2024 PCAV VOV

VOICE OF THE VISITOR

PCAV DESTINATIONS

A LETTER

from **Mike Konzen**, *Chairman*

We are pleased to present our ninth edition of ***PGAV's Voice of the Visitor (VOV 2024.)***

VOV 2024 tracks and evaluates the attractions industry's 2023 performance, comparing it with a decade of data to create a bird's eye view of our collective growth and look forward to the coming year.

VOV 2024 is a living survey, evolving yearly in response to changes and progressions in society, technology, entertainment, and the arts. New questions this year focus deeper on what's motivating visitors to trek to our attractions, what aspects they value the most, and how their experiences contribute to their satisfaction.

No longer defined solely by the facets of recovery, attractions are transformed. A fusion of resilience, adaptability, and a recalibrated set of consumer expectations marks the new landscape. In this landscape, the industry thrives by balancing innovation, inclusivity, and sustainability, while forging a path that acknowledges past challenges while proactively shaping a dynamic future.

What's imperative to success in today's environment?

AGILITY

The ability to react positively in the moment, make informed decisions quickly, and inspire your team to implement them quickly.

What makes agility successful? **Empathy**. *VOV 2024* shows that changes that are informed by a deep understanding of the visitor and a desire to make the visitor experience incredible are the ones that bring visitors back again and again.

Let's explore!

Mike Konzen
Chairman

PGAV VOV
VOICE OF THE VISITOR

TABLE OF CONTENTS

Agile adjective

ag·ile

:marked by ready ability to move with quick ease and grace.

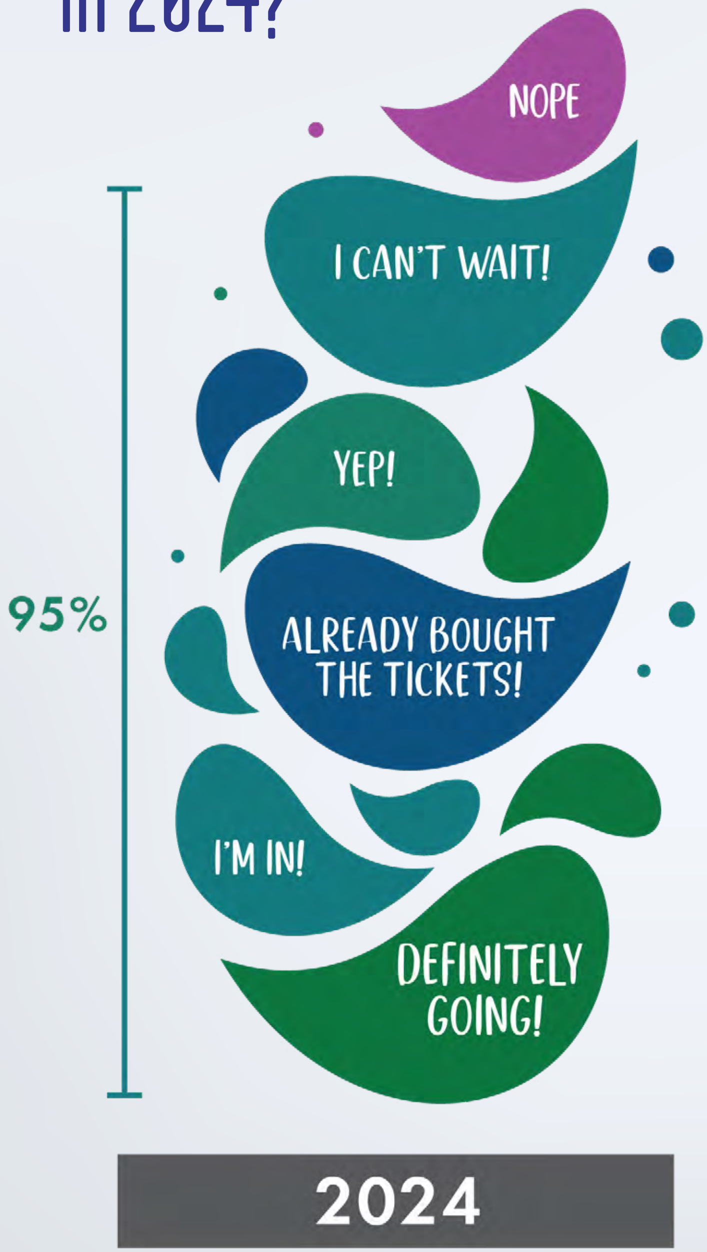
:having a quick and resourceful and adaptable character.

Nimble | *Spry*

"Agile." Merriam-Webster.com Dictionary, Merriam-Webster, | https://www.merriam-webster.com/dictionary/agile. Accessed 22 Dec. 2023.

LOOKING TO 2024

PLANNING TO VISIT AN ATTRACTION IN 2024?



In this fast-paced digital age, information, ideas, and experiences circulate globally in moments, rendering something a year old seemingly outdated and archaic at two years old. Attractions must be agile and responsive.

There's a lot of competition, with new players entering the market and existing ones expanding their offerings constantly. Influencers or content creators can make new or little-known places popular overnight—or cancel them just as quickly.

Visitors continue to explore attractions and are excited to see new things, but attractions must be ready to adapt. Let's get out our crystal ball, peer into the coming year, and see how these insights can prepare for the changing desires of visitors.

Attractions visitors express an intent to continue exploring in 2024, with **95% of responses indicating they plan to visit an attraction in 2024.**

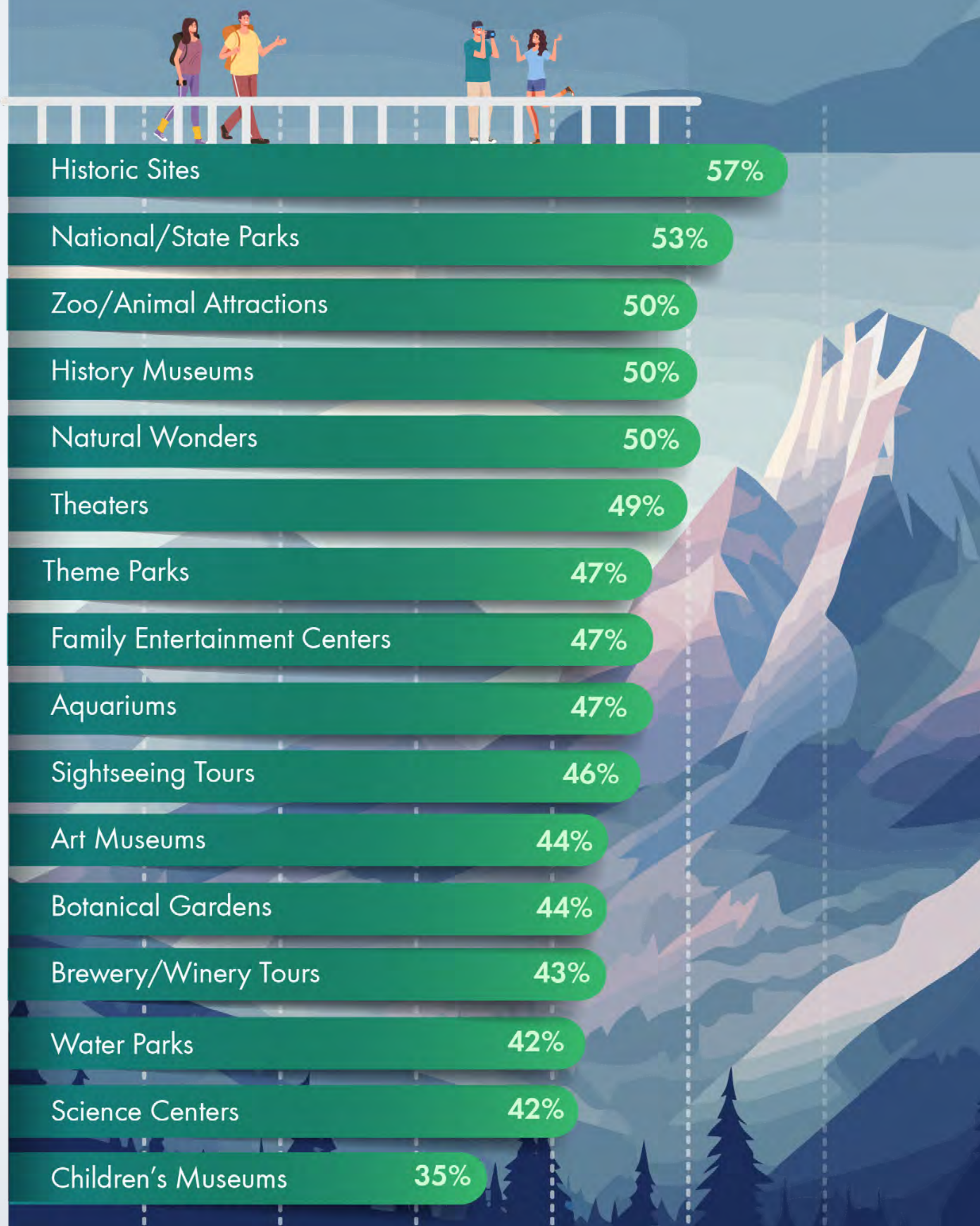
The landscape is shifting toward a preference for variety as visitors signal an inclination to venture beyond their habitual choices.

The general intent to explore an array of attractions sectors increases from 44% to 47%. A familiar lineup of perennial favorites such as historic places, national/state parks, zoos, and theme parks continues to dominate visitors' preferences. However, sightseeing tours, typically residing in the lower echelons of the list, emerge with the highest year-over-year increase, **soaring by an impressive 16%**.

INTENT TO VISIT ATTRACTIONS IN 2024

2024 Average 47%

2023 Average 44%

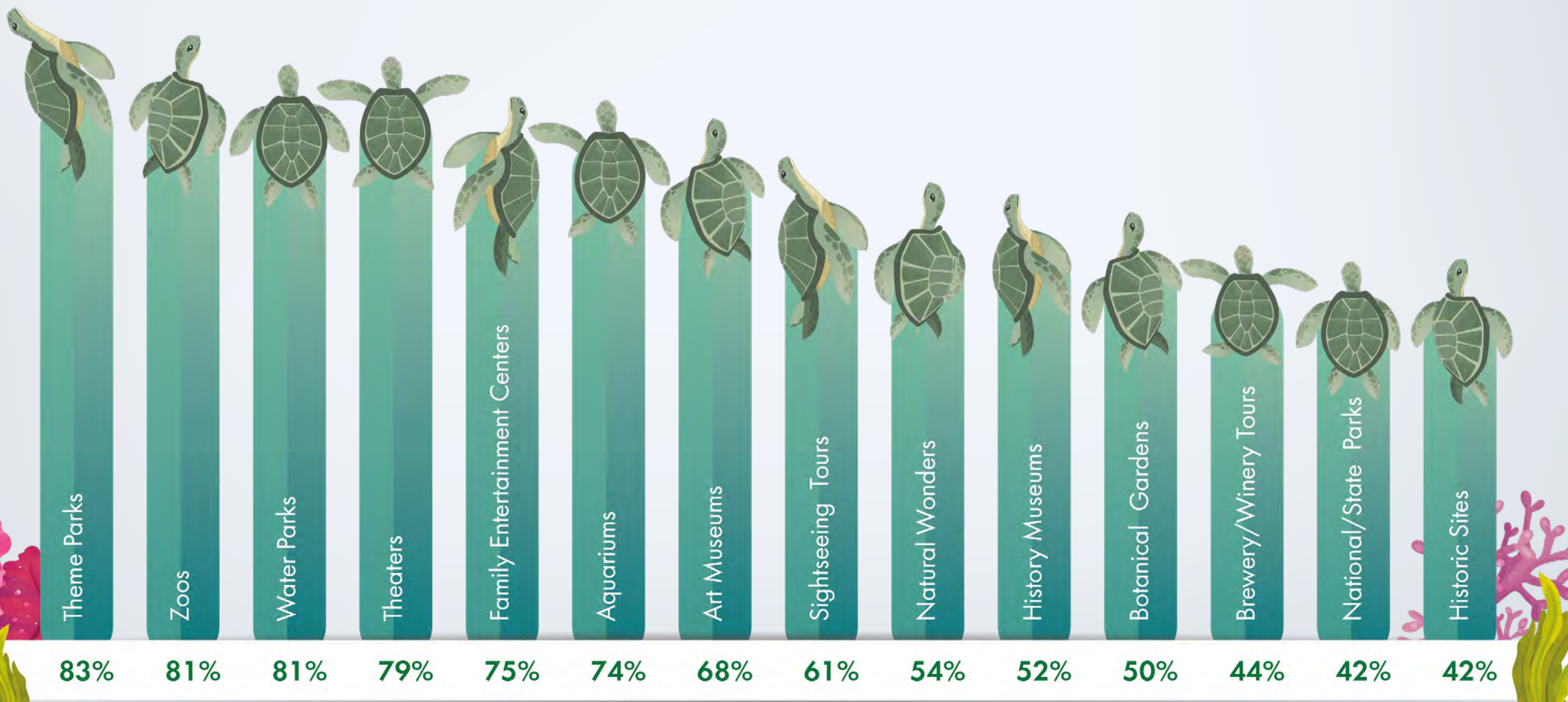


Despite the optimistic intent to visit attractions, visitors anticipate a decline in the frequency of visitation in 2024. In 2024, the average attraction visitor plans to explore 3.7 distinct attractions, signaling a 10% dip compared to the average and a **13% reduction** from the 4.3 attractions reported in 2022.

Visitor feedback indicates that many attraction-goers actively explore new destinations rather than return to familiar ones. Intent to visit the same attraction in 2024 **fell to 67%**, **down from 69%** in 2023. This propensity for finding someplace new to explore is most evident when comparing intent to visit any attraction **(95%)** to intent to visit the same attraction **(67%).** The attractions with the highest intent to return include theme parks, water parks, and zoos. National/state parks and brewery/winery tours generate the lowest intent to return.

INTENT TO VISIT

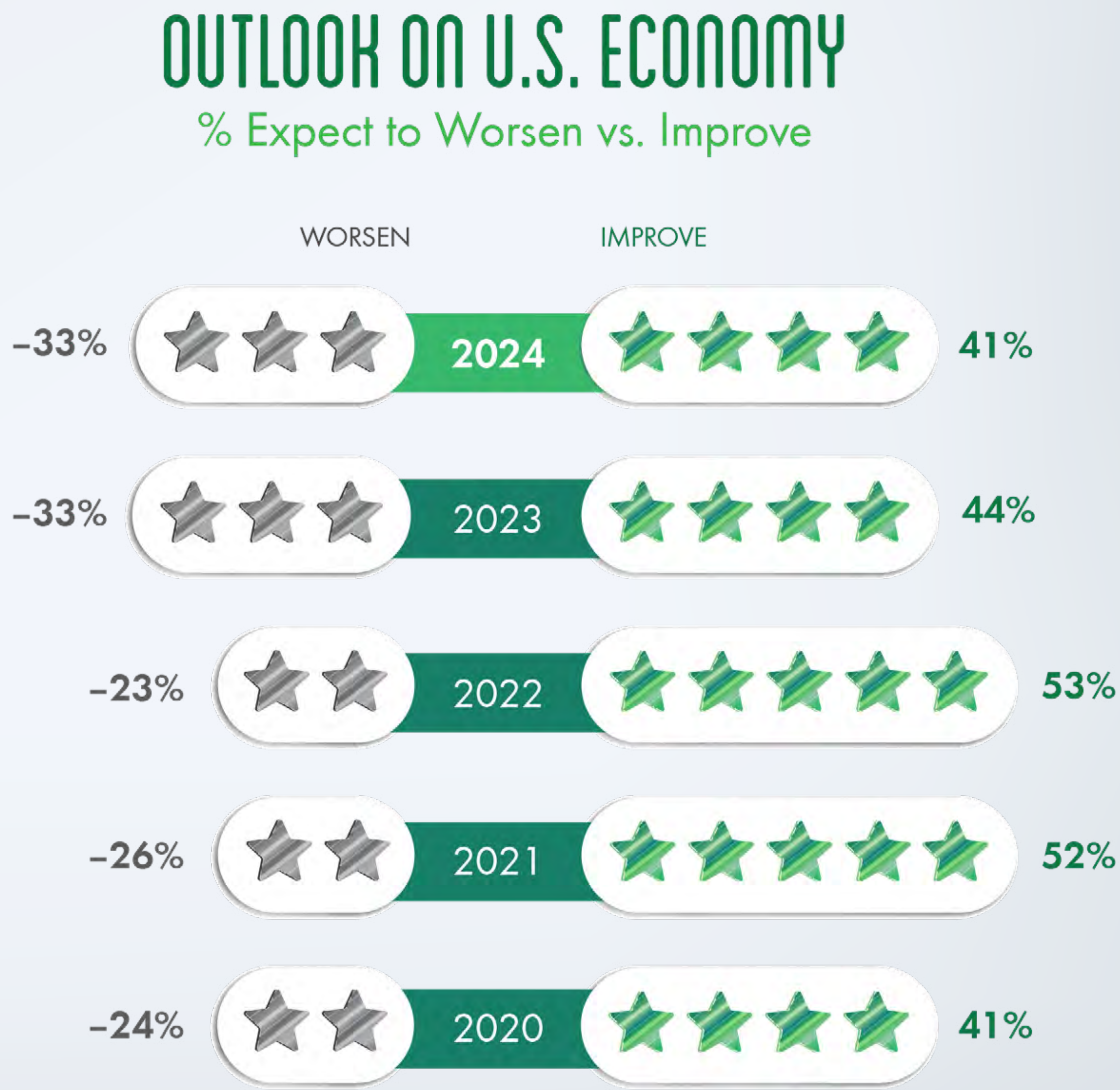
THE SAME ATTRACTION NEXT YEAR



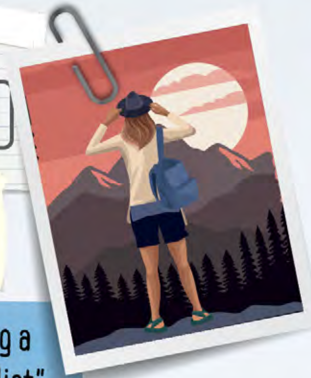
FINANCIAL OUTLOOK

Economic conditions fluctuate, impacting consumer spending and travel behaviors. Adjusting pricing strategies, offering promotions, or targeting new market segments can help **maintain revenue streams and profitability.**

The economic outlook reported in *VOV 2024* shows that **41% of respondents** foresee economic improvement. A third **(33%)** report believing the economy will worsen next year, signaling apprehensions about future economic stability and consumer spending. This echoes the [2023 Gen Z and Millennial Survey] by Deloitte which shows that **44% of Gen Z** expect their financial situation to improve next year, and **35% of millennials** expect theirs to improve.



WAYS PLANS HAVE CHANGED



Those That Expect the Economy to Improve

- No anticipated changes 57%
- Will take longer trips 27%
- Planning a "bucket list" trip 23%
- Investing in annual passes/ memberships 20%
- Upgrading my hotel/travel 20%

Those That Expect the Economy to Worsen

- No anticipated changes 39%
- Taking shorter weekend trips 29%
- Find budget-friendly activities 28%
- Travel off-peak season 27%
- Bring snacks/food to eat out less 23%

Economic outlook can impact visitor spending. Of those who expect the economy to improve, **57%** have not adjusted their plans. Of those that have adjusted their plans, **27%** say they'll take longer trips, **23%** are planning "bucket list" trips, **20%** will invest in an annual pass/membership, and **20%** express interest in upgrading their accommodations.

Notably, those expecting economic deterioration are more inclined to take evasive measures, suggesting a potential impact on discretionary spending and travel plans. The survey shows that **29%** of those who indicated the economy would decline in 2024 will take shorter trips, **28%** will research budget-friendly activities, **27%** will travel during the off-peak, and **23%** will try to save on food costs by bringing their own. On the other hand, of those who expect the economy to worsen, **39%** don't expect to make any changes to their plans.

THERE IS AMPLE EVIDENCE THAT THE ECONOMY IS IMPROVING

The U.S. added more than 2.3 million jobs in 2023.

The unemployment rate is below 4%, with 10 million open positions.

Inflation fell to under 3% by the end of December 2023. That's after peaking at 9.1% in June 2022—the highest level since the early 1980s. The drop boosted financial market expectations of an interest rate cut from the Federal Reserve in March 2024.

Holiday spending increased, defying fears of a decline. According to the New York Times, spending increased across many categories, with restaurants experiencing one of the largest jumps at 7.8% and apparel rising at 2.4%.

Rental price growth is stabilizing, according to Zillow's November 2023 rental report. While still high, asking rents increased 3.3% in November compared to 8.4% annual growth from the same time in 2022.

WHY THE NEGATIVITY?

Despite numerous positive indications, there remains a prevalent concern about the economy. Some Americans may not experience the robust economic conditions often highlighted by economists; others harbor negative sentiments even when their bank accounts are stable. Greg Ip of *The Wall Street Journal* suggests that much of this prevailing pessimism might be attributed to "referred pain" or a broader sense of discontent with the nation as a whole.

Additional factors can impact an individual's outlook on the economy. While economists and policymakers may focus on long-term economic trends or indicators, individuals often experience short-term fluctuations, such as rising prices or market volatility, which can shape their perceptions and attitudes. Personal experiences can influence their economic outlook regardless of broader economic trends. Even if macroeconomic indicators point to growth or stability, personal hardships or challenges can overshadow positive data.

- After reaching a historic high in June of 2022 of **$5.02/gallon in retail gas prices**, December's $3.25 can be interpreted as a positive return to the averages seen in the early 2010s or an increase over the much lower prices just before the pandemic.

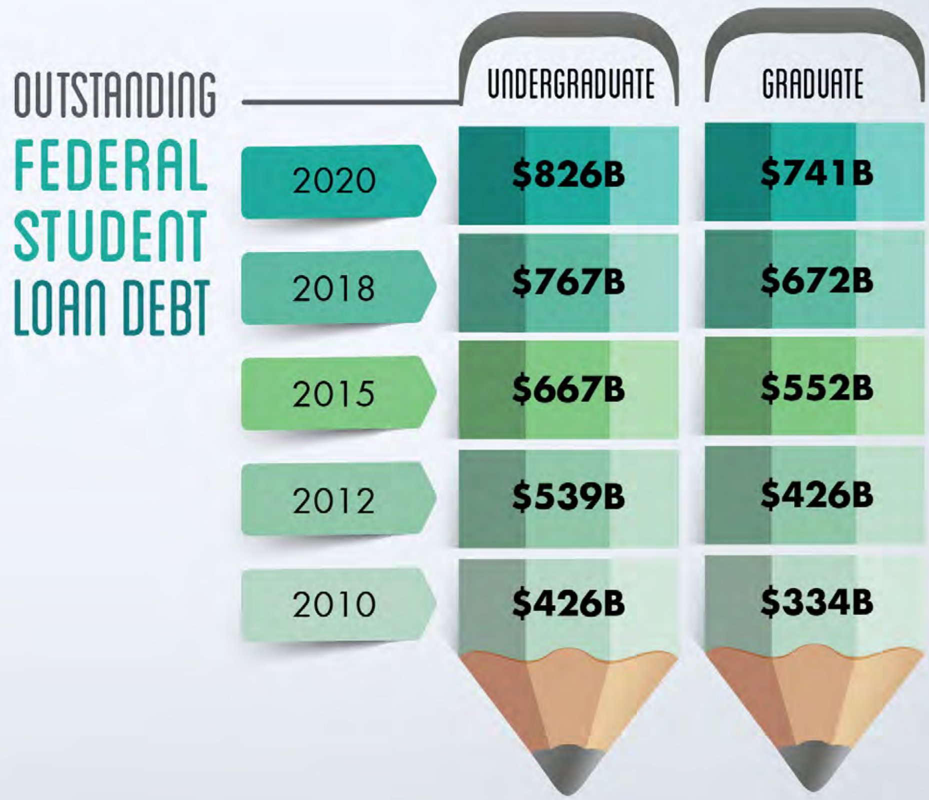
- **Food prices rose 2.9%** between November 2022 and November 2023, according to the most recent consumer price index (CPI) report from the Bureau of Labor Statistics. By comparison, at the same time in 2022, prices rose 10.6% over a one-year period.

- The price of the roof over your head is on fire: **The median price of home sales is up 27% since 2019.**

- Rental prices may be stabilizing, but that isn't comfort to the more than 2 million people who have been **evicted since the pandemic.**

- Cost of living is a major concern for Millennials and Gen Z, with half **living paycheck to paycheck,** according to the Deloitte study. A combination of credit card debt, student loan debt, and the cost of housing significantly impacts their income.

- Speaking of student loans, the last two years have been a roller coaster. In 2022, borrowers with $10,000 or less in student loan debt (34% of all borrowers) looked to have that debt wiped clean by the federal government—then, they weren't. Three new moves by the government in 2023 continue to try to increase the number of borrowers who qualify for forgiveness, with more programs teased for 2024. Many believe this will help the economy because, as it stands, **student debt has more than doubled in the last ten years.**



- **Shrinkflation:** That candy bar really did shrink (but the price didn't decrease). The Labor Department tracks these situations and showed about 10% of consumer items were downsized between 2015 and 2021.
- **Cognitive Biases,** including confirmation bias (favoring information that confirms existing beliefs) and negativity bias (giving more weight to negative information). These biases can distort perceptions and lead individuals to focus more on negative aspects or potential risks than positive economic indicators.
- Media coverage also plays a significant role in shaping **public perceptions of the economy.** Negative news stories, sensational headlines, or continuous coverage of economic challenges can amplify pessimism among the public, even if broader economic indicators suggest improvement.
- According to the Survey Center on American Life, Americans who follow political news overwhelmingly say **content is negative.**

- Funding for news has changed drastically over the last 20 years. Advertising revenue has been dispersed across the internet and social media, **causing media outlets to chase clicks**. And people are more likely to click on a negative headline.

- Before 2020, it was unlikely that most Americans used the words **"supply chain"** in a conversation with friends over coffee, **yet suddenly, it was topic #1—and with good reason.** Yet today, as supply chains level out, this positive news is not touted with a fraction of the thunder that their disruption created. The current number on the Federal Reserve Bank of New York's Global Supply Chain Pressure Index is a healthy .11. (Negative values are shown when supply chains are functioning well and experiencing limited disruptions or pressure. In its normal state, the GSCPI is expected to be below zero).

% OF AMERICANS WHO RATE THEIR NEWS CATEGORIES AS EITHER POSITIVE OR NEGATIVE

Survey Center on American Life

HOW TO SPEND THAT MONEY

Fears of a recession loomed large in 2023, but visitors still went out and spent money. Visitors reported increasing their average spending compared to the previous year, with expenditures **rising from $64 in 2022 to $78 in 2023**. Visitors frequenting historic sites, theme parks, and theaters emerged as the most significant spenders per person.

While some fears of a major recession have waned, not everyone is optimistic. And it's an election year, which throws in a wild card. Analyzing consumer preferences and spending priorities can help proactively plan for these uncertain economic conditions.

In consumer preferences, the desire for choice emerges as a dominant theme. The findings from ***PGAV's 'Creating Family Memories'*** fall 2023 survey shed light on this inclination. Respondents were closely divided when posed with the decision-making approach for their activities. Specifically, there was a nearly 50-50 split between those who wanted to pre-plan extensively and individuals who preferred the spontaneity of playing things by ear. Such a balanced perspective underscores the multifaceted nature of consumer needs, suggesting that a one-size-fits-all approach does not resonate with everyone.

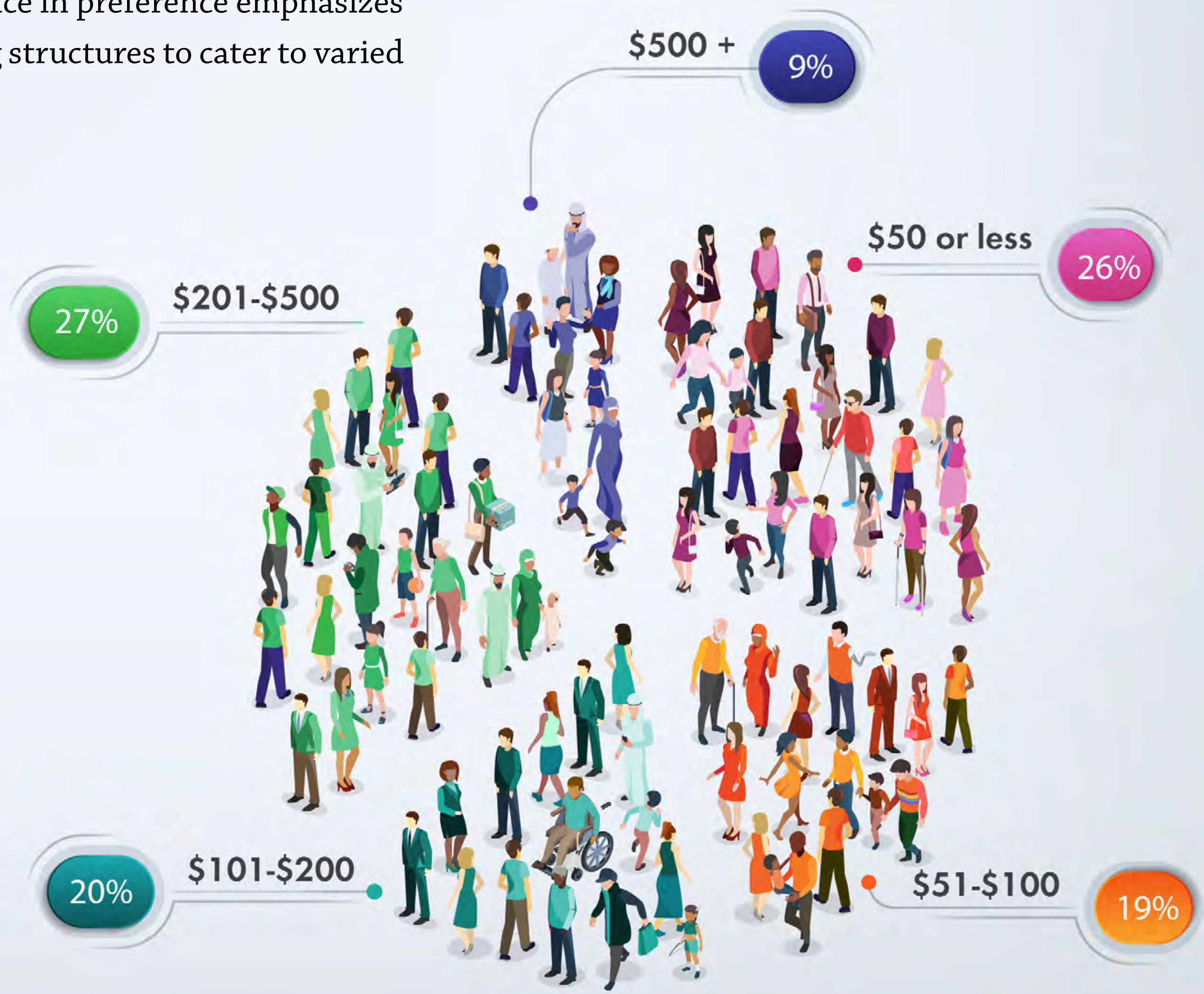
In *VOV 2024*, a similar split occurs when presented with the option of a bundled pricing model versus an all-inclusive package. A slight **majority (55%)** leaned toward bundled pricing, where one would pay a base price and augment their experience with additional amenities. This option is most popular with the crowd over 55 **(61%)**. Conversely, **45% favored** the simplicity and predictability of an all-inclusive fee that includes most services. This divergence in preference emphasizes the importance of offering flexible pricing structures to cater to varied consumer mindsets.

SELF-REPORTED

PARTY SPENDING

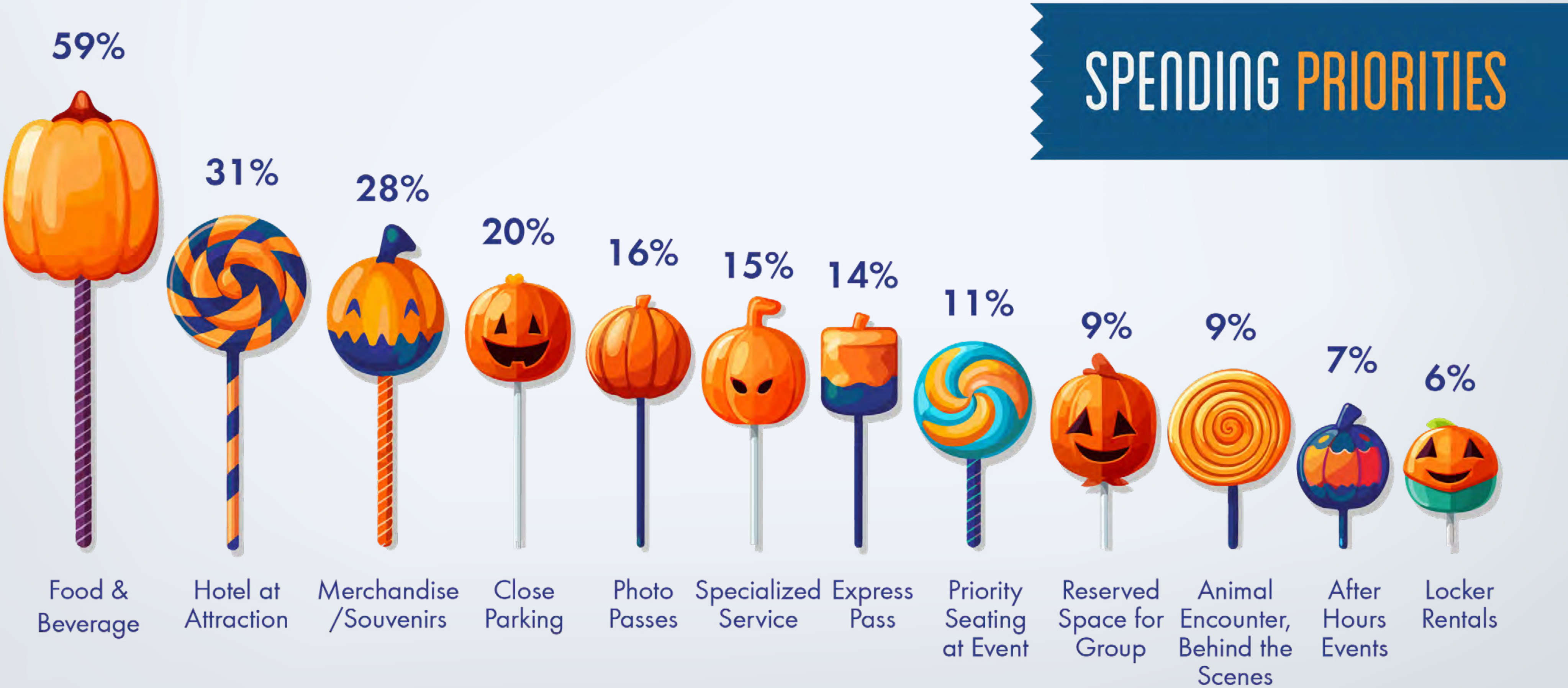
AVERAGE PER CAPS

2023: $78 | 2022: $64 | 2021: $72



VOV 2024 looked into spending priorities beyond admission fees. A clear appetite for food and beverage (F&B) emerges as a top spending priority, with 59% earmarking it as a spending priority. This suggests attractions can focus on enhancing dining options, collaborating with local vendors, or introducing unique culinary experiences. Following F&B, **31%** said on-site hotels, and **28%** mentioned merchandise or souvenirs as spending priorities. Rounding out the top five were preferred/close parking **(20%)** and photos/photo passes **(16%).**

Other experiential add-ons like personalized encounters **(15%)**, express or skip-the-line passes **(14%)**, and exclusive behind-the-scenes tours **(9%)** took a backseat in consumer spending priorities.



LOOKING TO 2024
SUMMARY

While there remains a positive trajectory in overall intent to visit attractions, the slip in the frequency of visits may suggest a recalibration.

- **95% of visitors intend to return.**
- Visitors are planning to visit a wider array of attractions rather than repeating a visit to a prior attraction.
- Many factors indicate the economy is improving, but some visitors remain skeptical.

SPENDING

- There's a fairly even split between visitors who prefer all-inclusive pricing rather than having a base price and paying for individual add-ons.
- Visitor spending priorities include food & beverage, on-site hotels, and merchandise/souvenirs.

INDUSTRY PERFORMANCE

VOICE OF THE VISITOR 2024

Monitoring, analyzing, and responding to market dynamics by adjusting offerings, strategies, and operations can help attractions react and capitalize on growth sectors or address areas of decline. Many areas held steady, but let's look at 2023's industry performance to see what can be learned. First, attraction visitation showed only minor fluctuations between 2023 and 2022 **(61% vs 63%)**, and market capture ticked up **(22% in 2023 vs. 19% in 2022)**.

MARKET CAPTURE

% of Americans Visiting Average Attraction Sector

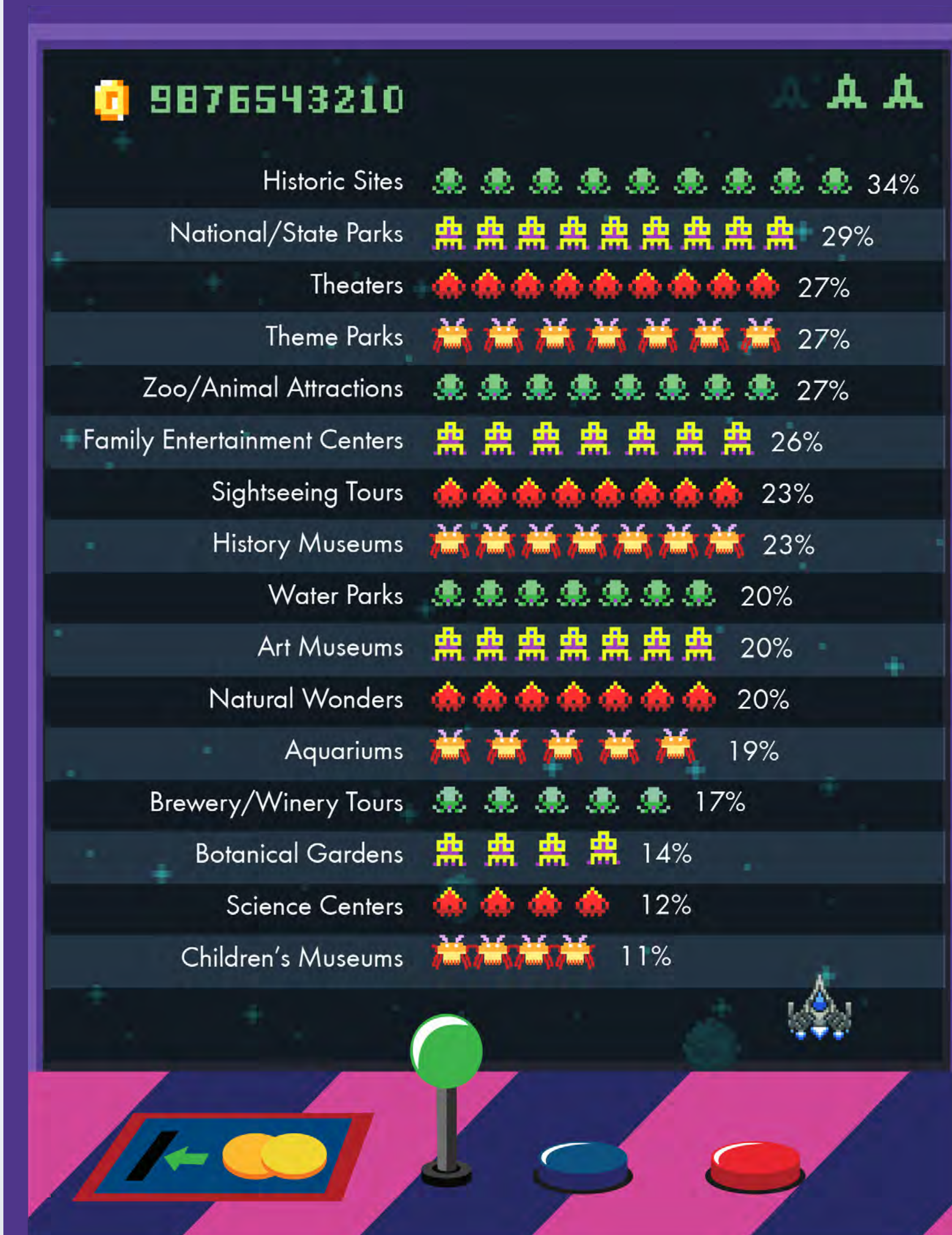
Nearly every sector saw growth in 2023. Historic places (now also including old homes and mansions), national/state parks, theaters (both live and on-screen), zoos and animal attractions, and theme parks were among the top attractions in 2023.

PENT-UP DEMAND

Exploring pent-up demand unveils a gradual return to equilibrium. Pent-up demand is quantified by measuring unconverted intent, or the amount of intent reported that remained unsatisfied by visitors' self-reported incidence of visitation. Historically, unconverted intent has **averaged 50%.**

Surging to 63% during the pandemic, unconverted intent **declined to 54%** in 2023, indicating a diminishing gap between intent and realization.

2023 ATTRACTIONS VISITATION

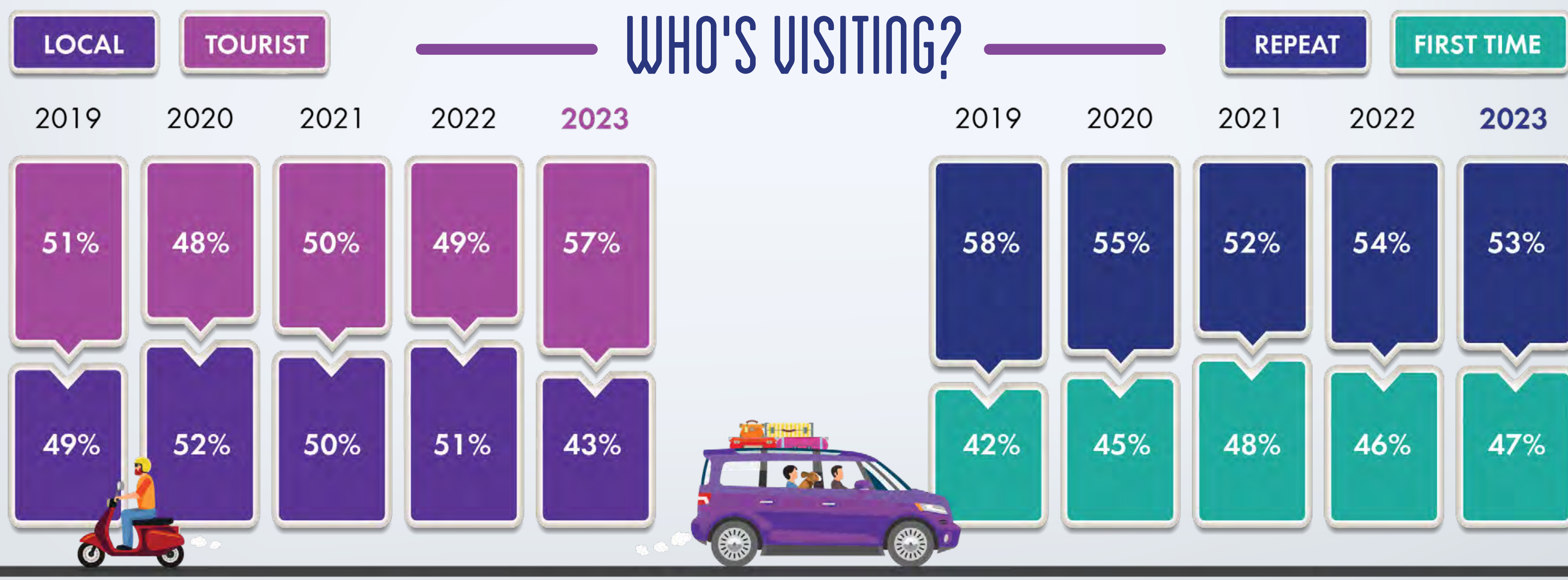


ON THE ROAD

Looking at **local visitors vs. tourists** and repeat visitation makes our ears perk up. The changing patterns indicate the importance of understanding, targeting, and serving a new set of visitors. *VOV 2024* marked a notable increase in travelers venturing away from home, with **57% indicating they were traveling away from home on their last visit.** This uptick, rising by 8 points from the previous year and surpassing the average by 7 points, signifies a growing inclination towards exploration and adventure. Intent to travel for leisure in 2024 also climbs to **83%,** so it looks like visitors will be heading to attractions while away from home.

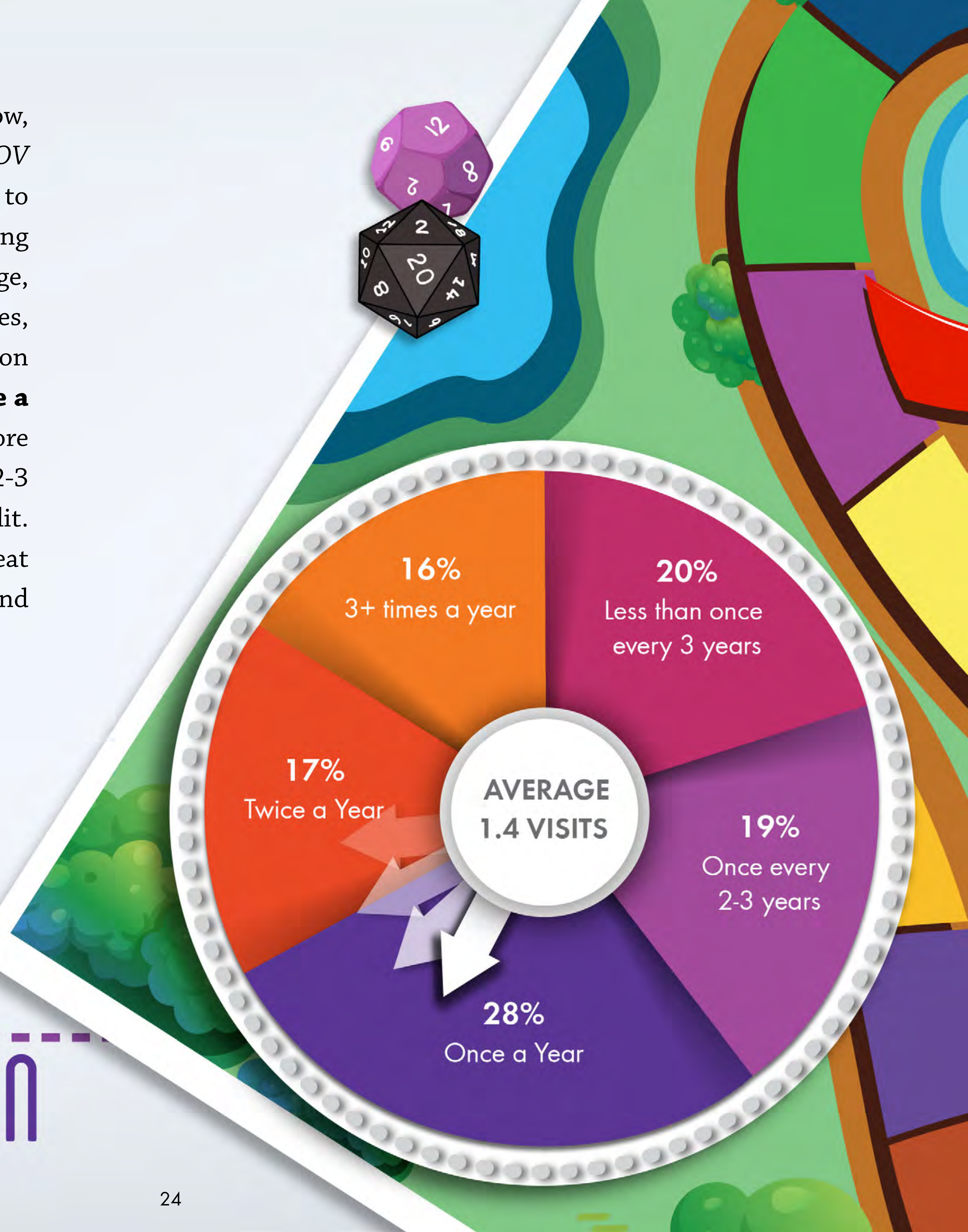
RETURN

Attractions visitors are gravitating toward novelty, with **47% embracing first-time experiences** during their last attractions visit. That marks a 2-point increase from the previous year and 4 points above the average. First-time visitation was the highest among history museums, brewery/wine tours, historic sites, national and state parks, and natural wonders.



FREQUENCY OF RETURN VISITATION

While first-time visitation continues to grow, a majority **(53%)** are repeat visitors. For *VOV 2024*, we asked about the frequency of visits to the same attraction per year. Upon analyzing visitor behavior, we found that, on average, visitors return to the same attraction 1.4 times, indicating at least some level of satisfaction and value. Responses showed **28% visit once a year**, and **16%** indicated visiting three or more times a year. Visiting twice yearly, once every 2-3 years, and less than every three were evenly split. Theaters showed the highest number of repeat visits (2.1). The least? Natural wonders (0.7) and historic sites (0.8) lagged at the bottom.



TO RETURN OR NOT TO RETURN?

COMMENTS FROM VOV 2024

Key denominator?

Desire For Something New	"Like to go to **different places**." "Want to see something different."	Fun Experience	"**A lot of fun** and didn't require a lot of planning." "Fun, convenient, & affordable."
Too Far Away	"Unlikely I will travel there again anytime soon." "It is **too far** to visit frequently."	Good for Families & Kids	"Great family experience, they all had fun." "Good for kids, **not too big and overwhelming.**"
Expensive	"Too expensive, need to try something new." "Can't **afford** to do again next year."	Affordable	**"Great prices & great experience."** "Affordable, with extensive varied activities."
Been There Done That	"Been there done that. **Once is enough**." "Changes a little over time."	Tradition	"It's become **a tradition**." "I go every year."
Other Priorities	"Have **other activities planned** for the year."	Fresh, New Exhibits	"Always bring in new animal exhibits." "**New attractions** added every year."

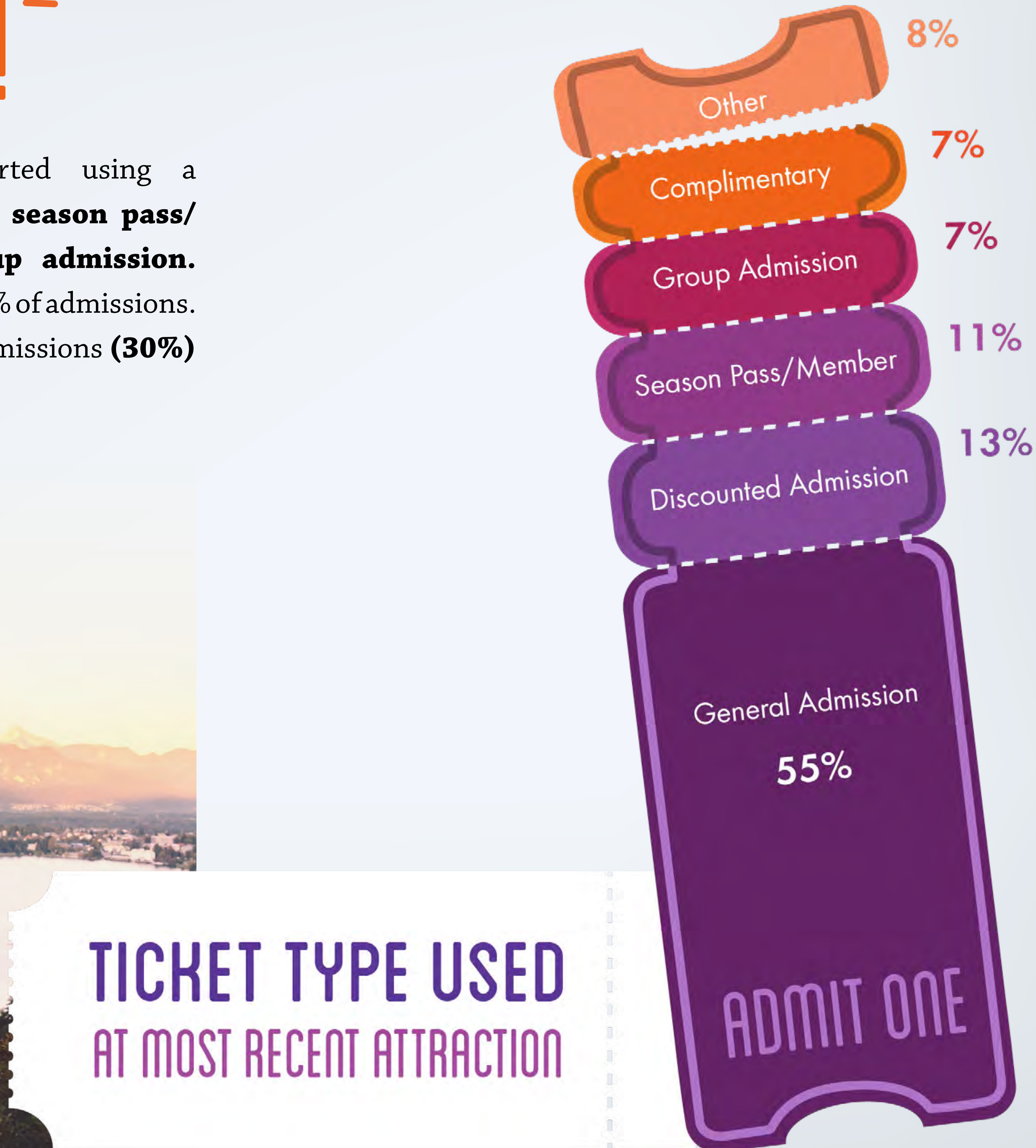
Visitors express a desire to revisit certain attractions due to their engaging, affordable, and innovative offerings that warrant repeated experiences. In contrast, individuals hesitant to return cite a preference for novel experiences, geographical distance, or affordability concerns as primary deterrents.

While natural wonders attract visitors seeking exploration, adventure, and discovery, the inherent constraints, seasonal variations, environmental factors, and logistical considerations may limit frequent or repeat visitation compared to theaters. **However, theaters may have traits other attractions could incorporate to boost repeatability.** Theatrical experiences evoke audiences' emotions, thoughts, and responses, fostering intellectual stimulation, emotional connection, and personal resonance. The transformative power, storytelling, and immersive nature of theater experiences captivate audiences, prompting them to revisit to relive, reflect, or rediscover the magic of performances.

With creative strategies and thoughtful planning, other attractions can leverage similar principles to **enhance visitor engagement, loyalty, and repeat visitation.**

TICKETS PLEASE!

Most **(55%) of visitors** reported using a general admission ticket, **11% used a season pass/ membership**, and **7% used a group admission.** Discounted admissions accounted for 13% of admissions. The highest percentage of discounted admissions **(30%)** were used at children's museums.



The increased number of travelers and first-time visitors may partly explain why only **11% indicated they used a season pass or membership** for admission on their most recent visit, the lowest percentage on record and well below both 2022 **(14%)** and the average **(17%)**.

New to *VOV 2024*, season pass holders/members were also asked to describe their status. Interestingly, **26%** said they received the season pass/membership as a gift, and **27%** said this was the first year they had ever been a season pass holder/member. Meanwhile, only **35%** indicated they renewed their season pass/membership from the previous year, and another **12%** said they renewed it again after allowing it to fall dormant the previous year.

Now that you're here ...

The visitors passed through the gates...now how long do they stay? Visitors reported spending an **average of 4.5 hours** at the attraction on the first day. Their dwell time increased to 5.2 hours on day two and 5.4 hours on day three for those who visited more than one day.

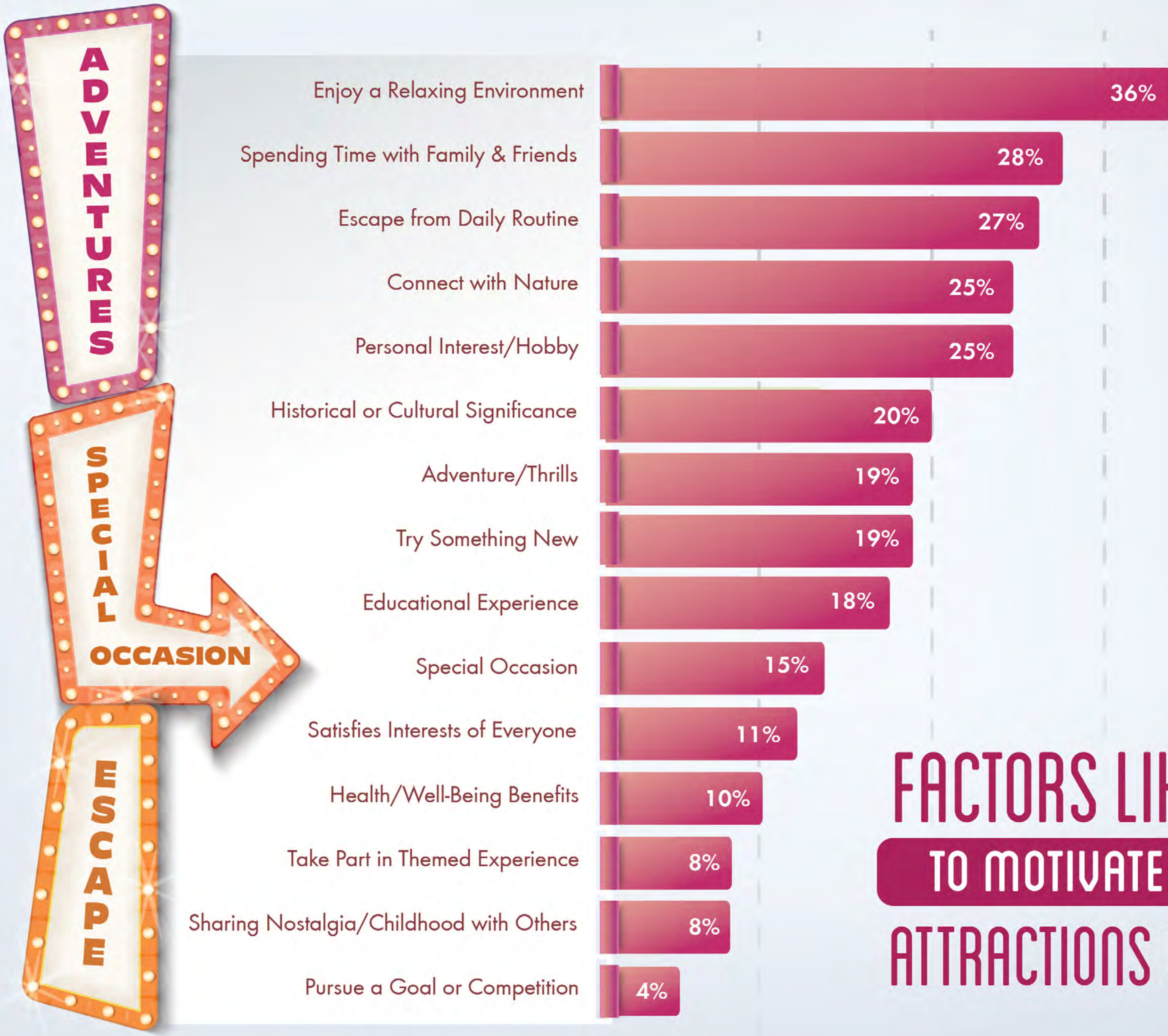
MOTIVATION

As attractions evolve and innovate, understanding and harnessing these motivations will be pivotal in crafting tailored, immersive, and resonant experiences that captivate, engage, and inspire diverse visitors in an ever-changing landscape. *VOV 2024* explored the underlying factors and motivations shaping attraction choices and engagements.

At the forefront of motivation is enjoying a relaxing environment, with **36%.** The social fabric, fostering connections, memories, and having shared experiences, emerges as a cornerstone, resonating with **28%** of respondents. Escaping daily schedules and routines motivates **27%.**

Connection to nature is a powerful catalyst, with **25% of visitors along with 25% who visited an attraction** because of a personal interest/hobby.

FACTORS LIKELY TO MOTIVATE AN ATTRACTIONS VISIT



INDUSTRY PERFORMANCE SUMMARY

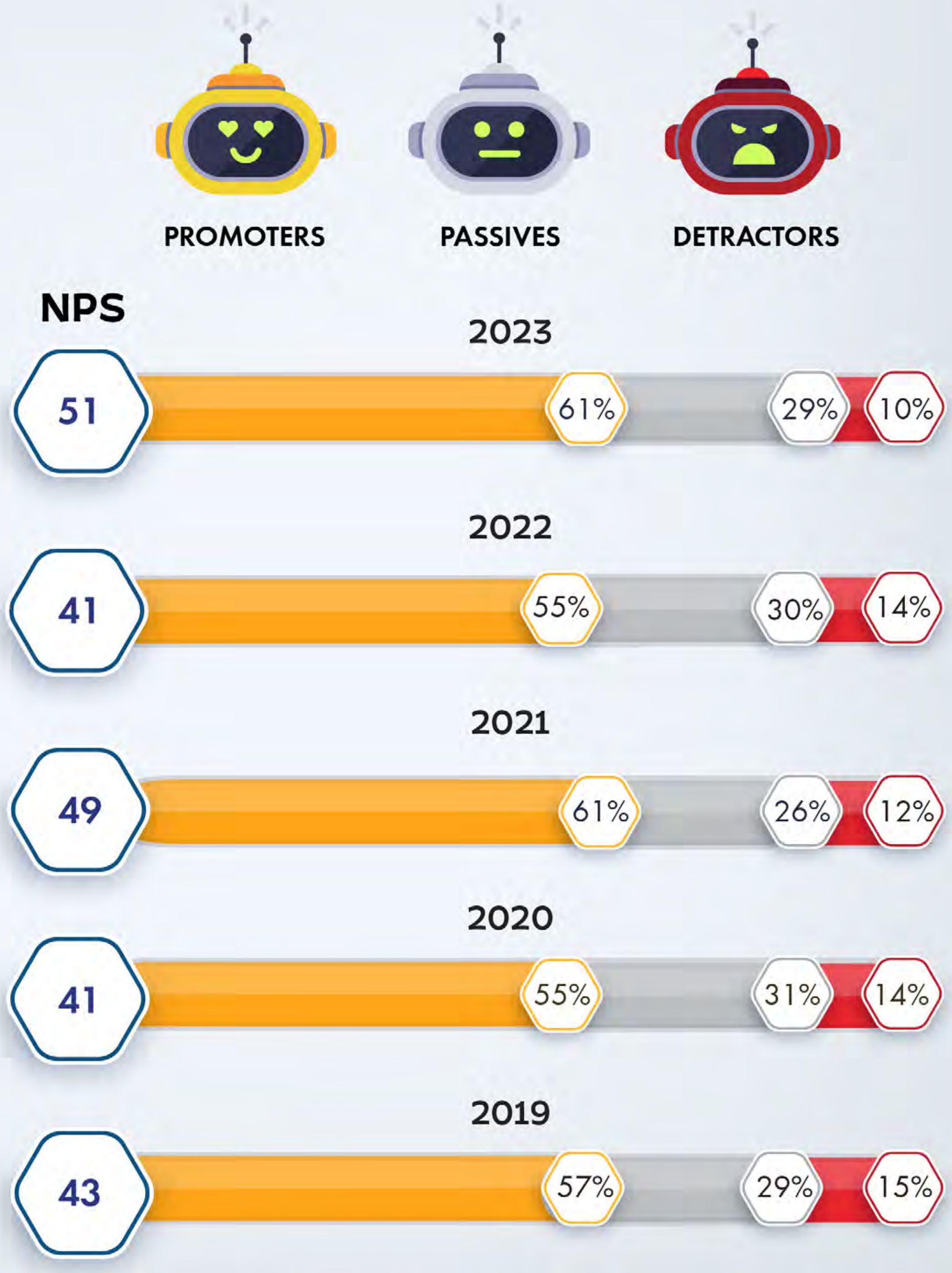
- Attraction visitation is steady, and overall market capture ticked up.
- Nearly every sector saw growth in 2023.
- Pent-up demand is returning to the historical average.
- **Over half of visitors** traveled away from home, and first-time visitation remains higher than average.
- Most visitors use general admission tickets, and the rate of season pass usage has declined.
- Visitors consider a relaxing environment, spending time with family and friends, and escaping daily routines the **biggest motivators** when choosing an attraction.

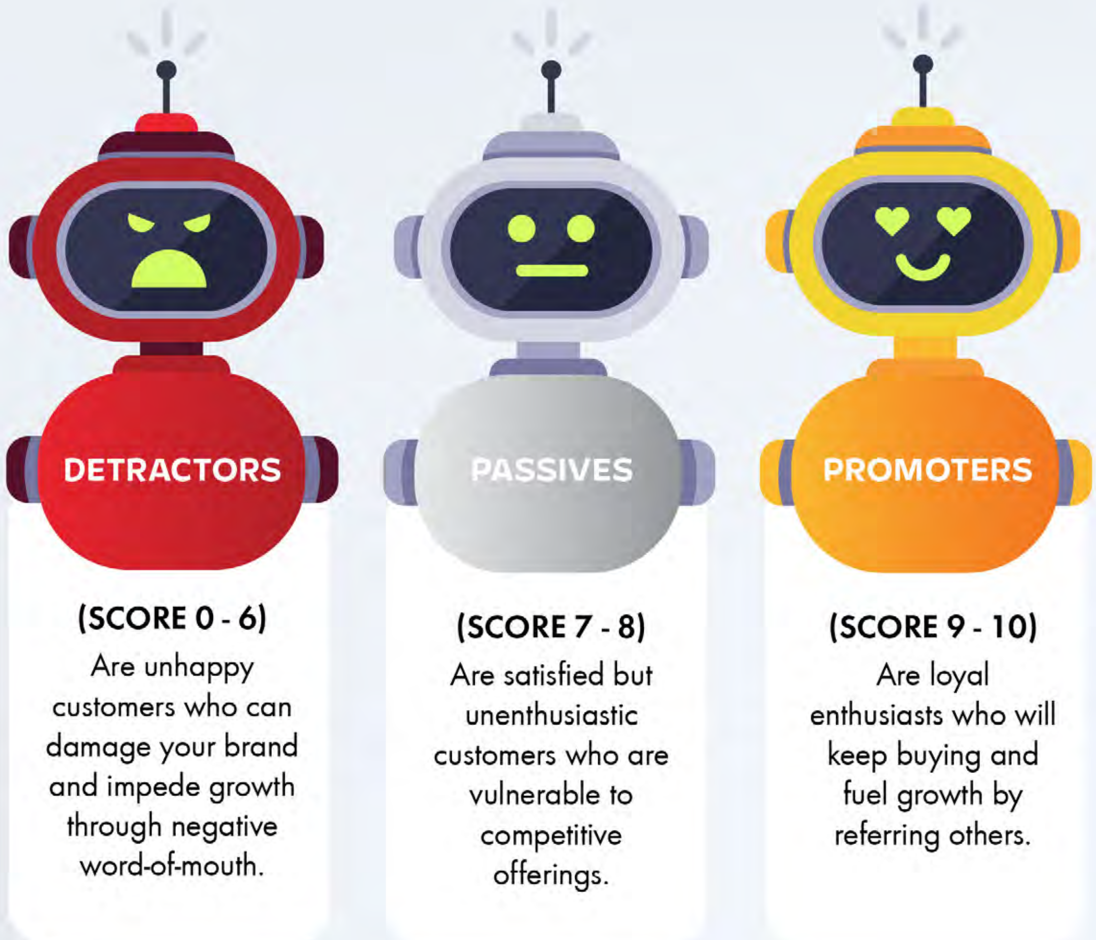
SATISFACTION

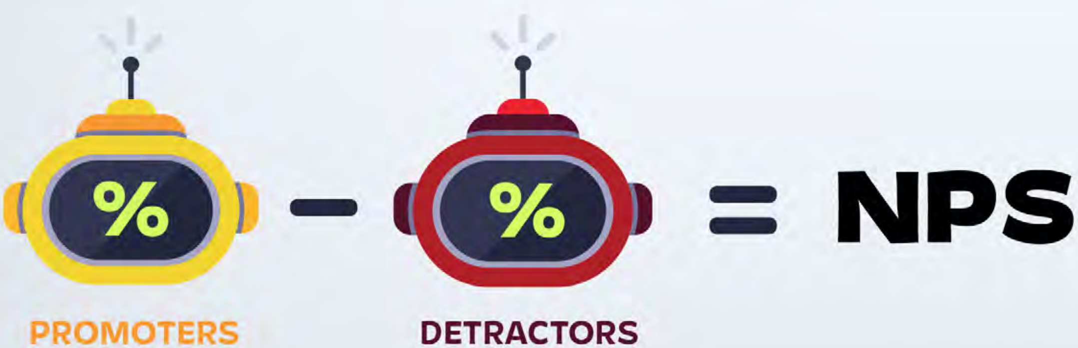
LET'S TAKE A CLOSER LOOK
AT NPS AND WHAT IT MEANS.

Visitor feedback plays a crucial role in shaping the visitor experience. Capturing and analyzing Visitor feedback allows attractions to identify areas for improvement and implement changes to enhance satisfaction and loyalty.

Net Promoter Scores (NPS) and overall visitor satisfaction emerged as compelling barometers of visitor experiences and sentiments. A wave of first-time visitors swept through attractions, bringing fresh perspectives and expectations. While first-time visitors typically report lower satisfaction scores, NPS surged, echoing sentiments reminiscent of 2015. The score resonated at **an impressive 52,** marking an 11-point ascent from the preceding year's **41.**







NET PROMOTER SCORE (NPS)

A metric used to gauge customer loyalty and satisfaction by asking a single question: "On a scale of 0 to 10, how likely are you to recommend this attraction to a friend or family member?"

Based on their responses, customers are categorized into three groups:

PROMOTERS (9 - 10)

PASSIVES (7 - 8)

DETRACTORS (0 - 6)

The NPS is then calculated by subtracting the percentage of detractors from the percentage of promoters, resulting in a score ranging from -100 (if every customer is a detractor) to 100 (if every customer is a promoter).

WHY IS IT A VALUABLE METRIC?

Customer Satisfaction Insight: NPS provides a clear and straightforward measure of customer satisfaction, allowing attractions to understand how visitors perceive their experience and identify areas for improvement.

Predictive of Growth: Studies have shown that companies with higher NPS scores tend to grow at a faster rate than their competitors. In the attractions industry, a high NPS can correlate with increased visitor numbers, revenue, and positive reviews.

Benchmarking and Comparison: NPS allows attractions to benchmark their performance against other industries, providing insights into market position and areas where they excel or lag.

Actionable Feedback: Promoters can be leveraged for testimonials and referrals, passives can be engaged to turn them into promoters, and detractors can be addressed to prevent negative word-of-mouth and improve their experience.

Strategic Decision Making: NPS helps attractions prioritize initiatives and investments based on customer feedback and satisfaction levels. By focusing on improving the visitor experience, attractions can enhance loyalty, drive repeat visits, and foster a positive reputation.

NPS
BY ATTRACTION

What's a good NPS? Bain and Company suggests that above 0 is good, above 20 is favorable, and above 50 is excellent. So, let's review. *VOV 2024* reports an NPS of +51. This is great news!

VOV 2024 showed that visitor's intent to return in 2024 is lower than in 2023. On the surface, that statistic can seem scary. But if we look at NPS, it shows the visitors have been happy and may be recommending the attraction to friends. They just happen to be seeking something new for themselves in 2024.

Having determined the overall NPS, the next step is examining individual attractions. Incorporate the question, **"Would you recommend this attraction to a friend or family member?"** into exit or follow-up surveys to obtain the NPS. Reference this score against the benchmark in the provided chart to gauge how your attraction performs relative to the sector.

IS EVERYTHING COMING UP ROSES?

Concurrently, Visitor satisfaction mirrored the positive trend of NPS, registering a score of **4.39 out of 5**, marking an uptick from the previous year's rating of 4.19.

Recognizing a need to adjust to changing priorities, *VOV 2024* introduced new metrics, including memorability, accessibility/inclusivity, customer service/staff interactions, safety/security, and cleanliness.

Memorability garnered **the highest score at 4.35**, closely followed by safety/security and cleanliness, each receiving a rating of 4.32. Customer service/staff interactions scored 4.2, while accessibility/inclusivity trailed slightly behind at 4.18.

ON A 1 – 5 SATISFACTION SCALE

A "good" rating typically falls within the range of 4 to 5.
Here's a general breakdown:

5 VERY SATISFIED
The highest level of satisfaction indicates that the individual is extremely pleased.

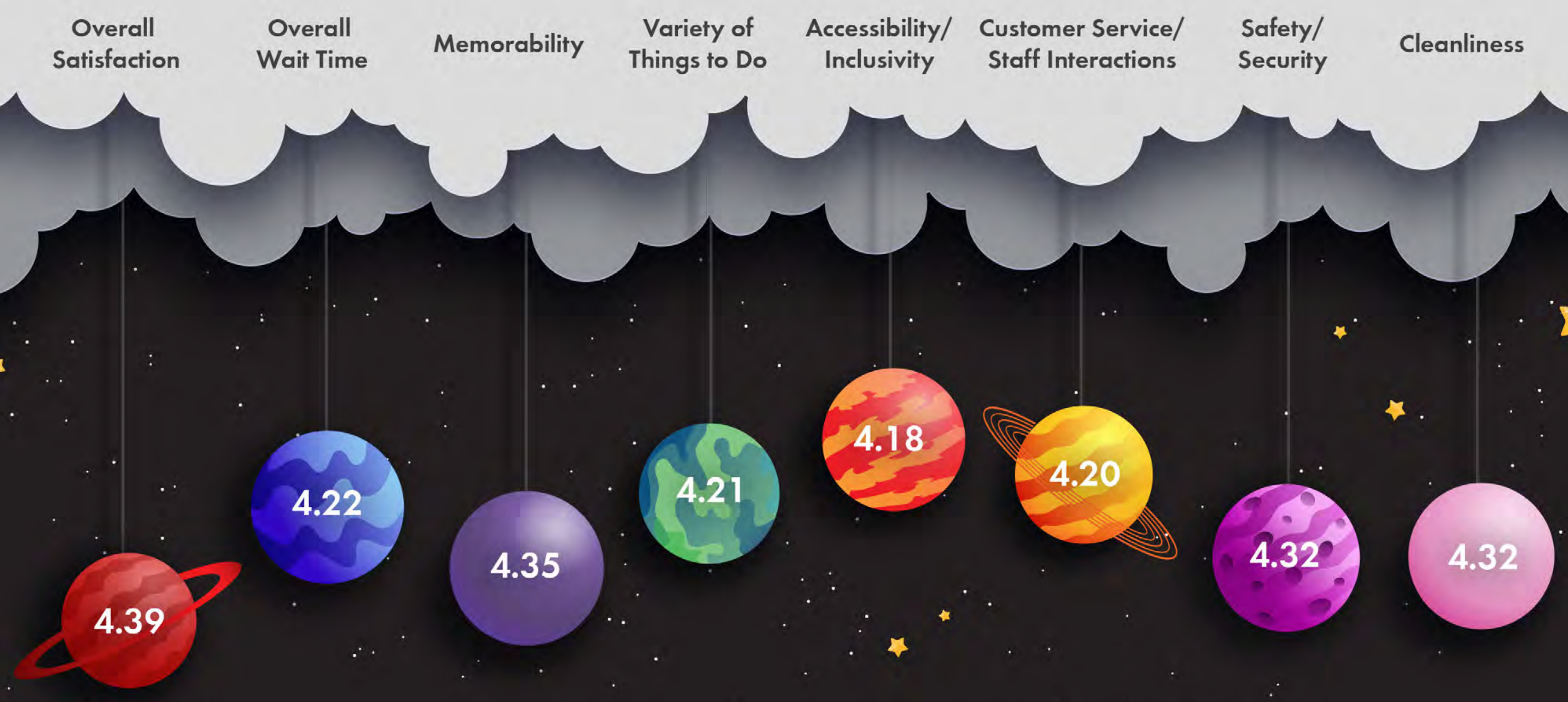
4 SOMEWHAT SATISFIED
A positive rating that suggests the individual is satisfied with the offering, though there may be minor areas for improvement or enhancement.

3 NEITHER DISSATISFIED NOR SATISFIED
An average rating that neither strongly indicates satisfaction nor dissatisfaction. This rating may suggest that the individual has a neutral or mixed opinion.

2 SOMEWHAT DISSATISFIED
A negative rating that indicates dissatisfaction with the offering, highlighting significant areas for improvement or concern.

1 VERY DISSATISFIED
The lowest level of satisfaction indicates that the individual is extremely dissatisfied.

OVERALL SATISFACTION WITH MOST RECENT ATTRACTION EXPERIENCE



SATISFACTION WITH BRAND ATTRIBUTES AT LAST ATTRACTION VISITED

A variety of factors often influences visitor satisfaction at attractions. In *VOV 2024*, attraction visitors highlighted several key aspects that enhanced their satisfaction. Specifically, visitors expressed the highest satisfaction **(80%)** with the cleanliness standards maintained at the attractions, emphasizing the importance of well-maintained facilities. Additionally, affordability emerged as a pivotal factor **(75%)**, indicating that reasonable pricing structures and value-for-money offerings resonate positively with visitors.

ONLY 55% ARE SATISFIED WITH ACCESSIBILITY ACCOMMODATIONS.

The reputation of the attractions also played a crucial role **(75%)**, reflecting the significance of positive reviews, recommendations, and public perceptions in shaping visitor satisfaction. Furthermore, the presence of family-friendly activities **(75%)** was highlighted as a defining element, emphasizing the appeal of inclusive, engaging, and age-appropriate experiences for diverse audiences. Collectively, these factors contribute to a holistic, visitor-centric approach.

Earlier in the report, visitors reported spending priorities included food and beverage and shopping/souvenirs. Regarding satisfaction, **64% are satisfied** with the food and dining, and **61% are satisfied** with the shopping opportunities, leaving plenty of room for improvement.

Here's an interesting note from this age of social media: **65%** mentioned satisfaction with capturing and sharing photos on social media. Ensure your picture-perfect spots shine brightly—and remember to incorporate your branding!

STRENGTHS FINDER

In *VOV 2024,* respondents were prompted to identify the top five characteristics they deem most appealing when considering an attraction. Subsequently, they rated how effectively these attributes met their expectations. The results reveal that attractions excel in areas such as the variety and uniqueness of exhibits, affordability, family-friendly activities, and overall reputation.

However, the study also highlights areas warranting attention, including food/dining, product innovation, and entertainment. Notably, food/dining emerges as a recurring concern, suggesting its significance to visitors.

STRENGTHS

- Variety and uniqueness of exhibits
- Affordability and pricing
- Activities that are family–friendly/for all ages
- Reputation and positive reviews

SECONDARY STRENGTHS

- Overall cleanliness and maintenance
- Interactive and hands-on experiences
- Sustainability and environmental practices

AREAS OF CONCERN

- Food and dining/unique places to eat
- New things to do each visit
- Entertainment, e.g., shows, live music, other

NEGATIVE IMPACT ON THE EXPERIENCE

12%

- Long lines at the ticketing windows
- Restrooms that were not clean
- Employees who were indifferent or rude
- Not enough shade/protection from the sun

11%

- Rides/attractions/exhibits that were not in operation
- Poor directional signage, difficult wayfinding
- Security and searches of personal property
- Sales pitches that were aggressive
- People stood or sat too close to me
- Too few restrooms in accessible places
- Traffic congestion/poor parking
- Not enough variety in food choices
- Too few benches or places to sit
- Long lines at the rides/attractions/exhibits
- Long lines at food & beverage shops/restaurants
- Low food or beverage quality

10%

- Rude or ill-tempered customers
- No baby changing tables available/dirty or unusable changing tables
- Not enough variety in available activities

9%

- Not enough family/gender neutral restrooms available

DELVING DEEPER, VOV 2024 FURTHER EXPLORED THE PERCEIVED IMPACT OF ENCOUNTERED ISSUES.

Several consistent pain points emerge in evaluating the visitor experience at attractions that can detract from overall satisfaction. **Most of these pain points received similar scores,** underscoring their collective impact on the overall attraction experience.

Inconsistent or subpar customer service, characterized by long lines and unresponsive or rude staff, can leave visitors with a negative impression. Additionally, low food and beverage quality is a concern for visitors.

One recurring issue is the lack of shade and protection from the shade. A glance at platforms like Trip Advisor or Google Reviews confirms that shade is a concern for visitors. **Dan O'Neill, Director of Land Planning and Design** at PGAV, says, "While landscaping might not always get the spotlight in design discussions, its impact on visitor experience, from comfort to theming, is undeniable. Plus, it's a win-win: landscaping offers attractions a cost-effective way to differentiate themselves while enhancing visitor satisfaction."

O'Neill explains, "**Aquatica in San Diego** had a dining area completely exposed to the sun. By introducing large palm trees, a palm court emerged, transforming the space into an inviting and comfortable haven, making it much more enjoyable."

Visitors will appreciate the much-needed defense against the sun that landscaping can provide, but the benefits don't stop there:

- Trees induce a cooling impact, which can lead to lower temperatures.
- Shading building structures reduces energy costs.
- Trees improve air quality by reducing air pollutants and carbon dioxide.
- Landscaping can create tranquil areas with reduced noise for visitors seeking a break or needing to decompress.

THE POSITIVE

EXPERIENCES WHEN VISITING

56%

Employees greeted us warmly with a friendly smile.

25%

I received helpful recommendations for rides, shows, and dining options based on my preferences.

17%

The attraction recognized our special occasion or event in a special way.

23%

An employee offered to take photos to capture our special moments.

11%

Dietary restrictions were easily accommodated, and staff went the extra mile to find suitable options.

12%

We received a surprise upgrade or special access to enhance our experience.

16%

Unexpected moments, such as surprise meet-and-greets, or parades, added to the enjoyment of our trip.

There's often a tendency to focus on the negative and things causing distress. But we also wanted to look at what was going right. And here's a fun note: **56% of visitors** were greeted warmly. A quarter of visitors received helpful recommendations, and **23% had an employee offer to take a photo**.

Need an easy win? On a night that isn't crazy, waitstaff can easily and quickly offer to take a picture of a family with the family's camera after serving drinks or dinner.

PEAK-END

The **peak-end rule** suggests people judge an experience based on how they felt at its peak (the most intense point) and its end rather than considering the entire duration of the experience. In other words, when recalling an event or experience, individuals **tend to remember the most intense moment (positive or negative)** and the concluding moments more vividly than other parts of the experience. These peak and end moments disproportionately influence their overall perception and memory of the event.

This principle has implications for designing a visitor experience. It's obviously important to think about those emotional highs, like seeing an original artwork in person or riding a thrilling roller coaster. But what about how the experience ends? Is the gift shop well-stocked? Are there clean restrooms on the way out? Is the parking tram up and running?

Not every negative experience is controllable, like delayed flights or flat tires. Good customer service, like friendly staff who are ready to help, can provide enough magic to get visitors through those tough situations without ruining the memory of the entire trip.

Keeping the Peak-End Rule in mind will help with overall visitor satisfaction from the beginning to the end of their experience. Focusing on ensuring visitors have a positive experience as a last impression is equally, if not potentially more important than a positive first impression. We tend to remember negative experiences more vividly than positive ones, so providing visitors with a happy ending to their day goes a long way, especially when they think about visiting again.

SATISFACTION SUMMARY

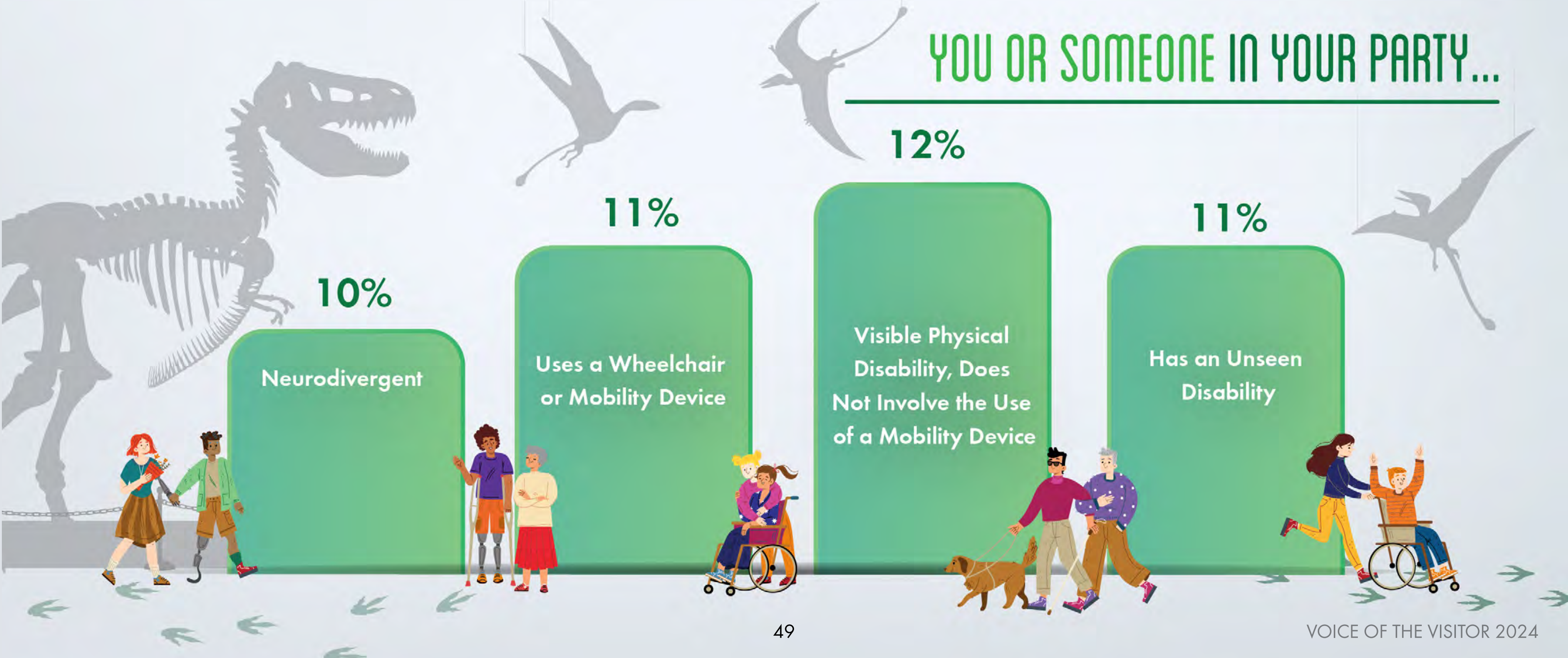
- **NPS and satisfaction scores are both higher!**
- Industry strengths include variety and uniqueness of exhibits, affordability, family-friendly activities, and overall reputation.
- Food and beverage consistently appear as important factors for visitors… but they aren't entirely satisfied with them after the experience.

THE HUMAN FACTOR

In *VOV 2024*, the average age, age distribution, and the proportion of families visiting attractions remained consistent compared to previous years. The average party size experienced a modest uptick, rising from 2.77 individuals in 2022 to 2.90 in 2023. On the economic front, while the household income of visitors slightly decreased, this decline suggests a gradual normalization as attraction patronage edges closer to pre-pandemic patterns.

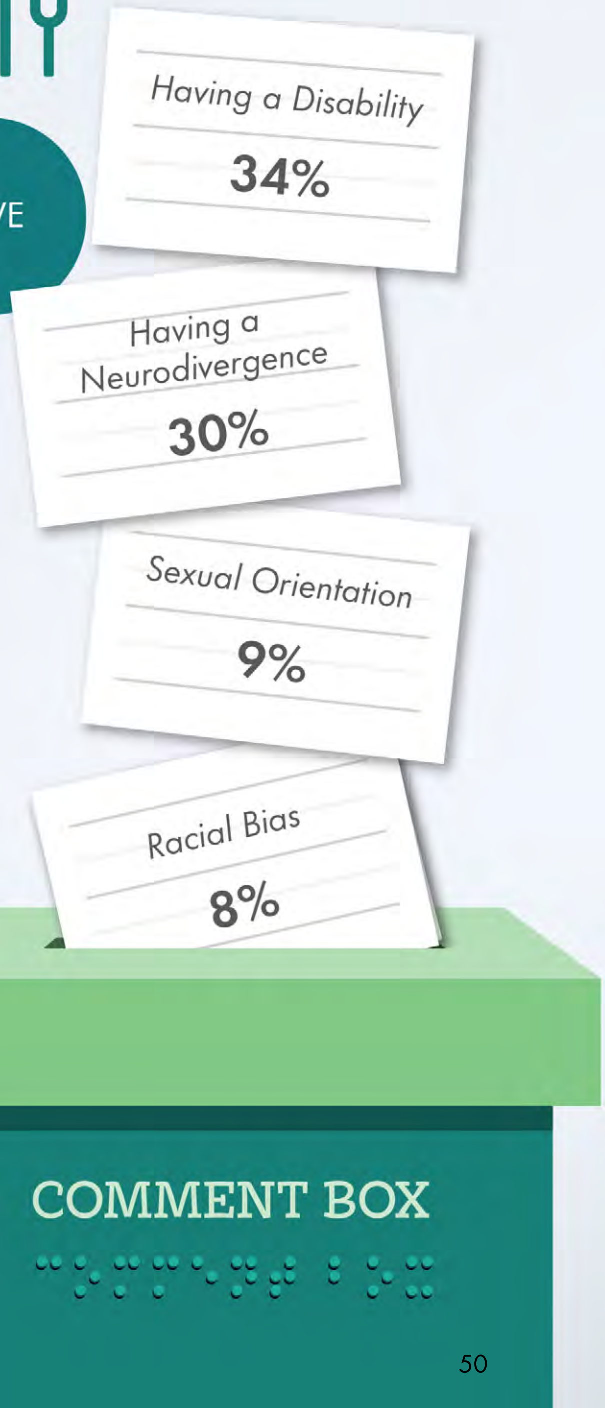
While the demographic data in *VOV 2024* held pretty steady, the nation is undergoing significant demographic shifts characterized by increasing diversity in age, ethnicity, gender, and cultural backgrounds. Focusing on creating environments where all individuals feel valued, represented, and included will foster feelings of belonging.

VOV 2024 introduced new questions related to visitors who are neurodivergent, have a disability, are people of color, identify as LGBTQ+, and have a larger body size. **Thirty percent of visitors reported visiting with someone who was neurodivergent or has a disability.** In other words, 30% of our visitors are personally affected by the level of empathy attractions employ in accessibility choices.



YOU OR SOMEONE IN YOUR PARTY

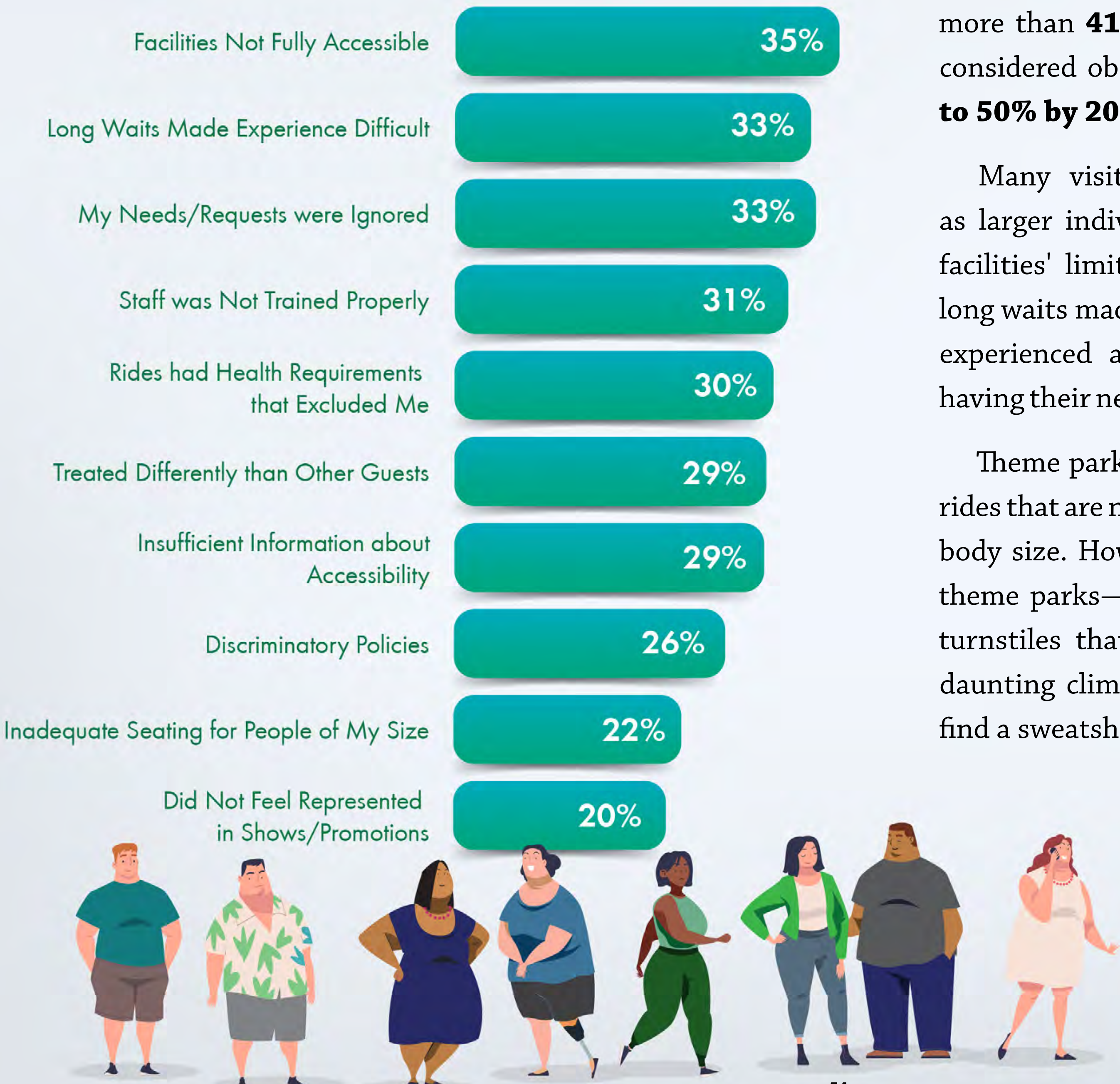
WERE DISCRIMINATED AGAINST OR HAD A NEGATIVE EXPERIENCE DUE TO



In *VOV 2024*, we wanted to probe visitors' experiences and perceptions regarding discrimination at attractions. The survey aimed to uncover instances where individuals felt marginalized or unfairly treated based on factors such as race, disability, neurodivergence, LGBTQ+ identity, or size inclusivity during their visits.

The results are troublesome. *VOV 2024* shows that **34% of people** with a disability experienced discrimination or had a negative experience due to that disability. Parties with a neurodivergent member also had shocking numbers, with **30% reporting a negative experience.** And though LGBTQ+ and people of color parties reported significantly fewer negative experiences, with **9%** and **8%**, respectively, our industry knows that there is no excuse for any of those numbers to be above zero.

BODY SIZE ISSUES EXPERIENCED



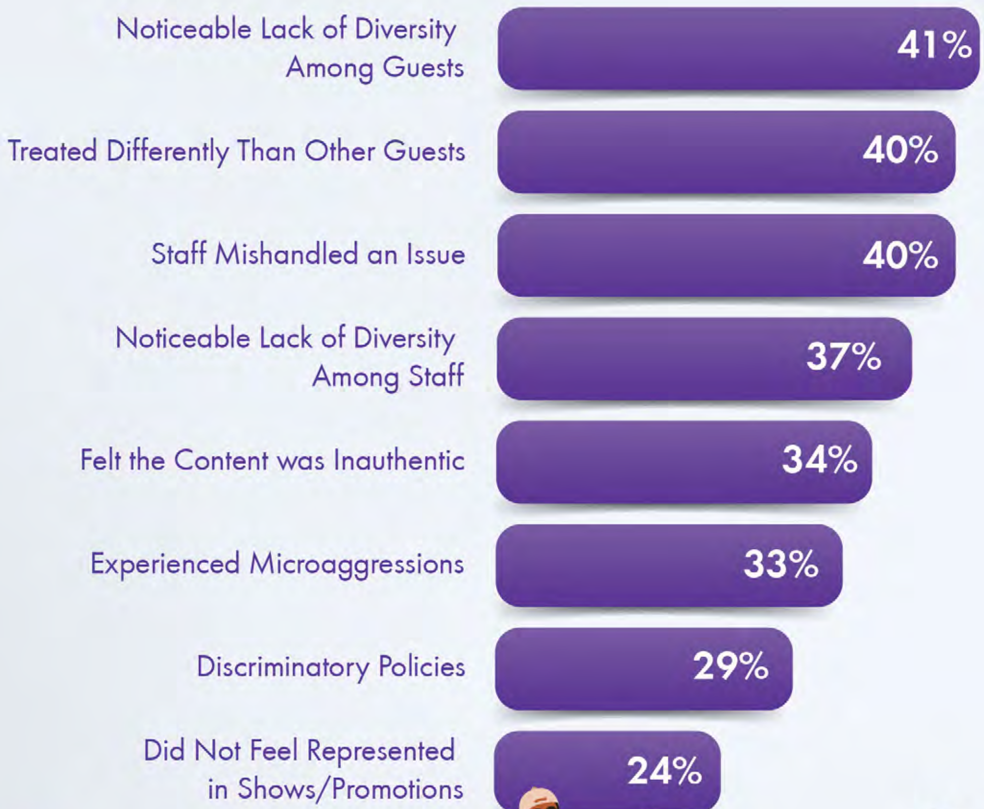
BODY SIZE

According to the Centers for Disease Control, more than **41% of people** in the United States are considered obese. That number is expected to **grow to 50% by 2030.**

Many visitors, particularly those who identify as larger individuals, expressed concerns about the facilities' limited accessibility. They also noted that long waits made the experience difficult and that they experienced a lack of customer service, including having their needs ignored and improper staff training.

Theme parks have often taken the heat for having rides that are not accessible to people who have a larger body size. However, these challenges extend beyond theme parks—narrow hallways in historic buildings, turnstiles that fail to accommodate all bodies, the daunting climb after a cave tour, or the struggle to find a sweatshirt that fits in the gift shop.

RACIAL DISCRIMINATION ISSUES EXPERIENCED

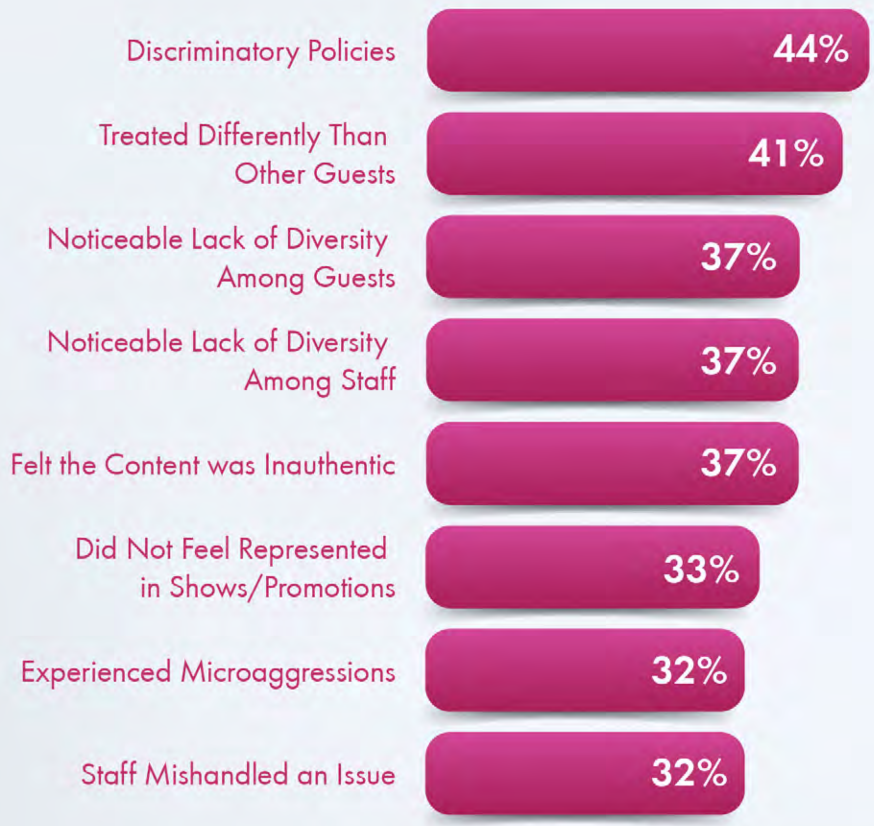


PEOPLE OF COLOR

In 2023, people of color constituted **27%** of attraction visitors, mirroring the figures from the previous year. It's noteworthy that people of color continue to be underrepresented at most attractions, considering that people of color comprise approximately 40% of the total U.S. population. **More than half of children in the U.S. are children of color.** The number of Black travelers is growing, and according to MMGY Global, **12%** of Black travel parties include young families. That's higher than young families among all U.S. travelers.

Individuals who experienced racial discrimination observed a notable lack of diversity among visitors and staff. A staggering **40%** reported being treated differently than other visitors, and **33%** experienced microaggressions. Furthermore, **29%** reported discriminatory policies.

DISCRIMINATION
BASED ON SEXUAL ORIENTATION



LGBTQ+

In a 2022 Gallup poll, more than **7%** of the U.S. population identified as LGBTQ.

The group that felt discriminatory policies most keenly was the LGBTQ+ population, with **44%** feeling their exclusion was intentional. Additionally, **41%** said they were treated differently than other visitors, and **33%** said they didn't feel represented.

The Human Rights Campaign tracks laws and policies that impact LGBTQ+ people. In the U.S., 22 states plus Washington D.C. prohibit discrimination based on sexual orientation, while 22 states provide no protection for public accommodations. While most states have laws regarding hate crimes, they aren't all-inclusive, with some not expressly addressing sexual orientation or gender identity.

DISCRIMINATION
BASED ON NEURODIVERGENCE

NEURODIVERGENCE

Roughly **15-20%** of people demonstrate some type of neurodivergence. Neurodiversity encompasses a range of neurological differences, including autism, ADHD, Tourette's, and other learning or developmental distinctions. Neurodiversity affects children and adults. Neurodiversity also includes military veterans with post-traumatic stress disorder (PTSD), individuals with dementia, Parkinson's, and stroke survivors.

For groups accompanying neurodivergent individuals, there were apprehensions about the absence of quiet spaces and perceived neglect of their specific needs and requests. **Lack of training among the staff was also frequently reported as causing an issue.**

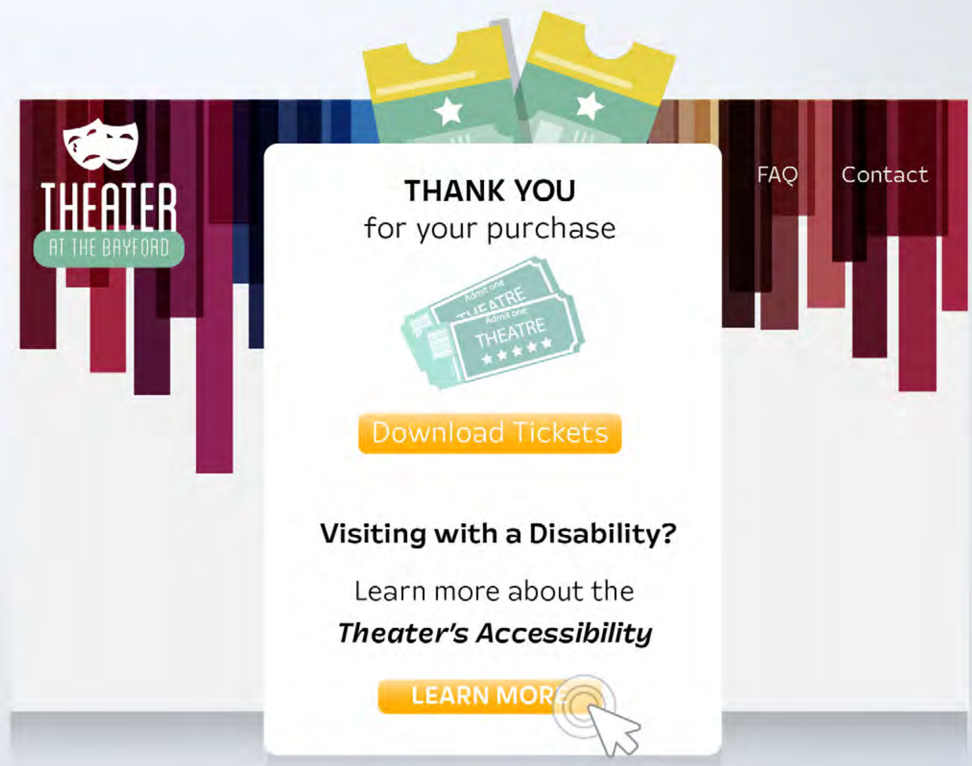
Families that include a person with neurodiversity often choose to skip attraction visits and travel completely. A study by the International Board of Credentialing and Continuing Education Standards indicated only **13%** of families that include a child with autism take vacations as a family. **Only 11% of those families are satisfied with current travel options.**

People experience the world through their senses—sight, sound, taste, smell, and touch. However, individuals with neurodiversity or sensory processing disorders might react differently to these stimuli, displaying either heightened sensitivity or lower tolerance. Coping with **overstimulation becomes an ongoing challenge** for them. Visiting an attraction with someone who has neurodiversity often requires extra planning. Families want to know if coping strategies are available and ways to manage overstimulation effectively.

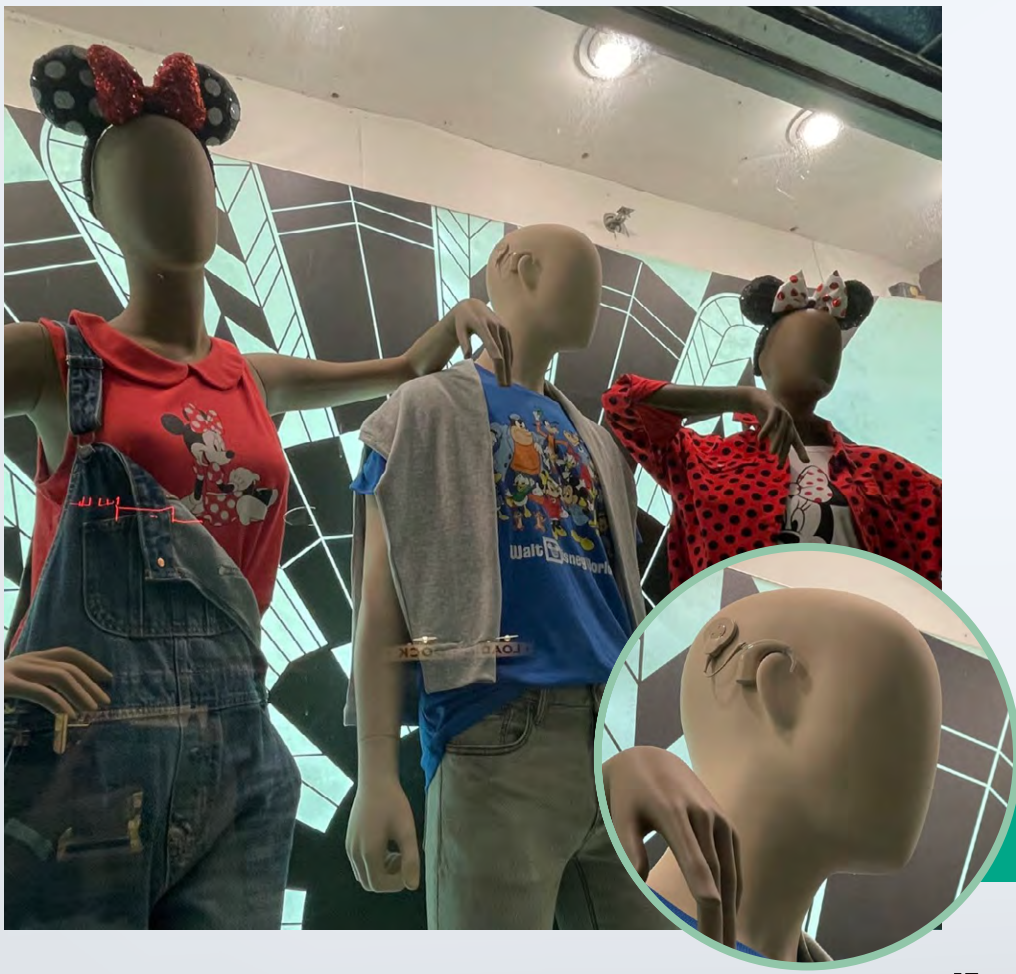
DISCRIMINATION BASED ON DISABILITY

Over a quarter of the U.S. population has a disability, including **12%** with serious difficulty walking or climbing stairs. **Eleven percent (11%)** of visitors in VOV 2024 reported visiting with someone with an unseen disability. In the U.S., **12%** of people have cognition difficulties, 6% hearing difficulties, and nearly **5%** have serious vision impairments. There are a reported 7 million students with disabilities in U.S. schools.

Visitors who faced discrimination due to disabilities highlighted issues such as extended wait times and inadequate communication as their primary grievances.



Unseen disabilities, also referred to as invisible or hidden disabilities, are conditions that are not immediately apparent to others based on physical appearance. Unlike visible disabilities, which may be immediately observable (such as using a wheelchair or wearing a prosthetic limb), unseen disabilities are not visible to the naked eye and might not manifest obvious physical signs. Since they are not visible, misunderstandings can easily occur.



Disney committed to inclusion and representation with the Re-imagine Tomorrow program.

UNSEEN DISABILITIES CAN INCLUDE...

- **Chronic illnesses:** Conditions like fibromyalgia, lupus, multiple sclerosis, and chronic fatigue syndrome.
- **Mental health disorders:** Conditions such as depression, anxiety disorders, bipolar disorder, post-traumatic stress disorder (PTSD), and schizophrenia.
- **Neurological disorders:** Conditions like epilepsy, migraines, and autism.
- **Learning disabilities:** Conditions like dyslexia, attention-deficit/hyperactivity disorder (ADHD), and auditory processing disorder.
- **Chronic pain conditions:** Conditions including arthritis, neuropathy, or other musculoskeletal disorders.

Individuals with unseen disabilities often face challenges related to societal perceptions, as their conditions may not be readily understood or acknowledged by others. Providing support, understanding, and accommodations can significantly improve their quality of life and inclusion in various settings.

Allison Zuck, a ***PGAV Project Leader and Architect***, lives with an unseen disability. She was diagnosed with Crohn's disease in her early 20s, underwent many surgeries, and now has an ileostomy. Zuck looks physically abled, but there are still many things that are difficult and situations where accommodations would allow her to feel more included.

Zuck says, "It's vital that we design spaces accessible to people with limited mobility, but it's also vital to consider all aspects of disability. Through understanding and empathy, we can celebrate and include everyone in our designs."

Zuck says there's an extra mental load when planning visits to attractions or live events. Many places have bag size limits or don't allow visitors to bring in water. That isn't easy when a visitor needs to carry extra supplies or dehydrates easily. Zuck said, **"It's hard to be fully immersed in the moment when you're worried about where you can sit or what happens if I get dehydrated and faint.** And while I know my body better now, there's still a lot of anxiety when there are insufficient accommodations." Long line queues and restroom availability are also concerns.

Visitors with disabilities have an added layer of planning to consider. Providing clear maps with accessible entrances, routes, aid stations, and restrooms online can help families plan their day.

Auditory messages should be accompanied by closed captioning that is readable at a distance. Anyone providing spoken messaging should be in clear view, not to the side or behind. For closed captioning, menus, and other printed materials, font colors should be considered for color-blind visitors. Adequate lighting will also help low-vision visitors in places with elevation changes, like stairways, or when reading text on exhibits or menus.

Suppose an attraction is overwhelmed by all the possibilities or doesn't know where to start making changes to be more accommodating. In that case, **Zuck suggests seeking out people with disabilities**. Spend the day navigating the attraction with them. Bring them into the design process.

SUNFLOWER

The sunflower has become a signal of a hidden disability. In 2016, Gatwick International Airport in London, England, launched the Hidden Disabilities Sunflower. It was created to help people with hidden disabilities navigate and receive help in public spaces. A yellow sunflower on a green background indicates a person may need extra assistance.

THE HUMAN FACTOR
SUMMARY

- Year-over-year demographics remain similar.
- People of color remain underrepresented at U.S. attractions.

17% of visitors said they or someone in their party had a negative experience due to discrimination at a U.S. attraction. The most startling numbers:

- **34%** among parties that included someone **with a disability.**
- **30%** among parties that included someone with a **neurodivergence.**

PROJECT OVERVIEW

Purpose. The purpose of PGAV's *Voice of the Visitor* research is to provide industry leaders with the most comprehensive assessment of attractions' customer behavior available and to offer insight into consumers' outlook for the coming year. Now in its ninth year, this study provides an apples-to-apples comparison of many previously measured consumer behavioral metrics and examines new insights and behaviors.

Target Audience. *PGAV's Voice of the Visitor 2024* study was conducted among U.S. leisure attraction visitors who have either visited an attraction in 2023 or are planning to do so in 2024. In this study, "attractions" include any: aquarium, zoo/animal attraction, theme park/amusement park, water park, museum of any kind, science center/science attraction, art gallery, family entertainment center, historic landmark/place, theater/dinner theater, old home/mansion, botanical garden, sightseeing tour, brewery/winery tour, national/ state park, or natural wonder.

Sample. A total of 1,500 respondents were interviewed for this study, providing for a maximum margin of error of +/-2.5% at a 95% confidence interval. This in line with the sample collected in each of the previous eight years.

PGAV DESTINATIONS

www.pgavdestinations.com

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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