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Theme parks, staycation practices, and COVID-19: opportunities and uncertainties

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Abstract

The effects of COVID-19 on the market transformation of the theme park industry has been significant in the short term because of travel restrictions. Challenges, impacts, responses, and strategies might vary from one region to another and even from one theme park to another. However, it can be assumed that domestic travel will continue to have an effect on the theme park industry during the months to come and likely beyond the pandemic. In this context, the "staycation" is becoming a booming trend in the leisure, entertainment, and tourism industry, creating new, current, and future unexpected economic winners and losers. Nevertheless, to what extent this reactive travel behavior under the pandemic will become permanent in the mid- and long-term is rather uncertain. In any case, the attraction of domestic visitors to theme parks as a staycation holidaying practice needs to be connected with the engagement of parks in the ongoing process of societal lifestyle changes shaping customers' decision-making. Whether this strategy could be useful to a particular theme park remains relatively unknown. In any case, more research is needed on the long-term effects of the pandemic in the theme park industry considering the characteristics of specific theme parks and their locational, contextual, human agency, and path dependency issues.

Keywords: staycation; theme parks; COVID-19.

1. Introduction

This essay builds upon the reflections in "The changing role of tourism-oriented theme parks as everyday entertainment venues during COVID-19" (see Anton Clavé et al., 2022). Aside from theme parks across the world having been closed for several months during the first year of the pandemic and, in most cases, having reopened under operational regulations and limited capacity, since 2020 COVID-19 has confronted the theme park industry with downsized mobility and long- and medium-haul travel restrictions (TEA/AECOM, 2021). In contrast, domestic travel appears as one of the more significant components for the recovery together with vaccine passports and extended vacations (Baidin, 2021). Challenges, impacts, responses, and strategies might vary from one region to another and even from one theme park to another. In any case, at the time of writing (winter 2021/2022), COVID-19 is still evolving and countries continue to enact travel and capacity restrictions. Therefore, it can be assumed that domestic travel will continue to have an effect on the theme park industry during the months to come and likely beyond the pandemic. In fact, the staycation, as highlighted by an article in *The Economist* (Anon., 2021a), is becoming a booming trend in the leisure, entertainment, and tourism industry, creating new, current, and future unexpected economic winners and losers.

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Staycation is a concept that was introduced after the 2008 global economic crisis to describe the growth of domestic and local tourism (Rosu, 2020). It has become a prominent trend during the pandemic, as customers look for customized, sure, and safe nearby leisure and entertainment options. Staycation could also play a role in the post-COVID future, reducing the potential vulnerability and increasing the theme parks' business resilience to unexpected new global crisis events.

2. Domestic visitors and theme park performance during the pandemic

In 2020 the business model of theme parks was fully disrupted due to COVID-19-related travel and mobility restrictions, social distancing requirements, capacity constraints, temporary closings, and specific operational adjustments in rides and attractions. All of these measures have had an enormous impact on people's leisure, entertainment, and tourism decision-making and behavior. Both the operational and marketing efforts of theme parks to attract domestic markets in response to travel limitations or inconveniences during much of 2020 and 2021, as well as the decisions made by people when choosing—for entertainment activities—domestic and local day trips rather than international or longer travels (Sivan, 2020) have changed theme park attendance over the past two years. In general, worldwide 2020 attendance data to theme parks indicates changes in the visitor mix of theme parks, including an increase of the proportion of domestic, local, or regional visitors; a dramatic reduction of international and long haul attendees, and a growing importance of repeat and passholder customers. More precisely, in 2020, a year with an estimated worldwide decline in theme park attendance and in theme park spending of more than 58% (IAPPA/WGA, 2021), theme parks that largely rely on resident markets were less vulnerable. This was the case, for example, of China's OCT parks, which reported an average decline in attendance of only 14%, Fantawild parks, which dropped an average of 20%, or Efteling Park in the Netherlands, whose attendance declined by 45% (TEA/AECOM, 2021).

Similarly, according to PGAV Destinations and H2R Market Research (2021), in the U.S., the number of people visiting an attraction located within 50 miles of their home in 2020 grew by 6% compared to 2019. Additionally, season passes and memberships increased in 2020 and ranked much higher than the historical average across all attraction types. In general, parks extended their annual passes and memberships for no additional fee in 2020 and due to this strategy, many of the repeat guests during that year and even in 2021 were existing passholders (TEA/AECOM, 2021). Reports also show that many local visitors were first-time visitors and that theme, amusement, and water parks (+8%) as well as educational attractions, museums, and galleries (+7%) were the attractions that recorded the highest increase in first-time visitation (PGAV Destinations & H2R Market Research, 2021). Obviously, the increased relevance of the domestic market will continue until travel restrictions are lifted.

Within this context, the case study in Anton Clavé et al. (2022) has also confirmed the hypothesis that the travel decision-making of visitors and the meaning of the experience when visiting a particular theme park was significantly different in 2020 compared to 2019. More particularly, geolocated social media data from the Twitter accounts of visitors to PortAventura living in Catalonia (where the park is located) was analyzed during the seven days before and after their PortAventura visit in 2019 and 2020. Aside from the expected increase of the proportion of domestic visits to the park, results also indicate that visitors decided to combine the visit to the park with the exploration of other nearby located tourism attractions. This implies a transformation of the conventional theme park visit into a different leisure practice linked to a new "near-to-home" travel trend. Welcoming local visitors looking for a complex travel experience (including visits to other attractions near the park) in their own area (such as they might expect when going "abroad"), the case of PortAventura illustrates a clear example of what is known as staycation (Rosu, 2020).

To what extent this type of practices will remain after COVID-19 cannot be predicted. Indeed, the study by Anton Clavé et al. (2022) only represents one particular case in which the visit to a domestic theme park is connected to a more meaningful and complex decision that can be understood as a staycation practice during the pandemic. Nevertheless, considering the previous reflections on the role of local visitors in the worldwide performance of theme parks, the next section of this essay will discuss domestic travel to theme parks as an unexpected opportunity in a context of uncertainties.

3. Staycation tourism practices and post-COVID uncertainties for tourism-oriented theme parks

A Tiqets survey among more than 7,000 participants in France, Italy, the Netherlands, Spain, the UK, and the U.S. about their tourism choices concluded that in the 2021 summer season, most visitors preferred traveling to destinations close to their home (Voges, 2021). From a conceptual perspective, close-to-home holiday-making refers to a previously non-existent tourism category that emerged during the first decade of the 21st century called the staycation. In a recent paper on travel discontinuities, enforced holidaying-at home, and alternative leisure travel futures after COVID-19, Steen Jacobsen et al. (2021) define staycation as "a temporary vacation-like activity during which one remains in or near one's domicile. It seeks to replicate tourism practices that may include engaging in various leisure activities, enjoying different types of food and drink, and drawing upon local or regional recreation and tourism opportunities that are the domain of the visitor economy" (p.2). Staycation is, then, a modality that apparently seems to contravene conventional views on mobility and tourism (Rosu, 2020). Nevertheless, the current travel crisis may provide new relevance to the concept and, even more importantly, to the actual practices of proximity tourism. This is likely because, as Tom Hall, Vice President at Lonely Planet, reflects on Tiqets, "being 'safe' in travel means something different now than what it meant in 2019." In his opinion, "there's an inkling for comfort travel—going to familiar destinations and classic places, and taking less risks back into destinations" (Anon., 2021b).

In this context, theme parks and attractions may wish to reconsider their potential role in the attraction of local visitors and design strategies to manage changes without losing the ability to manage resources and to create new value opportunities. This is known as adaptive resilience (Woyo, 2021) and is related to the capacity to adjust to, learn from, and promote changes when facing a critical situation such as the current pandemic. In the short term, health, political, and economic policies, travel regulations, as well as physical distancing restrictions will further reinforce the general trend towards the regionalization and localization of tourism flows (Niewiadomski, 2020). Hence, for theme parks to have a rich portfolio of products and experiences for domestic visitors is one strategy to ensure their adaptive capacity and resilience.

Nevertheless, to what extent this reactive travel behavior under the COVID-19 pandemic will become permanent in the mid- and long-term remains unclear. Miao et al. (2021), for instance, consider that the consciousness travel restriction salience is likely to influence people's post-COVID travel behavior. However, from an industry perspective, it may be assumed that once we enter the post-COVID era, many theme parks will generally attempt to retrieve their former market share. Therefore, the potential future impact of the increased attraction capacity among domestic visitors can be connected to two main factors: first, to the level of resumption of international and domestic travel and, second, to the capacity of parks to adapt to the differentiated expectations of domestic visitors practicing staycation as a particular modality of tourism rather than merely as a substitute practice.

From this perspective, staycation should be understood as a form of close-to-home tourism mobility that has "meaning" (Rosu, 2020). Staycation requires a set time frame, a sense of a successful vacation, and the full enjoyment of a local offer embedded in the local society and culture. These are important features for the theme park industry because like theme park consumption, staycation consumption is based on a fundamental binary distinction between "everyday life and extraordinary experiences" (Rosu, 2020). This is corroborated by the growing interest, even before the pandemic, in staycation products and specifically designed packages for domestic visitors available through specialized operators such as TUI Sverige or websites such as The Staycation Guide. From this perspective, the potential role of theme parks as entertainment venues for staycation purposes would depend, following Hannam and Zuev (2020), on their capacity to become "meaningful" attractions for visitors living nearby and to make them feel as if they were tourists in their own homes. As stated by the Tiqets report on "the immediate future of tourism: strategies for recovering strong [in the 2021] summer" (Anon., 2021b), from a more operational perspective this implies the need to "revisit the attractions marketing angle" for both the short- and for the mid- and long-term.

Moreover, attracting domestic visitors to theme parks as a staycation holidaying practice refers to engaging them in the various ongoing processes of societal lifestyle changes, including the desire to reduce one's carbon footprint (Rosu, 2020) or to develop new approaches to simple living (Andriotis, 2018). In the current context of the reconceptualization of tourist practices and experiences, the design of staycation theme park products and experiences can have social, economic, and environmental relevance; can help companies undergoing crises reduce vulnerability and build resilience (Woyo, 2021); and can create more attractive domestic tourism opportunities, transforming theme park visits into fully meaningful activities and including, in some cases, a combination of visits to other nearby attractions. This will not radically transform the attraction performance of any particular theme park, especially not that of larger, tourism-oriented, destination, branded theme parks, which need to attract a large number of visitors from all distances. Instead, this places environmental, social, and even political values and concerns at the center of the business resilience of parks. In any case, although there is evidence that not all theme parks are prepared to reconsider their marketing strategies in the mid- and long-term, Dubois and Dimanche (2021) rightfully point out that "this pandemic should act as a reminder, albeit painful, of the importance for [theme parks] to plan even for seemingly extreme contingencies and to grow resilient in case no one can come to the rescue or at least not soon or for long enough" (p.373).

4. Conclusion

The COVID-19 pandemic has been a major shock for the theme park industry to attract visitors. The key question that remains is, following Niewiadomski (2020, p.654), what is the resulting new configuration going to be? The effects of COVID-19 on the market's transformation of the theme park industry has been significant in the short term because of travel restrictions. Nevertheless, it might be a potential mid- and long-term driver of changes if the observed customer decision-making and travel behavior transformation persists. However, to what extent this may result in future trends is rather uncertain.

Acknowledging the potential mid- and long-term effects on tourist behavior and, particularly, the potential rise of staycation practices after the pandemic is important. This is especially true as it applies to the adaptation of the theme park industry to the needs and desired experiences of domestic visitors and the development of an adjusted value generation strategy. The design of a "delivering meaningful experiences strategy" focusing on close-to-home based visitors instead of an only "attraction visitors tactics" can be useful in terms of increasing the opportunities of destination or tourism-oriented theme parks as attractions for domestic visitors and in terms of improving their future resilience and adaptability. This can also be a strategy for regional parks to increase visitors' value generation when they are "tourists in their own homes." Of course, whether this strategy is useful to a particular theme park remains relatively unknown. In any case, more research is needed on the long-term effects of the pandemic in the theme park industry considering the characteristics of specific theme parks and their locational, contextual, human agency, and path dependency issues.

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