2026 Voice of the Visitor state of the industry report

accesso Intelligence℠

The Voice of the Visitor

2026 Industry Benchmark Report

What millions of visitor reviews from a decade of visitor sentiment around the world tells us about the state of visitor experience and where the industry goes from here.

One of the largest attractions specific studies of visitor experience ever conducted.

Powered by ***accesso Intelligence***.

About *accesso*

accesso technology is purpose-built for the visitor attractions industry. For more than three decades, we have designed and operated the systems that connect attractions to their visitors: ticketing, ecommerce, virtual queuing, mobile apps and guest engagement, distribution, retail and restaurant point-of-sale and decision intelligence. Our technology processes hundreds of millions of transactions annually across more than 1,100 venues in over 30 countries, spanning theme parks, water parks, cultural institutions, ski resorts, performing arts venues, live event spaces and more.

We are in the business of removing friction from the visitor journey. Every product we build is designed to make the moment between a visitor's intent and their experience shorter, simpler, and more satisfying, and to give operators the insights they need to keep improving that journey at scale. Learn more at ***accesso.com***.

About *accesso Intelligence*

accesso Intelligence is powered by Dexibit, a proven analytics platform trusted by leading visitor attractions around the globe. It brings together years of industry expertise and aggregated data to power smarter decisions across your ecosystem.

The analysis in this report was produced using ***accesso Intelligence***. The findings represent the largest AI-analyzed corpus of visitor attraction sentiment ever assembled: 2.5 million reviews, 37 countries, 500 attractions, a decade of data. What ***accesso Intelligence*** can do for your own property is give you that same analytical precision applied to your visitors, your venues, and your specific operational questions.

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Executive summary

Seven findings from the largest AI analyzed visitor sentiment dataset ever assembled

This report analyzes millions of visitor reviews, decomposed into individual remarks across 500 attractions in 37 countries, spanning a full decade from 2016 to early 2026. What follows is not a survey, but a census of what visitors actually say when they describe their experience in their own words, classified by sentiment, emotion, theme, and topic using ***accesso Intelligence*** - at a scale no manual analysis could ever achieve.

Seven findings stand out:

1. The industry has not recovered: it has recalibrated.

Visitor sentiment bounced back sharply in 2022-2023, but the current era (2024-2026) reversed that trajectory. Positive remarks have slipped to 58%, negative remarks have climbed to 25%, and disappointment now runs at 21%, higher than at any point since the pandemic. The pre-2020 baseline of 4.34 stars and 60% positivity is not returning. The new normal is lower - operators who still benchmark against 2019 are comparing against a ceiling they will not reach.

2. The queue crisis is the defining operational challenge of this era.

The combined share of queuing and crowding in the visitor conversation has doubled in three years, from 3% to 6% of all remarks. When a visitor encounters a long queue, it does not just ruin that moment. It drags down their perception of the price they paid, the staff they interacted with, and whether the visit was worth it. The cascade is measurable: queue negative alone averages 2.95 stars; add crowding and price negativity and it collapses to 1.87.

3. Transactions are the most negative dimension of the visitor experience.

Ticketing, food and beverage and retail touch points together account for 10% of all remarks, and at 39% their negativity rate is ten points higher than non-transaction topics. The booking page, the entry gate, the food counter and the checkout register are consistently where experience breaks. The finding with the most direct operational implication: refund interactions carry an 82% negativity rate and a 1.50 average star rating, the lowest of any topic in the dataset.

4. One star reviews are not caused by one failure, they compound by three or four.

A review with a single negative topic still averages 4.12 stars. With two, it drops to 3.31. With three: 2.69. Four or more: 2.09, with a 43% probability of being one star. Catastrophic reviews are produced by the accumulation of smaller failures, not by a single dramatic one. The most important metric most operators are not tracking is the number of distinct negative topics per review.

5. Friendliness is not what separates the best from the worst.

High performing attractions (4.5+ stars) and low performing attractions (below 3.5) mention staff friendliness at virtually identical rates. The gap is elsewhere: queuing is 8 times more prevalent at low performers, F&B pricing complaints 7 times, refund negativity 13 times. Emotional impact, the topic that captures awe and wonder, exists only at high performers. The fingerprint of excellence is not warmer service. It is better systems, better capacity management, and better transaction infrastructure.

6. Disappointed visitors outnumber angry ones 9 to 1.

Across the full dataset, disappointment accounts for 20% of all remarks; anger accounts for 2%. This ratio matters because anger is visible and vocal, while disappointment is quiet and final. The angry visitor complains at guest services. The disappointed visitor simply does not come back. Most service recovery programs are designed for the former. The larger revenue risk comes from the latter.

7. Emotional resonance is growing faster than almost any other topic, only existing at the very top.

Emotional impact continues to grow in conversation share. It appears frequently in remarks at high performing attractions and at literally never surfaces at low performing ones. Attractions that create moments of genuine awe, connection or meaning are building a competitive advantage that operational friction alone cannot erode. In a market where queuing, pricing, and capacity pressures are intensifying, emotional resonance is the differentiator that visitors will still write about even when everything else is hard.

How we listen at scale

The methodology behind the world's largest visitor attraction voice dataset

2.5M
reviews analyzed
Decomposed into individual remarks

3.4x
more insight via
remark-level AI classification

500
attractions
across 37 countries

10 yrs
of visitor feedback
2016 – early 2026

This report draws on two interconnected benchmarks from ***accesso Intelligence***, both derived from publicly available visitor reviews collected across the global attractions industry. Together, they form the most comprehensive AI analyzed corpus of visitor sentiment ever assembled for this sector.

The first dataset comprises 2.5 million complete reviews spanning a decade of visitor feedback from 2016 through early 2026. Each carries structured metadata: including the visitor's rating and freeform comment of their experience, the venue's response and various metadata elements relating to each, plus to the attraction itself.

The second dataset is where the analysis gets interesting. Using ***accesso Intelligence's*** proprietary AI, a representative sample is decomposed into individual remarks: atomic, single topic statements extracted from the body of each review. A visitor who writes "The staff were wonderful but the queue for the roller coaster was brutal and the food was overpriced" has given us one review but three distinct remarks, each carrying its own sentiment, emotion, theme and topic classification, amongst other elements. This decomposition provides roughly 3.4 times the analytical resolution of working with reviews alone.

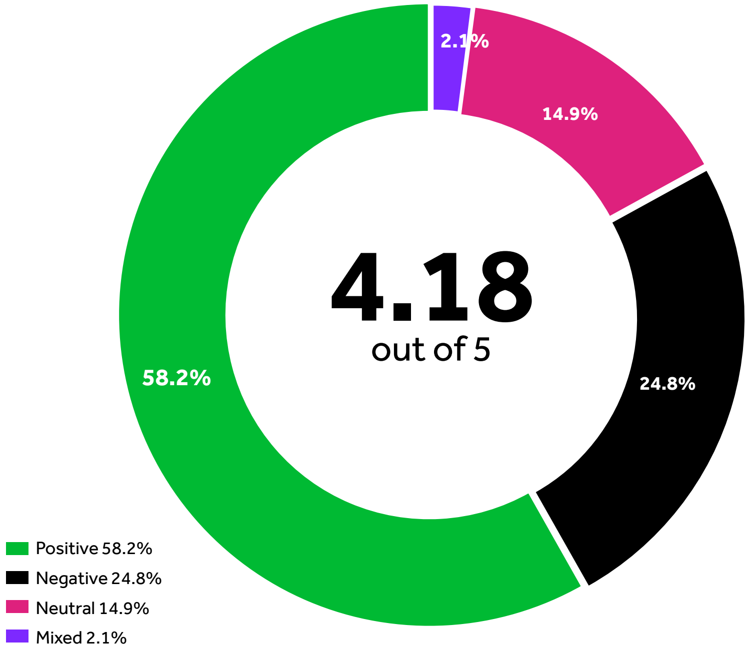
In addition, vector embeddings enable semantic search across the full corpus, meaning we can ask questions the original classification scheme did not anticipate and still surface relevant visitor statements.

The dataset covers 500 attractions across 37 countries and 16 distinct attraction segments, from theme parks and botanical gardens to immersive experiences and performing arts venues. Reviews span from January 2016 through March 2026. The bulk of volume falls more recently, in the 2022 to 2026 window, reflecting both the growth of online reviewing and the post pandemic surge in visitor feedback. Earlier years (2016 to 2021) provide a critical baseline for measuring long term shifts, even though their absolute volume is smaller.

The big picture

Industry sentiment at a glance: what visitors are actually saying

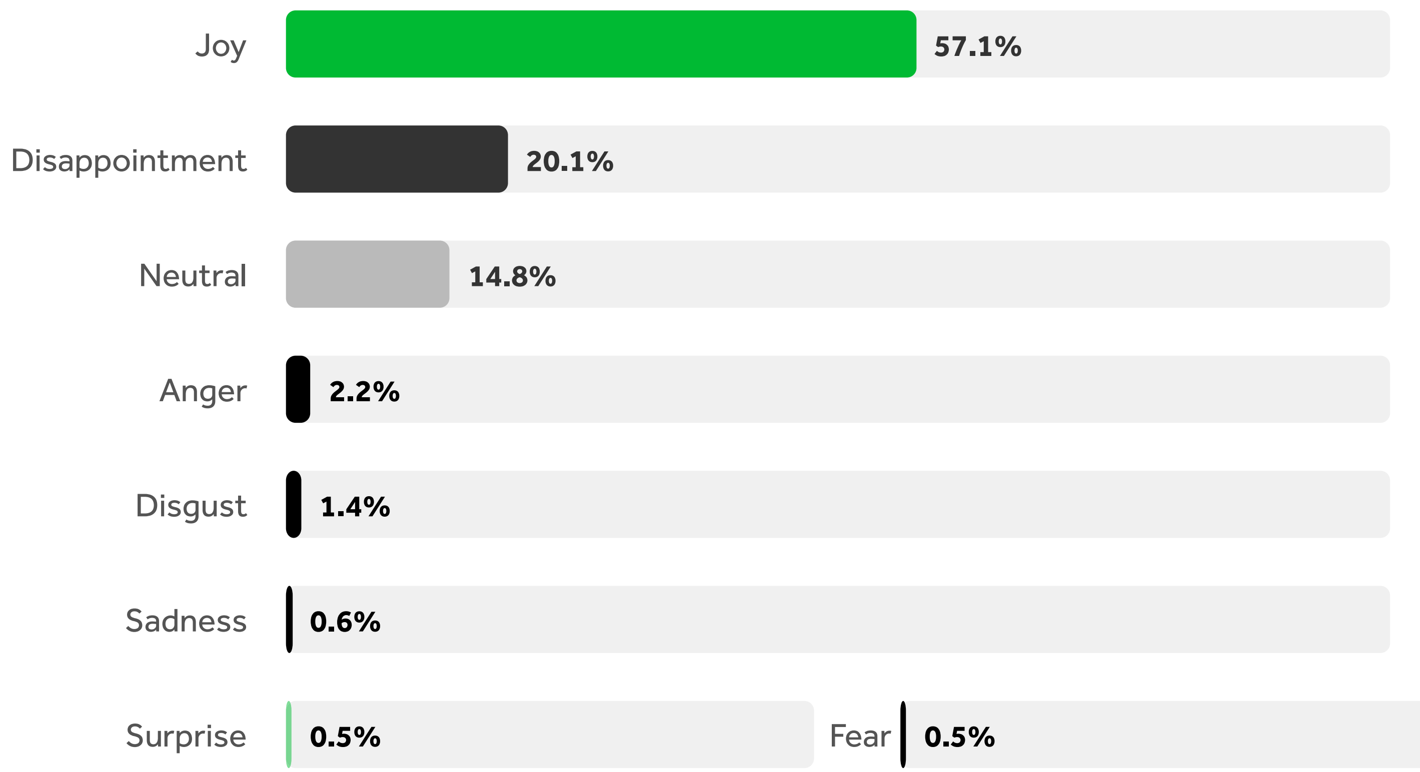
Across the global visitor attractions industry, headline numbers paint a picture broadly positive but far from comfortable. When every remark is tallied across every attraction, country and segment in the data-set, the split falls like this:



Roughly one in four individual statements a visitor makes about an attraction is negative, a fact worth sitting with. Even attractions visitors broadly enjoy, rate highly and recommend to friends, a substantial volume of criticism is generated at the remark level. A visitor can love an attraction overall and still articulate specific pain points in their review (in some instances, a sign they cared enough to provide constructive feedback). Remark level analysis surfaces those pain points in a way that star ratings alone cannot.

Emotion map

Sentiment tells us direction, but emotion reveals intensity. Emotion distribution across the industry reveals something important about the nature of negative visitor experience.

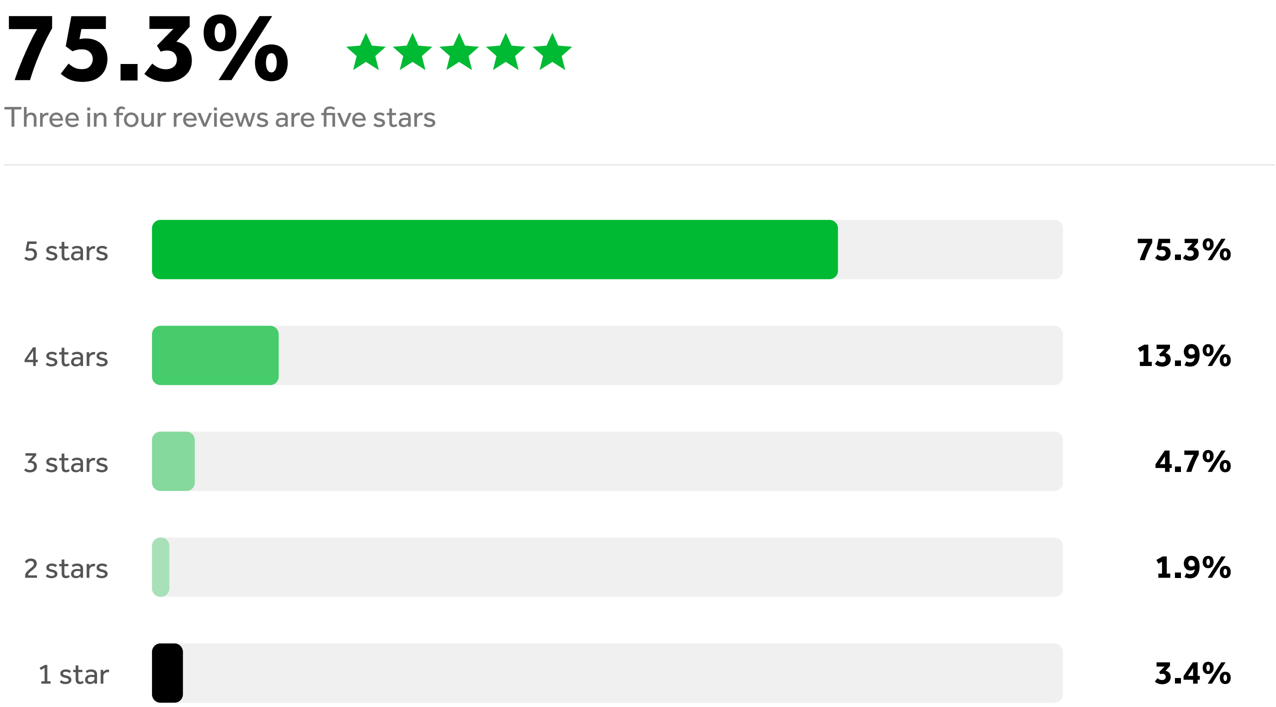


Disappointment outnumbers anger by a ratio of roughly 9 to 1. This single finding shapes how the entire industry should think about service recovery. Angry visitors make noise: they complain at guest services, they post heated reviews, they tag you on social media. Disappointed visitors do something far more dangerous: they leave quietly, tell a few friends and simply never return. They do not give you the chance to fix what went wrong.

This ratio is even more striking when examined at the segment level. Theme parks and water parks, the segments with the highest operational complexity, carry anger rates of 4.2% and 4.5% respectively, roughly triple the industry average. Sports venues sit at 4.0%. By contrast, a cultural segment such as botanical gardens generates anger in fewer than 1% of remarks. The implication: high throughput, high price, high expectation environments create conditions where disappointment can escalate into genuine anger and the operational stakes of getting it wrong are correspondingly higher.

Star rating distribution

At the review level (above the remark level), the distribution skews heavily positive:



Embedded in this distribution is a structural asymmetry that warrants attention. One star reviews consistently outnumber two star reviews across almost every year in the dataset, in some years exceeding by nearly double. This is the barbell effect: visitors increasingly either love you or want to tell the world how badly you failed them. The moderate middle is thinning, increasingly over time. Visitors who had a mediocre experience are less likely to review at all; those who do are more likely to round up to four stars or round down to one. The practical consequence is that star ratings compress nuance. They tell you whether you won or lost, but not why (and why remark level analysis is important).

OPERATOR TAKEAWAY: Stop treating your star rating as a holistic health metric. A 4.2-star average can mask the fact that one in four things your visitors mention is a pain point. Build internal dashboards that track the actionable signal of share of negative remarks by topic, not just the average star rating.

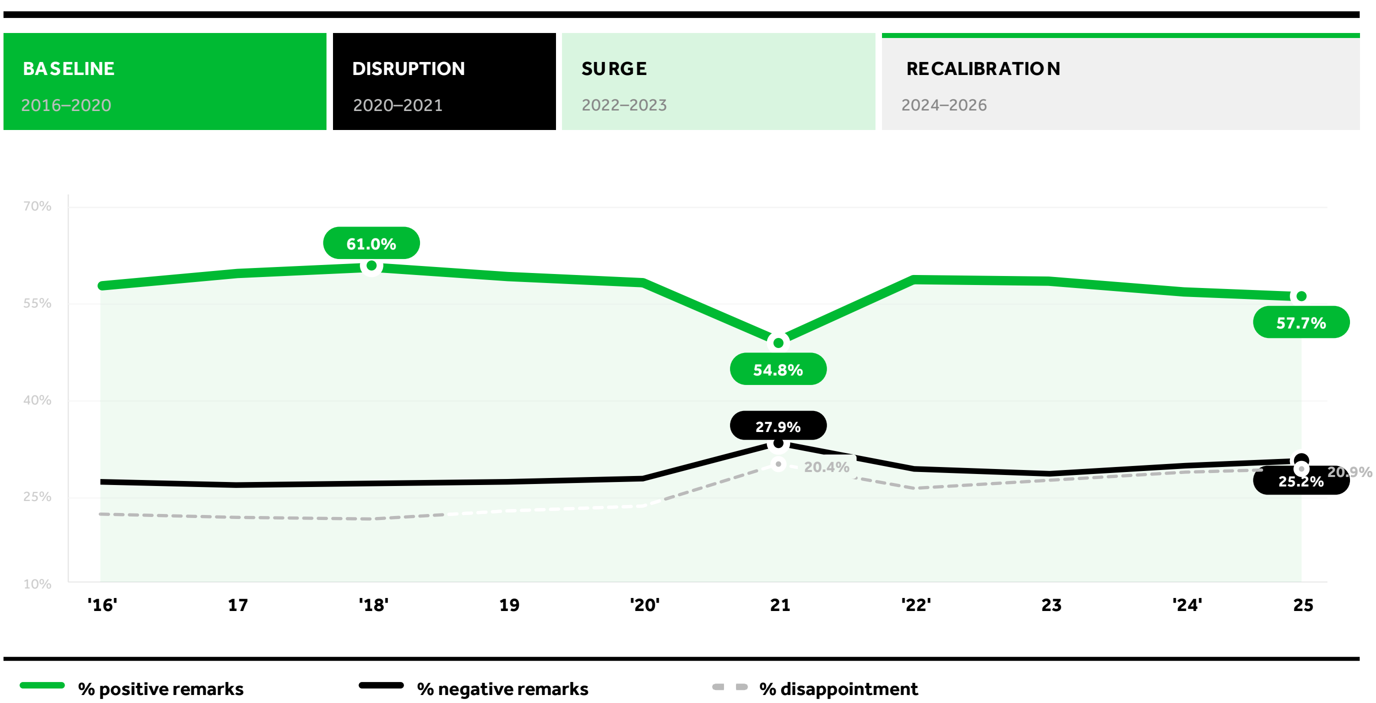
Four eras of visitor sentiment

How a pandemic, the revenge travel boom then a cost of living crunch reshaped what visitors care about

The decade of data in this report does not tell a single story, it tells one for each of four distinct eras. Each brought its own set of visitor expectations, tolerances and emotional baselines, the transitions between them leaving permanent marks on what visitors talk about, how they feel and what they are willing to forgive.

ERA	AVG RATING	POSITIVE	NEGATIVE	JOY	DISAPPT
Baseline 2016 to early 2020	**4.34**	**60.0%**	**22.0%**	**58.8%**	**14.3%**
Disruption Early 2020 to end 2021	**4.08**	**54.8%**	**27.9%**	**52.5%**	**20.4%**
Surge 2022 to 2023	**4.19**	**59.9%**	**23.5%**	**57.7%**	**19.6%**
Recalibration 2024 to 2026	**4.18**	**57.7%**	**25.2%**	**56.6%**	**20.9%**

What this table reveals is a story that is easy to misread. Most industry commentary focuses on the first two transitions: the pandemic crash and subsequent recovery. But the fourth column, the recalibration era, is where the real strategic signal lives that is relevant to today.



Year-by-year values interpolated from era averages. Labeled values are from the dataset.

Era 1: Baseline (2016 to early 2020)

The pre-pandemic period represents the industry's high water mark for visitor sentiment. At 4.34 average stars, 60% positive remark share and a disappointment rate of just 14.3%, this was the ceiling. Visitors were generally delighted, the gap between expectation and delivery narrow.

This is not to say the baseline was perfect. Value related negativity was already at 41.2% and food and retail negativity sat at 38.5%. The seeds of several post pandemic issues were already germinating. But overall, the social contract between attraction and visitor was working: visitors paid, attractions delivered and the majority of feedback reflected satisfaction.

Era 2: Disruption (March 2020 to December 2021)

COVID did not merely reduce visitor volumes. It rewired visitor psychology. The data shows the sharpest sentiment decline in the dataset: positive remarks fell by 5.2 percentage points, negative remarks surged by 5.9 points and the average star rating dropped a quarter of a star.

But the composition of that negativity tells a more nuanced story than "people were unhappy during COVID." Aside from friction unique to those times, several themes saw permanent structural shifts in how much space they occupied in the visitor conversation:

THEME	BASELINE	DISRUPTIONS	SHIFT	DIRECTION
Guest experience	12.2%	14.3%	+2.1	Visitors more attuned to how the visit felt
Staff and service	6.3%	8.5%	+2.2	Every interaction was scrutinized
Value	5.8%	5.9%	+0.1	Held steady, but negativity spiked
Admissions and ticketing	7.6%	8.0%	+0.4	Timed entry, cancellations, refunds entered the lexicon
Food and retail	8.7%	9.7%	+1.0	Limited menus, closures, inflated pricing
Family	5.7%	6.9%	+1.2	Parents hyper-aware of family suitability

The disruption era also introduced entirely new conversation threads. Timed reservations, which barely registered pre-pandemic, entered the visitor vocabulary for the first time. Refund and exchange complaints surged as cancellations became routine. The digital booking experience, once an afterthought, became the visitor's first and often most frustrating touchpoint.

Era 3: Surge (2022 to 2023)

The industry narrative for this period was 'recovery', but the data suggests something more complex. This was the era of pent up demand release: the so called 'revenge travel' wave that flooded attractions with visitors who had been locked down.

Sentiment bounced back significantly. Positive remarks recovered to 59.9%, nearly matching the pre-pandemic baseline. Average ratings climbed to 4.19. Joy returned to 57.7%. On the surface, the story looked like healing.

But underneath the headline numbers, structural problems were compounding. The surge created its own set of pressures, showing up clearly in the topic level data. Crowding's share of the conversation grew from 1.5% in 2022 to 1.8% in 2023. Queuing followed the same trajectory. Crucially, the value theme's negativity rate which had spiked during COVID, did not recover. Visitors returned in large numbers, but they carried a new sensitivity to whether the experience justified the cost, a sensitivity that was about to collide with macroeconomic headwinds.

Era 4: Recalibration (2024 to early 2026)

This is the era the industry is living in now, the most strategically important to understand.

The Recalibration did not continue the recovery trajectory, it reversed it. Average ratings slipped from 4.19 to 4.18. Positive remarks dropped from 59.9% to 57.7%. Negative remarks climbed from 23.5% to 25.2%. Disappointment rose to 20.9%, the highest level since the pandemic itself. The driver is not a single event, but a convergence of multiple forces:

- Cost of living pressure is the dominant macro factor. Value negativity has risen to 47.4% in the current era, up from 41.2% pre-pandemic. Ticket price negativity climbed from 48.2% in 2022 to 51.0% in 2025. Food and beverage pricing negativity holds steady at around 70% (meaning seven in ten visitors who mention prices here are likely complaining). When household budgets tighten, discretionary spending on attractions comes under scrutiny, with every touchpoint that involves a price tag evaluated harshly.
- Capacity management failures are the operational factor. The combined share of queuing and crowding remarks nearly doubled from 2.8% of all remarks in 2022 to 5.5% in 2025. This is the single largest topic share movement in the dataset over this period. We will explore this in detail in a dedicated chapter, but the summary is: attractions that grew their audiences during the surge did not proportionally grow their capacity infrastructure and visitors are increasingly vocal about the consequences.
- Expectation inflation is the psychological factor. Visitors who returned post-pandemic carried higher expectations - the tolerance for operational imperfection has narrowed. What might have been a minor annoyance in 2019 now registers as a failure in 2025.

Permanent shifts

Zooming out across all four eras, several theme level shifts appear permanent rather than cyclical:

THEME	BASELINE	CURRENT	SHIFT	ASSESSMENT
Guest experience	12.2%	15.4%	+3.2	**Permanent.** Visitors more attuned to the holistic journey.
Value	5.8%	7.3%	+1.5	**Permanent.** Price-consciousness has structurally increased.
Admissions and ticketing	7.6%	8.0%	+0.4	**Stable.** Digital ticketing offsets some friction, introduces new types.
Staff and service	6.3%	8.3%	+2.0	**Permanent.** Every human interaction is evaluated.
Facilities	10.0%	8.3%	-1.7	**Shifted down.** Displaced by experience and value concerns.
Food and retail	8.7%	6.6%	-2.1	**Shifted down.** May be due to reduced hours/offerings post-COVID.

The decline in food and retail share deserves scrutiny. At first glance it looks positive: visitors are talking less about food. But the negativity rate within that reduced conversation actually increased from 38.6% to 40.3%. Fewer visitors mention food, but a larger proportion of those who do are unhappy. This is consistent with reduced offerings, higher prices and longer service times, all of which compress the addressable audience for auxiliary revenue.

OPERATOR TAKEAWAY: The “recovered” narrative is misleading. Your 2019 sentiment benchmarks are not returning. Build your key metrics and operational targets around the Recalibration baseline (4.18 stars, 25% negative), not the pre-pandemic peak. If your current numbers beat that baseline, you are outperforming the industry. If they don’t, you are falling behind a market that has already adjusted expectations downward.

OPERATOR TAKEAWAY: The value theme is the sleeper risk. Its share of conversation has grown 1.5 points in a decade and negativity rate has climbed 6 points. This is not about whether your prices are “fair.” It is about whether the full arc of the experience, from the booking page to the exit gate, communicates and delivers value convincingly enough to overcome the cost of living headwind that is reshaping discretionary spending decisions for your visitors.

World in reviews

How sentiment varies across regions and attraction types

Regional sentiment landscape

The dataset spans 37 countries, which we have consolidated into seven major regions for meaningful comparison (note these regions do not have even shares of remarks in the data set, with North America representing 45% of remarks and Europe 12%). The picture varies significantly by geography and the reasons go beyond simple "cultural differences in reviewing style."

REGION	RATING	POSITIVE	NEGATIVE	JOY
Asia Pacific	**4.30**	**56.8%**	**22.8%**	**55.9%**
Middle East	**4.27**	**61.6%**	**21.7%**	**60.2%**
Africa	**4.22**	**59.3%**	**22.5%**	**57.3%**
Europe	**4.21**	**56.9%**	**24.7%**	**55.1%**
Australasia	**4.18**	**62.8%**	**22.9%**	**62.1%**
North America	**4.15**	**57.9%**	**25.7%**	**57.0%**
Latin America	**4.07**	**53.2%**	**27.0%**	**53.3%**

Several patterns emerge from this data that challenge conventional assumptions.

Australasia punches above its weight on positivity. At 62.8% positive and 62.1% joy, Australasian attractions generate the most emotionally warm visitor response of any major region. This is not simply a function of natural beauty or outdoor settings (though both help). It reflects a visitor culture in which friendly, informal service is the baseline expectation, and attractions that deliver on it are rewarded lavishly. The negativity rate of 22.9% is nearly 3 points lower than North America. For operators in other regions benchmarking their sentiment performance, this gap represents a tangible target.

The Middle East outperforms on ratings despite smaller sample size. At 4.27 average stars, Middle Eastern attractions rank second globally despite operating in a market where visitor expectations for service, cleanliness and presentation are exceptionally high. This speaks to the investment levels in the region's attraction infrastructure, particularly in the UAE and Saudi Arabia.

North America carries the highest negativity rate among major regions at 25.7%. Given that North America also contributes nearly half of all remarks in the dataset, this warrants careful interpretation. The region's attraction mix also includes a higher representation of theme parks and amusement destinations (which carry inherently higher negativity due to operational complexity, pricing levels and throughput friction). When controlling for segment mix, some of this gap narrows, but North American attractions still face a structurally more critical audience.

Europe's lower positivity rate (56.9%) disguises significant internal variation. Northern European markets (Netherlands, Scandinavia) and the UK trend higher, while Mediterranean markets generate more polarized responses. European visitors are also more likely to write reviews in a measured, analytical tone that our AI classifies as "Neutral" rather than "Positive," which depresses the headline positivity number without necessarily reflecting dissatisfaction.

OPERATOR TAKEAWAY: When benchmarking your sentiment against the global average, consider controlling for region and segment mix. A 4.15 star theme park in North America is outperforming its segment average, while a 4.15 star botanical garden anywhere in the world is underperforming significantly. Context is everything.

The segment hierarchy

Across the 16 attraction segments in the dataset, the spread in average rating is dramatic: a full star separates the highest rated segment from the lowest. This gap is structural, not incidental. It reflects fundamental differences in visitor expectation, operational complexity, price sensitivity and the degree to which the attraction can control the variables that shape the experience.

SEGMEN TR	ATING	POSITIVE	NEGATIVE	DISAPPT	ANGER
Parks and gardens	4.68	70.8%	13.2%	9.2%	1.1%
Performing arts	4.60	71.4%	12.8%	10.2%	0.5%
Historic sites	4.56	65.3%	17.5%	13.6%	1.2%
Museums and galleries	4.51	64.4%	18.7%	14.2%	1.3%
Immersive experiences	4.29	57.9%	24.0%	18.7%	2.0%
Towers	4.28	52.3%	26.1%	19.7%	2.1%
Zoos and aquariums	4.08	55.3%	28.1%	20.8%	2.3%
Sports venues	4.05	53.2%	29.2%	18.8%	4.0%
Ski resorts	3.87	46.2%	30.7%	17.9%	3.3%
Theme and water parks	3.64	45.2%	37.0%	23.4%	4.4%

The gradient here tells a powerful story about what drives sentiment variance across the industry.

At the top of the table sit attractions with low operational complexity, low price sensitivity and high intrinsic value. National parks and botanical gardens benefit from environments that are inherently beautiful, low cost or free and carry few of the friction points (queuing, crowding, transaction frequency) that generate negative remarks. The visitor is walking through nature. The attraction merely has to not get in the way.

At the bottom sit attractions with the opposite profile: high operational complexity, high pricing and constant transactional friction. Theme parks and water parks require visitors to queue repeatedly, spend money at multiple touch points, navigate complex environments and manage high emotional stakes (particularly with children). Every ride that breaks down, every queue that exceeds 45 minutes, every $18 hamburger is an opportunity to generate a negative remark.

The middle of the table is where the strategic insight lives. Zoos and aquariums carry disproportionately high negativity (27-29%) for their price point, driven by factors that are partially outside management's control (animal visibility, weather) and partially within it (crowding, facilities, food pricing). Within segments, there's further variation still: science museums underperform art museums despite similar price brackets, likely reflecting higher expectations for interactivity that are not always met and more opportunities for something to go wrong (broken interactives, school groups).

Who has gained and lost ground

SEGMENT	BASELINE	CURRENT	CHANGE	ASSESSMENT
Theme and water parks	3.81	3.77	-0.04	*See note below
Museums and galleries	4.56	4.46	-0.10	Resilient
Immersive experiences	4.29	4.20	-0.09	Stable
Zoos and aquariums	4.26	4.11	-0.15	Moderate decline
Parks and gardens	4.82	4.66	-0.15	Moderate decline
Performing arts	4.77	4.61	-0.16	Moderate decline
Towers	4.63	4.34	-0.30	Severe decline
Historic sites, castles and palaces	4.52	4.49	-0.03	*See note below
Sports venues	4.57	4.24	-0.33	Severe decline

*Note again, inter segment shifts are hidden at this level. Theme parks declined -0.30 while water parks improved 0.22, plus historic sites declined -0.33 while castles and palaces improved 0.28. These two pairings see segments which nearly cancel each other out, hiding two of the most dramatic declines in the dataset.

Castles and palaces are the only segment to substantially outperform their pre-pandemic baseline, gaining +0.28 points. This likely reflects targeted investment in visitor experience, improved interpretation and storytelling, and the heritage tourism tailwind of post-pandemic travel patterns. Water parks also improved, possibly driven by a wave of facility upgrades and the appeal of outdoor leisure in a post-lockdown world.

The severe decliners (0.30+ stars lost) share a common profile: high volume, high expectation environments where operational execution has to be near flawless to maintain sentiment. Theme parks, sports venues and towers all involve queuing, crowding and premium pricing. Historic sites, the outlier in this group, may be suffering from a combination of increased visitation (over tourism) and infrastructure that has not kept pace.

OPERATOR TAKEAWAY: If you operate a zoo, aquarium, or science museum, you are sitting in the segment band (4.05 to 4.45) that is most vulnerable to further decline. Your negativity rates (27-30%) are elevated, your segment has not recovered to pre-pandemic levels and you face the same capacity and pricing pressures as theme parks but without the brand loyalty and repeat visitation that theme parks can lean on. The prescription is twofold: invest in the controllable factors (food quality, service speed, retail experience, digital ticketing), and systematically manage.

What good looks like

The anatomy of a 5 star visit and the patterns that separate delight from adequacy

Expanding out to all reviews, not just those with comments, five star reviews account for roughly three quarters of all reviews. That concentration is both a strength (most visitors leave happy) and an analytical challenge (what separates the visitors who felt compelled to write a glowing review from those who simply had a fine time?). Focusing on reviews with commentary and analysis with remark level decomposition gives us the answer.

When we look at the topics that appear most frequently within five star reviews, a clear hierarchy of experience drivers emerges:

The 5-star conversation

What visitors talk about when they give you the top rating.

TOPIC	SHARE	POSITIVITY	JOY RATE
Highlights	16.2%	96.1%	94.8%
Satisfaction	10.2%	99.7%	99.6%
Friendliness	3.7%	98.6%	98.6%
Recommendations	3.5%	97.2%	96.7%
Kid appeal	3.3%	95.2%	95.3%
Visit duration	2.7%	33.6%	32.2%
Worth	2.0%	92.1%	95.0%
Return intent	1.9%	86.3%	85.9%
Crowding	1.8%	32.9%	33.4%
Food quality	1.6%	86.1%	86.4%

There is something immediately notable about this list. The top driver is not a specific operational feature. It is the visitor's attempt to articulate what made the experience memorable. "Highlights" captures the moments that stood out: the exhibit that took their breath away, the ride that made their child scream with delight, the view from the observation deck. It is the experiential residue that visitors carry out of the exit gate.

The second driver, “Satisfaction,” is almost perfectly positively polarized at 99.7%. This is the catch-all for the visitor who steps back and says: this was worth my time. It is the emotional summary statement. But what produces that satisfaction? The answer lies in the topics that follow.

The human factor

Friendliness is the single most powerful controllable driver of five star experiences. It accounts for 3.7% of all remarks in five star reviews, and within those mentions, 98.6% are positive. That positivity rate is remarkably close to perfect and it means that when a visitor in a five star review mentions staff friendliness, they are almost certainly using it as a reason for the rating, not as a caveat within it.

The data gets more interesting when you look at what co-occurs with positive friendliness mentions in five star reviews. When a visitor praises staff friendliness in a top rated review, the same review is highly likely to also contain positive mentions of recommendations (“I’d tell everyone to go”), food quality, return intent (“we’ll definitely be back”) and worth. Friendliness does not just create a pleasant moment. It catalyzes a chain reaction of positive perception that touches every other dimension of the visit.

The language in these reviews are not flowery endorsements. They are pragmatic, almost advisory. The five star visitor is acting as a recommender, addressing the imagined future visitor who is wondering whether to buy the ticket (“If you’re wondering if it’s really worth it, it’s definitely worth it.”). This is the voice of the ambassador, the most valuable marketing asset an attraction can have.

The kid appeal multiplier

Kid appeal generates 3.3% of remarks in five star reviews with a 95.2% positivity rate, making it the third most reliable predictor of a top rating. Across segments, aquariums lead on kid appeal share (6.0% of all remarks), followed by science museums (5.5%) and water parks (4.6%). The positivity rate when kids are mentioned is above 85% everywhere it appears in meaningful volume and hits 93% at water parks.

The mechanism is straightforward but powerful: a parent whose child is having a great time will forgive almost anything else. The data shows that reviews containing positive kid appeal remarks have materially higher average ratings even when they also contain negative remarks about queuing or pricing. A child’s joy acts as an emotional buffer against the operational frictions that would otherwise drag the rating down (“A great place to beat the heat with the family while you learn about the world you live in”).

OPERATOR TAKEAWAY: If you serve families, measure kid appeal sentiment as a standalone metric. It is the single most forgiving topic in the dataset. Investments that improve the child experience (dedicated play spaces, age appropriate programming, child height exhibit design) generate disproportionate returns in overall satisfaction because they make the accompanying adults happier too. A parent watching their child light up at an interactive exhibit is not thinking about the $18 they just paid for a sandwich.

The loyalty flywheel

Three topics in the five star conversation form what we call the loyalty flywheel: recommendations (3.5% share), return intent (1.9%) and emotional impact (0.7%). These are not experience inputs but experience outputs. They are the behavioral signals that indicate an attraction has moved beyond delivering satisfaction and into building advocacy.

Emotional impact, while small in share, is among the fastest growing topics in the dataset (more on that in the rising signals chapter). It is also almost exclusively concentrated in heritage adjacent segments: historic sites (8.3% of remarks) and cultural museums (4.3%). When visitors mention being emotionally moved, the positivity rate is 94.4% at historic sites and 72.7% at cultural museums. The lower number at museums partly reflects the nature of the content; visitors to memorial museums and conflict related exhibitions experience profound sadness classified as emotional impact but not “positive” in the traditional sense.

“Neither my husband nor I had dry eyes the entire time.” — Visitor at a cultural museum (joy classification, 5 star review)

“It was a really emotional experience to see the place I’ve only read about or seen interpreted in media.” — Visitor at a cultural museum (sadness classification, 5 star review)

That second example is classified as “sadness” (within its context) and yet sits inside a five star review. It illustrates a nuance that star ratings alone could never reveal: sometimes the most powerful visitor experiences do not produce joy at all. Institutions dealing with topics such as human rights, slavery, war or the holocaust can be difficult experiences for visitors. They may produce feelings of awe, reverence, grief or wonder. The remark level analysis can distinguish between sadness that damages the experience and sadness that is the experience.

OPERATOR TAKEAWAY: Track recommendations, return intent and emotional impact as your advocacy triad. These are leading indicators of organic growth and repeat visitation. If your share of these topics is declining while your star rating holds steady, your visitors are satisfied but not inspired. That is the difference between a venue people visit once and one they build into their identity.

The surprising presence of negativity in 5 star reviews

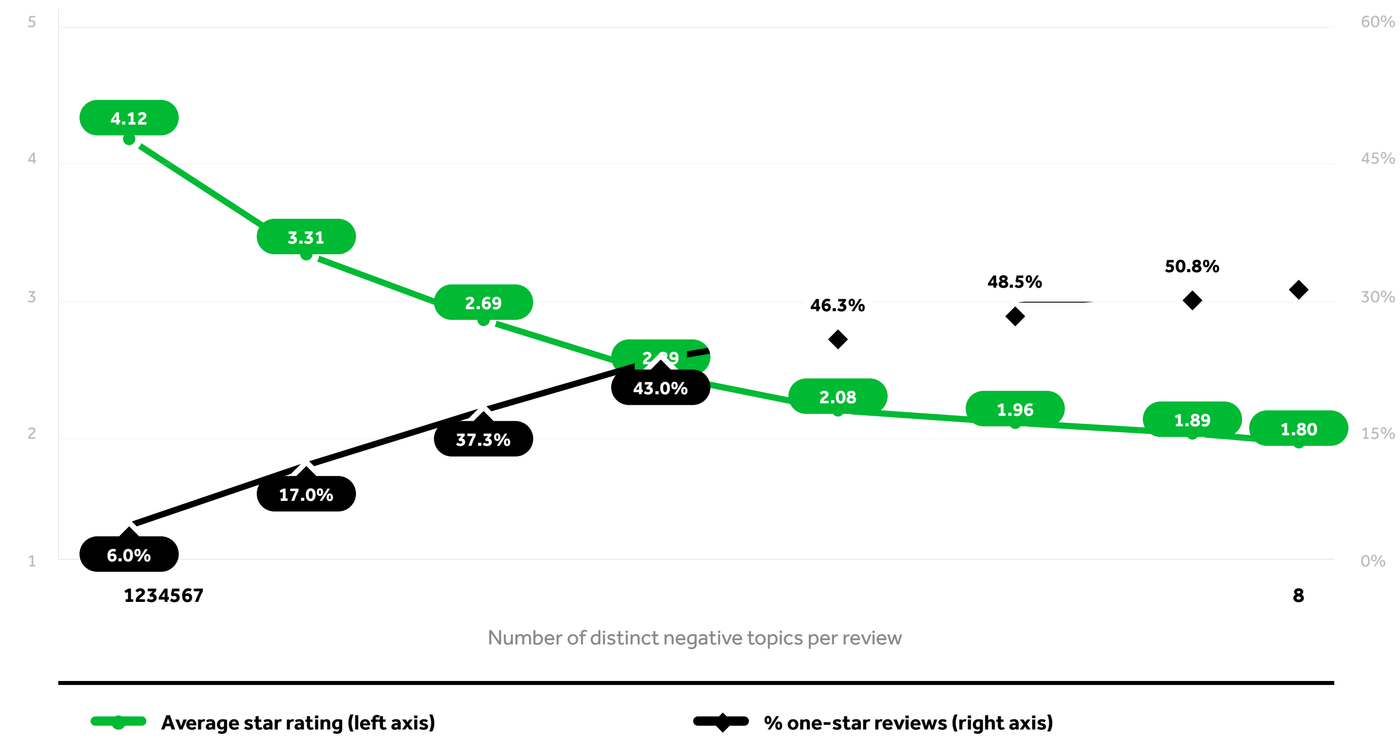
Here is a finding that challenges the assumption that five star reviews are purely positive. Within five star reviews, 1.8% of remarks mention crowding and 1.4% mention queuing. When they do, those remarks are predominantly negative (67% and 56% negative respectively). Five star reviewers are telling you: “I loved it, but…” and then naming the operational friction they tolerated. This is a gift. These are your most loyal visitors, the ones who gave you the benefit of the doubt, explicitly identifying what needs to improve. They are not complaining; they are coaching.

OPERATOR TAKEAWAY: Mine your five star reviews for negative remarks. These are not contradictions; they are your highest signal improvement opportunities, surfaced by the visitors who like you enough to tell you the truth rather than simply downgrading your rating.

What bad looks like

The anatomy of a 1 star visit and the compounding failures that create them

One star reviews tell a fundamentally different story from five star reviews, not just in their sentiment. The structure of a one star review is different. Where five star reviews tend to be holistic ("we loved everything"), one star reviews are forensic. They enumerate specific failures and those failures compound in predictable, measurable ways.



The 1-Star Conversation

Topic	Share of 1-Star Remarks	Negativity Rate	Anger Rate	Disappointment Rate
Criticisms	12.2%	99.4%	17.9%	70.7%
Professionalism	6.4%	97.9%	47.4%	44.5%
Queuing	5.1%	94.4%	19.4%	74.3%
Worth	3.5%	97.1%	6.5%	88.9%
Ticket Prices	3.1%	82.3%	18.2%	62.0%
Crowding	2.6%	91.8%	15.9%	65.8%
Overall Affordability	2.4%	94.9%	21.6%	69.2%
Ride Availability	2.1%	94.4%	6.6%	87.6%
Friendliness	2.0%	79.2%	47.9%	30.3%
Return Intent	1.8%	88.3%	7.3%	80.5%
Refunds & Exchanges	1.8%	88.4%	17.3%	70.8%

This table reveals three distinct clusters of failure, and the emotional signatures that accompany each one tell operators exactly what kind of problem they are dealing with.

Cluster 1: People failures

Professionalism and friendliness together account for 8.4% of remarks in one star reviews. They are the most emotionally intense topics in the dataset. When a visitor mentions professionalism in a one star review, 47.4% of those remarks carry anger, not merely disappointment. Friendliness in one star reviews is even more anger-concentrated at 47.9%.

This is the only topic cluster where anger rivals or exceeds disappointment. Every other failure mode is predominantly disappointment driven. But when a visitor feels disrespected, condescended to, or ignored by a staff member, the emotional response is qualitatively different. It becomes personal.

"The gentleman as well as his co-worker were being extremely rude and condescending." — Visitor at an aquarium (anger, 1 star)

"The courtesy and professionalism of the staff could be improved to provide a more respectful and welcoming experience for visitors." — Visitor at an art museum (disappointment, 1 star)

The correlation data reinforces the severity. Reviews containing negative professionalism remarks average a 1.90 star rating. That is the lowest average rating of any topic in the dataset. When both professionalism and friendliness are negative in the same review, the average drops to 1.91. When professionalism alone is negative (without friendliness), it sits at 2.07. And when friendliness alone is negative, it recovers slightly to 2.44.

The implication: visitors can tolerate a staff member who is not particularly warm (friendliness negative only: 2.44 average). They cannot tolerate a staff member who is incompetent or disrespectful (professionalism negative: 1.90). Warmth is a nice to have; competence and respect are non-negotiable.

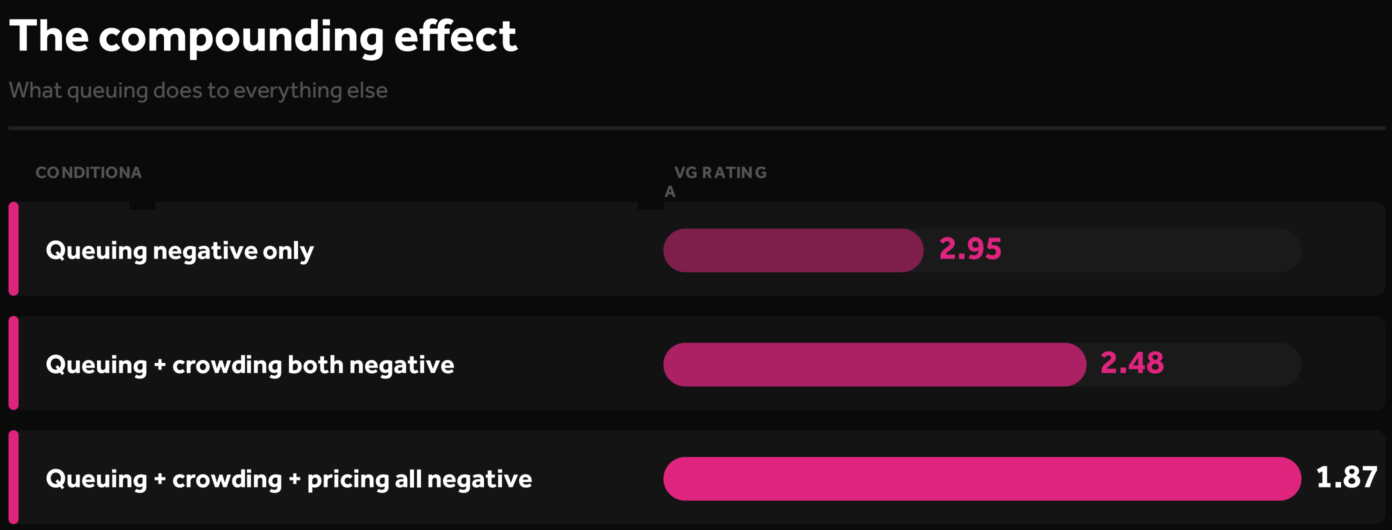
OPERATOR TAKEAWAY: Separate your staff training into two distinct tracks. Track one is warmth and hospitality: the smile, the greeting, the "how can I help?" This is important and drives joy. Track two is professionalism and de-escalation: how to handle complaints, how to communicate bad news, how to enforce policy without making the visitor feel punished. Track two is more important. When it fails, the emotional damage is nearly twice as severe, and it is the kind of damage that generates the most harmful reviews.

Cluster 2: Operational failures

Queuing (5.1% of one star remarks), crowding (2.6%), and ride availability (2.1%) form the operational failure cluster. These are system level problems, not individual staff failures and the emotional signature reflects it: disappointment dominates (74%, 66%, 88% respectively) with anger staying relatively contained.

Visitors experiencing operational failures are not angry at a person. They are disappointed in the organization. They feel let down by a system that promised an experience and under-delivered. This is a critical distinction for service recovery: operational failures can be addressed with transparency, communication, and compensation. People failures require apology and behavioral change.

But the danger of operational failures lies in their compounding nature. The data reveals a striking cascade effect:



When a visitor encounters a single operational problem, the experience is damaged but recoverable (2.95 average). When two compound, the visit is severely impaired (2.48). When three stack up, the result is a near complete experience collapse (1.87). The compounding is not linear; it is multiplicative.

This pattern plays out viscerally in the reviews themselves. At a theme park, one visitor wrote about queuing: “We waited 2 hours to go on a 30 second roller coaster.” In the same review, the crowding remark read: “I heard people complaining all day long about how packed the park was.” The combination of excessive wait times and oppressive crowd density, experienced together over a full day visit, transformed what should have been a leisure experience into an endurance test.

At another theme park, a visitor described the sequence more explicitly: “We even queued for an hour just to get in the park!” paired with “The park is just way too busy to enjoy in my opinion.” Both remarks carry disappointment as their primary emotion. Neither mentions staff. This is a systems failure and the visitor recognizes it as one.

Cluster 3: Value Failures

Worth (3.5%), Ticket Prices (3.1%), and Overall Affordability (2.4%) form the value failure cluster. This is the cluster where disappointment is most extreme: 88.9% of “Worth” mentions in one-star reviews carry disappointment as their primary emotion. Anger is minimal at 6.5%. These visitors are not outraged. They are sad. They feel they wasted their money and their time.

The correlation analysis reveals that value negativity rarely exists in isolation. When “Worth” is negative, the same review almost always contains at least one other negative topic, most commonly from the operational cluster (queuing, crowding) or the people cluster (professionalism). This suggests that visitors do not decide an attraction was “not worth it” in abstract. They arrive at that conclusion after encountering specific failures that erode the experience below the threshold of acceptable value.

Put differently: value perception is an output, not an input. Visitors do not typically arrive already feeling the attraction is overpriced. They arrive hopeful, encounter friction, and then reinterpret the price they paid through the lens of the friction they experienced. Fix the friction, and the value perception often resolves itself.

OPERATOR TAKEAWAY: Don’t respond to value complaints with price reductions or discounts. Respond by addressing the upstream experience failures that are causing visitors to question the value. The data consistently shows that positive "Worth" mentions co-occur with positive friendliness, kid appeal, visit duration, and food quality mentions. Worth is a downstream reflection of the visit as a whole. When visitors say "not worth it," they are giving you a symptom, not a diagnosis.

Cascade effect

Perhaps the most important finding in the one star analysis is the relationship between the number of distinct negative topics in a review and the rating outcome:

NEG. TOPICS	NEG. TOPICS	NEG. TOPICS	NEG. TOPICS
1	**2**	**3**	**4+**
4.12	**3.31**	**2.69**	**2.09**
avg rating	avg rating	avg rating	avg rating
6.0% one star	**7.0% one sta**	**28.7% one star**	**42.9%**

A review with a single negative topic still averages above four stars. The visitor encountered one problem, noted it, moved on. A review with two negative topics drops by nearly a full star. At three, the review is below three stars and nearly one third are one star. At four or more, the visit has comprehensively failed: 42.9% of these reviews carry the lowest possible rating.

This is the cascade effect in quantified form. One star reviews are not caused by one catastrophic failure. They are caused by the accumulation of multiple smaller failures that, together, overwhelm the visitor's willingness to forgive. The queue was too long, the food was overpriced, the staff member was rude and then the ride broke down. No single one of those might have produced a one star review. Together, they become a farewell letter.

"Return intent" appears in 1.8% of one star remarks, and 88.3% of those mentions are negative. When a visitor explicitly states their intention not to return, they are not complaining. They are closing the account.

The co-occurrence data confirms this: when return intent is negative, the same review contains negative remarks about guest experience (16.1% of co-occurrences), staff and service (12.7%), value (10.5%), facilities (9.5%), and admissions and ticketing (8.5%). These are multi-system failures. The visitor experienced a bad journey across nearly every touchpoint and the farewell letter is the conclusion.

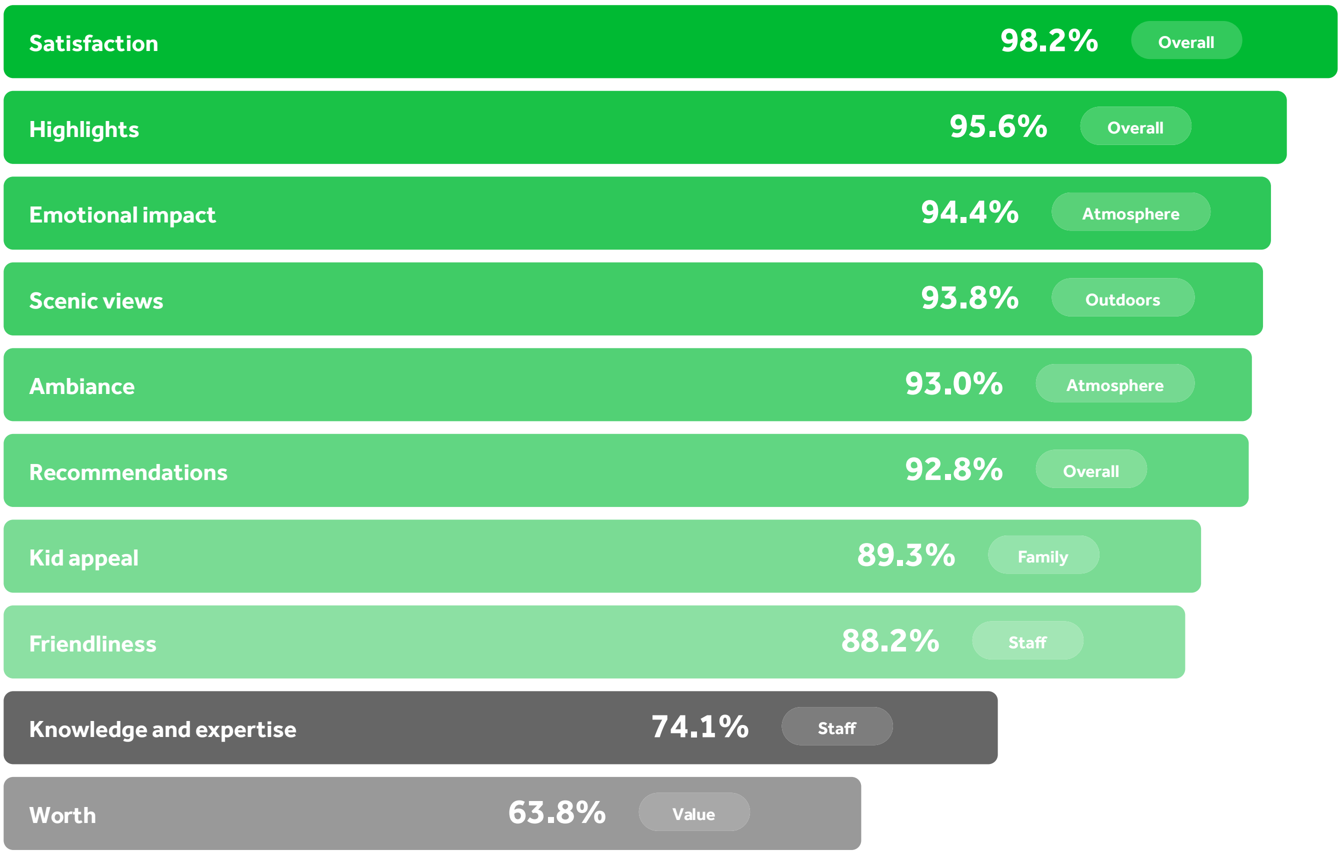
OPERATOR TAKEAWAY: Your single most important metric for identifying at risk visits is not any individual topic. It is the count of distinct negative topics per review. Track the share of reviews with 3+ negative topics. That number, more than your star rating, tells you how many visitors are having a comprehensively bad experience, the kind that generates the most damaging word of mouth and the lowest likelihood of return.

The drivers

What makes visitors happy, what makes them leave, and where the two collide

Joy machines

Across the full topic taxonomy, the most positively polarized topics (minimum threshold of meaningful volume) form a clear hierarchy:



The top of this list is dominated by experiential and emotional topics: satisfaction, highlights, scenic views, ambiance. These are the topics that describe how the visit felt rather than how it functioned. The operational topics that we know drive one star reviews (queuing, pricing, professionalism) are entirely absent from the top of the positive spectrum. This asymmetry is important: the things that make visitors happiest are not the inverse of the things that make them angriest. Joy and anger are driven by different systems.

The joy drivers cluster around four dimensions:

1. Atmosphere and place (scenic views, ambiance, emotional impact). These are environmental drivers that attractions shape through design, curation, and setting. They are hardest to retrofit but longest lasting in their impact.

2. Human connection (friendliness, knowledge and expertise). When staff are warm and knowledgeable, visitors notice. But there is an interesting gap here: friendliness is 14 points more positive than knowledge. Visitors value warmth more than expertise, though both contribute. This aligns with the broader finding that attractions in the heritage and performing arts segments (where expertise is front and center) have the highest ratings overall.

3. Family and social (kid appeal). As discussed in the 5 star analysis, this is the most powerful "forgiveness factor" in the dataset. A child's delight overrides parental frustration with remarkable consistency.

4. Value confirmation (recommendations, worth, return intent). These output metrics confirm that the experience arc held together. Worth sits at only 63.8% positive, lower than you might expect for a "joy driver," because it is a battleground topic. When visitors mention value, they are roughly twice as likely to be positive as negative, but the negative share (30.5%) is large enough to make it the most contested topic in the positive spectrum.

Experience Destroyers: The Negative Spectrum

The most negatively polarized topics paint a precise map of where the industry is failing:

Expectations vs delivery	87.8%	Disappointment 79.9%	Value
Ride availability	86.3%	Disappointment 83.0%	Operations
Professionalism	82.5%	Anger 34.6%	Staff and service
Refunds and exchanges	82.1%	Disappointment 68.3%	Admissions and ticketing
Habitat conditions	81.2%	Disappointment 45.9%	Animals
Parking costs	78.4%	Disappointment 83.8%	Value
Service speed	74.6%	Disappointment 69.7%	Food and retail
Animal visibility	71.6%	Disappointment 16.2%	Animals
Entrance and security	69.2%	Disappointment 62.0%	Facilities
Overall affordability	67.8%	Disappointment 64.4%	Value
Queuing	64.1%	Disappointment 57.3%	Guest experience

The single most negatively polarized topic in the dataset is expectations versus delivery at 87.8% negative. When visitors explicitly compare what they expected with what they received, the comparison is overwhelmingly unfavorable. This topic is a pure measure of the gap between marketing promise and operational reality and it should concern every operator whose advertising shows empty walkways, smiling children and golden hour lighting.

Professionalism is the only topic in the negative spectrum where anger is the dominant secondary emotion at 34.6%. For every other destroyer, disappointment holds primary position by a wide margin. Anger clusters around professionalism because perceived disrespect triggers a fundamentally different emotional response than operational inconvenience. The brain processes "that person was rude to me" differently than "that queue was too long." Both are negative. Only one becomes personal.

Refunds and exchanges sits at 82.1% negative and deserves particular attention. When a visitor reaches the point of requesting a refund, the experience has already failed. The refund interaction is their last touchpoint with the attraction, and the data shows it is overwhelmingly negative. The correlation analysis reveals what happens in the same review: negative refund remarks co-occur heavily with negative professionalism and negative booking experience remarks. The implication is that the refund process itself is generating additional damage. A visitor whose visit was bad enough to request a refund then encounters an adversarial refund process, and this compounds the failure. An already lost visitor becomes an actively hostile one.

OPERATOR TAKEAWAY: Your refund and exchange process is not a cost management function. It is your final opportunity for service recovery with a visitor who has already decided you failed them. The data shows that refund interactions co-occur with the highest anger topics in the dataset. Make the refund process fast, empathetic, and frictionless. You will not win the visitor back, but you can prevent them from becoming an active detractor. Every hour of policy enforcement you invest in fighting a refund generates more reputational damage than the dollar value of the refund itself.

Battleground topics

The most strategically important topics are not the ones at the extremes. They are the ones that sit in the middle of the spectrum, where the balance between positive and negative is close enough that operational execution determines which way any given visitor's remark will tip:

TOPIC	POSITIVE	NEGATIVE	ASSESSMENT
Animal visibility	41.5%	43.6%	**Coin flip.** Uncontrollable variable.
Gift shop	41.6%	28.3%	**Positive leaning.** But volatile.
Food quality	63.6%	29.8%	**Broadly positive.** But 30% negative is too high.
Booking experience	34.8%	25.7%	**Heavily neutral.** When it works, nobody talks about it.
Queuing	22.1%	64.1%	**Negative dominant.** But 22% positive shows what's possible.
Crowding	20.0%	55.6%	**Heavily negative.** But not universal.

The gift shop is a quiet win for the industry. At 41.6% positive and 28.3% negative, retail merchandise is generating more praise than criticism. This may surprise operators who think of the gift shop as an afterthought, but visitors who enjoy the retail experience mention it in their reviews as a genuine part of the visit. The takeaway: retail is an experience touchpoint, not just a revenue line.

Booking experience shows an unusual pattern. Its positivity rate (34.8%) and negativity rate (25.7%) leave a large neutral gap of nearly 40%. This means that most visitors who mention the booking process do so in a factual, emotionless way: “we booked online” or “tickets were pre-purchased.” It is only when the process breaks that emotion enters and when it does, the damage is measurable. Reviews containing negative booking experience remarks average 2.77 stars, a full star and a half below the industry mean. The booking experience is invisible when it works and devastating when it doesn’t.

OPERATOR TAKEAWAY: Think of your digital booking experience, your entry process and your onsite point of sale systems as a single transaction journey, not separate functions. The data shows that negative booking experience remarks co-occur with negative professionalism, negative refund and exchange, and negative onsite ticketing remarks in the same reviews. When the pre-arrival transaction goes wrong, it poisons every subsequent transaction touchpoint. Conversely, when the booking is smooth, visitors simply do not mention it, freeing their attention (and their review space) for the experiential aspects that drive five-star ratings. The best thing your booking system can do is disappear.

The queue crisis

The single largest shift in visitor conversation and why it is accelerating

If there is one finding in this report that demands immediate executive attention, it is this: the combined share of queuing and crowding remarks in the global visitor conversation has nearly doubled in three years.

2022	1.38%	1.47%	2.85%	72.0%
2023	1.44%	1.81%	3.25%	68.1%
2024	2.45%	2.30%	4.75%	69.5%
2025	2.93%	2.59%	5.52%	69.6%

This is not a marginal shift. It is a structural reordering of what visitors care enough to write about. In 2022, queuing and crowding together accounted for roughly 1 in 35 remarks. By 2025, they account for roughly 1 in 18. The conversation share has nearly doubled, and when visitors raise these topics, seven in ten are doing so negatively.

The queue crisis is not evenly distributed across the industry. It concentrates in specific segments with predictable intensity where queue and crowd topics arise:

SEGMENT	2022	2025	CHANGE	ASSESSMENT
Theme park	9.4%	10.0%	+0.5	**Already critical;** getting worse
Water park	9.0%	8.0%	-1.0	**Improving** (capacity investments)
Tower	3.5%	5.9%	+2.3	**Severe deterioration**
Aquarium	3.7%	5.6%	+1.9	**Severe deterioration**
Science museum	1.4%	3.2%	+1.8	**Rising fast from low base**
Immersive experience	1.9%	2.5%	+0.6	Growing with the segment
Zoo	2.0%	2.1%	+0.1	Stable (outdoor capacity advantage)

Theme parks are the epicenter. One in ten remarks at theme parks is about queuing or crowding, and the figure has grown. At water parks, the picture is cautiously improving, likely reflecting the wave of capacity management technology and facility investments the segment has made in recent years.

But the fastest growing queue crisis is happening at towers and aquariums, segments that are not traditionally associated with queue problems. Tower attractions saw their combined queue or crowd share grow from 3.5% to 5.9%, a 66% increase. Aquariums moved from 3.7% to 5.6%, a 51% increase. These are fixed capacity environments: you can only fit so many people on an observation deck or in front of an aquarium tunnel. As visitor volumes have recovered and grown post pandemic, these environments have hit their physical limits and visitors are vocal about it.

Science museums represent the most alarming trajectory. From a low base of 1.4% in 2022, their combined queue/crowd share has more than doubled to 3.2% in 2025. Interactive exhibits, the core differentiator of the science museum experience, create natural bottlenecks. When a visitor must wait 20 minutes to use a hands on exhibit designed for 3 minutes of interaction, the math does not work, and the visitor knows it.

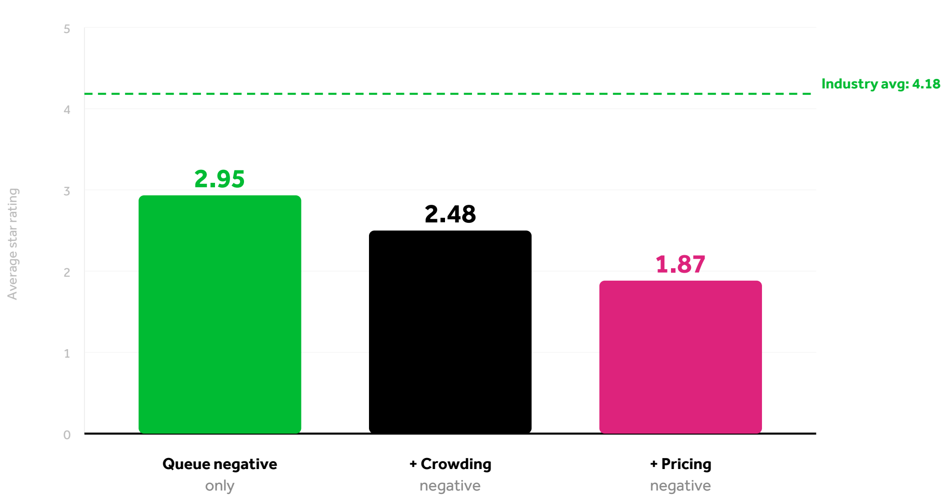
Queuing is not just a problem in isolation. It is a catalyst that amplifies every other negative experience. The correlation data makes this startlingly clear. When visitors mention queuing negatively, the same review disproportionately contains negative mentions of:

CO-OCCURRING TOPIC (NEGATIVE)	FREQUENCY
Crowding	Very high
Ride availability	Very high
Professionalism	High
Ticket prices	High
Overall affordability	High
Food and beverage pricing	Moderate

The mechanism is psychological. A visitor who has been standing in a queue for 90 minutes has had 90 minutes to reconsider the price they paid, to notice every staff interaction that falls short, to feel the crowding pressing in on them, and to conclude that the attraction is not worth the money. Queuing does not just waste time. It degrades the perceived value of every dollar the visitor has spent and will spend for the rest of the visit.

The friction stack

Each layer of operational friction compounds the damage



The cascade data quantifies this precisely:

CONDITION	AVG RATING
Queuing negative only	2.95
Queuing + crowding both negative	2.48
Queuing + crowding + pricing all negative	1.87

That 1.87 average is lower than the 1 star average for any single topic in isolation. When queue, crowd and price perceptions all break in the same visit, the result is a near complete experience collapse. These are the reviews that begin with "never again" and end with "I want my money back."

One visitor at a theme park captured the cascade perfectly: "We waited 2 hours to go on a 30 second roller coaster." In the same review, the crowding remark: "I heard people complaining all day long about how packed the park was."

At another theme park: "We spent a large amount of the time lined up on a platform that felt like it had no end, on a very hot and humid day" alongside "Too many people and not enough rides to spread out the queues."

And perhaps most damningly, at a tower attraction: "This park was operating at way over capacity today. It's pure greed." That final sentence is important. The visitor has moved beyond disappointment into moral judgment. They are not just unhappy; they believe the attraction has chosen to make them unhappy for profit. That is the most dangerous sentiment an operator can generate, because it reframes every future communication from the attraction through a lens of mistrust.

What Good Queuing Looks Like

Here is the counterpoint that makes the queue crisis actionable rather than merely depressing: 22.1% of queuing mentions are positive. When visitors praise the queue experience, their reviews light up across every other dimension. Positive queuing co-occurs with positive mentions of ride quality, friendliness, kid appeal, recommendations, food quality, return intent, and worth.

The positive queue remarks in the dataset tell a clear story about what works:

"Quick to board from the entrance; the queue goes down fast." — Visitor at a tower (joy, 5 star)

"Most of the queues were not too bad, which made the kids happier." — Visitor at a theme park (joy, 5 star)

"Thanks to the app that gives you the time attendance for every attraction." — Visitor at a theme park (joy, 5 star)

Three common threads run through these positive mentions. First, speed of throughput matters more than entertainment within the queue. Visitors do not want a more fun queue; they want a shorter one. Second, technology that provides visibility and control (apps showing wait times, virtual queue systems, timed entry) transforms the queue from a passive endurance test into an active planning tool. Third, the absence of queuing is itself a highlight. Multiple five star visitors specifically call out "no wait" as a reason for their rating. The best queue is no queue.

The transaction experience

How ticketing, food service and retail purchasing shape the visit and where the friction hides

There is a journey that runs parallel to the visitor's experiential journey: the transaction journey. It begins the moment a visitor opens a booking page, continues through the entry gate, follows them to every food counter and retail display and ends with the receipt for the gift shop purchase on the way out (or, in the worst cases, with a refund request the following week). This transaction journey is less visible in the visitor's conscious memory than the experiential journey, but the data shows it is equally powerful in shaping the overall rating.

The ticketing arc: seven touchpoints, one journey

The dataset captures seven distinct topics within the admissions and ticketing theme. Viewed together, they trace a complete arc from pre-arrival to post-visit, and each touchpoint carries its own risk profile:

TOUCHPOINT	ORDER IN JOURNEY	NEGATIVITY	AVG RATING	ANGER	DISAPPOINTMENT
Booking experience	1. Pre-arrival	**25.7%**	**2.76**	2.5%	**23.2%**
Discounts & promotions	2. Pre-arrival or onsite	**16.1%**	**2.69**	0.9%	**15.8%**
Timed reservations	3. Pre-arrival	**32.2%**	**2.87**	1.7%	**30.7%**
Onsite ticketing	4. Arrival	**43.1%**	**2.83**	**3.7%**	**38.7%**
Membership value	5. Ongoing	**19.7%**	**2.12**	1.4%	**19.1%**
Ticket prices	6. Throughout	**49.6%**	**2.93**	**5.6%**	**44.8%**
Refunds & exchanges	7. Post visit	**82.1%**	**1.50**	**14.2%**	**68.3%**

Several patterns emerge from this arc that have direct implications for how attractions design and operate their transaction systems.

Pre-arrival touchpoints are improving in sentiment, but growing in volume

Booking experience has doubled its share of the overall conversation in the past three years. Yet its negativity rate has actually improved, dropping almost by half. More visitors are mentioning the booking process and a larger proportion are mentioning it positively. This is a story of digital investment paying off: attractions that have modernized their booking platforms are reaping measurable sentiment dividends. But the 25.7% that remain negative are encountering frustrations that the digital transformation has not yet resolved.

Timed reservations shows the same volume trajectory but with a more complex sentiment profile. Its negativity rate sits at 32.2% and the comments reveal a tension between visitors who appreciate the crowd control benefits and those who find the restrictions burdensome:

“Selling untimed tickets was a bad idea.” — Visitor at a botanical garden (negative, disappointment, 1 star)

“A lot of the exhibits that seem actually interesting required extra tickets for specific times, which means you’d have to wait to see the exhibit.” — Visitor at a science museum (negative, disappointment, 2 star)

The tension here is instructive. Timed reservations solve the capacity problem but introduce a flexibility problem. Visitors understand the concept but resent the execution when it fragments their visit into a series of scheduling constraints. The visitors who praise timed entry are the ones who booked well in advance and found availability; the ones who criticize it are the ones who encountered sold-out slots or felt the system prevented spontaneous exploration.

Onsite ticketing is the forgotten failure point

Onsite ticketing carries a 43.1% negativity rate, making it the second most negative topic in the ticketing arc after refunds. Yet it receives relatively little strategic attention compared to the digital booking experience. The correlation data reveals why this matters: when onsite ticketing goes wrong, the same review is heavily likely to also contain negative mentions of professionalism, queuing, booking experience, ticket prices, and timed reservations. Onsite ticketing failures are not isolated incidents. They are the visible symptom of a ticketing system that has broken down across multiple touch points.

The implication: visitors who encounter onsite ticketing problems often started with a booking problem (“the website crashed, so we went to buy tickets at the gate”), which became a queue problem (“the ticket line was 45 minutes”), which became a staff interaction problem (“the person at the counter couldn’t find our reservation”), which became a price problem (“and then they charged us the walk up rate instead of the online discount”). By the time the visitor is standing at the ticket counter, they have already accumulated negative impressions across three or four other topics.

OPERATOR TAKEAWAY: Audit your onsite ticketing experience as the canary in the coal mine for your entire ticketing system. High negativity at the onsite ticket counter is rarely about the counter itself. It is the place where failures in digital booking, pricing transparency, capacity management, and staff training all converge and become visible. If your onsite ticketing feedback is deteriorating, look upstream: the root cause is almost certainly in the digital journey, and the counter staff are absorbing the frustration.

Membership value: low frequency, catastrophic when negative

Membership or season pass holder value has the lowest negativity rate in the ticketing arc at 19.7%. Most are happy. But when a member is unhappy, the review is devastating: an average rating of 2.12 when negative, the second lowest in the entire ticketing journey (behind only refunds). This makes membership value the highest stakes topic per negative mention in the arc. A disappointed member is not merely a disappointed visitor. They are a loyal fan who made a commitment to the attraction, and feels that commitment has been betrayed.

Refunds: the point of no return

Refunds and exchanges sits at 82.1% negative, 14.2% anger and an average rating of 1.50 when negative. That 1.50 is the lowest average rating of any topic in the entire dataset. There is no other touchpoint where the visitor attraction relationship is more thoroughly destroyed.

The refund interaction is particularly damaging because of what it co-occurs with. When refund remarks appear, the same review contains negative mentions of professionalism, booking experience and service recovery at rates far above baseline. The refund process is compounding the damage of the original failure rather than containing it. Visitors do not simply want their money back. They want acknowledgment that the experience failed and the data suggests most refund processes are designed to resist the refund rather than recover the relationship.

OPERATOR TAKEAWAY: Redesign your refund process as a service recovery touchpoint, not a loss prevention function. A visitor requesting a refund has already decided the experience failed. Your only remaining variable is whether that visitor becomes a passive detractor (tells a few friends, never returns) or an active one (posts a 1 star review, disputes the charge, warns others publicly). The 14.2% anger rate on refund remarks, the highest anger rate in the ticketing arc by a factor of three, tells you that current refund processes are producing the latter outcome far too often. Fast, empathetic, frictionless refunds do not cost you revenue. They cost you the revenue you have already lost. What they save is reputation.

The food and beverage experience

Food and beverage is the second most frequent transaction a visitor makes during a visit (after the entry ticket), and the data reveals a sector under significant pressure across three dimensions: pricing, speed and quality.

Pricing

The negativity rate for F&B pricing is 71% across all segments. That number does not move much by segment: it ranges from 57% (at immersive experiences, where F&B expectations may be lower) to 78% (at botanical gardens, where visitors may anchor their price expectations to the modest admission fee). But the volume varies enormously. At sports venues, F&B pricing accounts for 2.7% of all remarks, the highest in the dataset. At theme parks, it is 1.8%. These are segments where food is not optional (visitors are captive for hours) and pricing reflects the captive market dynamic.

CONDITION	AVG RATING
F&B pricing negative only	3.48
F&B pricing + ticket pricing both negative	2.61
F&B pricing + ticket pricing + queuing all negative	2.27

The compounding effect of F&B pricing negativity is substantial:

Then F&B pricing is the only complaint, the review still averages 3.48, which is recoverable. But when combined with ticket pricing frustration (the visitor feels they overpaid at every touchpoint), the average drops nearly a full star. Add queuing to the mix, and the review collapses to 2.27. This is the "nickel and dimed while waiting in line" experience that generates the most damaging word of mouth in the industry.

"The prices for food and drinks were totally outrageous." — Visitor at a theme park (anger, 2 star)

"We'll go back, but we'll bring our own food." — Visitor at an aquarium (disappointment, 4 star)

That second quote is particularly telling. A visitor who loves the attraction enough to give it four stars and express intent to return has still decided to opt out of the F&B economy entirely. This is not a lost transaction; it is a lost transaction from a loyal visitor. They have performed the value calculation and concluded that the food is not worth it, even though the attraction itself is.

Service speed

Service speed in F&B contexts carries a 74.6% negativity rate overall, but it concentrates in specific segments. Water parks lead with an 85% negative rate. Theme parks follow at 82% negative. The problem is straightforward: high volume attractions with limited F&B infrastructure create bottlenecks at meal times, and the resulting wait compounds the queue fatigue visitors are already experiencing at ride lines.

The negative spiral is clear: a visitor who waited 90 minutes for a ride, then waited 25 minutes for a $16 hamburger, has now spent nearly two hours of their visit standing in lines rather than experiencing the attraction. Every subsequent touchpoint is evaluated through the lens of accumulated frustration.

Retail experience

Gift shops and merchandise present a more nuanced picture than F&B. Overall, the gift shop is a net positive for the industry: 41.6% positive, 28.3% negative. But the negative end of the spectrum reveals visitor frustration not with the concept of retail, but with its execution and pricing.

“Gift shop was pretty fun to guess prices, just over exaggerate the price and it’s probably more.”

— Visitor at a zoo (disappointment, 3 star)

“There are honestly more souvenir shops, merch stands and food stalls than animals to see.”

— Visitor at a zoo (disappointment, 1 star)

“You walk through a maze of enticements to buy stuff.” — Visitor at a tower (disgust, 3 star)

The second and third quotes point to a visitor perception that retail is cannibalizing the experiential real estate. When the physical journey from one exhibit to the next forces visitors through retail corridors, the commercial intent becomes visible and resented. Visitors do not object to being offered a chance to buy; they object to feeling funneled into buying.

The positive side of the retail correlation is illuminating. When visitors mention the gift shop positively, the same review disproportionately contains positive mentions of friendliness, recommendations, food quality, kid appeal and return intent. A good retail experience is part of a good overall experience. The gift shop is not separate from the visit; it is a chapter of the visit, and visitors evaluate it within that arc.

OPERATOR TAKEAWAY: Your food and beverage plus retail transactions are not ancillary to the visitor experience, they are embedded within it. A visitor who spends seven hours in your attraction will make an average of three to five transaction decisions (entry, food, drink, snack, retail). Each one is an opportunity to reinforce the value of the visit or to erode it. The technology that powers those transactions (ordering systems, point of sale speed, payment flexibility, pricing transparency) matters as much to the visitor’s review as the exhibits and attractions themselves. When the transaction is invisible, fast and fair, it disappears from the review. When it is slow, opaque or feels exploitative, it becomes a central grievance. The best transaction system, like the best booking system, is the one the visitor never thinks about.

Rising signals

What visitors are talking about more recently than they were in three years ago and what it means

Beyond the queue crisis and the ticketing conversation growth, several other topics have shifted meaningfully in their share of the visitor conversation. These are the emerging signals that may define the next era of visitor experience.

TOPIC	THEME	SHARE 2022	SHARE 2025	CHANGE
Crowding	Guest experience	1.47%	2.59%	+1.12
Queuing	Guest experience	1.38%	2.93%	+1.55
Timed reservations	Admissions & ticketing	0.45%	0.93%	+0.48
Booking experience	Admissions & ticketing	0.40%	0.82%	+0.42
Emotional impact	Atmosphere	0.41%	0.72%	+0.31
Onsite ticketing	Admissions & ticketing	0.37%	0.55%	+0.18
F&B pricing	Food & retail	0.80%	0.90%	+0.10

Topics losing share

TOPIC	THEME	SHARE 2022	SHARE 2025	CHANGE
Food quality	Food & Retail	2.43%	1.57%	-0.86
Friendliness	Staff & Service	2.47%	1.98%	-0.49
Scenic views	Trails & Outdoors	1.04%	0.80%	-0.24
Gift shop	Food & Retail	0.84%	0.73%	-0.11

The rising topics tell a story of escalating operational pressure and growing digital complexity. The falling topics tell a different, subtler story: visitors are not necessarily experiencing less friendliness or encountering fewer scenic views. Rather, the competitive landscape for their attention in the review has shifted. When a visitor's mental real estate is consumed by the queuing experience and the ticketing process, there is less room left to mention the lovely scenery or the friendly staff member. Operational friction displaces experiential delight in the visitor's narrative. This is a crowding out effect in the literal sense: the negative operational topics are crowding out the positive experiential ones in how visitors allocate their review.

Emotional impact is the exception to the operational pressure trend. It is growing in share (+75% from 2022 to 2025) and is overwhelmingly positive. Visitors are increasingly attuned to, and willing to articulate, the emotional resonance of their experience. This may reflect the broader cultural shift toward valuing experiences over possessions, or it may reflect the growth of immersive and narrative-driven attractions that are designed to provoke emotional responses. Either way, it is a signal that attractions capable of creating genuine emotional moments have a powerful differentiator, one that visitors will prioritize in their reviews even amid operational friction.

OPERATOR TAKEAWAY: Monitor the rising and falling topics in your own review data as a leading indicator of visitor priority shifts. If your queue and crowding share is growing while your friendliness and food quality share is shrinking, it does not mean your staff became less friendly or your food got worse. It means the visitor's attention has been captured by a problem they consider more urgent and they are using their finite review space to talk about that instead. Fix the operational problem and the positive experiential topics will return to the conversation. They have not disappeared from the experience; they have been buried by the noise.

Paradoxes

Five counterintuitive findings that challenge conventional industry wisdom

The loyalty paradox

Membership value carries the lowest negativity rate (19.7%) of any topic in the ticketing arc, but when a member is unhappy, the average review rating is 2.12, the second most devastating score in the dataset. Members are more satisfied on average, but their floor is lower. The explanation is straightforward: a member has made an identity investment, not just a financial one. They are "a member of" your attraction. When the experience fails to honor that identity, the betrayal is personal, and the review reflects it.

The invisible transaction

Booking experience and onsite ticketing have a combined positive rate of just 34.8% and 11.7% respectively, but their neutral rate (the share that is neither positive nor negative) is among the highest of any topic, roughly 40% for booking and 45% for onsite ticketing. When these systems work, they generate no sentiment at all. They are invisible. This means the return on investment of a great booking system cannot be measured in positive reviews, because visitors do not often praise a frictionless booking. It can only be measured in the absence of negative reviews, which is harder to quantify but equally valuable.

The compensation paradox

Positive queuing co-occurs most strongly with positive ride quality mentions. Visitors who experienced short queues are disproportionately likely to also praise the quality of the ride or attraction they queued for. But the inverse is not simply true: visitors who experienced long queues do not correspondingly criticize ride quality more than baseline. This means that short queues magnify the perceived quality of the experience that follows, but long queues do not diminish it. The ride is still good. The visitor just cannot enjoy it because they are framing their evaluation through accumulated frustration. The solution is not to make the ride better (it already is); it is to make the queue shorter so the visitor arrives at the experience in a state capable of appreciating it.

The price perception paradox

Food and beverage pricing is almost universally negative (71% across all segments), yet food quality is broadly positive (64%). Visitors are simultaneously saying "the food is too expensive" and "the food is pretty good." This is not a contradiction. It is a value equation in which the numerator (quality) is sufficient but the denominator (price) is too high. The operational implication is that F&B operators do not have a quality problem; they have a value communication problem. The visitor knows the food is decent. They just do not believe it is worth what they paid. Portion sizes, presentation, perceived value signaling (visible preparation, premium ingredients, local sourcing narratives) may matter more than actual recipe improvement.

The silence of the satisfied

The most satisfied segments in the dataset (national parks, botanical gardens, performing arts venues) have the lowest management response rates. National parks: virtually no management responses. Botanical gardens: minimal. Performing arts: near zero. Yet these segments maintain the highest ratings. Meanwhile, the segments with the highest response rates (water parks at 35%, immersive experiences at 29%) carry among the lowest ratings. This does not mean responding to reviews is counterproductive. It means that the segments that need to respond are the ones facing the most operational challenges and responding alone is not enough to close the gap. The response is a bandage, not a cure.

OPERATOR TAKEAWAY: If you find yourself investing heavily in review response programs, ask whether you are treating the symptom or the disease. Response programs are valuable for service recovery, reputation management and potentially generative engine optimization, but every hour spent drafting responses is an hour that could be spent addressing the underlying operational issues that generated the negative review (and saved, when the review can be authored by AI). The data shows that the highest rated attractions in the world barely respond to reviews at all. They do not need to, because they have invested in the experience rather than the apology.

The response gap

How the industry handles feedback and the strategic cost of silence

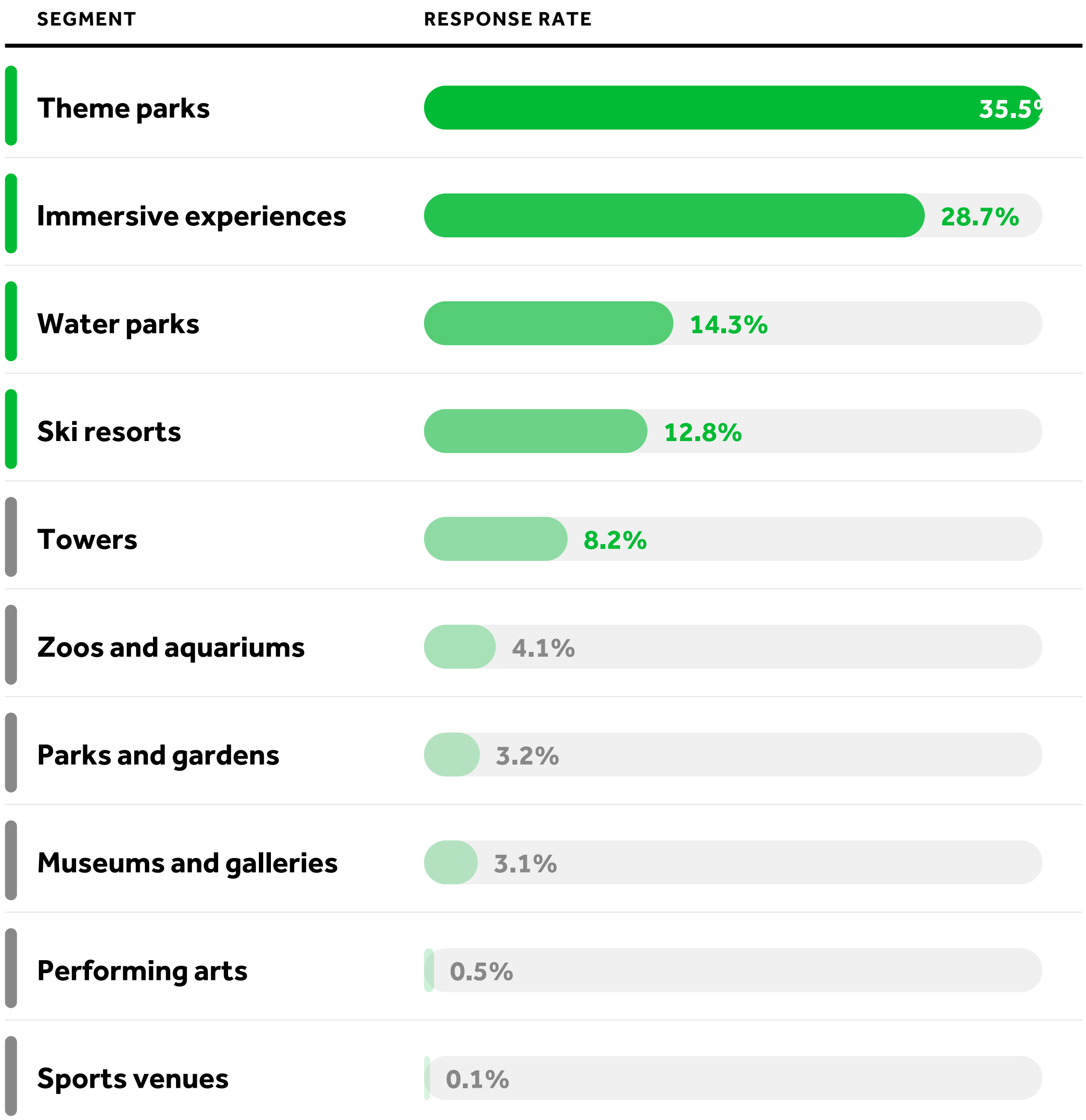
Across the full review dataset, the global management response rate stands at approximately 9.6%. That means more than nine in ten visitors who take the time to write a review receive no acknowledgment from the attraction. The gap between visitor effort and operator engagement is vast and it varies dramatically by context.

Response rate by star rating

RATING	RESPONSE RATE
1-star	26.9%
2-star	22.7%
3-star	16.1%
4-star	9.3%
5-star	7.8%

The industry correctly prioritizes negative reviews for response: 1 star reviews receive a response nearly 3.5 times more often than 5 star reviews. But the 26.9% response rate for 1 star reviews still means that nearly three quarters of visitors who had the worst possible experience receive no engagement at all. These are the visitors writing farewell letters, the ones explicitly stating they will never return. They represent the highest stakes feedback in the dataset and most of them are speaking into silence.

Response rate by segment



The disparity is striking. Where water parks respond to more than one in three reviews, sports venues respond to essentially none. This likely reflects differences in organizational structure (water parks often have dedicated guest experience teams), ownership models (many museums and performing arts venues have limited marketing resources), and the perceived return of engagement (sports venues may consider the game day experience self contained, or managed by a partner and not the venue).

But the strategic cost of silence is real, even for high performing segments. A five star review that receives a thoughtful management response becomes more visible, more credible and more persuasive to future visitors reading reviews. It signals that the attraction is listening, that individual feedback matters and that the organization cares about the relationship beyond the transaction. The 7.8% response rate for five star reviews represents 92% of your best advocates going unacknowledged.

OPERATOR TAKEAWAY: Develop a tiered response strategy based on sentiment and star rating. For 1-star reviews: respond within 48 hours with empathy, acknowledgment, and a clear next step (contact information for resolution). For 5-star reviews: respond with genuine gratitude and a personal touch that makes the visitor feel seen. For the middle: prioritize reviews that mention specific operational topics (queuing, pricing, staff), as these contain the most actionable intelligence. Automating portions of this process (AI assisted draft responses, sentiment triggered prioritization) can make it feasible at scale. The goal is not to respond to every review; it is to ensure that the reviews with the highest strategic value, both positive and negative, receive human attention.

The fingerprint of excellence

What separates the best attractions in the world from the worst (hint: it's not what you think)

We compared the topic profiles of two groups: attractions averaging 4.5 stars or above (the high performers) and those averaging below 3.5 stars (the low performers), each with at least 500 reviews to ensure statistical stability.

METRIC	HIGH PERFORMERS (4.5+)		LOW PERFORMERS (<3.5)
Queuing	0.88%	6.97	8x higher at low
Professionalism (neg)	0.53%	2.34%	4.4x higher
F&B pricing (neg)	0.22%	1.62%	7.4x higher
Worth (neg)	0.19%	1.26%	6.6x higher
Refunds (neg)	0.05%	0.63%	12.6x higher
Emotional impact	2.13%	0.00%	Only at high performers
Worth (pos)	1.70%	0.62%	2.7x higher at high
Friendliness	2.81%	3.00%	Identical

The comparison produces a finding that should reframe how the industry thinks about experience quality.

METRIC	HIGH (4.5+)	LOW (<3.5)	DIFFERENTIAL
Queuing	0.88%	6.97%	8x higher
Professionalism (neg)	0.53%	2.34%	4.4x higher
F&B pricing (neg)	0.22%	1.62%	7.4x higher
Ticket pricing (neg)	0.41%	1.50%	3.7x higher
Worth (neg)	0.19%	1.26%	6.6x higher
Refunds (neg)	0.05%	0.63%	12.6x higher
Booking (neg)	0.13%	0.28%	2.2x higher
Worth (pos)	1.70%	0.62%	2.7x at high
Emotional impact	2.13%	0.00%	Only at high
Friendliness	2.81%	3.00%	Virtually identical

Read that last row again... friendliness mentions are virtually identical between the best and worst attractions in the world. Both groups generate roughly 3% of their remarks about staff friendliness. The difference is not that high performing attractions have friendlier staff. The difference is in everything else.

The fingerprint of excellence is defined not by what is present but by what is absent:

Queuing mentions are 8 times lower at high performers. Visitors at excellent attractions barely talk about queuing because queuing barely exists as a friction in their experience. Whether through lower volumes, better capacity management, timed entry systems, virtual queuing, or simply better designed throughput, high performers have solved the queue problem to the point where it is no longer a significant part of the visitor conversation.

F&B pricing complaints are 7.4 times lower. This does not mean high performers charge less for food. Many of them charge more. It means that the overall value perception of the experience is high enough that food pricing does not trigger the “nickel-and-dimed” reaction that dominates at low performers.

Refund complaints are 12.6 times lower. At high performers, refunds barely register as a topic. At low performers, they account for 0.63% of all remarks, meaning that refund friction is a measurable, recurring feature of the visitor conversation. This is the clearest signal in the data that the post-visit transaction experience differs fundamentally between the best and worst attractions.

Emotional impact exists only at high performers. At 2.13% of remarks, emotional impact is a meaningful part of the conversation at top-rated attractions. At low performers, it is literally zero. This is perhaps the most profound finding in the report. Visitors at the best attractions are moved, awed, and transformed. Visitors at the worst attractions do not experience those emotions at all, or if they do, they are buried so far beneath operational frustration that they never surface in the review.

The transaction gap

Across the industry, transaction related topics (admissions and ticketing plus food and retail) account for approximately 10% of all visitor remarks. But their negativity rate of 38.9% is nearly ten percentage points higher than non-transaction topics at 29.0%.

Transaction touchpoints are the most negative dimension of the visitor experience across the global industry. They are more negative than the experiential journey, more negative than the facilities, more negative than staff interactions outside of transactions. This is the clearest evidence in the dataset that the infrastructure connecting the visitor to the attraction (the booking system, the entry gate, the POS terminal, the ordering queue, the checkout counter) is consistently the weakest link in the experience chain.

And here is the commercial implication: transaction touchpoints are also the most directly improvable through technology investment. Unlike ambiance, scenic beauty or animal visibility, the transaction experience is fully within the operator's control and can be systematically optimized. The gap between the 38.9% transaction negativity rate and the 29.0% non-transaction rate represents a quantifiable opportunity.

OPERATOR TAKEAWAY: When you benchmark your sentiment data, look beyond the headline rating. Compare your topic profile against the fingerprint of excellence. If your queuing share is above 2%, your F&B pricing negativity is above 1%, or your refund negativity is above 0.2%, you are carrying the topic DNA of a low performer regardless of your overall star rating. These are the specific, measurable, addressable gaps between where you are and where the best attractions in the world operate.

Ten things to tackle today

An evidence based action plan for every visitor attraction operator

The following recommendations are ordered by estimated impact, drawn directly from the correlation, cascade, and benchmarking data in this report. Each is supported by specific findings and designed to be actionable within an annual operational cycle.

1. Treat queue reduction as your highest return investment

The evidence: Queuing share has nearly doubled from 2.8% to 5.5% of the visitor conversation in three years. Negative queuing alone drops the average review to 2.95. Combined with crowding and pricing negativity, it falls to 1.87. High-performing attractions carry an 8x lower queuing share than low performers.

The action: Invest in virtual queuing technology, real time wait time communication, timed entry systems and dynamic capacity management. Audit peak day throughput for every major attraction and entry point. The data shows that visitors who experience short queues are more likely to praise ride quality, recommend the attraction, and rate the visit as "worth it." Queue reduction does not just prevent complaints; it amplifies every other positive dimension of the visit.

2. Redesign the transaction journey as an experience, not an administrative process

The evidence: Transaction related remarks carry a 38.9% negativity rate versus 29.0% for non-transaction topics, a ten point gap. Booking, ticketing, food ordering and retail checkout are consistently the most negative touch points in the visitor journey.

The action: Map every visitor transaction from pre-arrival booking through exit gate retail purchase. Identify friction points, redundant steps and moments where the visitor is forced to wait, repeat information, or navigate confusing interfaces. Invest in seamless, integrated technology that makes each transaction fast, transparent, and invisible. The best transaction is the one the visitor never thinks about.

3. Split staff training into warmth and professionalism tracks

The evidence: Negative professionalism remarks produce a 1.90 average rating with 47% anger. Negative friendliness produces a 2.44 average with 48% anger. Both are high anger topics, but professionalism failures are 0.5 stars more damaging. High and low performers have identical friendliness mention rates; the gap is in professionalism.

The action: Develop a dedicated professionalism training program focused on de-escalation, policy communication and respectful enforcement. This is separate from (and more important than) hospitality warmth training. Equip front line staff to handle the three highest friction interactions: queue complaints, pricing questions and refund requests. These are the moments where professionalism failures generate anger.

4. Turn your refund process into a service recovery opportunity

The evidence: Refund remarks are 82.1% negative with a 1.50 average rating when negative, the lowest of any topic. They are 12.6x more prevalent at low performers. Negative refund remarks co-occur with negative professionalism and booking experience, indicating the refund process is compounding damage rather than containing it.

The action: Remove friction from the refund process entirely. Empower front-line staff to authorize refunds without escalation. Set a maximum response time (ideally under 24 hours for digital requests). Frame the refund interaction as the final chapter of the visit, not a cost management exercise. A fast, empathetic refund costs you money you have already lost. A slow, adversarial one costs you reputation you have not yet lost.

5. Manage capacity as an experience quality lever, not just a revenue one

The evidence: The queue crowding pricing cascade drops reviews to 1.87 average, the most devastating combination in the dataset. Visitors at over-capacity attractions use moral language ("pure greed"), reframing the attraction's intent as exploitative. Combined queue or crowd share at aquariums grew 51% in three years, at towers 66% at science museums 130%.

The action: Define an "experience capacity" for your venue that is lower than your physical capacity. Use dynamic pricing, timed entry and distributed marketing to shape arrival patterns and cap simultaneous occupancy. Monitor crowding and queuing sentiment in real time as an operational metric, not just a post visit metric. When the queue share in your feedback rises, you are selling more tickets than your experience can support.

6. Invest in emotional resonance, not just operational efficiency

The evidence: Emotional impact exists at 2.13% of remarks at high performers and 0% at low performers. It is growing faster than almost any other topic (+75% share growth from 2022 to 2025). When visitors feel emotionally moved, they recommend, return, and forgive operational imperfections.

The action: Identify the moments in your visitor journey that have the potential to create awe, wonder, or meaningful connection. Invest in storytelling, interpretation, narrative design, and sensory curation at those moments. Not every attraction can be a memorial museum or a national park, but every attraction can create at least one moment where the visitor stops thinking about logistics and starts feeling something.

7. Use the kid appeal multiplier deliberately

The evidence: Kid appeal is 95% positive in five star reviews. Reviews with positive kid appeal remarks maintain higher ratings even in the presence of negative queue and price remarks. Aquariums, science museums and water parks lead on this metric.

The action: If you serve families, audit every major exhibit and attraction for child accessibility and engagement. Invest in age appropriate interactions, child height design, dedicated family spaces and programming that allows children to lead the experience. The return is not just in the child's satisfaction. It is in the parent's willingness to forgive the queue, overlook the food price and give you five stars despite the operational friction they encountered.

8. Mine 5 star reviews for operational intelligence

The evidence: Five star reviews contain negative remarks about queuing (1.4% of remarks) and crowding (1.8%) at meaningful rates. These are your most loyal visitors telling you what to fix.

The action: Implement a systematic process for extracting negative remarks from high rated reviews. These are not complaints; they are coaching from advocates. They identify the specific operational gaps that, if closed, would push your already strong performance toward excellence. Prioritize these findings over the noise from low rated reviews, which tend to reflect compounding failures that are harder to isolate.

9. Track the cascade metric, not just the star rating

The evidence: A review with one negative topic averages 4.12 stars. Two negative topics: 3.31. Three:

2.69. Four or more: 2.09 with a 43% chance of being 1-star. The number of distinct negative topics is the strongest single predictor of catastrophic reviews.

The action: Build a “cascade score” into your visitor feedback analysis: the average number of distinct negative topics per review. Track this weekly. A rising cascade score is the earliest warning sign of experience deterioration, and it will move before your star rating does. Target a cascade score below 1.5 to remain in the high performer band.

10. Respond strategically, fix relentlessly

The evidence: Industry response rate is 9.6%. The highest rated segments (national parks, botanical gardens, performing arts) have the lowest response rates. The lowest rated segments have the highest. Responding to reviews is necessary but not sufficient.

The action: Benefit from AI prescribed reply to semi automate with human in the loop review and implement a tiered response program (1 star: within 48 hours with empathy and resolution; 5 star: within a week with gratitude and personalization; middle: prioritize by topic). But invest the majority of your feedback related resources into fixing the operational issues that reviews surface rather than managing the reviews themselves. The goal is not to win the argument with a disappointed visitor. The goal is to ensure the next visitor never has the same experience.

Closing

The voice of the visitor is louder, more specific and more consequential than ever.

A decade ago, visitor feedback was a blunt instrument: a star rating, a brief comment, an occasional trip to the guest services desk. Today, visitors articulate their experience with analytical precision, enumerate specific touch points, evaluate value with sophisticated mental accounting and publish their conclusions to a global audience within hours.

The data behind this report reveals an industry that delivers delight the majority of the time but faces structural pressures that are eroding satisfaction at the margins. The queue crisis is real and accelerating. The transaction experience is the most consistently negative dimension of the visitor journey. The cost of living crunch is reshaping value perception. And the gap between high performing and low performing attractions is defined not by the quality of their exhibits or the friendliness of their staff, but by the operational systems, technology infrastructure and capacity management practices that shape every visitor touchpoint from booking to exit.

The good news: nearly every driver of negative sentiment identified in this report is addressable. Queuing, ticketing friction, pricing perception, refund processes, food speed and capacity management are operational challenges with technological solutions. The attractions that invest in solving them will not merely improve their star ratings. They will shift the composition of their visitor conversation from operational grievance to experiential advocacy, from disappointment to emotional impact, from farewell letters to return intent.

The voice of the visitor is not just feedback. It is a real time, continuous, globally distributed audit of th-eexperience you deliver. The only question is whether you are listening with the precision that your data and your visitor demands.

About accesso Intelligence

See your own benchmark.

We offer a complimentary diagnostic for visitor attraction operators: a structured analysis of your public review data using the same methodology behind this report.

- **Your remark-level sentiment profile**
- **Segment comparison**
- **Top 3 improvement opportunities by impact**

Book your diagnostic session