SMU SINGAPORE MANAGEMENT UNIVERSITY

Institute of Service Excellence

TOPICAL REPORT

Domestic Tourism: Staycations & Paid-Attractions

June 2021

Domestic Tourism Insights: Staycations & Paid-Attractions by ISE at SMU

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INTRODUCTION

Domestic Tourism: Background of the Study

Tourism receipts have dipped by over 75% in the first 3 quarters of 2020[1] due to international travel restrictions caused by the COVID-19 pandemic. The restrictions on both inbound and outbound leisure travel are expected to continue for the foreseeable future. With international travel heavily affected, domestic spend on tourism has now become critical to support tourism and related businesses and to keep the tourism sector afloat during these trying times.

With a view to understanding the post-COVID-19 impact on travel and tourism, the **Institute of Service Excellence at SMU** conducted online surveys of locals in **September and October 2020**. The study **surveyed 450 Singaporeans and Permanent Residents** who were randomly selected from a nationally representative online panel.

SINGAPORE - Visitor arrivals to Singapore plummeted to 2.7 million last year, the lowest in about four decades, following unprecedented global travel restrictions and border closures amid the Covid-19 pandemic.

"Given that we are a small country and we don't have the benefit of domestic travel, what we are trying to do now is to encourage Singaporeans to visit some of our local tourist attractions," said Mah.

Source: https://www.straitstimes.com/singapore/consumer/27-million-visitors-in-singapore-in-2020-lowest-in-four-decades-due-to-covid-19

Domestic Tourism Survey: Study Objectives

This study aims to understand Singaporeans' attitudes towards domestic tourism. Specifically the study sought to obtain insights on the following research questions:

- With restrictions on traveling overseas for leisure, how willing are Singaporeans to go for Staycations and visit local Paid Attractions?
- What is the impact on the number of visitors and domestic spend in these industries?
- What are Singaporeans' key concerns when going for Staycations and visiting Paid Attractions?
- How can operators alleviate their concerns to encourage higher engagement/ visits?

METHODOLOGY

Domestic Tourism Survey: Research Methodology

	Local Tourism Study 2020
Data Collection Methodology	**Online Survey of Locals** (Singaporeans and PRs were randomly selected from a nationally representative online panel. Quotas were set to ensure the respondent profile was representative of the general population)
Fieldwork Period	18 September to 2 October 2020
Sample Size	n=450

Domestic Tourism Survey: Areas of Measurement

Local Tourism Behaviour
Pre-Covid-19 vs "now"

Staycations
(Hotels + Facilities + F&B)
- Likelihood to visit
- Estimated spend/ visits
- Concerns & points of alleviations

Paid Attractions
- Likelihood to visit
- Estimated spend/ visits
- Concerns & points of alleviations
- Attractions to visit/ not visit

Free Attractions
- Likelihood to visit
- Attractions to visit/ not visit

EXECUTIVE SUMMARY

Key Findings

Domestic Tourism Overview

- 40% of residents are willing to both visit a paid-attraction and engage in staycations, with a further 30% of residents willing to do either.
- About a third of residents had their incomes negatively affected by the pandemic whilst a further third held a stable income during the pandemic. Despite having their incomes negatively affected, this segment of residents have indicated a greater willingness to visit a paid-attraction and to go for staycations.

Staycation Overview

- More than half of local residents are willing to go for staycations with 15% having already made a booking.
- About 38% of residents are willing to increase booking frequency. While a similar 41% are willing to increase their spending on staycations.
- The bulk of these increases stem from a projected increase in “in-frequent” customers (stay of 3 times or less per year), and customers with smaller budgets (less than S$500 per year).

Key Findings

Staycation: Concerns & Focus Areas

- The top three concerns for locals were (1) Proper and effective disinfection of facilities, (2) Price and (3) Whether the hotel was used for stay home notice cases.
- The top three areas that operators can focus on/ communicate about to alleviate customers' concerns were (1) Having SG clean certification, (2) Cancellation policy and (3) Air filtration systems in the facilities.

Staycation: F&B and Facilities

- A high proportion of residents (74%) were likely to utilise the hotel operator's facilities; similarly 88% of them said they would use the F&B services.
- Crowding and sanitisation of F&B outlets were the key concerns of residents. F&B operators should consider ensuring (1) frequent sanitisation (for e.g. SG Clean), (2) introduction of a-la-carte buffets, (3) room service meals, and (4) staggered service times via bookings.
- Likewise, (1) sanitisation and (2) crowding of facilities were the key concerns of residents. Facility operators should follow (1) frequent sanitisation procedures and (2) provide realtime updates on number of patrons so as to prevent overcrowding.

Key Findings

Paid Attraction Overview

- Singapore residents are slightly more willing to visit paid attractions as opposed to engage in staycations.
- Frequency of visits and spend are more likely to be reduced or kept constant by residents.
- Similar to Staycations, the proportion of “in-frequent” (visit less than 2 times a year) is set to increase. While the proportion of more frequent visitors are set to decrease.
- Likewise, the proportion of customers with smaller budgets for Attractions is set to increase as compared to 2019.

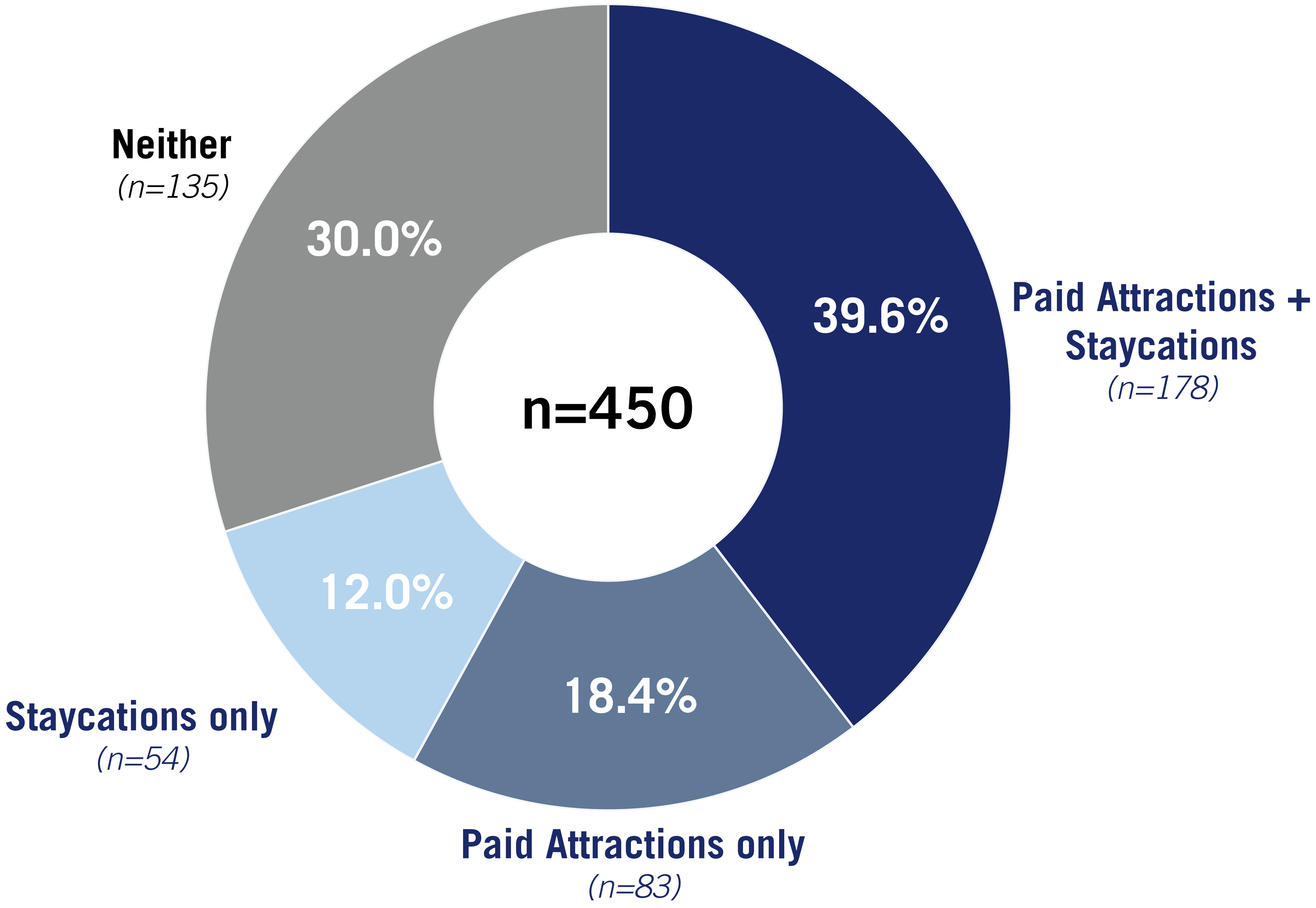
Paid Attraction: Concerns & Focus Areas

- Key concerns for residents when visiting paid-attraction were (1) sanitisation, (2) price of entry and (3) the ability to maintain safe-distancing.
- Key factors residents felt would alleviate their concerns were (1) offering promotional pricing, (2) having SG clean certification and (3) offering tickets with flexi cancellation policies.

DOMESTIC TOURISM OVERVIEW

70% of Residents Are Willing Visit a Paid Attraction and/or Book Staycations

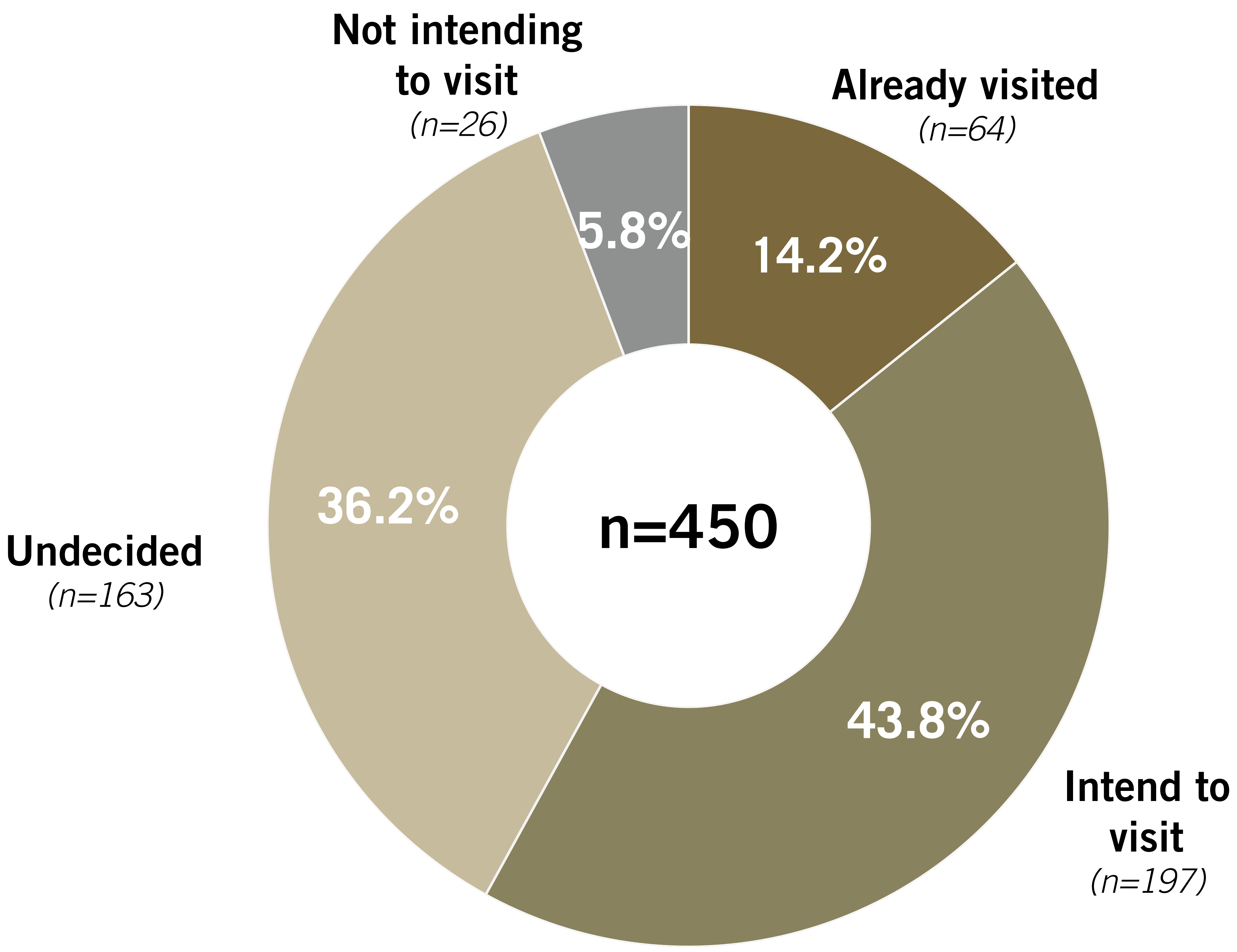
Willingness to Visit Attractions/ Book Staycations



- Nearly **40%** of the local residents surveyed are willing to **visit Paid Attractions and book Staycations**
- **18.4%** of them said they would **only visit Paid Attractions,** while **12.0%** said they would **book Staycations only.**

Consumer Outlook of Paid Attractions for the Next 12 Months

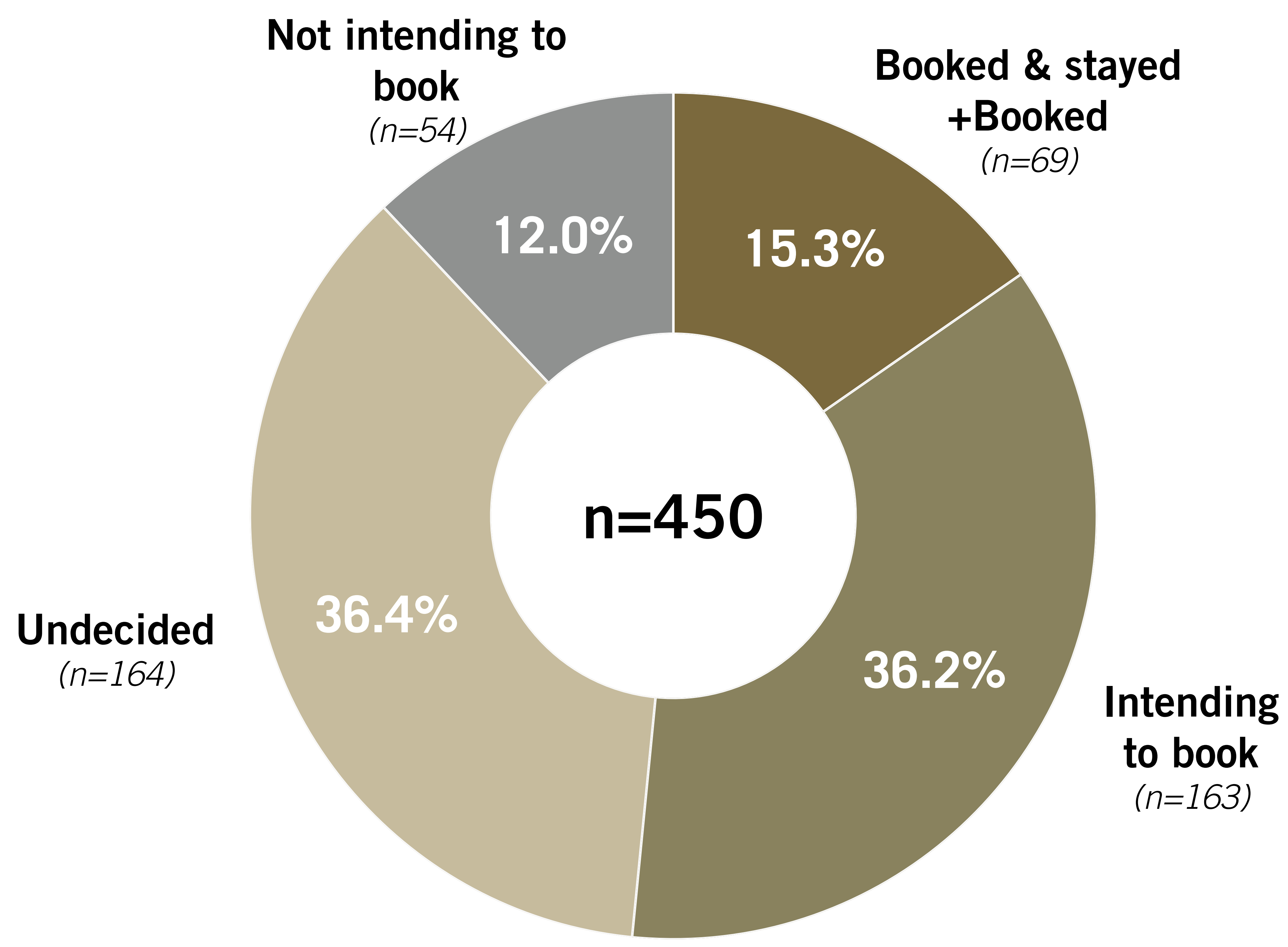
Intent to Visit a Paid Attraction in the next 12 months



- Nearly **44%** of the local residents surveyed intend to **visit Paid Attractions** in the next 12 months
- **14.2%** of them said had already **visited Paid Attractions**, after the re-opening in Phase 2 (after July 2020)
- **36.2%** of residents were still undecided about whether they would visit paid attractions

Consumer Outlook of Staycations for the Next 12 Months

Intent to Book a staycation in the next 12 months



- **36.2%** of the local residents surveyed intend to **book Staycations** in the next 12 months
- **15.3%** of them said had already **booked and/or engaged in Stayactions,** after the re-opening in Phase 2 (after July 2020)
- **36.4%** of residents were still undecided about whether they would book staycations in the next 12 months

LOCAL DEMAND FOR ATTRACTIONS

Tourism Sector: Attractions re-opened to the Public in Phase 2 with safety measures in place

Jan to Feb 2020

- Jan-Feb: Changi Airport steps up precautionary measures
- Jan - Feb 2020 Entry Restrictions on visitors from affected countries
- No entry to or transit through SG for new visitors with recent travel history to Italy, France, Spain, Germany, Mainland China, South Korea and Iran.

Mar 2020

- **Mar 23: All short-term visitors (including tourists/visitors) barred from entering Singapore**
- **Mar 30: All long-term pass holders (such as LTVP or student passes) need approval before entering or returning to SG**

Apr to May 2020

- **Apr 7 to May 4: Circuit-breaker period**
- **Temporary Closure of all attractions during this period**
- **List of Attractions included - Sentosa, Universal Studios, Wildlife Reserves -Singapore Zoo, Jurong Bird Park, key Museuems**

Circuit Breaker

Jun 2020

- Jun 1: End of Circuit-breaker
- Jun 2: Travellers allowed to transit through Changi Airport
- Jun 8: Singapore-China Fast Lane for Essential Travel
- **Jun 16: KidZania SG closes down**
- Jun 17: SHN restrictions lifted for travelers from Aus, HK, Japan, Brunei, NZ, Vietnam, Macau, China, Taiwan
- Jun 19: End of Phase 1
- **Attractions to reopen to public in July**

Jul to Aug 2020

- **Jul 1-6: Attractions open to public with safety measures and restrictions in place**
- Aug 17: Reciprocal Green Lane (RGL) and Periodic Commuting Arrangement (PCA) with Malaysia opened.
- Aug 21: Announcement that SG may consider introducing reciprocal green lanes for leisure travel

Sep 2020

- Sep 1: SG & Brueni Reciprocal Green Lane (RGL) and Air Travel Pass (ATP)
- Sep 1: NZ travelers can apply for single entry Air-Travel Pass (ATP) - travel period from Sep 8
- Sep 4: "Fast lane" for Chinese and South Korean business travellers.
- Singaporeans permitted to travel to China, New Zealand, Brunei, Vietnam and Australia, China.
- "Business Track" on 18 Sep and "Residence Track" with Japan on 30 Sep

Oct 2020

- **Oct 1: Haw Par Villa to close for renovations from 1 Oct 2020 to 31 Mar 2021**
- Oct 2: Announcement Cruises to nowhere will be allowed with a maximum occupation of 50 per cent of a ship's original capacity for the first three months
- Oct 8: Travelers from Vietnam and Australia (except Victoria State) allowed to enter
- Oct 15: Singapore-HK to establish a bilateral air travel bubble (no quarantines/ SHN, no restrictions on travel itineraries or travel purposes). Only Covid019 negative test mandatory before departure.
- Oct 26: Applications for Singapore-Indonesia Reciprocal Green Lane begins

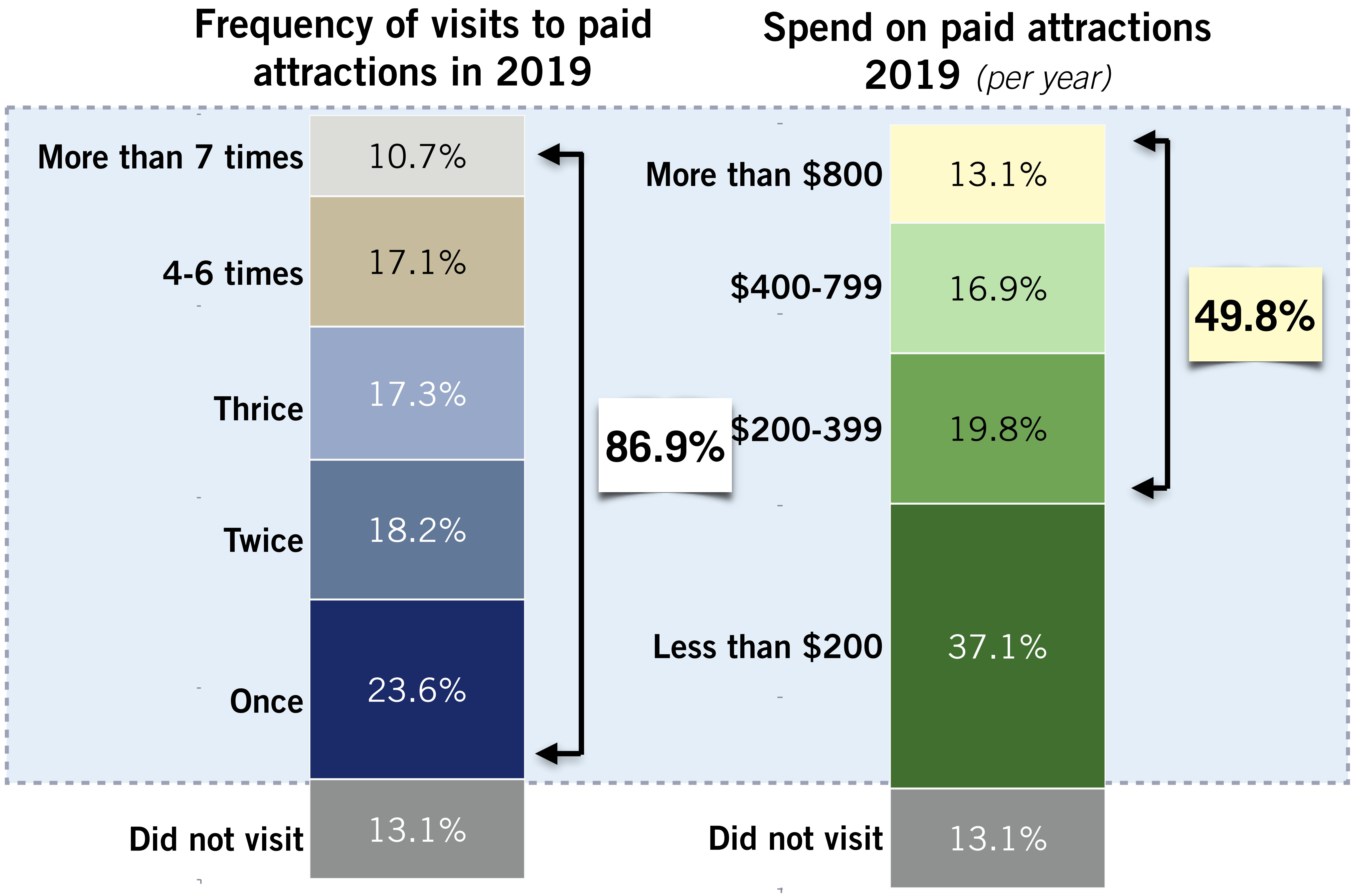
Nov 2020

- **Nov 6: Genting Cruise Lines' World Dream will start offering those cruises on Nov 6**
- **Dec (expected): Royal Caribbean International's Quantum of the Seas will begin sailing in December,**

19

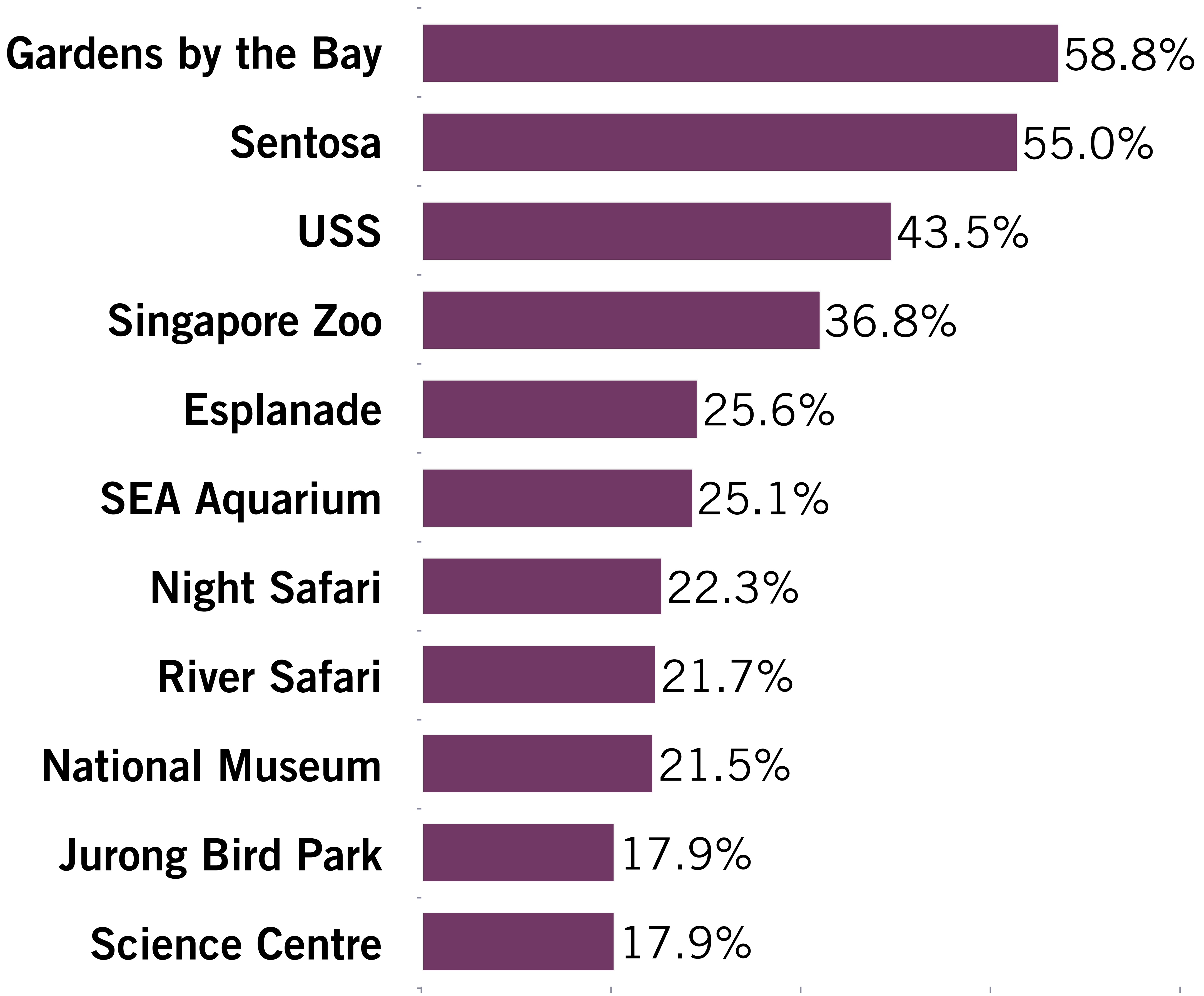
Visiting Paid Attractions Pre-COVID in 2019

(Locals Visit Frequency & Spend on Paid Attractions: Prior to the Pandemic)



- Majority of the local residents surveyed **(86.9%)** had visited Paid Attractions **at least once in 2019** ao Paid Attractions in 2019
- **Nearly half of them (49.8%)** ohad **spent at least $200** on bookings in 2019

Top Visited Paid Attractions Pre-COVID in 2019



The top 3 Paid Attractions visited by local residents in 2019 were:

1. Gardens by the Bay **(58.8%)**
2. Sentosa **(55.0%)**
3. Universal Studios Singapore **(43.5%)**

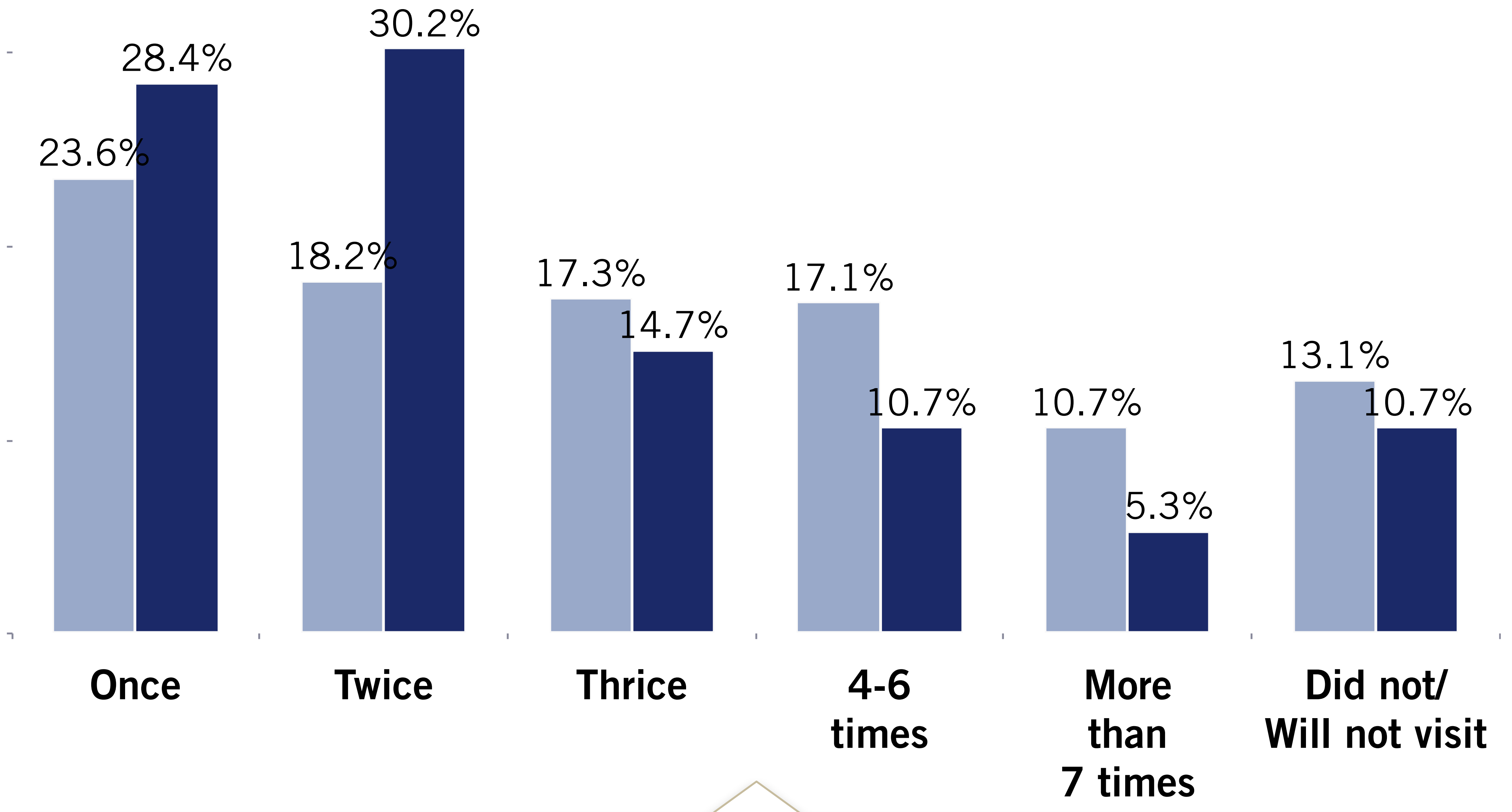
Most Locals Intend to Increase or Maintain Their Visits & Spend

(Locals Visits & Spend on Attractions: Pre-COVID-19 vs Next 12 months)

2019
Next 12 Months

Frequency of paid attraction visits

(% of respondents)



21% Increased

34% Unchanged

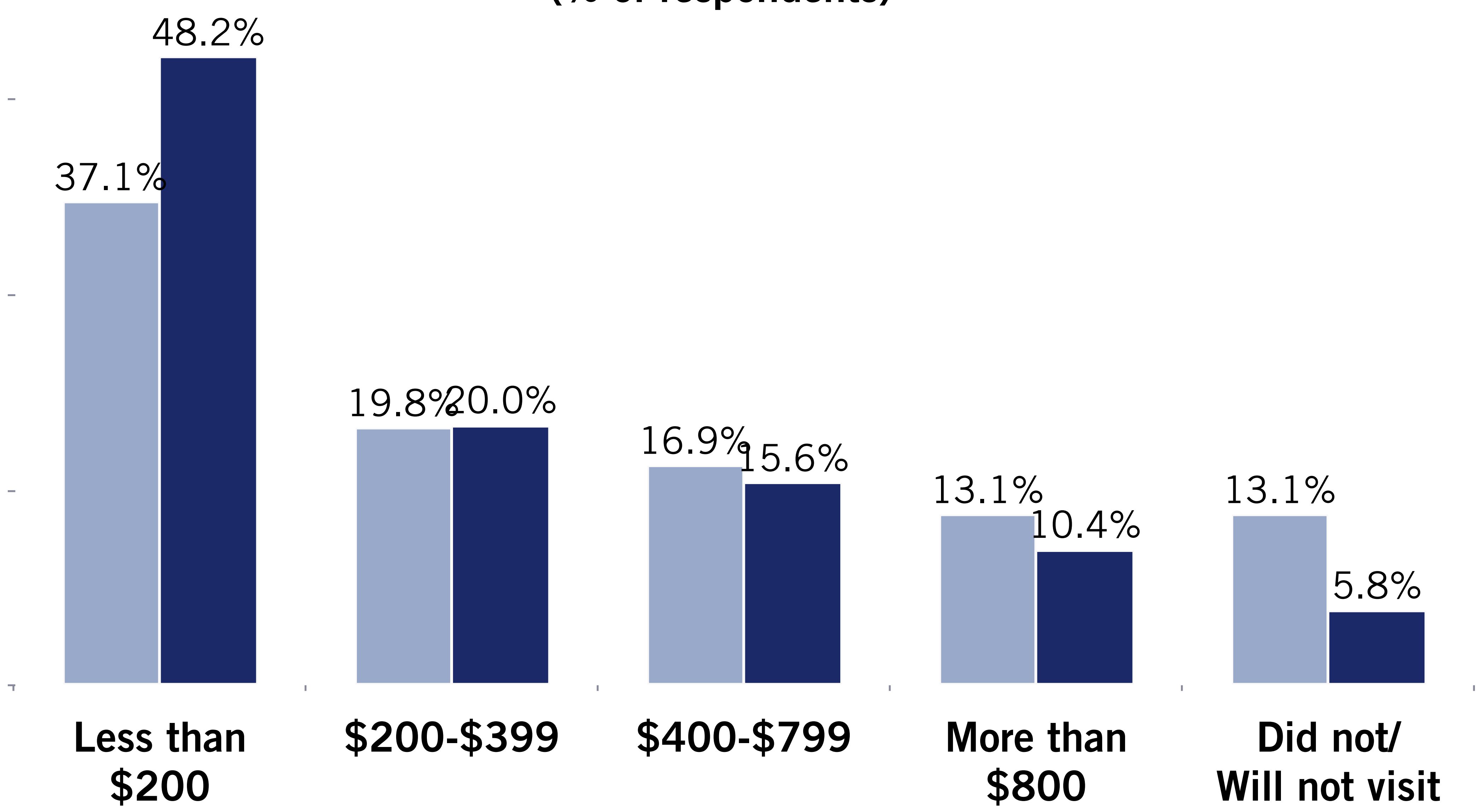
41% Decreased

5% Will Still Not Visit

% of respondents

Spend on paid attractions *(per year)*

(% of respondents)



24% Increased

46% Unchanged

28% Decreased

2% Will Still Not Visit

% of respondents

Attractions: Sanitisation/Safe-Distancing & Pricing Issues Are Key Concerns

Examples of Post-Circuit Breaker Safe Management Measures for Attractions

Singapore Zoo

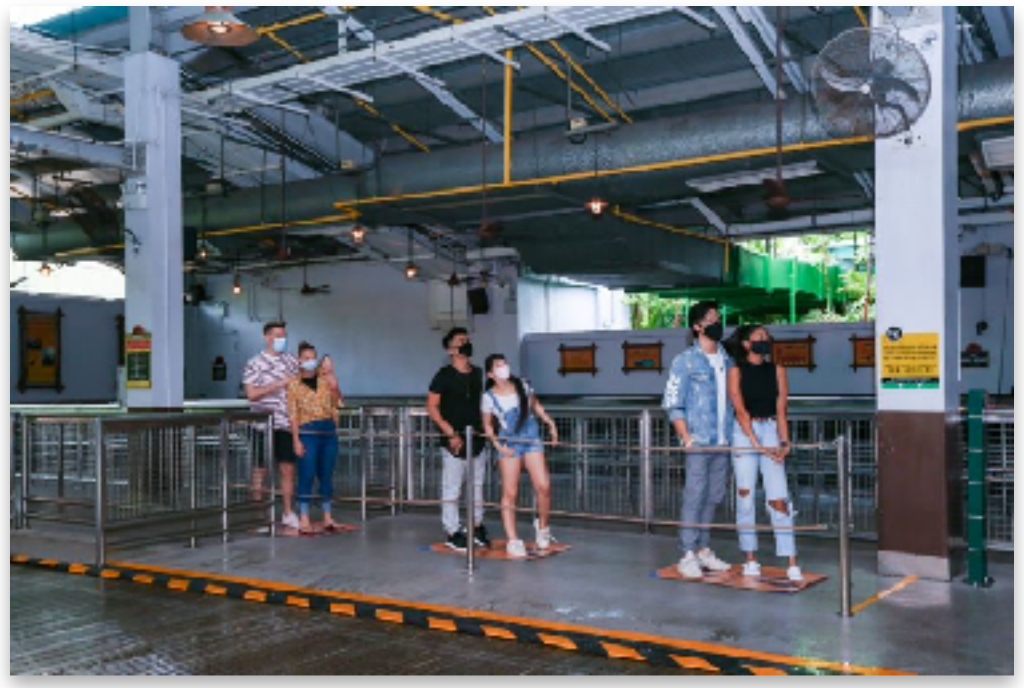
Source: https://www.straitstimes.com/singapore/almost-2000-visitors-at-singapore-zoo-on-first-day-of-reopening

Gardens by the Bay

Source: July 2020 - GBB Facebook/Website

Sentosa

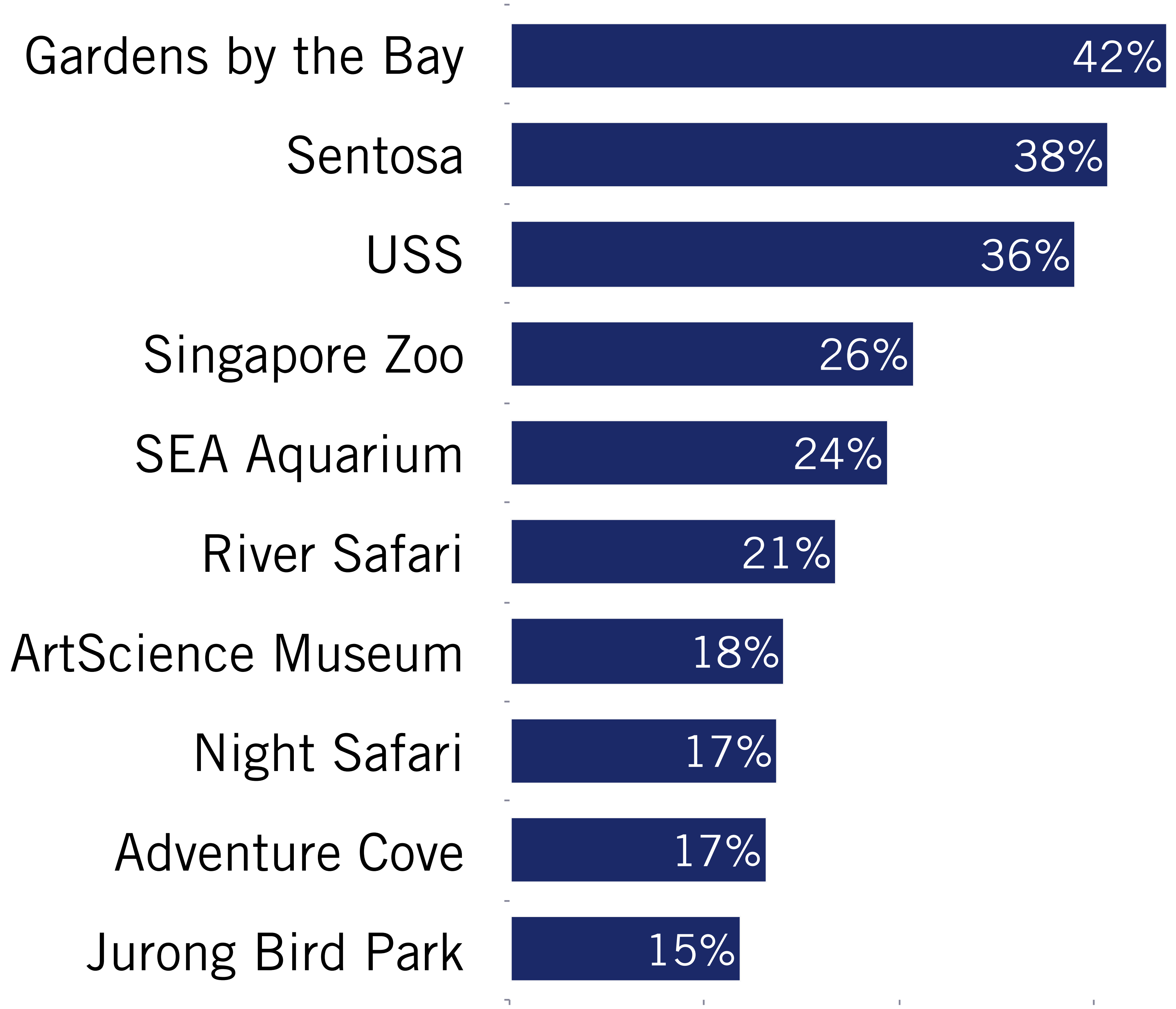
Source: https://www.sentosa.com.sg/en/safe-measures/



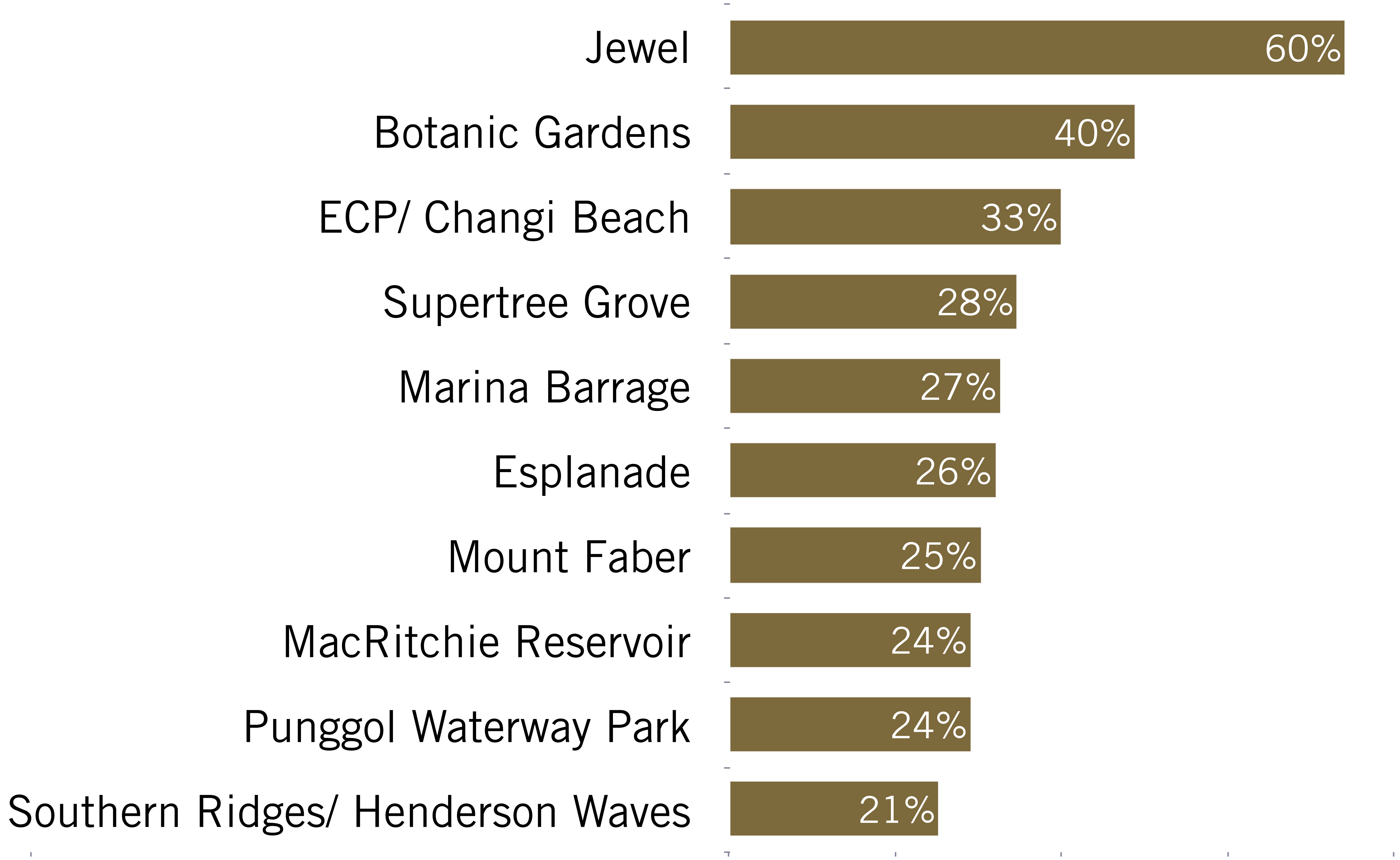
Source: https://sg.style.yahoo.com/some-sentosa-attractions-to-reopen-with-covid-19-safety-measures-064025858.html (Posed pictures)

Top 10 Attractions Respondents Would Want To Visit in the Next 12 Months

Paid Attractions



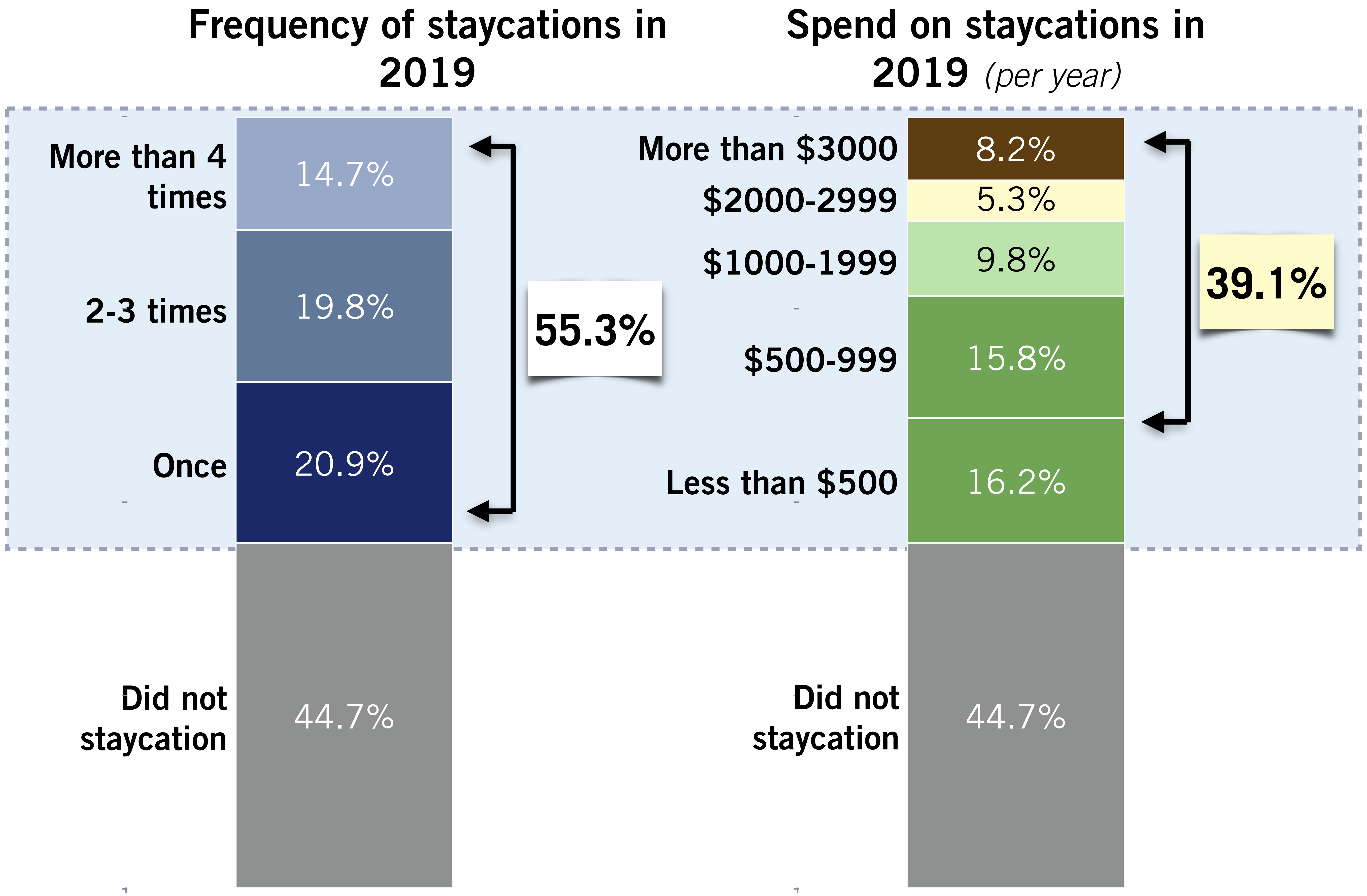
Free Attractions



LOCAL DEMAND FOR STAYCATIONS

Staycations Pre-COVID in 2019

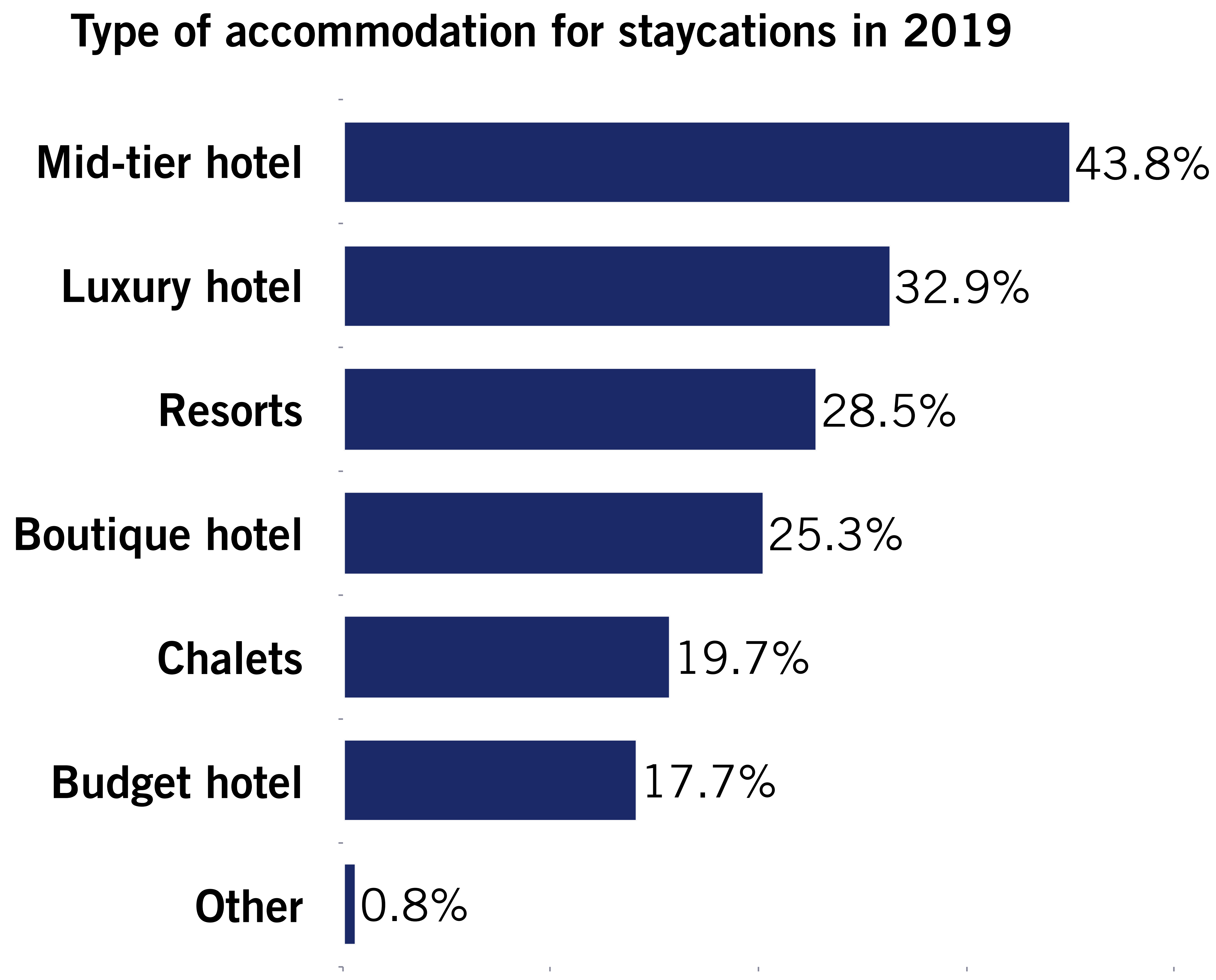
(Locals Frequency & Spend on Staycations: Pre-COVID-19)



- More than half of the local residents surveyed **(55.3%)** had booked Staycations **at least once in 2019** in 2019
- **Nearly 40%** of them had **spent at least $500** on bookings in 2019

Staycations Pre-COVID in 2019

(Locals Frequency & Spend on Staycations: Pre-COVID-19)



The staycation accommodation type that most respondents booked in 2019 were:

1. Mid-tier Hotel (43.8%)
2. Luxury Hotels (32.9%)

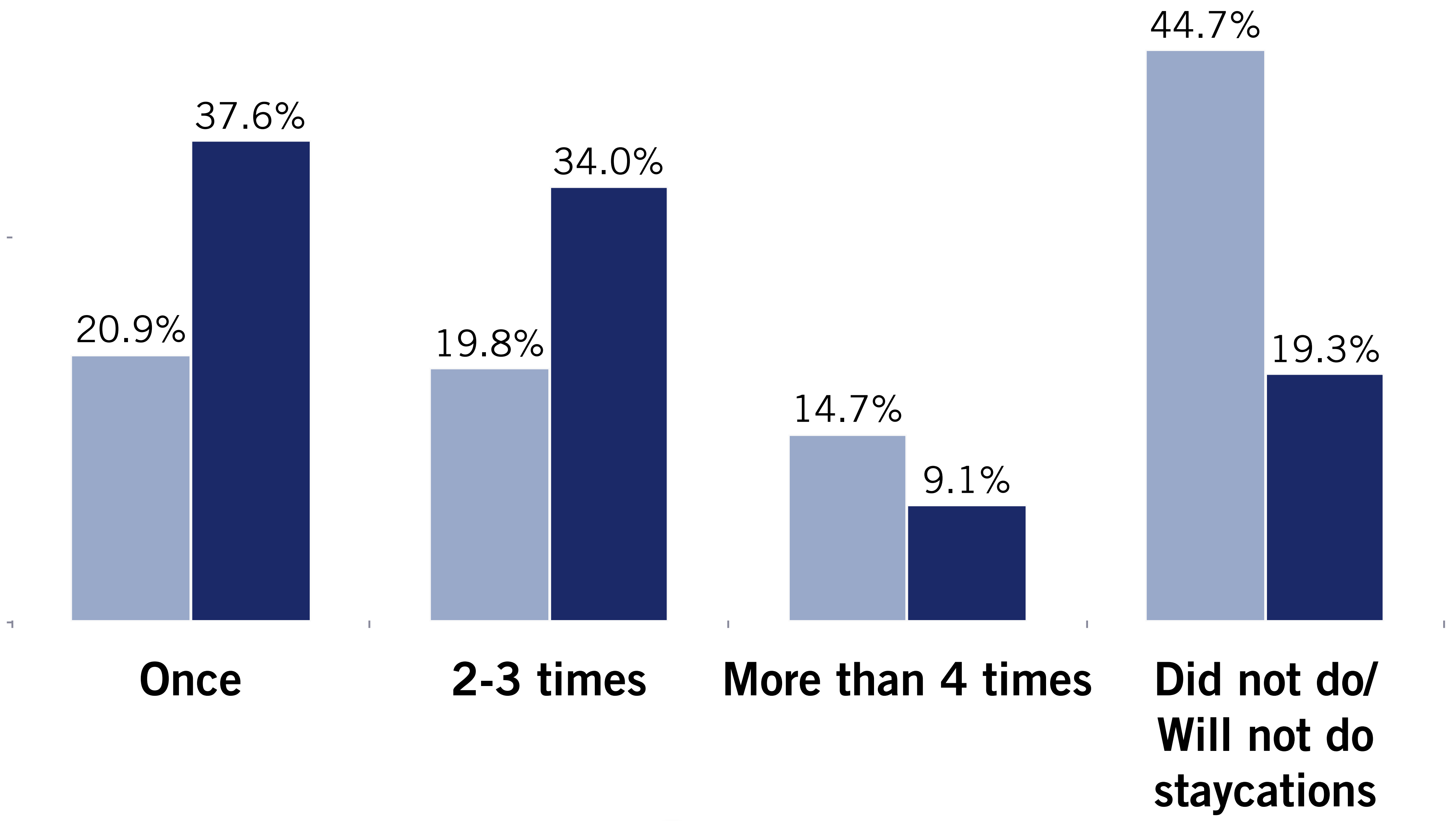
Most Locals Intend to Increase or Maintain Their Frequency & Spend

(Locals Visits & Spend on Staycations: Pre-COVID-19 vs Next 12 months)

2019 ■ Next 12 months

Frequency of staycations

(% of respondents)



38% Increased

24% Same

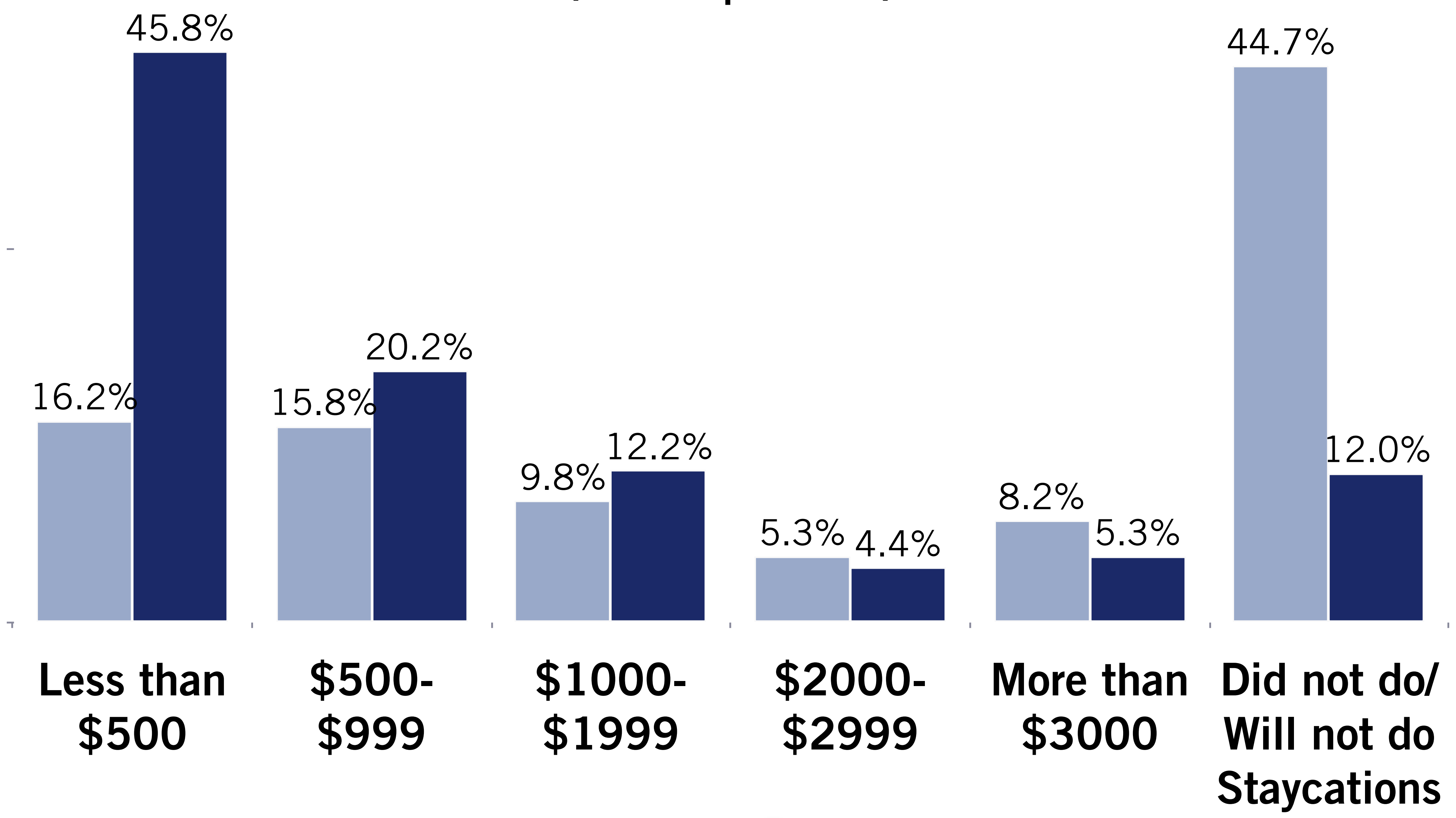
21% Decreased

16% Still does not want to engage in staycation

% of respondents

Spend on staycations *(per year)*

(% of respondents)



41% Increased

30% Same

19% Decreased

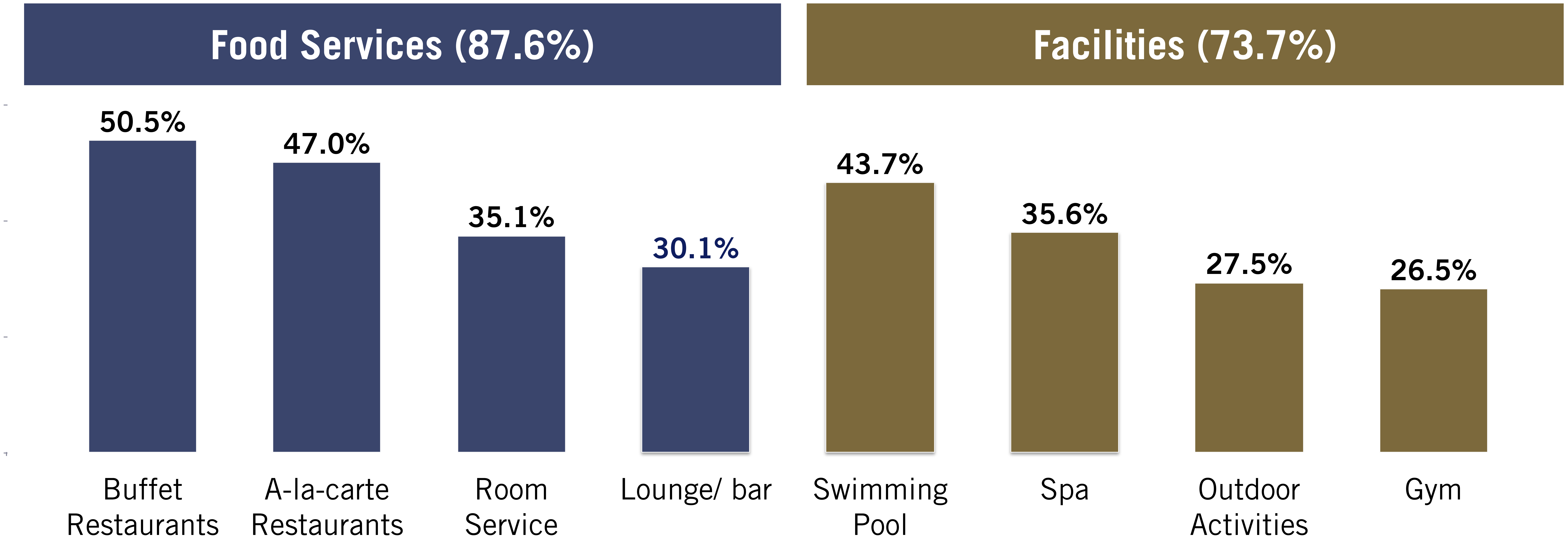
10% Still does not want to engage in staycation

% of respondents

Staycations: Sanitisation & Pricing Issues Are Also Key Concerns

STAYCATION:
F&B AND FACILITIES

Facilities/ Services Most Likely Used During Staycations Post COVID-19



- Overall **87.6%** of locals surveyed would **use F&B services** during their staycations, while **73.7%** are likely to use the **hotel facilities/amenities.**
  - For F&B, **about half (50.5%)** of the respondents indicated they would use the **buffet and/or a-la-carte restaurant**s in the hotels, as compared to only **35% for room service.**
  - The **swimming pool** at the staycation location was the facility **most likely to be used (43.7%)** followed by the **spa (35.6%).**

F&B Concerns: Hotels Can Consider A-La-Carte Buffets, Frequent Sanitisation, Staggered Reservations and Room Service Meals To Alleviate Concerns

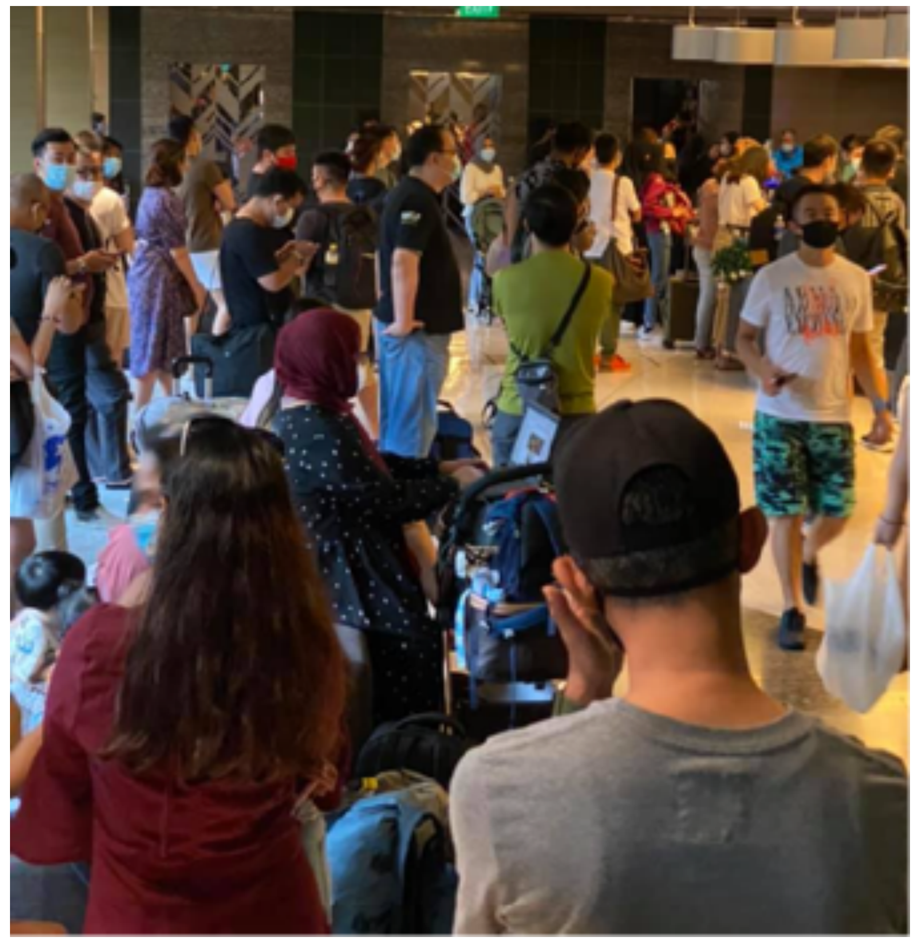
Facilities: Frequent Sanitisation and Realtime Update of People in Facilities To Help Guests Plan Their Usage Would Be Useful for Customers

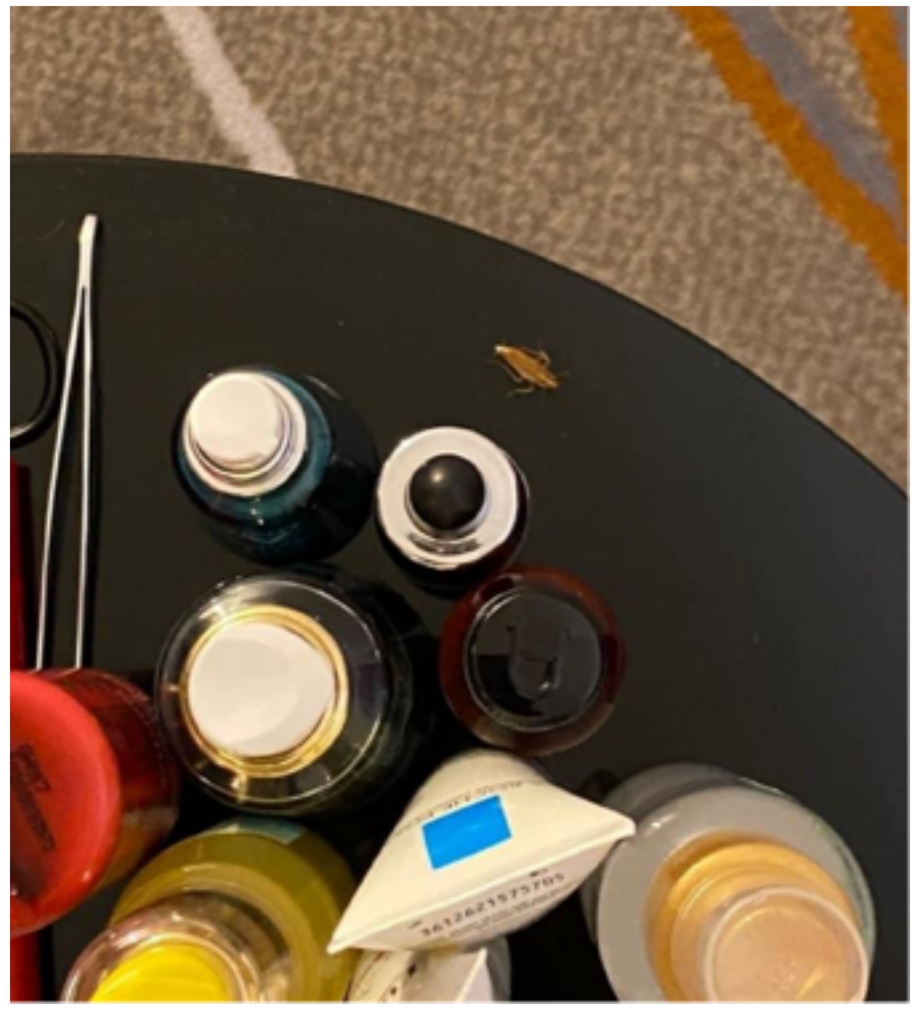
STAYCATIONS: LEARNINGS

Hotels Would Need To Finely Balance the Demand and Supply of Rooms Whilst Adhering to Regulations and Delivering Quality Service

Only 50% of Malaysian workers have returned since border reopening

Guests using staycation vouchers forced to wait over 4 hours at crowded check-in





Gabriel Goh
3 hours to check in, 3 hours to get a carpark lot, dead cockroaches on the bathroom curtain, live cockroaches on the bed and side tables, spent 4-5 hours calling operator/ housekeeping to get necessities which we never got... walked to taka to buy toiletries instead. And did I mention more cockroaches when we got back??
12 m Like Reply 1

- Whilst hotels rush to plug the gap in tourist spend through staycations, they need to be mindful of manpower shortages and safe distancing regulations.
- Regardless of the COVID-19 situation, customers still do expect quality service when going for a staycation.
- Hygiene factors such as “seamless check-in” and “clean rooms” are still expected. Failure to deliver on these expectations can lead to bad experiences, lower satisfaction, and ultimately a lower likelihood to return.

Source 1: https://mothership.sg/2020/12/grand-park-orchard-queues/
Source 2: https://theindependent.sg/guests-using-staycation-vouchers-forced-to-wait-over-4-hours-at-crowded-check-in/
Source 3: https://www.straitstimes.com/business/economy/only-50-of-malaysian-workers-have-returned-since-border-reopening

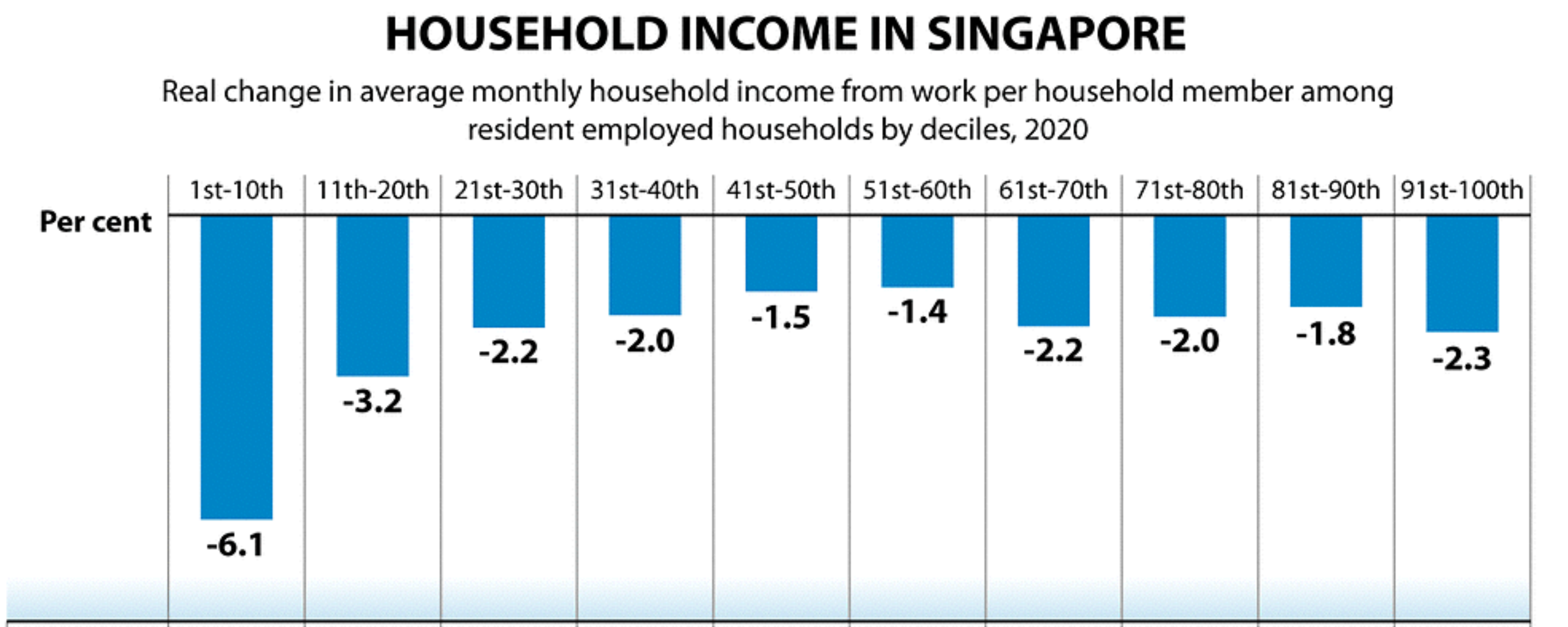
IMPACT OF COVID-19 ON LOCALS

Incomes of Residents Have Been Severely Affected due to COVID-19

Nearly half of Singaporeans, PRs' income affected by COVID-19

47% of Singaporeans and PRs have experienced a dip in income such as wage cuts, forced to take no-pay leave or a reduction in commission earnings.

Source: https://hrmasia.com/nearby-half-of-singaporeans-prs-income-affected-by-covid-19/



	1st-10th	11th-20th	21st-30th	31st-40th	41st-50th	51st-60th	61st-70th	71st-80th	81st-90th	91st-100th
2019	S$597	S$1,179	S$1,647	S$2,131	S$2,647	S$3,250	S$4,036	S$5,080	S$6,843	S$13,737
2020	S$560	S$1,141	S$1,609	S$2,085	S$2,603	S$3,201	S$3,940	S$4,972	S$6,712	S$13,400
Diff	**-S$37**	**-S$38**	**-S$38**	**-S$46**	**-S$44**	**-S$49**	**-S$96**	**-S$108**	**-S$131**	**-S$337**

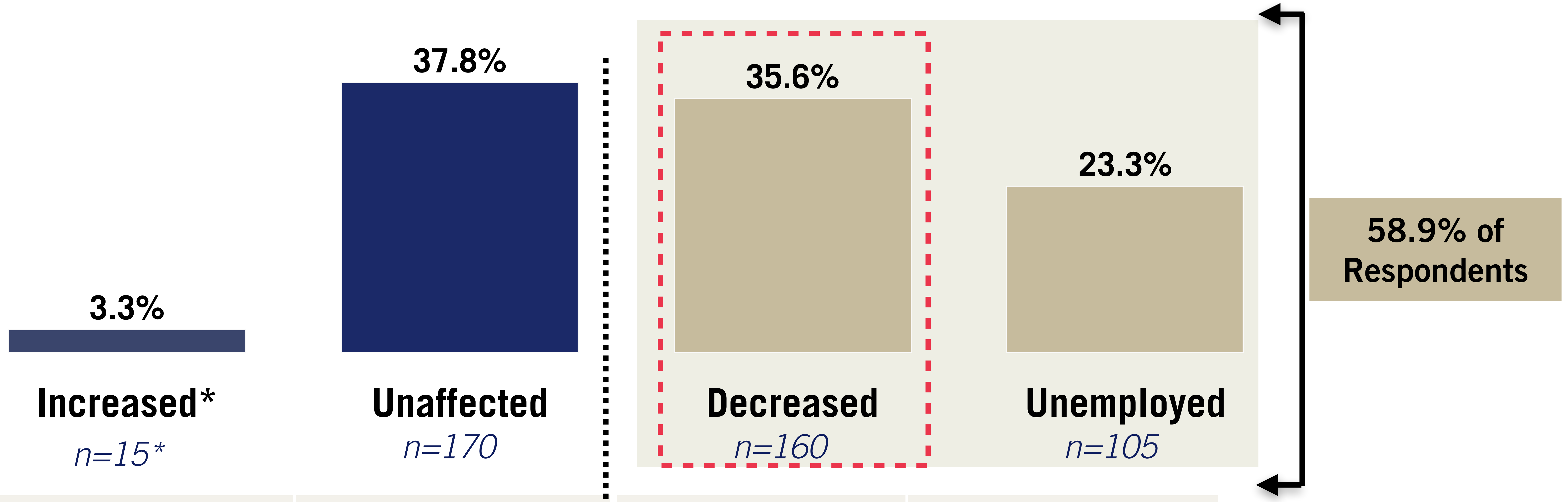
Infographic by Rafa Estrada *Source: Department of Statistics Singapore*

cna

Source: https://www.channelnewsasia.com/news/singapore/singapore-household-incomes-fall-in-2020-due-to-covid-19-impact-14137260

1 in 3 Singapore Residents Mentioned That Their Incomes Were Negatively Affected by the Pandemic

Income affected by COVID-19
(% of respondents)
n=450



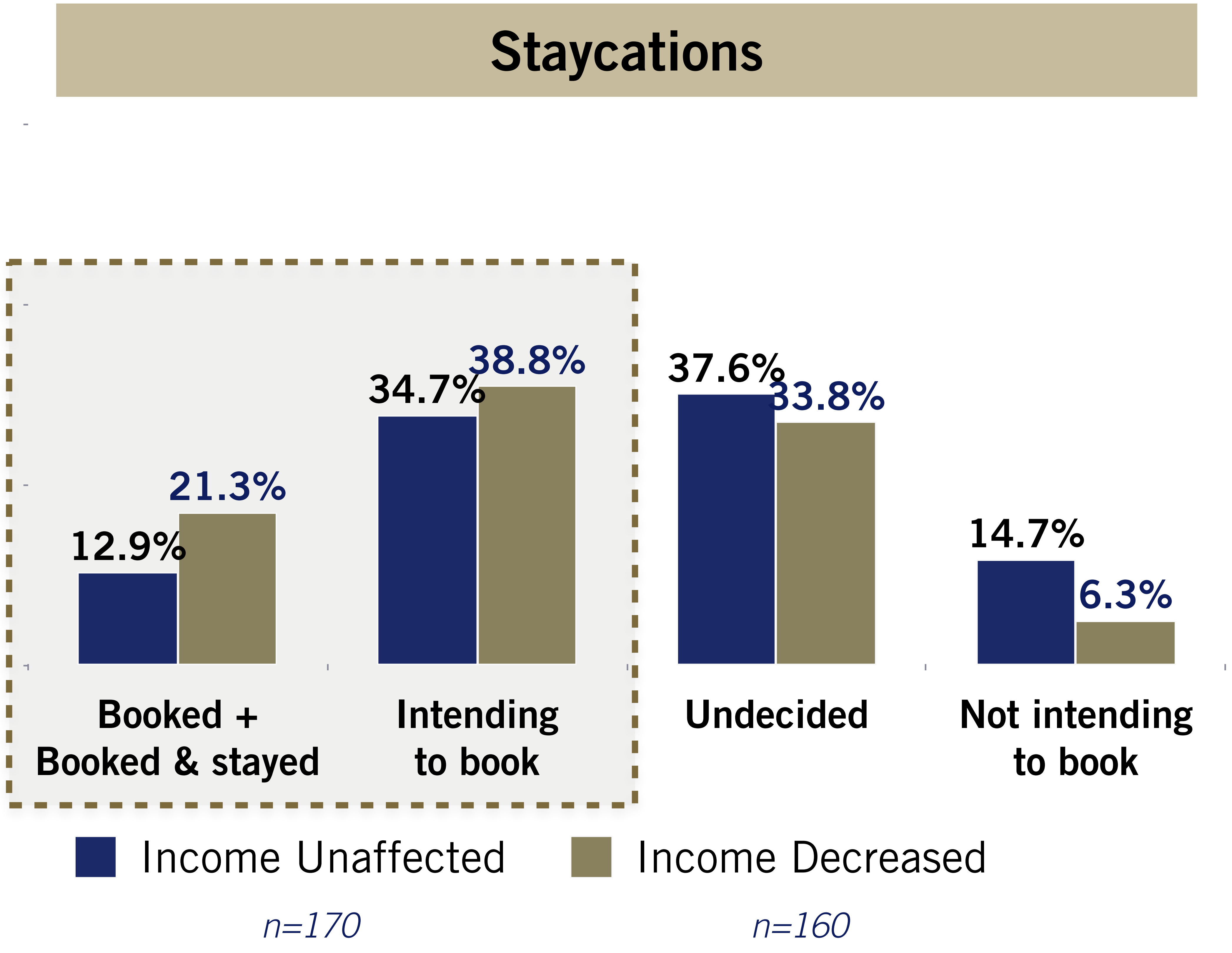
Profile of respondents (Row %)		Increased* *n=15**	Unaffected *n=170*	Decreased *n=160*	Unemployed *n=105*
Age	18 to 29 years	5.0%	41.6%	26.7%	26.7%
	30 to 44 years	8.1%	30.2%	**48.8%**	12.8%
	45 to 59 years	3.5%	43.7%	**40.2%**	12.6%
	60 years and above	0.0%	49.3%	35.6%	15.1%
Housing	HDB 1-3 room	0.0%	27.2%	29.1%	43.7%
	HDB 4-5 room	7.8%	33.8%	39.0%	19.5%
	Condo/ Landed/ Pte	2.5%	38.8%	34.2%	24.6%

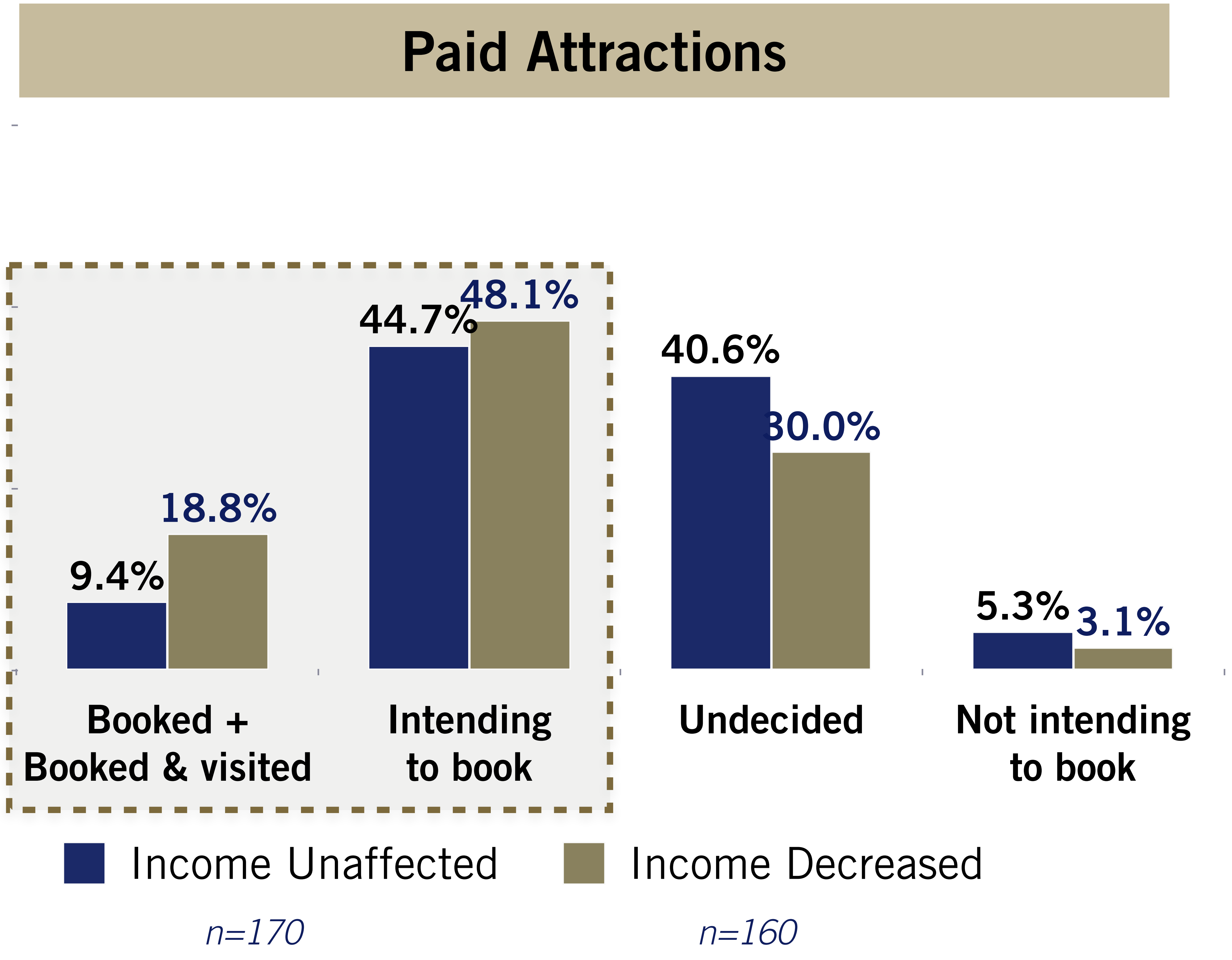
The respondents **most affected by negative income changes** due to the pandemic were in the **age group 30 to 59 years**

**Low Sample sizes for this group of respondents*

HOW DOES THIS IMPACT WILLINGNESS TO VISIT ATTRACTIONS AND/OR TO GO FOR STAYCATIONS?

Willingness To Go for Staycations and Visit Paid-Attractions Higher Amongst Those Negatively Affected by COVID-19





HOW DO LOCALS INTEND TO USE THEIR SINGAPOREDISCOVERS VOUCHERS?

SingapoRediscovers Vouchers Provided By The Government To Support Local Tourism During The Pandemic

Book Experiences with Your SingapoRediscovers Vouchers

CHANGI RECOMMENDS | GLOBALTIX Your Ticketing Partner | KLOOK | traveloka | Trip.com

Singapore's Finest Attractions

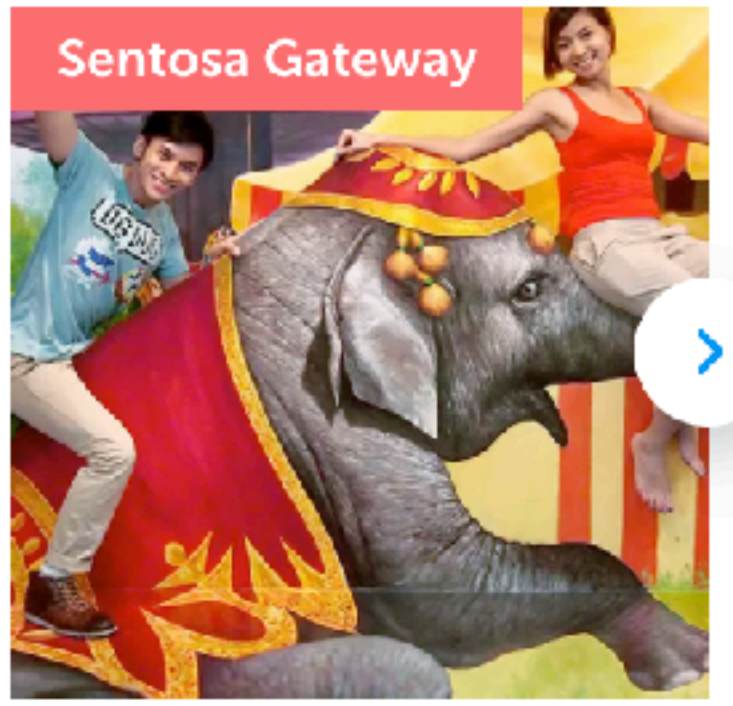
Eligible for SingapoRediscovers Vouchers

Universal Studios Singapore
S$ 66.00

Gardens by the Bay
S$ 10.00

Madame Tussauds Singapore
S$ 21.60

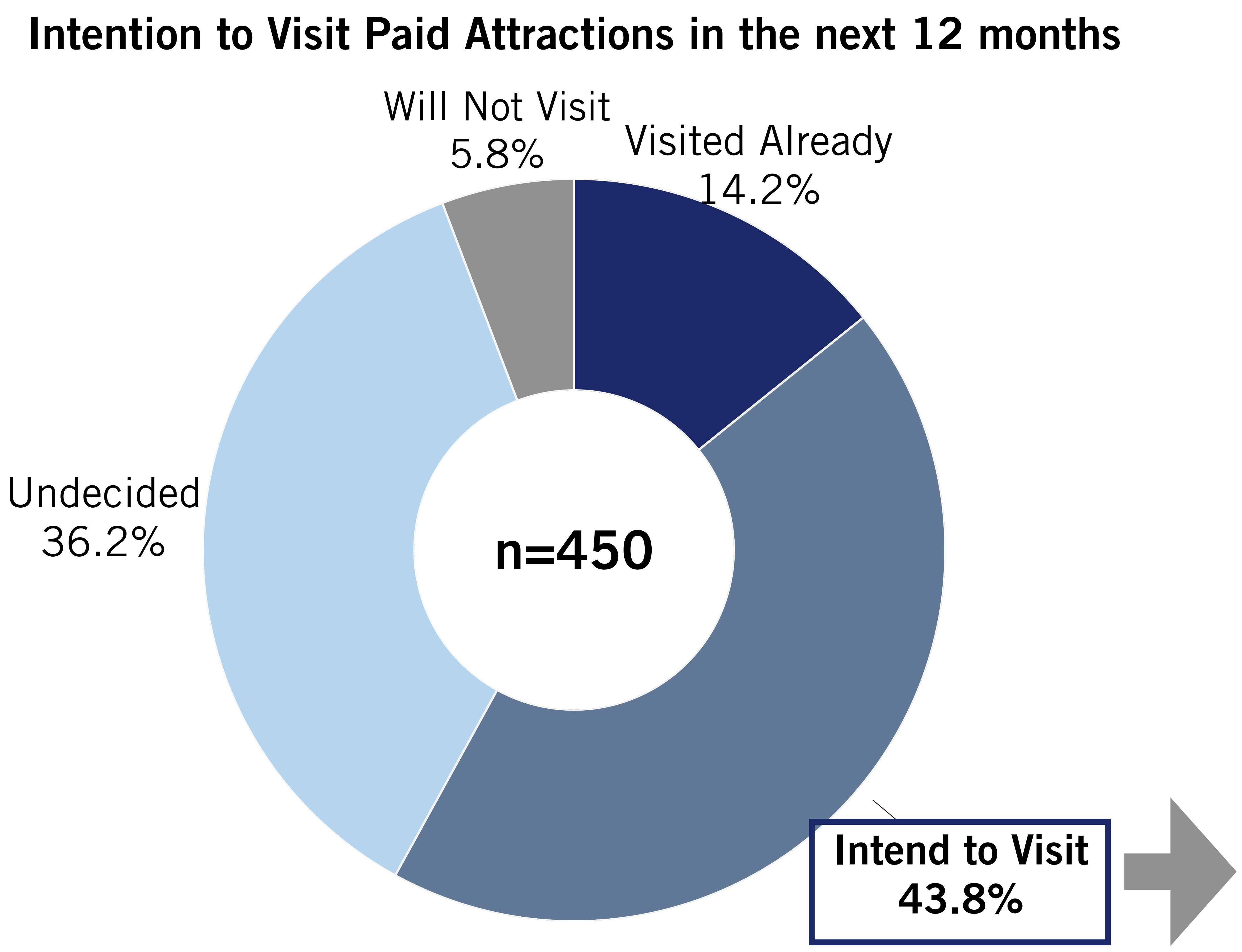
Red Dot Design Museum
S$ 10.00

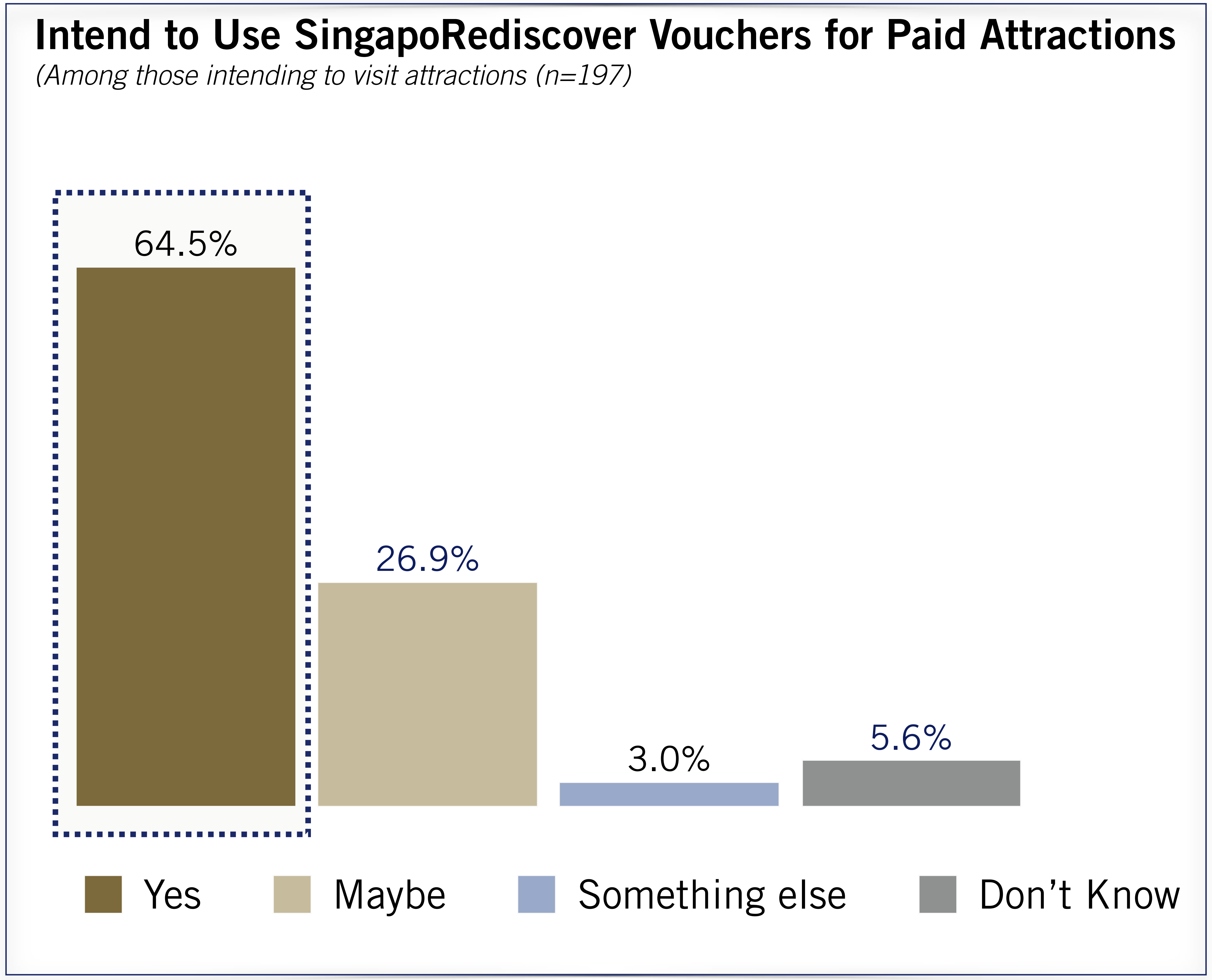


Trick Eye Museum Singapore
S$ 20.00

Source: https://singaporediscovers.life.gov.sg/

Among Those Intending To Visit Paid Attractions, Nearly 65% Intend To Use the Vouchers on Paid Attractions

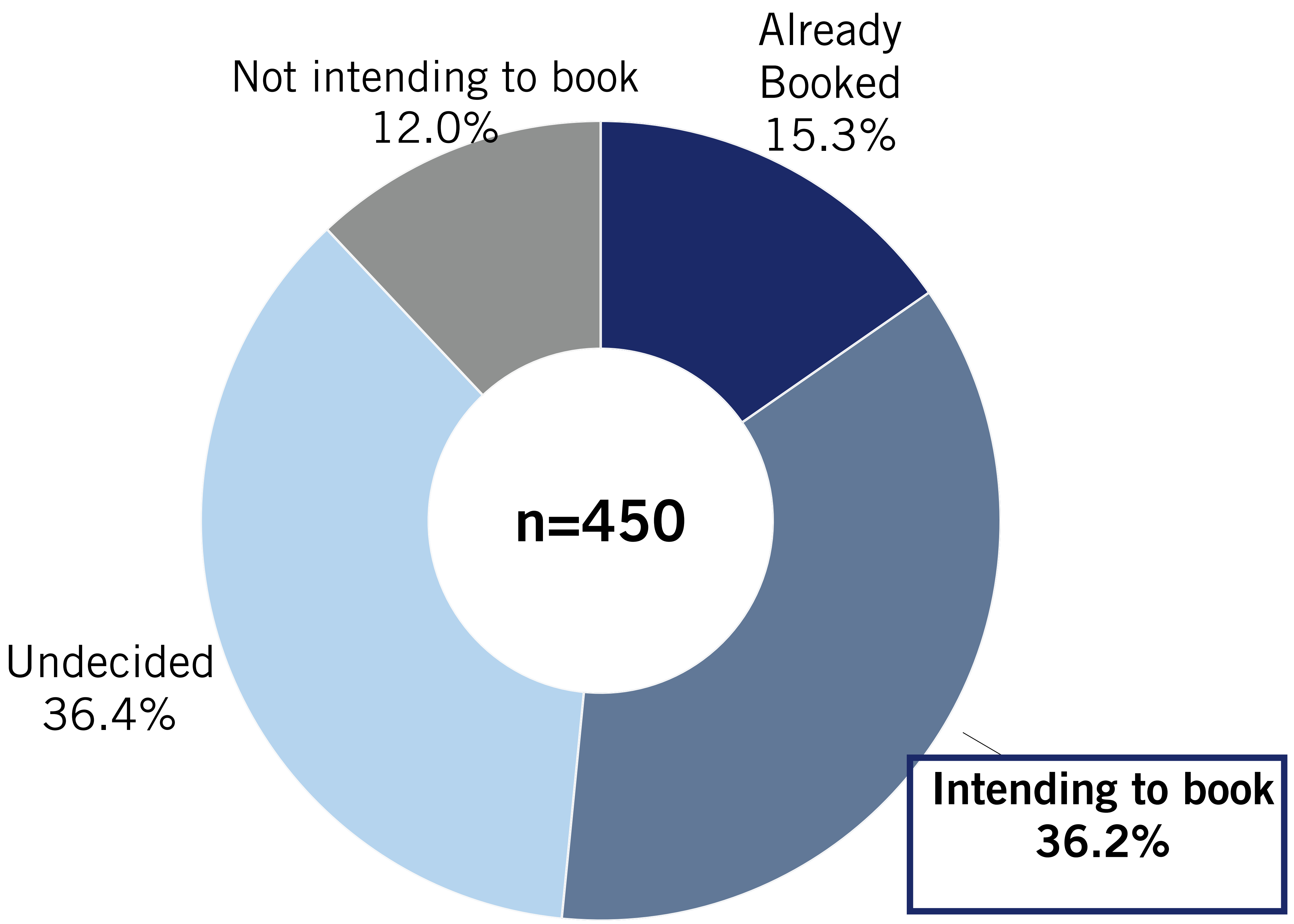




Notes: The study reflects local sentiment about using vouchers before the amount/redemption procedures were finalised.

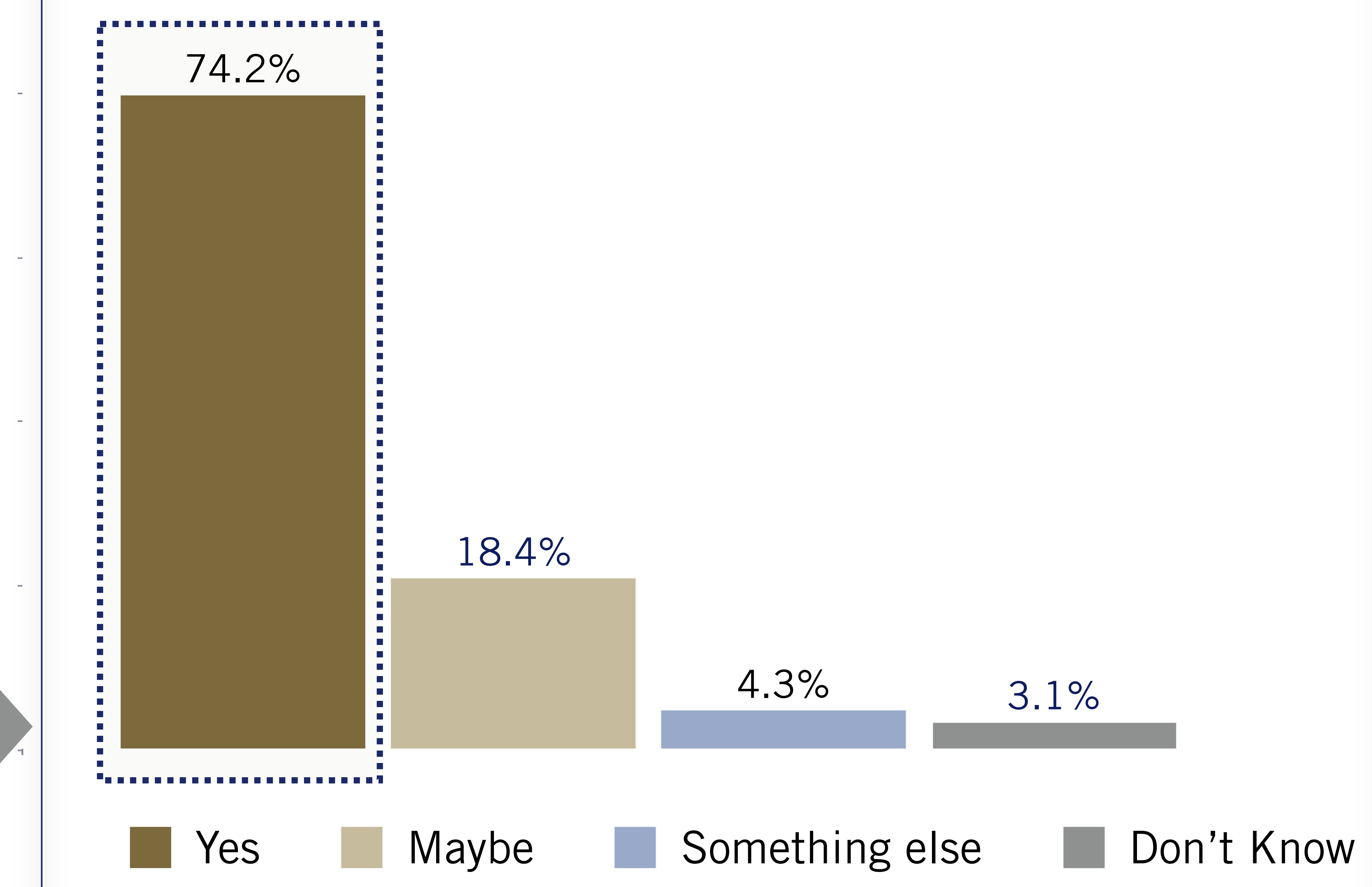
Among Those Intending to Book Staycations, Almost Three-Fourths Intend To Use the Vouchers on StayCations

Intention to Book Staycations in the next 12 months



Intend to Use SingapoRediscover Vouchers for Staycations

(Among those intending to visit attractions (n=163)

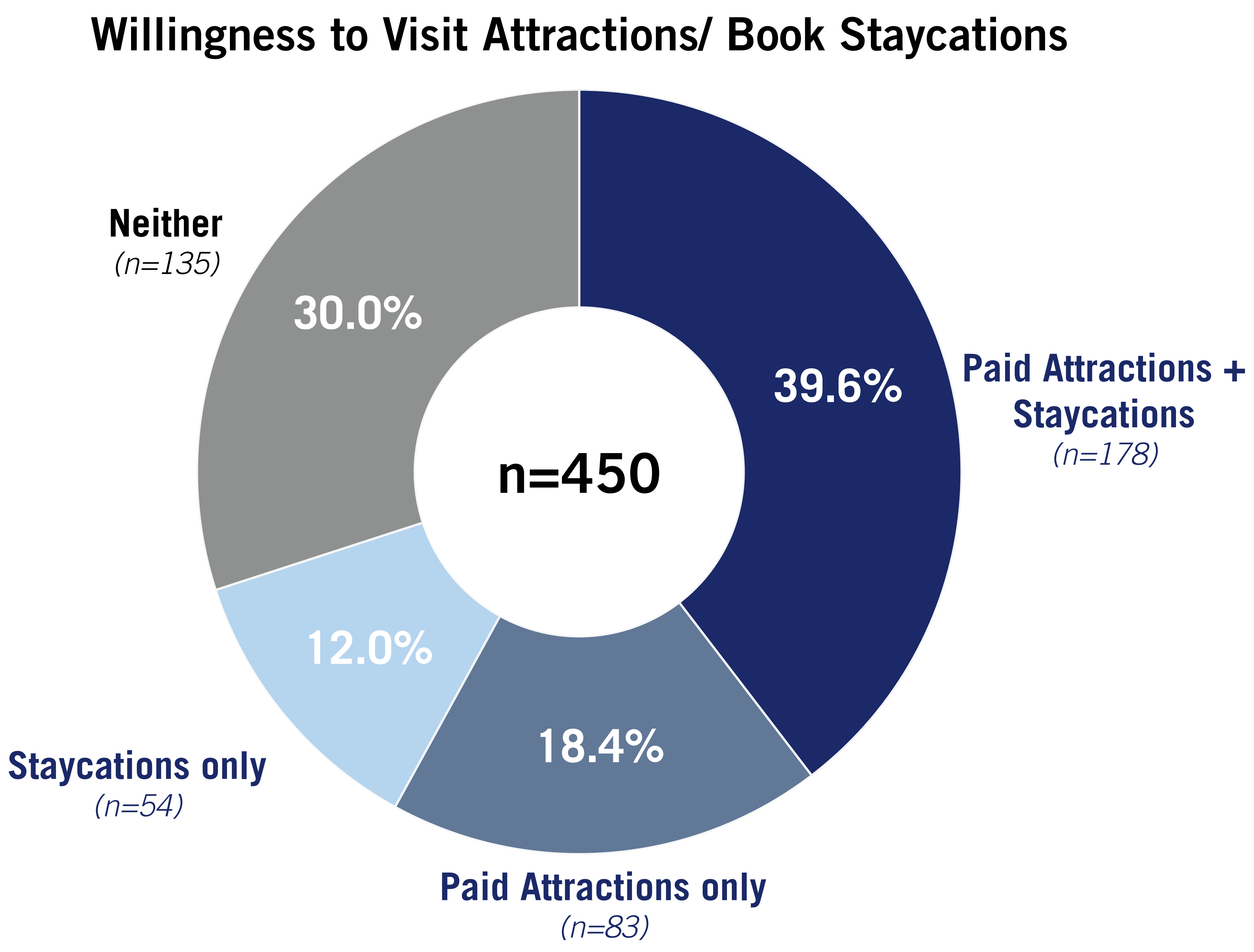


Notes: The study reflects local sentiment about using vouchers before the amount/redemption procedures were finalised.

OPPORTUNITIES FOR DOMESTIC TOURISM

Is there an **opportunity to cross-sell staycations and attractions** to residents of Singapore? What is the **target market for cross-selling locally**?

70% of Residents Are Willing Visit a Paid-Attraction or Engage in Staycations. About 40% Are Willing To Engage in Both.



Locals Who Are Less Than 45 Years and Have Kids Are More Willing To Engage in Domestic Tourism

Willingness to visit/ engage

Respondent Profile (Row %)		Paid-Attractions + Staycations 39.6% (n=178)	Paid-Attractions only 18.4% (n=83)	Staycations only 12.0% (n=54)	Neither 30.0% (n=135)
18-29 years old	n=101	**50.5%**	9.9%	15.8%	23.8%
30-44 years old	n=121	**51.2%**	17.4%	10.7%	20.7%
45-59 years old	n=125	29.6%	17.6%	15.2%	37.6%
60+ years old	n=103	27.2%	29.1%	5.8%	37.9%
No Kids/ No Dependent Kids	n=249	33.3%	17.3%	14.1%	35.3%
With Kids	n=198	**48.0%**	20.2%	9.6%	22.2%

Greater Willingness Amongst Locals Living in Smaller HDBs and Those Whose Incomes Were Negatively Affected by the Pandemic

Willingness to visit/ engage

Respondent Profile (Row %)		Paid-Attractions + Staycations 39.6% (n=178)	Paid-Attractions only 18.4% (n=83)	Staycations only 12.0% (n=54)	Neither 30.0% (n=135)
HDB 1-3 room	n=77	**46.8%**	22.1%	9.1%	22.1%
HDB 4-5 room	n=281	37.7%	18.5%	13.5%	30.3%
Condo/ Landed/ Pte	n=92	39.1%	15.2%	9.8%	35.9%
Income Unaffected	n=170	32.9%	21.2%	14.7%	31.2%
Income Decreased	n=160	**50.6%**	16.3%	9.4%	23.8%

Note: Impact on income was evaluated by asking respondents the question *"Has your monthly personal income been affected by COVID-19?"*
The "Income Unaffected" group includes those respondents who said their was no change in income or those whose monthly incomes increased. The "Income Decreased" group includes all respondents who indicated that their monthly personal incomes had declined.

KEY TAKEAWAYS

Domestic Tourism Survey: Key Takeaways

Do locals want to visit attractions or do staycations?

70% of Singapore residents are willing to engage in staycations or visit paid-attractions, of which, **40% are willing to engage in both.**

Did changes in income affect respondents' willingness to engage in local tourism?

About a **third of residents** had their incomes negatively affected by the pandemic. Despite having their incomes negatively affected, this segment of **residents are more willing to visit a paid-attraction and engage in staycation**s as compared to those whose income remained stable.

What are the key concerns about Staycations?

For staycation respondents, **disinfection procedures, price and hotels used for stay home order** are key concerns.

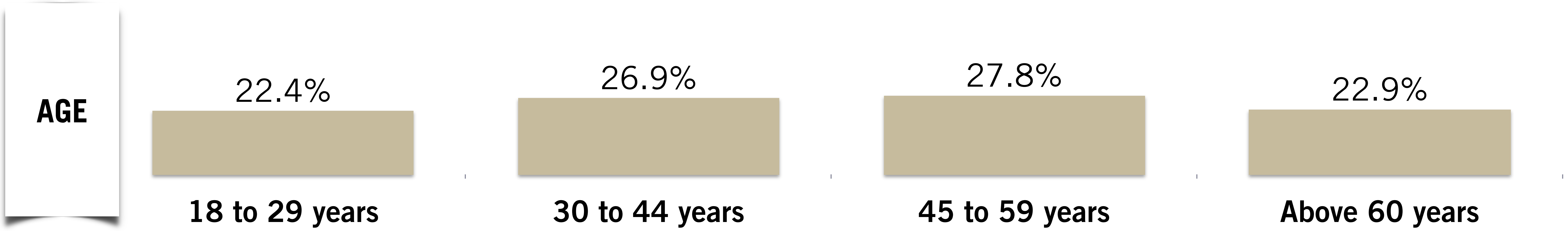
What are the key concerns about visits to Attractions?

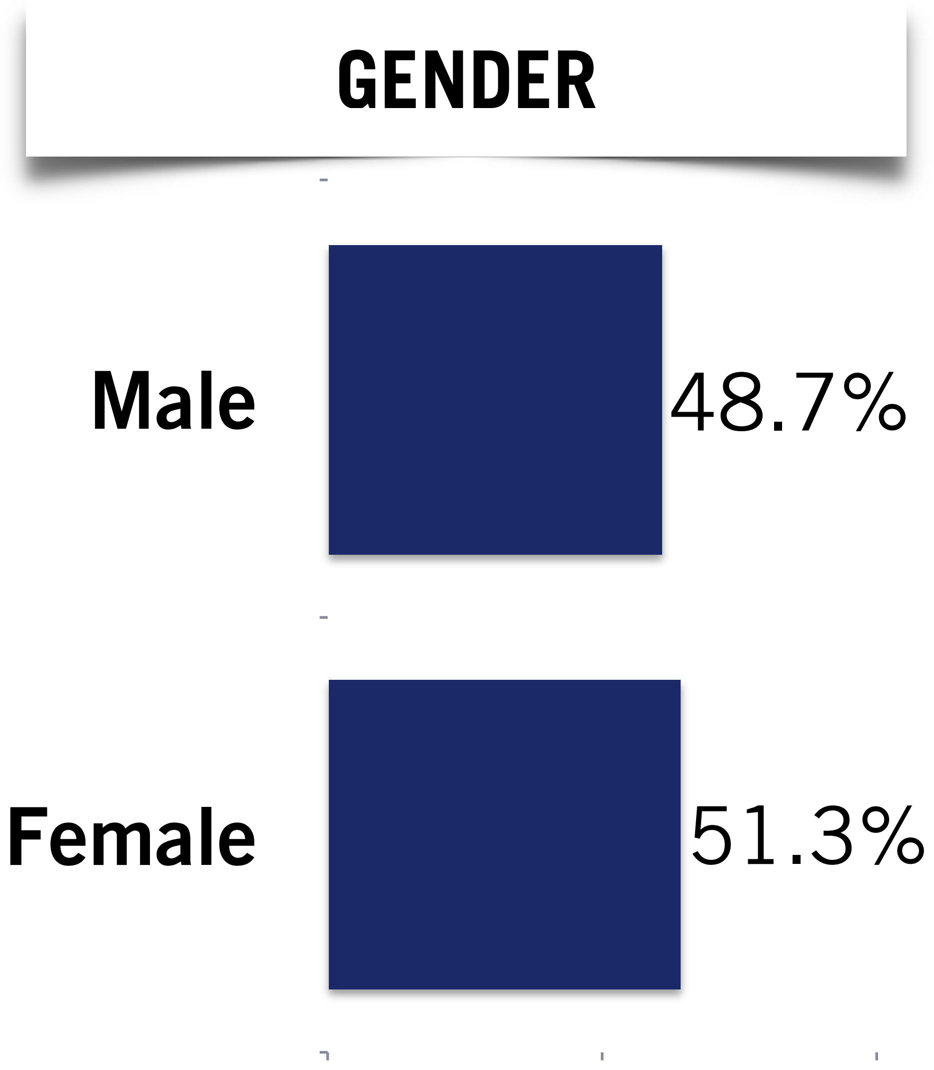
Similarly, **sanitisation, price of entry and safe distancing** are the key concerns of respondents when visiting a paid attraction.

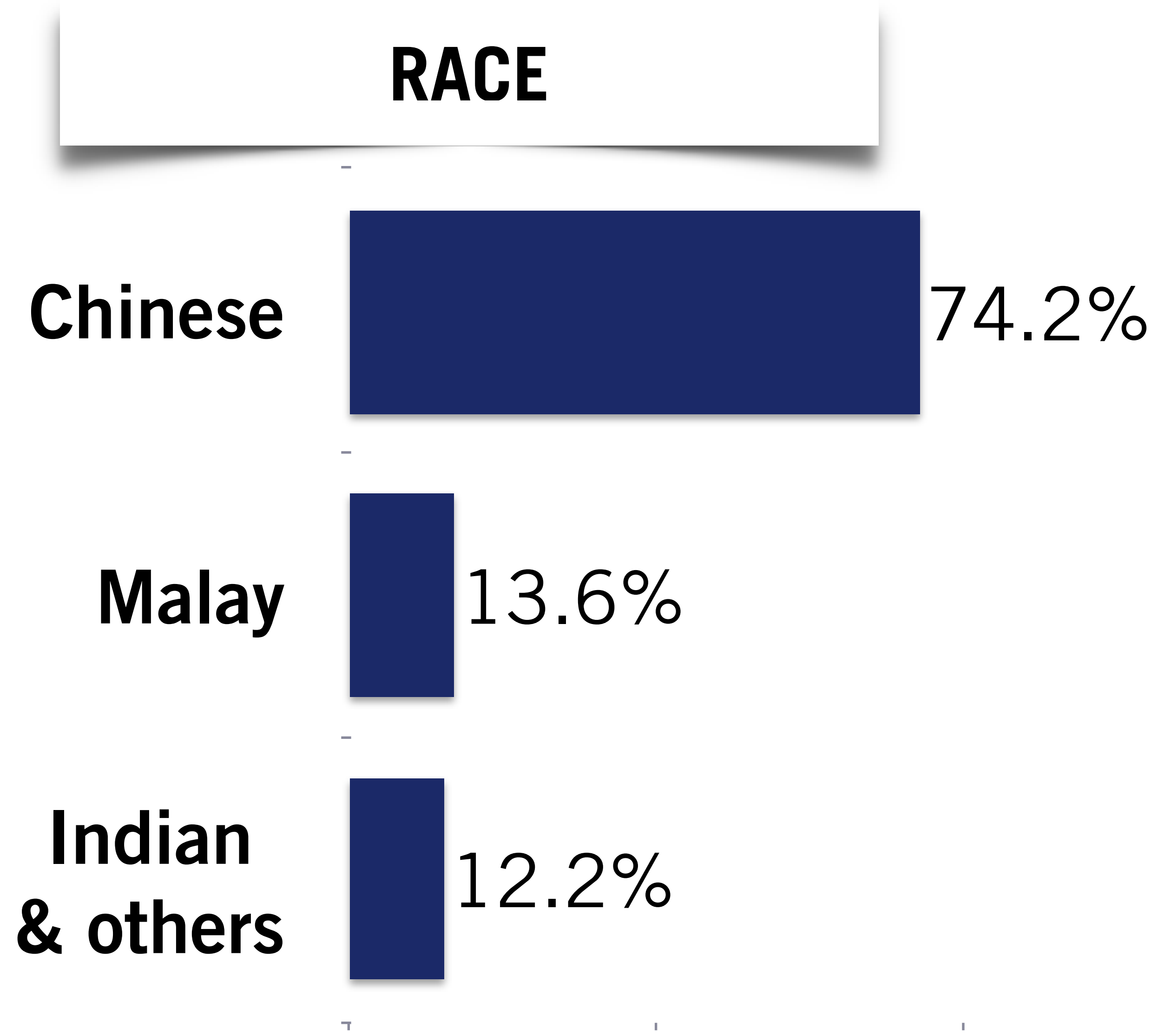
APPENDIX A: RESPONDENT DEMOGRAPHICS

Domestic Tourism Survey: Respondent Demographics

Respondent Demographics (Singapore Genpop)







Stay-cationers Are Likely to Be Middle Aged And Median Income/ Emerging Affluent

Intention to book staycations in the next 12 months n=450

		Yes 51.6%	Undecided 36.4%	No 12.0%
Age Group	18 to 29 years	28.9%	17.7%	9.3%
	30 to 49 Years	**44.4%**	30.5%	37.0%
	50 to 59 Years	12.1%	21.3%	18.5%
	60 Years & Above	14.7%	30.5%	35.2%
Dependent Children	Have Dependent Children	49.1%	40.1%	35.8%
	No Dependent Children	50.9%	59.9%	64.2%
Monthly Household Income	Under S$3,000	10.8%	14.2%	23.3%
	S$3,000 to S$6,000	**26.0%**	33.5%	23.3%
	S$6,000 to S$10,000	**27.4%**	27.7%	23.3%
	S$10,000 to S$15,000	**25.6%**	15.5%	16.3%
	Above S$15,000	10.3%	9.0%	14.0%

Profile of Respondents (Column %)

Visitors to Paid Attractions Are Likely to Be Middle Aged, Working And Emerging Affluent Groups

Intention to visit paid attractions in Singapore n=450

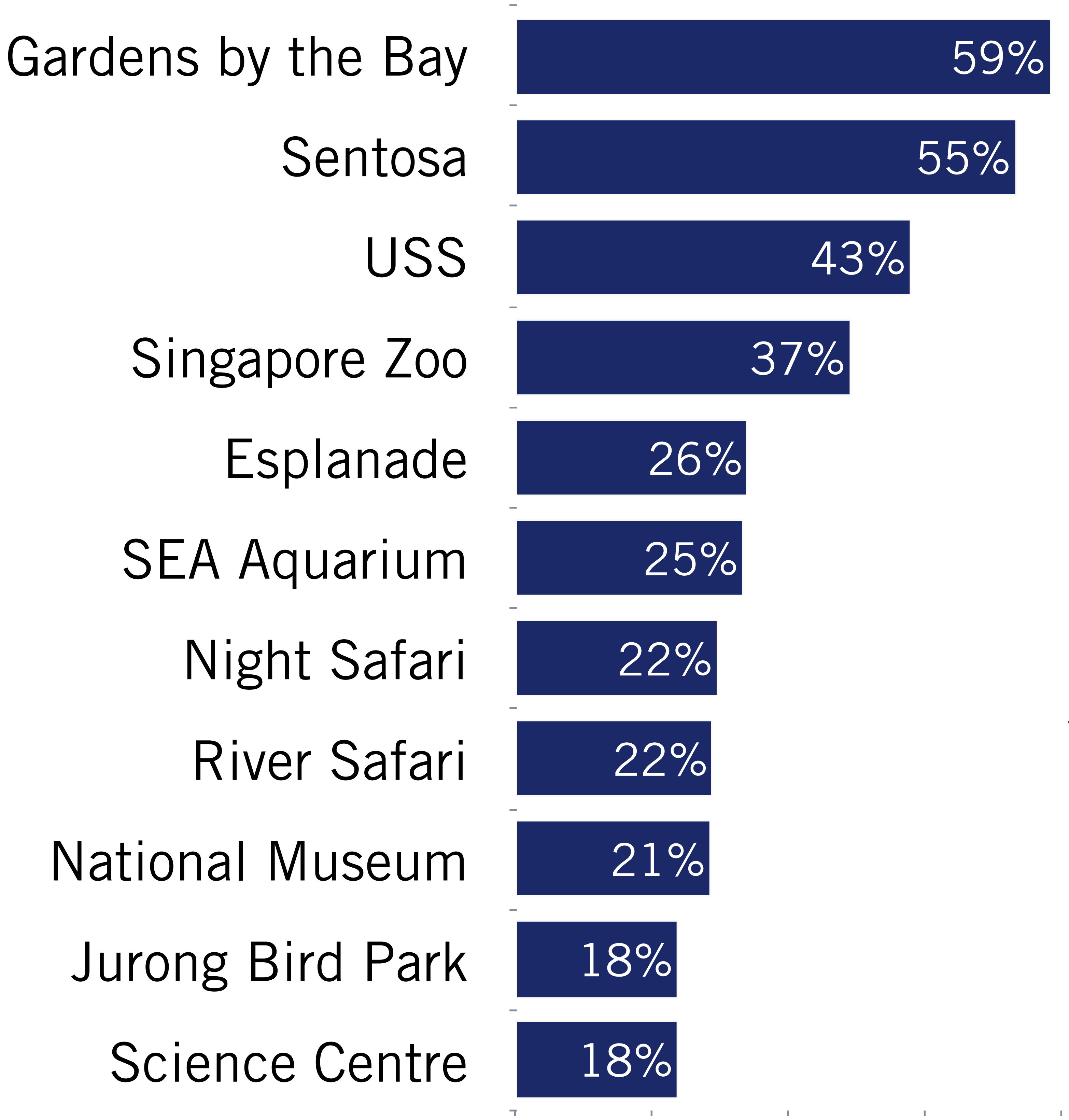
		Yes 58.0%	Undecided 36.2%	No 5.8%
Age Group	18 to 29 years	23.4%	21.5%	19.2%
	30 to 49 Years	**42.1%**	33.1%	34.6%
	50 to 59 Years	12.3%	21.5%	23.1%
	60 Years & Above	22.2%	23.9%	23.1%
Work Status	Working Full-Time	**71.6%**	65.0%	50.0%
	Working Part-Time	7.7%	8.0%	0.0%
	Not Working	20.7%	27.0%	50.0%
Dependent Children	Have Dependent Children	48.3%	66.0%	66.7%
	No Dependent Children	51.7%	34.0%	33.3%
Monthly Household Income	Under S$3,000	10.1%	14.6%	40.9%
	S$3,000 to S$6,000	23.8%	34.4%	40.9%
	S$6,000 to S$10,000	**28.2%**	28.5%	4.6%
	S$10,000 to S$15,000	**27.0%**	13.9%	0.0%
	Above S$15,000	10.9%	8.6%	13.6%

Profile of Respondents (Column %)

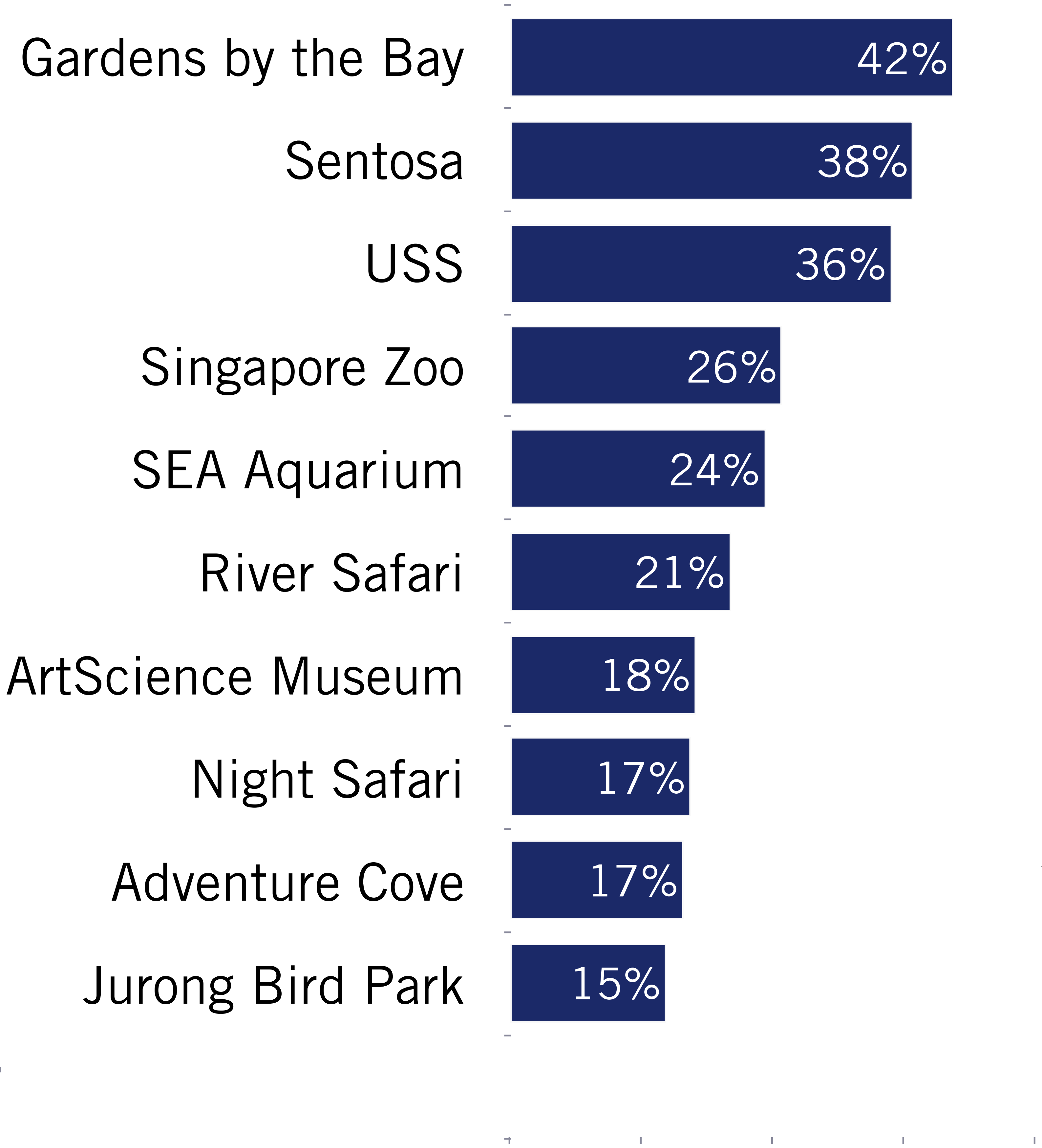
Institute of Service Excellence

Paid Attractions: Comparison of Places Visited 2019 vs Intend To Visit In the Next 12 Months vs Those They Do Not Intend To Visit

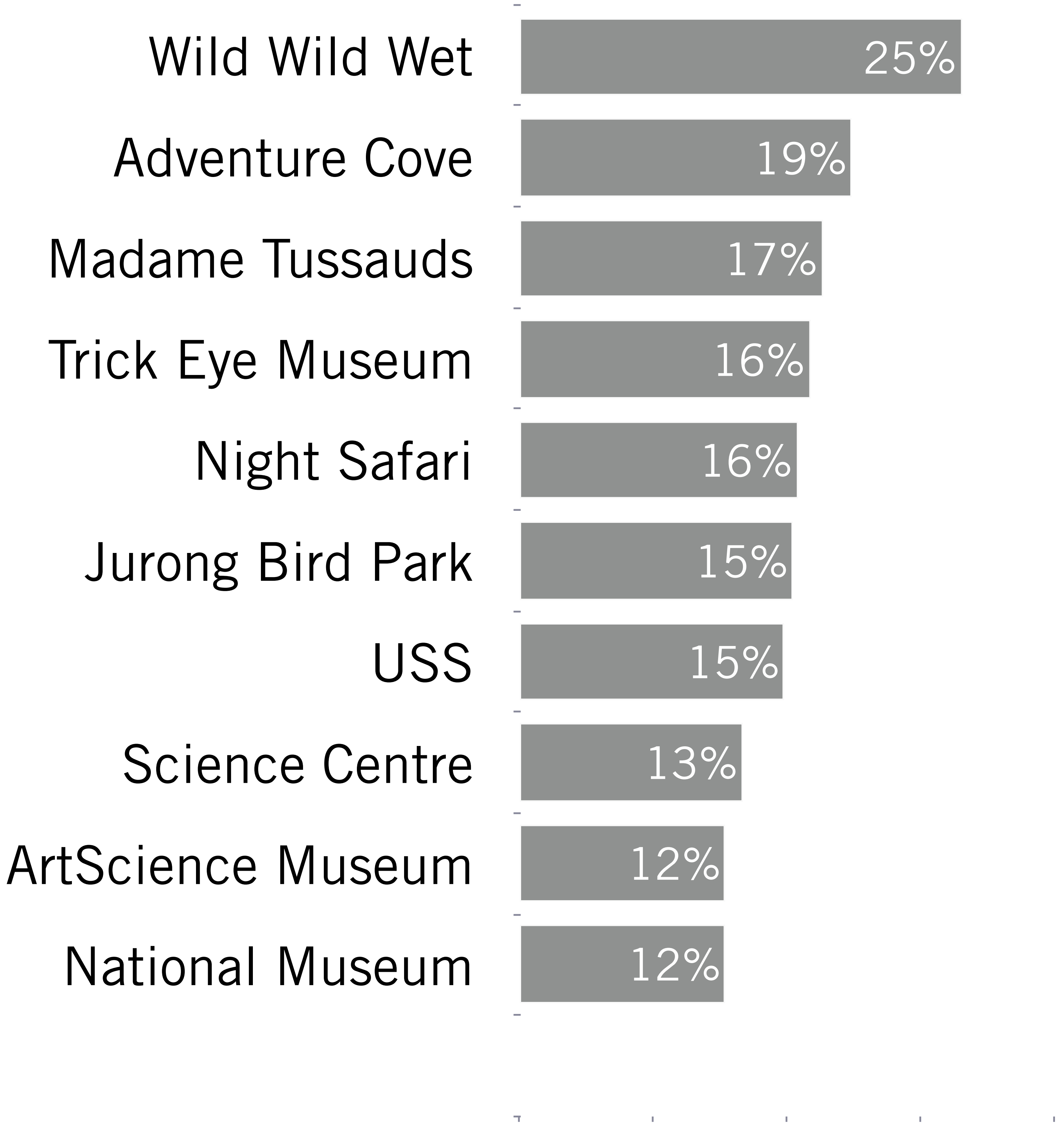
Top 10 paid attractions visited in 2019



Top 10 paid attractions to visit/ in next 12 months

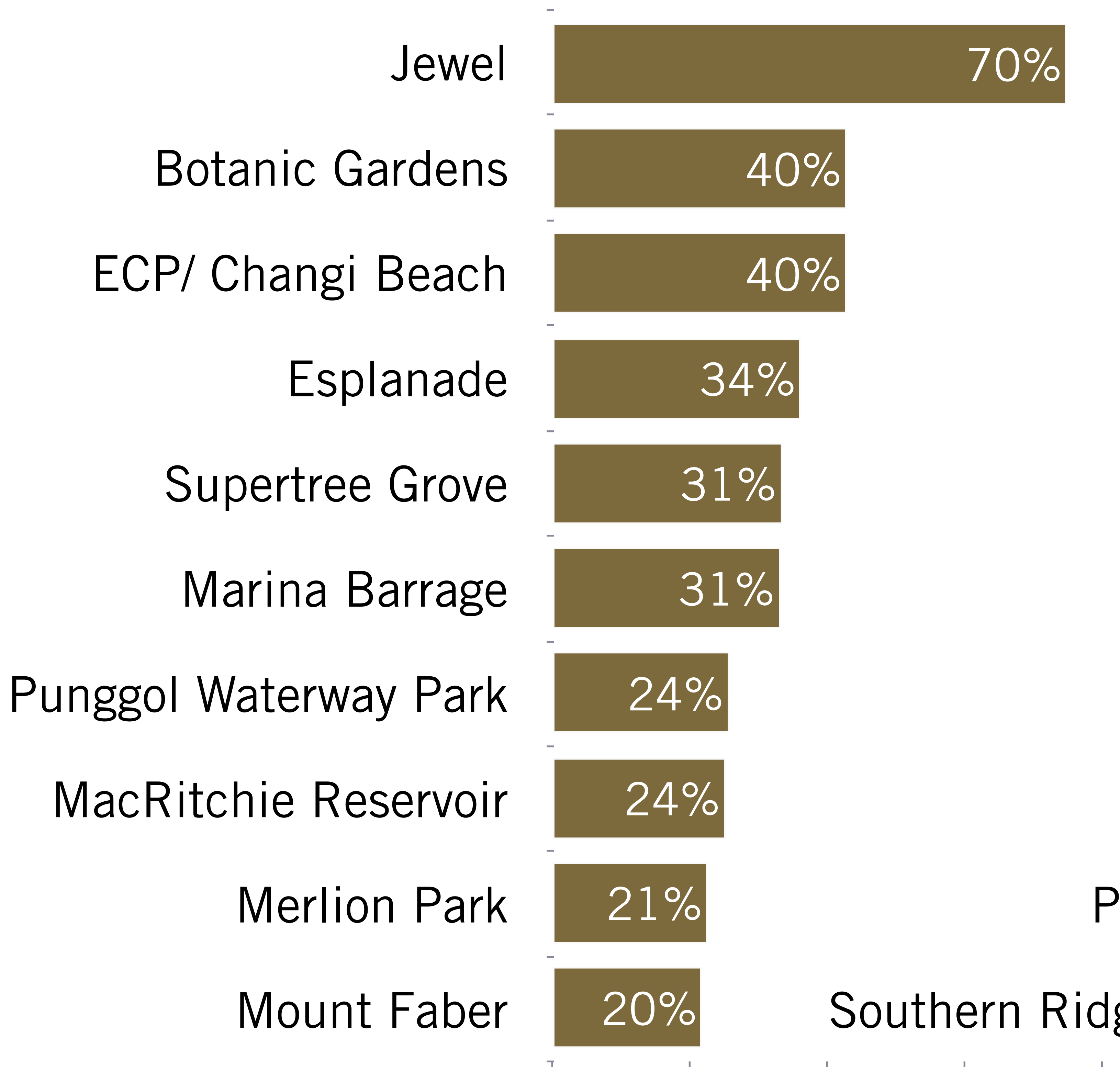


Top 10 paid attractions to NOT visit in next 12 months

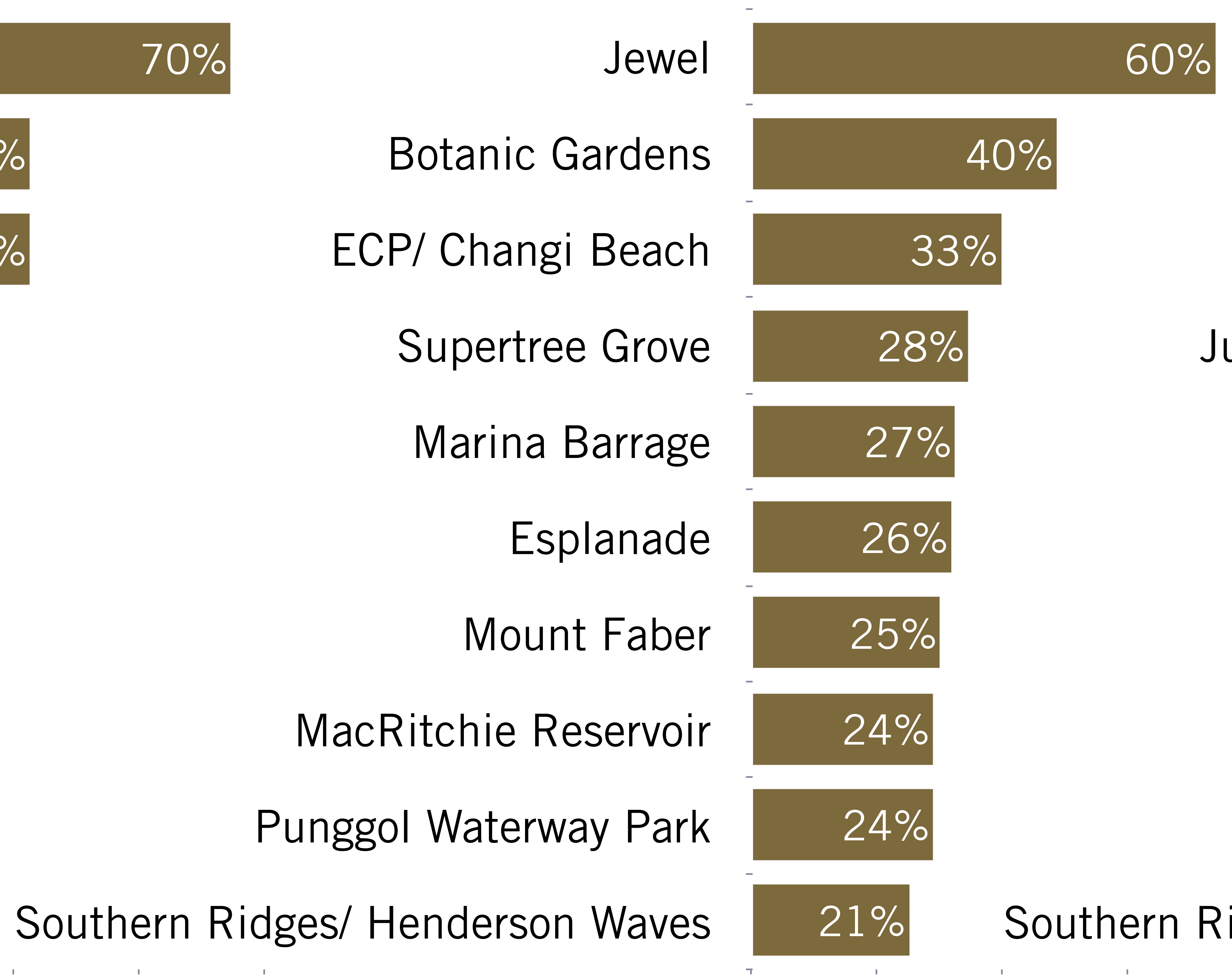


Free Attractions: Comparison of Places Visited 2019 vs Intend To Visit In the Next 12 Months vs Those They Do Not Intend To Visit

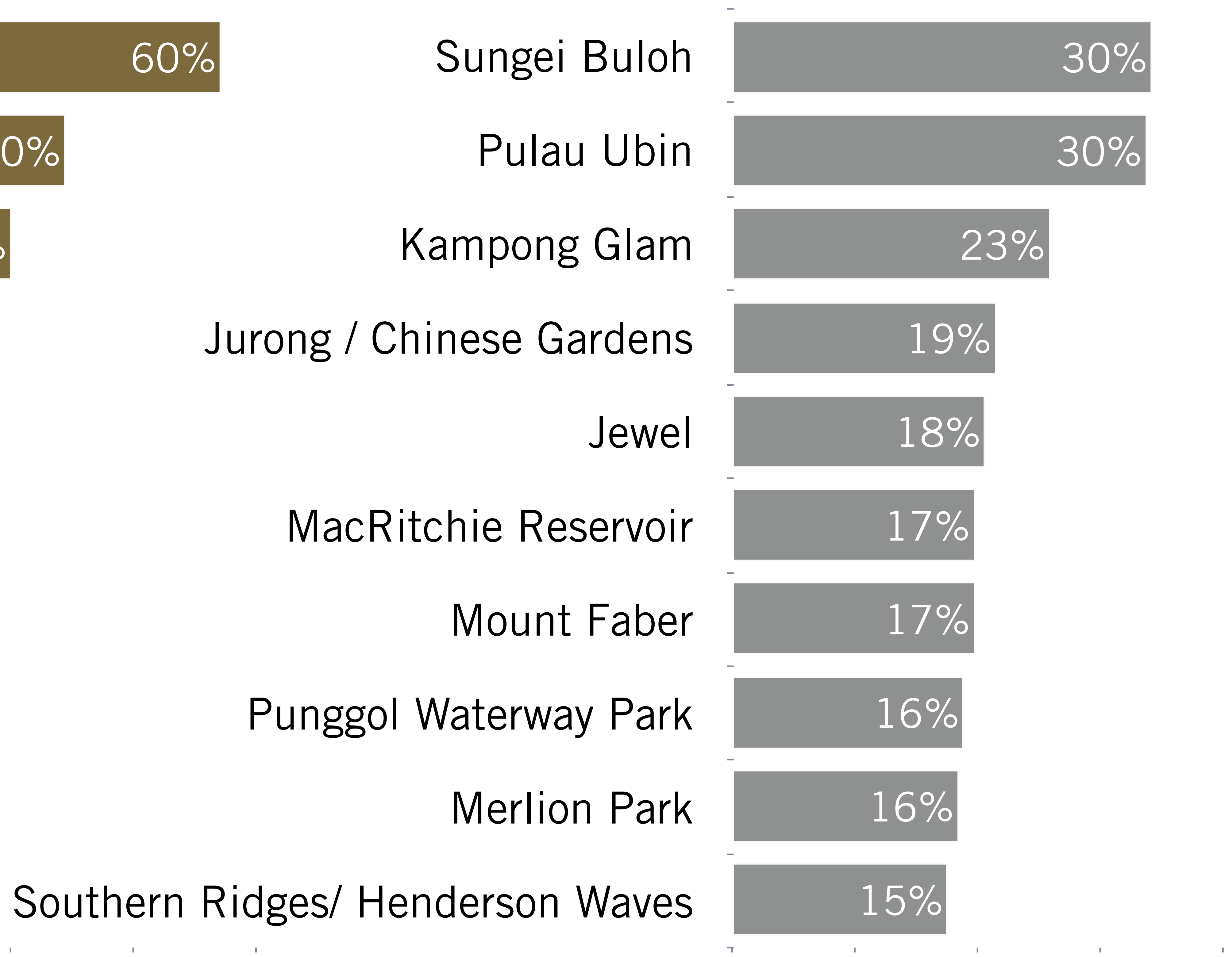
Top 10 free attractions visited in 2019



Top 10 free attractions to visit/ in next 12 months



Top 10 free attractions to not visit in next 12 months



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