue comes from its recommendation engine

MCKINSEY

# WE'RE PLANNING FOR THE FUTURE.

The COVID-19 pandemic has made the future less certain, but many people have an idea of where they'd like to visit first once it's safe to do so.

Soon there will be an influx of people making their first post-pandemic travel plans—and it's likely that A.I. will assist that planning in one form or another.

It's equally important that operators of location-based entertainment (LBE) consider their own plans for a future involving A.I. technologies.



27% RESORTS



26% MUSEUMS

Where would you visit once it's safe?



47% THEME PARKS



# THREE BIG IDEAS. THREE PREDICTIONS.

There's no shortage of amazing, audacious ideas for what A.I. could achieve. Thinkwell's 6th Annual Guest Experience Trend Report explores three of those big ideas for LBEs.

Having a big idea is only the first step. That's why our predictions also analyze the challenges these ideas will face in the real world. To do this, we surveyed 1,359 people to help determine how excited (or concerned) guests will be to try these new A.I. experiences at their favorite attractions.



## 01

PREDICTION 01

### PHYSICAL QUEUES ARE WAITING FOR OBSOLESCENCE.

For over 20 years, virtual queuing technology has allowed visitors to skip the lines by "holding" a spot for them. The concept is simple, but A.I. could radically transform virtual queuing—and the entire park-going experience with it!

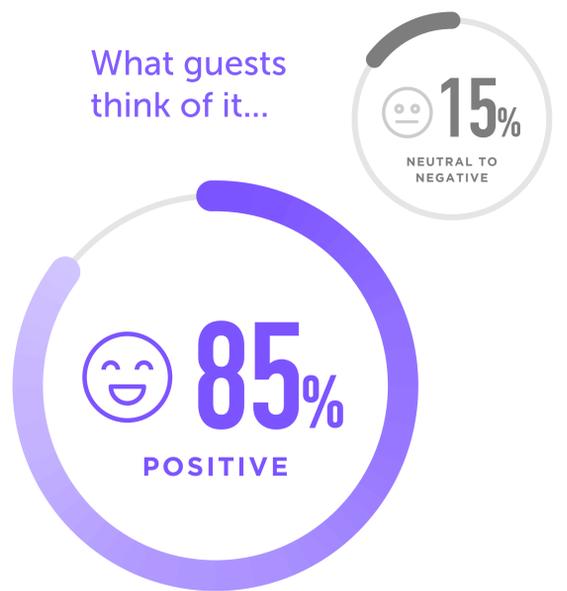
PREDICTION 01

## THE BIG IDEA.

Imagine a theme park with 100% virtual queuing capacity, meaning no traditional stand-by queues—*anywhere!*

The A.I. behind the interface can manage demand, redirect guests around bottlenecks, and adjust for disruptions... all in real-time. (No planning hours or even months in advance!) Recommendation algorithms will not only help guests discover new experiences they'll love but even predict where individual guests are likely to be later in the day, enabling dynamic capacity forecasts and on-demand reservations to give each guest a greater sense of spontaneity. With every single guest accounted for in the system, A.I. can balance each person's needs to ensure the best possible day for everyone.

What guests think of it...



### The Full Prediction.

As more and more parks deploy virtual queuing technologies (especially in the wake of social distancing guidelines), Thinkwell predicts guests will increasingly expect fewer physical queues as part of their visit. Indeed, when surveyed on the many benefits provided by an intelligent virtual queuing system, by far the most popular aspect was not having to wait in line.

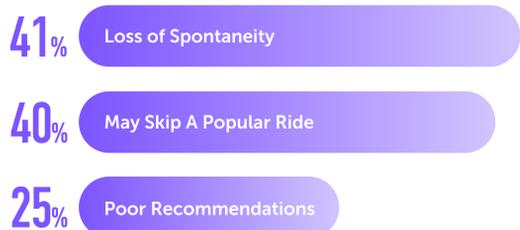


#### Top Reasons in Favor



However, getting to an intelligent real-time virtual queuing system won't happen overnight. The raw computing power required for detailed predictive algorithms at that magnitude is still several years away. And no artificial intelligence can solve every challenge of a busy park with only so much capacity. The most common concern among guests was whether this technology will further erode their sense of spontaneity. They may not be offered access to all the most popular rides, even if certain guests would have been willing to wait all day. Plus, there's still a virtual interface that guests must learn to navigate.

#### Top Concerns



Also, while never popular with guests, physical queues do have the advantage of keeping a large number of people occupied for a certain amount of time. Reinventing the queuing experience will require reinventing the entire park infrastructure to accommodate all the guests who are no longer waiting in lines, such as by adding significantly more flexible entertainment spaces and lounge areas.

These challenges are all achievable in the near future, but in the meantime, it's best to keep virtual queuing and reservation systems simple and transparent, so that guests can understand the process and fairness behind it... even if it means waiting a little longer for the big reward.



# 02

PREDICTION 02



## GUESTS WANT TO MAKE DISCOVERIES. A GUIDE CAN HELP.

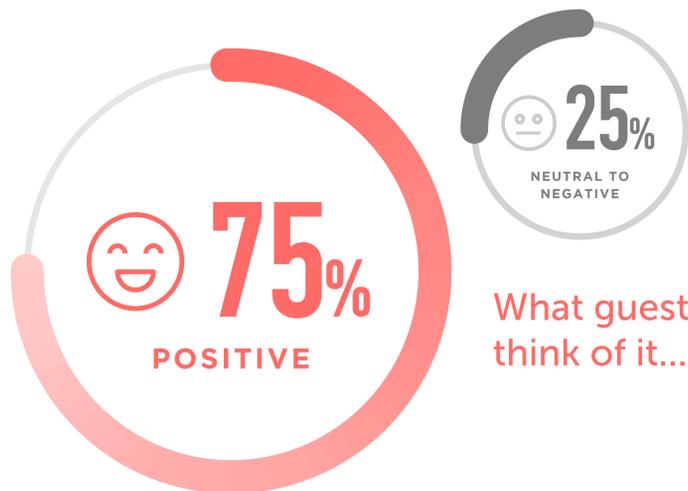
Digital guides have become a powerful tool for museums to further engage with their audience. But what if that engagement went in both directions, and the digital guide itself could *learn from its audience*? That's exactly where A.I. is guiding this technology!

PREDICTION 02

### THE BIG IDEA.

Imagine a digital museum guide that actively responds to each guest's interests and questions—just as an expert human docent would!

Input sources such as social media integration or previous museum visits could evaluate one's interests to start, while on-site metrics such as dwell time, body movement, or facial recognition can continually monitor non-verbal feedback and adjust the tour accordingly. Most importantly, the guide can help visitors discover more rare and unique exhibits they'll love!



PREDICTION 02



### The Full Prediction.

Every museum visitor wants to discover exhibits that are interesting and meaningful to them, but it can be hard to know how to prioritize their visit. As people become more reliant on recommendation algorithms to navigate online shopping or media services, Thinkwell predicts guests will increasingly demand similar features in physical location-based contexts as well. This is borne out by the fact that the most positively rated aspects of this concept were the ability to make personal recommendations, followed closely by the efficiency gained from not having to search out those exhibits for themselves.

#### Top Reasons in Favor

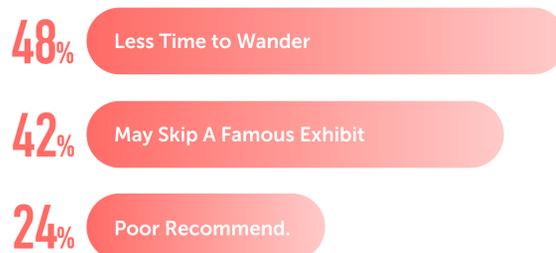


Museums in particular are special places of intellectual exploration and discovery for people of all ages and backgrounds. And while a digital guide can certainly help facilitate that experience, there are certain aspects that need to be treated carefully, no matter how advanced the guide may be. Among those surveyed, the top concern about the technology as proposed is that it would limit their ability to wander the museum with a spirit of free curiosity.

It's also important to note that for some guests, what's important to them *is* what's important to others as well. A significant contingent responded negatively to the prospect that a tour might skip a popular exhibit, even if the guide thinks other exhibits are more relevant to their interests.

There's no question that advances in artificial intelligence will soon make the way we tour museums and other attractions vastly more personalized and responsive to each person's individual wants and needs. However, part of that personalization also requires recognizing when the A.I. should step back and let the guest lead their own tour.

#### Top Concerns





PREDICTION 03

## A.I. IS ABOUT GETTING PERSONAL.

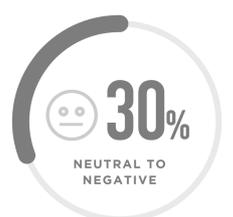
While interactive technologies have come a long way, many of the most important interactions that guests make during a visit are still human in nature, whether it's a warm hug from a costumed character or helpful directions from a friendly host. But what happens when you're able to combine artificial *and* human intelligences?

PREDICTION 03

## THE BIG IDEA.

Imagine a themed resort where every employee is connected to a resort-wide A.I. network, allowing them to predict each guest's needs and make more personalized interactions.

Conversations with restaurant servers can be recorded and analyzed to prompt better dish recommendations at future meals, regardless if it's the same person serving them. Meeting a costumed character could lead to a personalized interactive show—with a custom script and generative media effects created in real-time based on the guest's reactions. The system can even help facilitate natural interactions between guests and staff who speak different languages!



What guests think of it...

PREDICTION 03



### The Full Prediction.

Using an external system to aid an employee's interaction with a guest is hardly a new idea. Anytime they look up a reservation on a computer or notice a guest wearing a birthday badge, they're relying on an external system put in place to provide better service and more personalized interactions. That will remain true even with more advanced future technologies. In-person interactions won't ever be completely replaced by computers or robots, but Thinkwell predicts that soon a majority of guest-to-employee interactions will have some A.I. support in one form or another, especially as many global attractions become more and more accessible to an increasingly diverse audience of all backgrounds, abilities, wants, and needs.

### Top Reasons in Favor



Currently, although employees can't always respond to each guest as a unique individual (after all, it's almost always the first time they've ever met), there's still a set of social expectations and communication guidelines that both sides know how to follow for a smooth and useful interaction. Unilaterally changing those expectations to accommodate a system of "intelligent prompts" could unintentionally backfire, resulting in more socially awkward encounters if the guest becomes aware that this seemingly personal interaction with a human isn't entirely personal nor human.

### Top Concerns



### Top Concerns



It's also important that any personalization for experiential purposes is truly bespoke to each guest's individual wants and needs, and isn't simply a veneer of their data repeated back to them in a novel context. One of the most important needs is privacy. While many guests liked the opportunity for "special surprises" from A.I.-enhanced personalization, a large portion also reported feeling self-conscious if those surprises had the effect of forcing them into the spotlight of public attention.

Personalization can take many forms, and it's often the smaller, quieter moments that guests remember most fondly. After all, that makes it more personal. For A.I. technology to work in these applications will require more than just technical engineering, but also social engineering that provides transparency, security, and authenticity, understanding how guests expect (and prefer) to interact with their favorite places and the people who work there.

# CONCLUSION.

Thinkwell's three predictions **only scratch the surface** of all the many possible applications of A.I. at location-based experiences, both in the **near term** and more **distant future**.

As the **technology evolves** in increasingly **complex, multifaceted directions** worthy of further study and analysis, the same can be said for the ways that **people** themselves understand, interact with, and form opinions about this technology.

## EXPLORING FURTHER >

Continue exploring Thinkwell's 6th Annual Guest Experience Trend Report subjects by clicking on the deep dive reports and data analyses below (with more to come in the weeks ahead)! [Find this report on our website.](#)

### Data Analysis: Bias in A.I.

How have different people experienced bias in A.I. technologies, and what do they want done about it?

<https://thinkwellgroup.com/2021-guest-experience-trend-report/data-analysis-bias-in-a-i/>

READ ARTICLE

### Data Analysis: Generation Gaps

To what degree does age determine attitudes towards A.I. technologies?

READ ARTICLE



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ARTIFICIAL INTELLIGENCE

This data and information was collected in 2020 through an anonymous survey of 1,000 respondents across the United States.

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