2019
VOICE OF THE VISITOR
Annual Outlook on the Attractions Industry
America is on track to be ‘MINORITY WHITE’ in 24 YRS.

Travelers are seeking places to RELAX AND FEEL WELCOME.

STAFF satisfaction declines amid overall STABILITY.

First-time visitation to attractions has reached an all-time high.

Season passes peak while variety declines.

Intent to travel & return to same attractions continues to decline into 2019.

Oldest Millennial families from minority backgrounds may now be your core audience.

The strengthening economy keeps travelers optimistic for 2019.

Staff satisfaction declines amid overall stability.

Top 8 statistics.
“Just because something works, doesn’t mean it can’t be improved,” says Black Panther’s show-stealing Shuri, a brilliant engineer innovating on her king-brother’s super cat-like suit. The 18th film in the Marvel Cinematic Universe, based on the 1966 comic book series, quickly rose to become the highest grossing solo superhero movie (e.g. not a team of heroes) in history, and the 3rd largest US box office gross of all time, surpassing James Cameron’s Titanic and barely trailing the director’s Avatar and Disney’s Star Wars: The Force Awakens. Black Panther was so successful that Marvel Studios is now fast-tracking its long awaited Shang-Chi franchise, the first super hero film series starring an Asian protagonist. How are these two film heroes, from one of the most successful film studios of all time, different from their box office-topping peers?

TIME TO CHANGE

“Just because something works, doesn’t mean it can’t be improved.”

THEY’RE THE ONLY NON-WHITE HEROES.

Among many other finger-on-the-pulse wisdoms, Marvel Studios has recognized the immense and growing influence minority audiences and subjects are having on culture – and the economy that accompanies it. In our fourth annual Voice of the Visitor: Outlook on the Attractions Industry, we’ve uncovered the same: what were once deemed “minority” cohorts are quickly gaining momentum to have the majority voice at attractions – from the front gate to the boardroom. Destinations who fail to adopt nimble, diverse, and responsive cultures may be queued to become irrelevant.

2019 Voice of the Visitor
The first and most comprehensive report of its kind, 2019’s Voice of the Visitor has evolved to uncover more actionable insights, bringing underlying trends front and center. PGAV has now added five new attraction types—Children’s Museums, History Museums, Art Museums, Natural Wonders, and National/State Parks—bringing our total destination exploration to 20 categories.

Our long-standing partner H2R Market Research conducted this year’s fieldwork and interpreted the insights gathered from 2018’s destination guests, surveying 1,500 U.S. leisure attraction visitors who either visited an attraction in 2018 or plan to do so this year, providing a margin of error of +/-2.5% at a 95% confidence interval. The results have revealed imperative insights into travel motivations, guest satisfaction, the Millennial influence, and forecasts to watch for 2019.

Your creative and brilliant teams no doubt have worked tirelessly in recent years to innovate your programing and performance, and your boards have approved significant capital investment to make your wonderful attractions even better. As Americans’ intent to travel for leisure and return to attractions continues to decline, we can’t ignore Shuri’s wise words: “Just because something works, doesn’t mean it can’t be improved.”

Let PGAV’s Voice of the Visitor be your guide.
As the result of slowing population growth in the country’s White population and accelerating growth in minority populations, the next quarter-century will see American...

On track to be the "minority majority," America’s Hispanic population has grown sixfold since 1970 to an estimated 57.4 million just three years ago, cites National Geographic.

According to the Brookings Institution,* America is on track to become minority White by 2045.

* The US Will Become ‘Minority White’ in 2043, Census Projects
William H. Frey, The Brookings Institute, March 14, 2018
Unlike Whites, these groups are less likely to travel for leisure (76% vs. 84%), are less satisfied with their last attraction experience (76% vs. 89%), are less likely to recommend their last attraction to friends and family (Net Promoter Score of 39% vs. 50%), and are less likely to travel this year (77% vs. 82%).

While Whites visited attractions at a higher incidence rate last year, minority groups visited Theme and Water Parks at significantly higher rates, and similar rates at Zoos, Aquariums, Children’s Museums, Science Centers, FECs, Dinner Theaters/Cruises, and Large-Format Screen Theaters. The largest disparity by a significant margin lies within Historic Landmarks/Places, where Whites visited 19 percentage points more than minorities (the next closest category was Breweries/Wineries by 10 percentage points).

Minority groups are significantly more likely (10 percentage points) to own season passes or memberships, and are looking to use them this year. Roughly half of Hispanics, Blacks, Asians, and more intend to visit each kind of attraction this year, only about a third of Whites generally intend to visit each one (with History and Animal-associated attractions topping their wish lists around 50%).

Simply put, “the minority” is quickly on track to become “the majority,” but they’re not visiting attractions in proportion to their population; and when they do, they’re less satisfied and less likely to return. If attractions are to remain relevant, it’s the Golden Hour to conduct a Brand Audit. Review the make-up of your board, staff, part-time staff, and volunteers: do they proportionally represent the cultures of America? Engage local communities and openly and transparently review your copy, from collateral to wayfinding; examine your permanent and traveling installations; and work to better understand what programming would appeal to the real and future make-up of your guests.

Our data revealed minority groups accounted for 21% of attraction visitation in 2018, while currently comprising 39% of the US population.

Failure to do so may cause you to be buried in the Travelanche on the horizon.
WHAT MAKES TRAVELERS want to visit you?

By understanding what motivates Americans to travel and visit attractions, destination managers can develop relevant content and programs to better attract these travelers. Our results show that “Logging Out” might just be the new “Rocking Out.”

In 2018’s Voice of the Visitor, we explored the State of Permanxiety – the stress-inducing phenomenon of minute-by-minute jarring and shocking political, societal, and natural-disaster-filled headlines. The trend has unquestionably continued, and travelers continue to seek opportunities to tune it all out, regroup, and find peace. Americans are reducing some key digital interactions, most significantly playing video games and hanging out with friends online, while seeking out more authentic time with their compatriots at home to “relax and chill out.”

16% of our respondents are spending more time outdoors than they were five years ago, Logging Out to spend some peaceful time in nature to reboot. Hispanics (+20%) and Asians (+20%) are more likely to be hitting the parks and trails than Whites (16%) and Blacks (+1.5%).

<table>
<thead>
<tr>
<th>ACTIVITY TRACKER</th>
<th>Doing More</th>
<th>Doing Less</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spending time outdoors</td>
<td>33%</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>Ordering takeout/delivery</td>
<td>26%</td>
<td>25%</td>
<td>1%</td>
</tr>
<tr>
<td>Ordering groceries online for pickup</td>
<td>32%</td>
<td>25%</td>
<td>7%</td>
</tr>
<tr>
<td>Relaxing, chilling out</td>
<td>38%</td>
<td>11%</td>
<td>27%</td>
</tr>
<tr>
<td>Playing video games</td>
<td>24%</td>
<td>33%</td>
<td>-21%</td>
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<tr>
<td>Hanging out with friends at home</td>
<td>23%</td>
<td>10%</td>
<td>13%</td>
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<td>Hanging out with friends online</td>
<td>23%</td>
<td>28%</td>
<td>-5%</td>
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<tr>
<td>Taking selfies</td>
<td>24%</td>
<td>3%</td>
<td>21%</td>
</tr>
<tr>
<td>Doing More</td>
<td>15%</td>
<td>2019 Voice of the Visitor</td>
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</tbody>
</table>
Americans aren’t reducing all of their technology usage, however. Programs that help speed up and simplify tasks – like ordering groceries online, meal delivery, ride sharing, and online shopping – continue to increase in popularity as smartphone-native Trailing Millennials grow their usage and teach their Gen. X parents and Boomer grandparents. People certainly are using significant amounts of digital data, but the trend is shifting away from using it for socialization, and more towards polishing off “jobs” to more quickly get to authentic, in-person interactions.

Most importantly, however, is the effect the State of Permanxiety is having on where people want to go. For the first time in the four years of our study, the number one emotional driver which inspired people to visit an attraction was the desire to seek out “a place that made me feel that I am welcome” (29%). The world is in a difficult period of divisive transition, with – at times - unfortunate marginalizing consequences (even Sir David Attenborough, famed naturalist, opened last December’s UN climate talks with the warning that the “collapse of civilization is on the horizon”).

In this environment, people are seeking places where they are welcome and safe; and we have to ask ourselves, “Is my attraction welcoming and safe for everyone?” Similarly to previous years, travelers are commonly motivated by something that’s good for the family (26%), and continue to seek new and unique experiences (27%), even more so than five years ago. Both Trailing Millennials and Blacks lead the pack in seeking out these fresh experiences.

A quarter of 2018 travelers noted that the opportunity to unplug and relax is what drove them to visit a specific attraction. As you make your plans for this year and beyond, what steps are you taking to make your destination more relaxing, and less tied to headline-enabling smartphones? Travelers are seeking places to get outdoors and reconnect with nature. While destinations like theme parks and zoos are naturally outdoor-prominent, how can other attractions add gardens, parks, and other peaceful places bathed in sunshine? Lastly, these visitors are looking for environments where they can reconnect and deepen their relationships with their friends and family –

How are you innovating to facilitate that bond they so desperately seek?
Economic optimism (or pessimism, for that matter) is a key metric in forecasting your attendance and revenue. A more optimistic population more freely spends its income, is more likely to travel, and is more likely to visit more attractions, buy food and beverage, and tour opportunities when they do so. Understandably in reverse, a nervous or more pessimistic population is more apt to put its earnings into savings, invest in long-term pay-outs, and seek out stay-cation, free, or at-home entertainment in lieu of the big annual family vacation.

Although expectations for 2019’s US economy are just a couple points higher than our four-year average, they are just a tiny fraction lower than 2017’s outlook. Despite this decline, these “lows” are nothing like 2016, where we saw a quarter of respondents expecting the economy to worsen, and only 39% expecting it to improve. Of interesting note is that these numbers continue to fluctuate slightly within a range of nine percentage points, while the overall health of the economy continues a year-over-year strengthening. Since we began this report in 2016, the Dow Jones Industrial Average has risen from approximately 17,000 to 25,000 (although with a significant dive in the first quarter of 2018, mired by data breach scandals), and the rate of unemployment has dropped from roughly 5.7% to 3.7%.

Regardless of Permanxiety, attraction visitors tend to monitor key economic performance indicators and remain positive overall for the coming year, with the most optimistic travelers being young, employed, minority men with children.
More Vacation Days, Fewer Attractions

2018 marked the third straight year of Americans using more of their earned vacation days, as company cultures encourage them to do so. According to Project Time Off’s State of the American Vacation, these workers are working less while on vacation, all of which contributes to reducing work burnout and potentially contributing to this positive outlook for 2019. So where did these travelers go last year?

While the overall incidence of attraction visitation remained relatively stable with 2017 and our four-year average, individual attraction incidence either held steady or declined at every attraction type in our study.

First time visitors to attractions, however, reached its highest rate - 47% - in the history of our study, when respondents noted it was their first time going to the last attraction they visited. First time visitors are most likely to be Millennials, reinforcing the early observation that travelers are more than ever seeking out fresh and new experiences. Variety of attractions has decreased though, as visitors only visited 3.3 different attractions in 2018, down from 3.9 in 2017. Savvy travelers are better identifying what they like, and seeking more variety within those categories.

First Time Attraction Visits

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rate</td>
<td>36%</td>
<td>36%</td>
<td>36%</td>
<td>43%</td>
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Despite an increase in memberships, first time visitation is up by four points this year overall. Those with a higher income tend to do both.
The percentage of respondents who have visited an attraction in 2018.

These numbers simply record the incidence of visitation, and don’t report repeat visitation or the size of their groups (e.g., simply, “did you visit this type of attraction in 2018?”). However, we are seeing decreased party size overall, so with smaller groups visiting a smaller variety of attractions, destination managers have a new challenge to face in 2019. The goal must be to inspire a greater number of households to visit your attraction to make up for smaller party sizes. Additionally, as travelers better define what kinds of attractions they love most, and reduce their variety, you may want to consider regional partnerships that make more thematic sense. Whereas a museum might have once offered a reduced-price multi-pass to visit it, a zoo, and a nearby waterpark, 2019’s strategy might benefit from considering partnering with more museum-like attractions.
Nearly half of all 2018 attraction visitors had a season pass, annual pass, or membership to at least one destination. This is a significant 13-point increase over last year, and where a historical average hovered around 40%. Those attractions with the highest rate of membership include Theme and Water Parks (34%), Outdoor Recreation like Natural Wonders and Parks (31%), and Animal Attractions like Zoos and Aquariums (29%). As previously noted, minority populations are ten points more likely to own and leverage one of these passes than Whites.

Visitors who engage in more repeat trips are generally more likely to visit attractions and use passes and memberships while doing so. Interestingly enough, those destination patrons who travel more than 50 miles from home to visit an attraction have a lower intent to visit other attractions. In fact they visit fewer attractions upon arrival (as opposed to repeat visitors).

One theory is that long-haul travelers are making the journey to see only one, or just a few, iconic sites – such as a trip to New York City from Ohio may just be for Times Square, Staten Island, and Central Park. Or, as attractions increase their capacity to be full or multi-day experiences, travelers may have less time to visit a variety of attractions while vacationing.

Attraction membership departments should consider creating and executing new strategies this year to identify and reach potential repeat visitors as early as possible (previous PGAV studies have noted that guests often have to visit four times before considering becoming members). Additionally, competition is heating up for the share of time of your out-of-town guests, so strategies that increase length of stay, connect to must-see icons, and truly boast the value of their attraction will be effective plans in winning over travelers in 2019.
When deciding which attractions to visit, travelers consider value (79%), cleanliness (78%), and friendly staff (71%) as the three most important characteristics. Generally speaking, attractions are delivering well on most of the key attributes visitors are seeking; overall guest satisfaction improved last year by 0.05 to 4.4 on a five-point scale, on par with our four year average. However, there’s one area that saw the most significant drop in guest satisfaction (4.21 out of five), and it wasn’t undercooked hamburgers: it was friendly staff.

With the tagline “Putting the F.U. in Fun,” the Dick’s Last Resort chain of restaurants has become notorious for intentionally hiring obnoxious servers, who verbally abuse and insult their guests. Last Resort diners may be forced to wear over-sized and uncomfortable bibs and hats – often thrown at them – with intentional mistakes in orders or servers ignoring their diners for long periods of time.

But that’s not why visitors are coming to your attraction.
Despite this all-time low in staff satisfaction, attraction visitors continue to be more likely to recommend their last attraction visit to friends and family. 61% of respondents in 2018 were likely to send their network walking in their destination footsteps, up from a 2016 low at 50%. White Baby Boomers are the most likely cohort to give these high scores, while Yelp and TripAdvisor-savvy young minority groups are significantly more critical.

If satisfaction is stable, then why isn’t repeat visitation higher?

Two underlying trends may point to the answer. First, as previously noted, travelers are seeking new and fresh experiences at higher rates than we’ve ever seen. Your attraction may have done quite well and met your guests’ expectations; but with no new galleries, rides, or renovations, nothing “new and fresh” is there to draw them back.

Secondly, while review sites like Yelp and TripAdvisor are so prevalent that they’ve entered our daily lexicon, most attraction visitors still don’t register reviews, regardless of positive or negative experiences. A hidden data point may be that some guests may be having negative experiences, but simply aren’t lodging a complaint.

Fortunately, the advice for attraction managers is clear: consider revisiting your front-line staff training to increase public positivity, listen to guest concerns and complaints, and take action to rectify them. Happy guests lead to happy members!

Top 10 Important Attraction Attributes

1. Is a good value for the money
2. Is a clean place to visit
3. Friendly staff members
4. Provides a safe and wholesome environment
5. A diverse experience with a lot of different things to see and do
6. Is a fun place for my family to visit
7. Has positive guest reviews
8. A unique experience that is out of the ordinary
9. Discounted admission
10. Offers something that is both fun and educational
With the ever-stirring American Melting Pot, 2018 saw Millennials become the most diverse generation in history, with 44% of their population representing one or more minority groups. This generation also represents the largest share (36%) of attraction visitors last year, but has dropped four percentage points from its historical average, in addition to a 13-point decline in visitation and four-point decline in satisfaction.

As Millennials represent both the largest attendee share and are significantly comprised of the two-decade minority Travelanche on the horizon, it’s time to take notice (if you’ve not already).

Millennials as a whole, despite being increasingly optimistic about the economy and more likely to recommend their last attraction to friends and family, are exhibiting a lower intent to travel this year – even though they visited attractions in 2018. It’s only when we divide this generation into Leading (ages 27–37) and Trailing (ages 18–26) Millennials, that we see some underlying causes.

Trailing Millennials represent an even greater portion of the US minority population than their older counterparts, a segment we explored in-depth in an early chapter whose needs are simply not being met. These younger Millennials visit fewer attractions, and are significantly less satisfied (by 13 points) and less likely to recommend their most recent attraction to friends and family (by 18 points). If you want to turn the tide of Trailing Millennials, it seems like the most influential move might (and probably should) be out of your control:

### Children

<table>
<thead>
<tr>
<th></th>
<th>Leading Millennials (27–37)</th>
<th>Trailing Millennials (18–26)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visited an Attraction in 2018</td>
<td>96%</td>
<td>26%</td>
</tr>
<tr>
<td>Intent to visit an Attraction in 2019</td>
<td>89%</td>
<td>66%</td>
</tr>
<tr>
<td>White/Caucasian</td>
<td>74%</td>
<td>46%</td>
</tr>
<tr>
<td>Minority</td>
<td>52%</td>
<td>26%</td>
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</tbody>
</table>
Leading Millennials who have children are significantly more likely than all other Millennials to visit every type of attraction, have higher satisfaction, higher rates of recommendation, and higher intention to visit attractions this year. Regardless of age, families account for 30% of attraction visitor households—on par with the US population—and it’s not news that they’re the most likely customer segment to check all the positive attraction boxes previously noted. It’s important to take note that Millennial Mothers found discounted admission to be a very high priority that they felt many attractions were lacking.

Parents of today are certainly different than those of yesteryear (in other news, ‘Water is Wet!’). But to better understand your audiences, Millennial families are far more likely to be found at Water Parks, Aquariums, Zoos, and Theme Parks, while Baby Boomers are more likely to be found at Historic Landmarks, Sightseeing Tours, and Old Homes and Mansions.

As attraction managers, it’s important to note that your core audience may very well be Leading Millennial families from minority backgrounds, and that patience may be one of the key elements in attracting their younger counterparts. When considering Baby Boomers and Millennials, review which types of attractions they’re most likely to visit and what portion of your annual visitation they comprise: you can’t always make a horse drink water, and potentially some steeds might not be ideal to even try and lead there.
Looking inside the 2019 Crystal Ball

Attraction visitors’ desire for fresh and new experiences in 2018 extends into this year, with a steady, continuing decline in intent to return to the same attraction as last year. Water Parks (4.45/5) and Aquariums (4.39/5) have the highest repeatability in the eyes of American visitors, while Historic Landmarks (3.04/5) and Sightseeing Tours (2.66/5) have the highest potential to be “One-and-Done” experiences.

Whether they’ve been there before or not, the top attractions travelers intend to visit are Children’s Museums (84%), Art Galleries (79%), Water Parks (79%), and Large Format Screen Theaters (79%), while Dinner Theaters/Cruises (69%), Historic Homes/Mansions (64%), and Sightseeing Tours (62%) are less likely to capture their attention. Top-intended attractions carry key characteristics of this report’s core population needs: a desire to tune out and reconnect, get outdoors, and/or find something for the whole family.

2019 Voice of the Visitor
Fueled largely by Hispanic, Black, and Asian travelers, Americans’ intent to travel for leisure this year continues its downward trend, dropping to 81%. Some of America’s most iconic cities top the intended destination travel list, including New York City (34%), Orlando (32%), and Las Vegas (30%).

The ratio of guests who intend to visit “far more attractions this year” grew once more to 24%, led largely by Millennials (45%). Minorities, a growingly-influential segment with generally-lower satisfaction, intend to visit far more attractions than Whites by ten percentage points.

Attraction-related intentions continue to decline in 2019, after steady decreases over the last three years. Understanding what’s missing from surprising and delighting underserved, large markets will be essential to turn the tide and inspire guests to fill their 2019 and 2020 Destination Dance Cards.
THE FINAL WORD

In an era where minorities are rapidly increasing their influence and reducing their satisfaction, and Millennials’ majority share of attraction visitation forecasts a decline, it’s time to make a change.

2019 may be the “Year of the Brand Audit,” as we encourage destination management to deeply examine their programming, dining options, retail, signage, staff, volunteers, and leadership. If they don’t mirror America’s demographic shifts and attraction guests’ wants and needs, they probably should begin to take the steps to be more reflective. Leadership should reflect the life experience and cultural knowledge of the populations they serve: empathy is a cornerstone of success.

More than ever, attraction visitors are seeking welcoming, peaceful environments that give the opportunity to get a breath of real fresh air, reconnect with their friends and family, and unplug from it all for a while. These travelers continue to enthusiastically seek out the fresh and new, and if your attraction doesn’t keep a constant supply of “fresh and new” on hand, whether additions, renovations, or repurposes, what’s to keep these guests coming back?

Once again we present to you a 2x2 matrix summarizing your guests’ feedback. While it may be a boost of confidence to celebrate and point out the industry’s Strengths and Secondary Strengths to your CEOs and Boards, we highly recommend sincere reflection on the bottom right Unmet Needs and the issues raised throughout Voice of the Visitor.

As Black Panther’s Shuri reminds us, “Just because something works, doesn’t mean it can’t be improved.”
Looking for More Insights?

If you or your staff would like a brief, compiled report of our findings associated with your attraction category, or a profile of any of the integral demographics explored, please feel free to request them from PGAVDestinations.com/insights.

We at PGAV are also thrilled to be publishing the first ever attractions industry report with deep insights into international guests’ experiences in the United States later this spring. If this study would be integral to your 2019 strategy and planning, and you’re not currently on PGAV’s mailing list, please email us to join!
We believe in the power of destinations to enrich lives, enhance communities, and celebrate culture, nature, and heritage through an unforgettable story and beautiful, immersive design.

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