

PCAVDESTINATIONS

2023

PCAVOV

VOICE OF THE VISITOR





# A LETTER

from **Mike Konzen**, *Chairman*

We are pleased to present our eighth edition of **PGAV's Voice of the Visitor** (VOV 2023).

As with prior editions, VOV 2023 enables us to evaluate the previous year's industry performance and offer a look into the coming year. Across twenty different attraction types, we paint a picture of the many factors that will shape 2023's performance for the thousands of attraction destinations across America. We are proud that so many VOV readers have come to rely on it as a valued resource in planning their success strategies for the coming year.

Visitors see the value in our attractions and the value of connection with each other. VOV 2023 again surveyed attraction visitors to learn what's driving their choices, but we also know that environmental factors continually impact our visitors and attraction operations. The reality is that inflation and fears of a recession impact spending, but VOV 2023 shows there's plenty of room for optimism. Visitors haven't satisfied all their pent-up demand and are still relishing the chance to get out and explore. They're still willing to spend and continue to find new attractions to visit. VOV 2023 forecasts are strong—exceeding





2019 levels. Airlines, despite their recent troubles, are recovering along with hotels and cruise lines. Flexible work schedules allow for extended travel, and business travel is continuing to recover, enhancing the opportunity to entice bleisure visitors. Other factors in the economy are promising too—China reopening, low unemployment, and a growing GDP.

We continually analyze and respond to the changing world. Timed ticketing is here to stay in many places, and many attractions have seen surprising success by maintaining a lower capacity. Our ability to innovate allows us great opportunities to connect with our visitors and create beautiful moments and memories.

We invite you to review VOV 2023, and as always, we welcome your feedback.

**Mike Konzen**  
Chairman

**PGAVOV**  
VOICE OF THE VISITOR

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Annual Outlook on the Attractions Industry



INNOVATION.  
CONNECTION.  
OPPORTUNITY.



In the wildly popular show ***Ted Lasso***, an American football coach travels across the pond to coach an English fútbol team. Ted is known for dispensing nuggets of wisdom to his team and friends. His words resonate because of his positivity, even during challenging times. His upbeat and quirky quips inspire his team and bring joy to viewers. Many of Ted's sage words apply to the attraction industry as he shares the virtues of connection and opportunity.

***“I do love a locker room. It smells like potential.”*** Attractions don’t typically have locker rooms, but every corner of our venues is full of potential. Attractions offer experiences that immerse visitors in vibrant stories. Telling these stories authentically invites visitors to discover new ideas and connect with the world and its people in beautiful new ways. Attractions have the potential to help people grow and connect . . . and let go and have fun.

***“Taking on a challenge is a lot like riding a horse, isn’t it? If you’re comfortable while you’re doing it, you’re probably doing it wrong.”*** The industry continually faces challenges: economic factors that impact consumer spending, continuing pandemic problems, and labor shortages. These things bring

discomfort but also feed our innovation. Propelled by creativity and passion, innovation drives the industry toward opportunity. It may not always be comfortable, but it's worth it when we reach our goals.

***“You know what the happiest animal on Earth is? It’s a goldfish. Y’know why? It’s got a 10-second memory. Be a goldfish.”*** While we shouldn’t forget the lessons the past few years have brought, we should reflect on them, learn from them, and use them to move forward. Keep what has improved the experience for our visitors and staff, and release what isn’t working. For some, that means embracing lower visitation numbers, like the Louvre in Paris. For others, it’s embracing innovative technology that streamlines orders and on-line reservations. ***“And then we can be a gosh-darn goldfish. Onward. Forward.”***

***“There’s two buttons I never like to hit, all right? And that’s ‘panic’ and ‘snooze.’”*** VOV 2023 demonstrates there’s no need to panic. There’s plenty of good news, including visitation numbers, intent to return, and season pass numbers. It’s also a reminder not to snooze on opportunities—find the trends that resonate with your attraction and incorporate them into future plans.

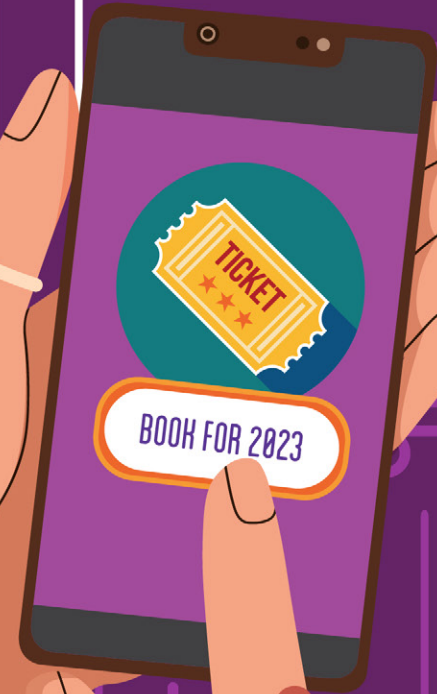
***“So, I’ve been hearing this phrase y’all got over here that I ain’t too crazy about. ‘It’s the hope that kills you.’ Y’all know that? I disagree you know? I think it’s the lack of hope that comes and gets you. See, I believe in hope. I believe in believe.”***

Attractions are powerful sources that drive connection, fuel creativity, spark imagination, and educate. Together, we can inspire people, whether it be a child dreaming of becoming an astronaut, a family setting down their phones as a roller coaster spins them through a different galaxy, or someone learning vital conservation lessons through animal ambassadors.

Keep Ted’s voice in your mind while reading PGAV’s *Voice of the Visitor 2023*. It looks forward to the coming year, reflects on 2022, embraces the innovative ways attractions connect to visitors, and anticipates more celebration opportunities. And remember, ***“Ain’t nobody in this room alone.”***



LOOKING  
TO 2023

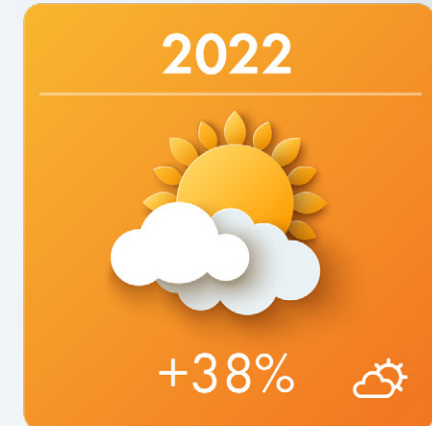


# ATTRACTIONS INDUSTRY FORECAST

Let's celebrate! Visitors are reporting they want to visit our attractions. VOV 2023 forecasts an increase of 15% over 2022's visitation. Even better? That means forecasts show that 2023 visitation will exceed 2019 levels by 7%!

## OTHER POINTS OF OPTIMISM

- ✧ A [Destination Analysts' survey](#) revealed promising news: **74.8%** of participants said travel was a “worthwhile investment” even during a recession. And **39.3%** felt spending money on travel is essential (this includes parents of school-aged children who are driving attraction visitation).
- ✧ The unemployment rate remains low (**3.4%** as of January 2023).
- ✧ Disposable personal income [has seen moderate increases](#).

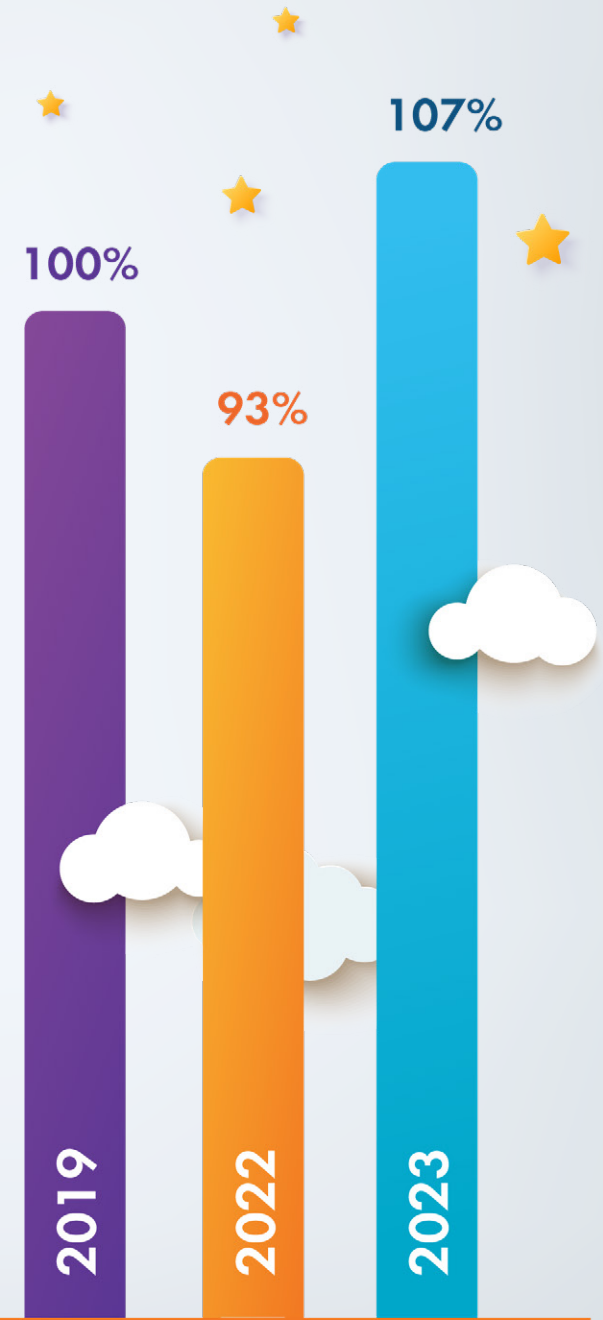




- ✧ In their [2023 Megatrends report](#), Skift shared that there is potential for “catch-up” growth in the travel industry. Gross Domestic Product is **20-30%** higher than pre-pandemic, but there is room to grow since the travel sector has not yet seen the same level of increase.
- ✧ TSA checkpoint numbers are on par with levels from 2019.
- ✧ China is loosening its "zero-Covid" policy, allowing **155 million tourists** to explore the world again.
- ✧ Corporate travel is returning, and many business travelers are extending their trips to include leisure activities.
- ✧ Vaccine advancements, more effective treatment and prevention, and growing immunity among the population are reducing the negative impacts of Covid, [according to the Johns Hopkins Bloomberg School of Public Health](#).
- ✧ A December [Axios/Ipsos Coronavirus index](#) showed Americans are optimistic about the impact of COVID-19 and are returning to normal, pre-pandemic life.

## ATTRACTIONS INDUSTRY

% Compared to 2019



# VISITING AGAIN?

% of Visitors Probably/Definitely  
Will Visit Same Attraction  
Again in 2023



VOV 2023 shows that visitors continue to return to attractions. Down only slightly from 2022 levels, **69%** of visitors say they will return to the same attraction in 2023. Leading the way in intent to return: **theme parks, water parks, zoos, and aquariums.**

“ I enjoyed myself, and everyone else did too. We ate, drank, and were very merry! The children were entertained while we enjoyed the spirits. We want to go back again!

VOV 2023 *survey response*

”



# TRENDING TOPIC

## BUSINESS + LEISURE



© Carly Caramanna

Remote work has surged, giving people more freedom to travel and visit attractions. A [study by Upwork](#) found that **36.2 million** Americans will be working remotely by 2025. That's an **87%** increase over pre-pandemic levels. Remote workers are heading away from their homes to work—and play. Many also combine work trips with leisure, spawning new buzzwords—bleisure and digital nomads. These changes provide attractions with even more opportunities to welcome visitors through the gates. Bleisure is changing typical traffic patterns by extending the weekend and peak seasons.

In 2020, Carly Caramanna, a theme park and travel journalist, gave up her office space and worked remotely from Universal Studios Hollywood. Caramanna said, **“Working from the kitchen island gets old**, and I didn’t want to sit in a coffee shop all day. I already had an annual pass and knew locations away from crowds and tucked away.” After writing about her time working from the park, she heard from many others utilizing season passes to work

from places like zoos and aquariums. “Working from these locations is **more stimulating than staying at home** all the time. Many people just need their laptop and decent Wi-Fi to work remotely.”

Caramanna also says the perks of free passes can help with cost savings for remote workers, including free parking and food discounts. The most challenging part? Finding a charging port.

While most visitors won’t work from an attraction full time, attractions can still find ways to cater to the increasing number of remote workers. Offering speedy Wi-Fi, quiet spaces to take calls, and power outlets can help accommodate bleisure travelers who need to stay connected while visiting. What about a weekday-only annual pass? Invite remote workers on low-traffic days, and they’ll likely spend additional money on coffee, snacks, and meals.

Are you already working with the Convention and Visitors Bureau in your area? Are there creative and innovative ways to invite attendees to extend their stays and visit you? Caramanna says, “Themed entertainment locations are finally tapping into getting convention guests and families to extend their stays. **You can mix business with pleasure** with unique experiences, including park or land buyouts, one-of-a-kind dining and dessert parties, and evening partnerships.”







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# INDUSTRY

## PERFORMANCE

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# GOLD STARS FOR ALL

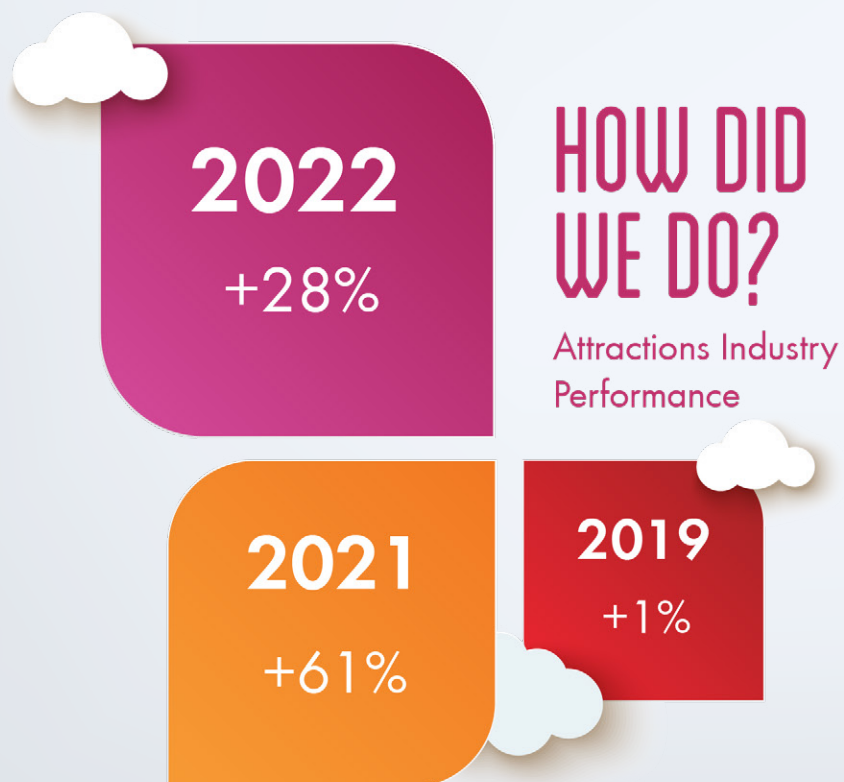
VOV 2023 reports that visitation was up **28%** in 2022 over 2021. Visitation remains **7% lower** than in 2019, but there's plenty of reason for optimism and opportunity.

Good news surrounds the industry. The Cruise Lines International Association [recently said](#) that demand and perception of cruise holidays exceeded 2019 levels. Celebrity Cruises, Holland America Line, Royal Caribbean

International, and Seabourn [reported breaking booking records](#) in November 2022.

Jeff Shell, NBC Universal CFO, echoed similar optimism about theme parks during NBC Universal's Q3 earnings call, reporting record theme park earnings. He said, "Despite the economic uncertainty that you see elsewhere in the economy, we're seeing no effects of that right now in the theme parks, either in terms of our performance or our bookings going forward."

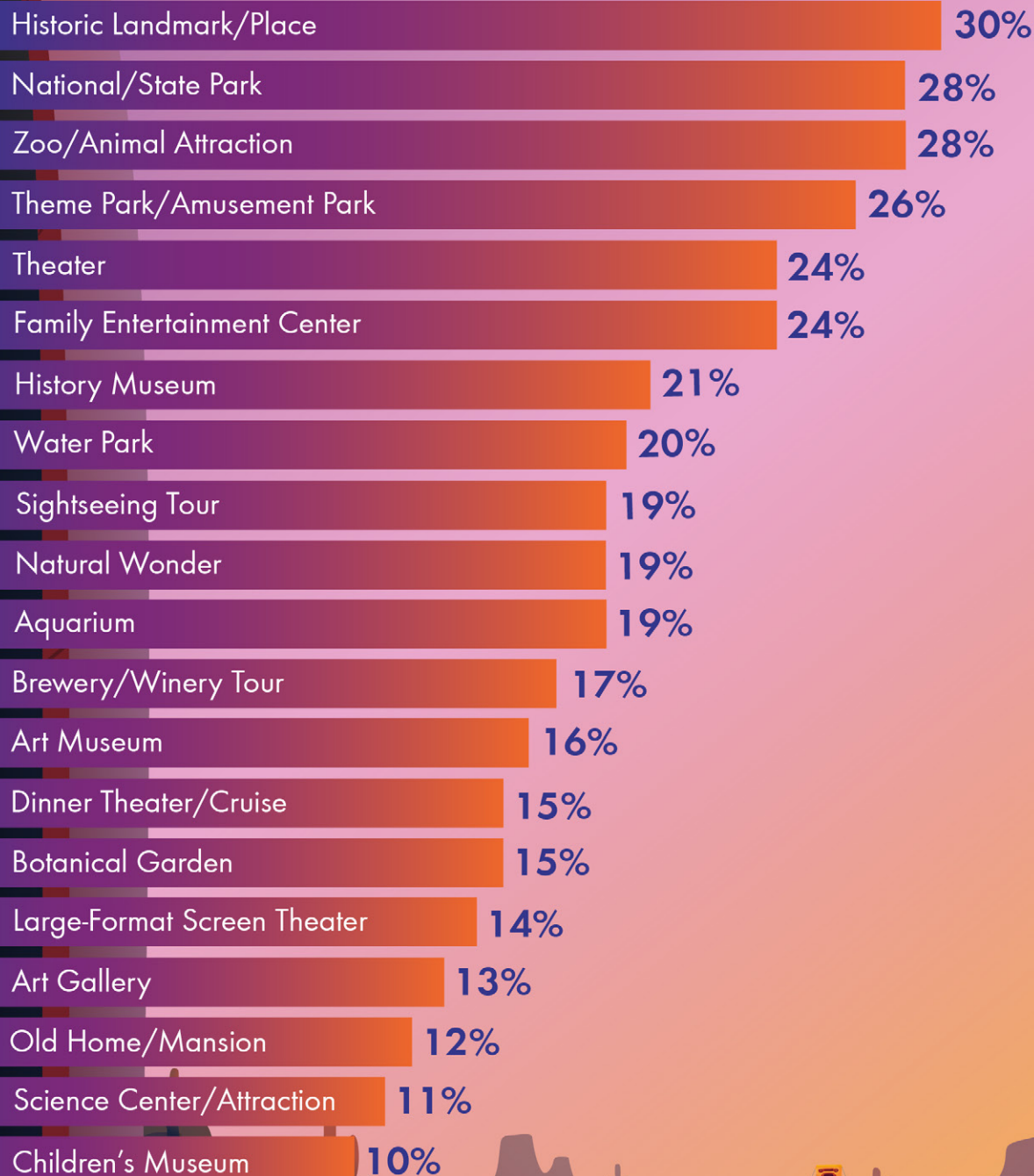
In the hotel sector, STR and Tourism Economics predicts an average 2023 U.S. daily room rate of \$151; companies now project 2023 revenue per available room to reach \$96, up **11.6%** from 2019 levels. During [Hyatt Hotels Q3 earnings call](#), Mark Hoplamazian, Hyatt President and CEO said, "It's clear that people are prioritizing experiences and connection as we see in the upcoming festive season where our resorts are pacing **30%** ahead of 2019, or the amount of group business being booked into 2023 at our Americas full-service managed properties, which is **30%** higher than 2019 levels."





# 2022 ATTRACTIONS VISITATION

**Where were people looking to connect in 2022?** Historic landmarks, national and state parks, zoo/animal attractions, and theme park/amusement parks topped the list. Most categories saw an increase in visitors from 2021 reports, with slight declines in categories including natural wonders and large-format screen theaters.

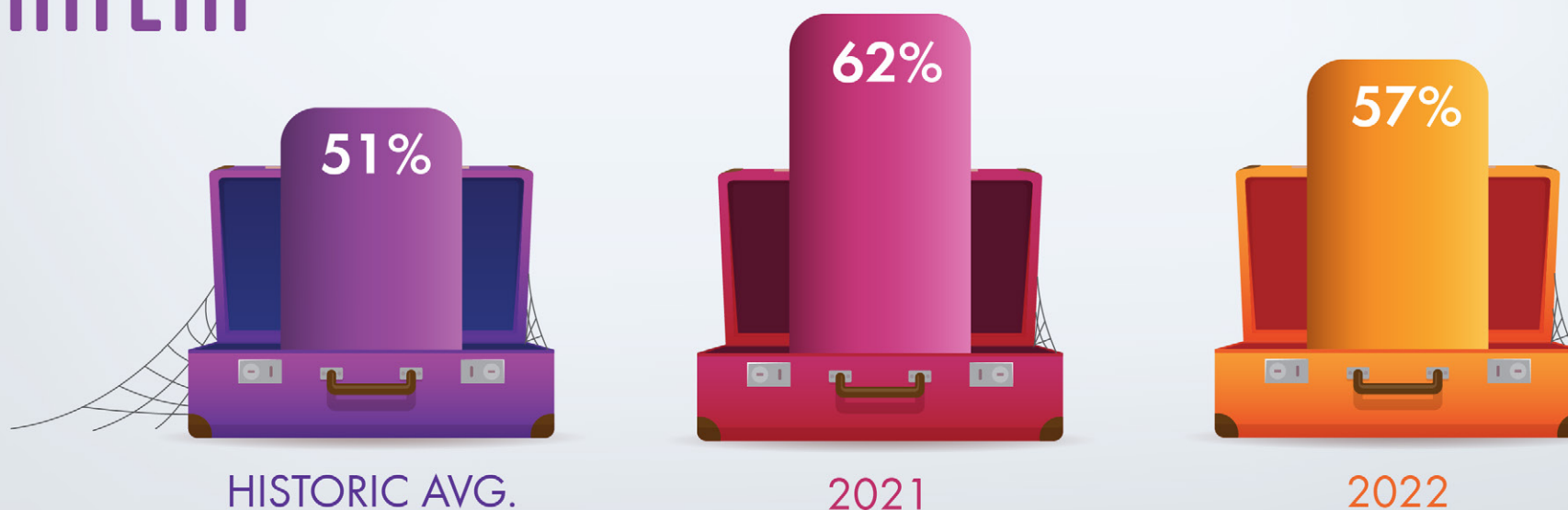


VOV also tracks unconverted intent, quantifying pent-up consumer demand—or a measurement of consumer intent relative to actual incidence of visitation. The level of unconverted intent remains high at **57%**. It's beginning to level out but has not reached 2019 levels yet.

**Jerry Henry**, CEO of H2R Market Research, explains further, “Consumer intent nearly always exceeds actual behavior. It is only a matter of by how much intent exceeds incidence. Historically, attraction visitor intent has exceeded incidence of visitation by **51%**. That is normal.

In 2020, that figure surged to a **record 65%** because people wanted to visit but were unable because of COVID-19. Thus, intent remained strong while actual incidence was comparatively low. In 2021, aggregate attractions industry unconverted intent slipped to **62%**, and in 2022 fell back to **57%**. But while this is a bit lower, **57%** remains well above the historical norm of **51%**. **Why?** I believe it is because the heart wants what the heart wants. A significant desire remains to visit attractions, travel for leisure, and engage in new experiences. And while incidence of visitation has increased significantly since 2020, intent to visit continues to surge as well. Therefore, unconverted intent or pent-up demand remains comparatively high relative to the historical norm.”

## UNCONVERTED INTENT

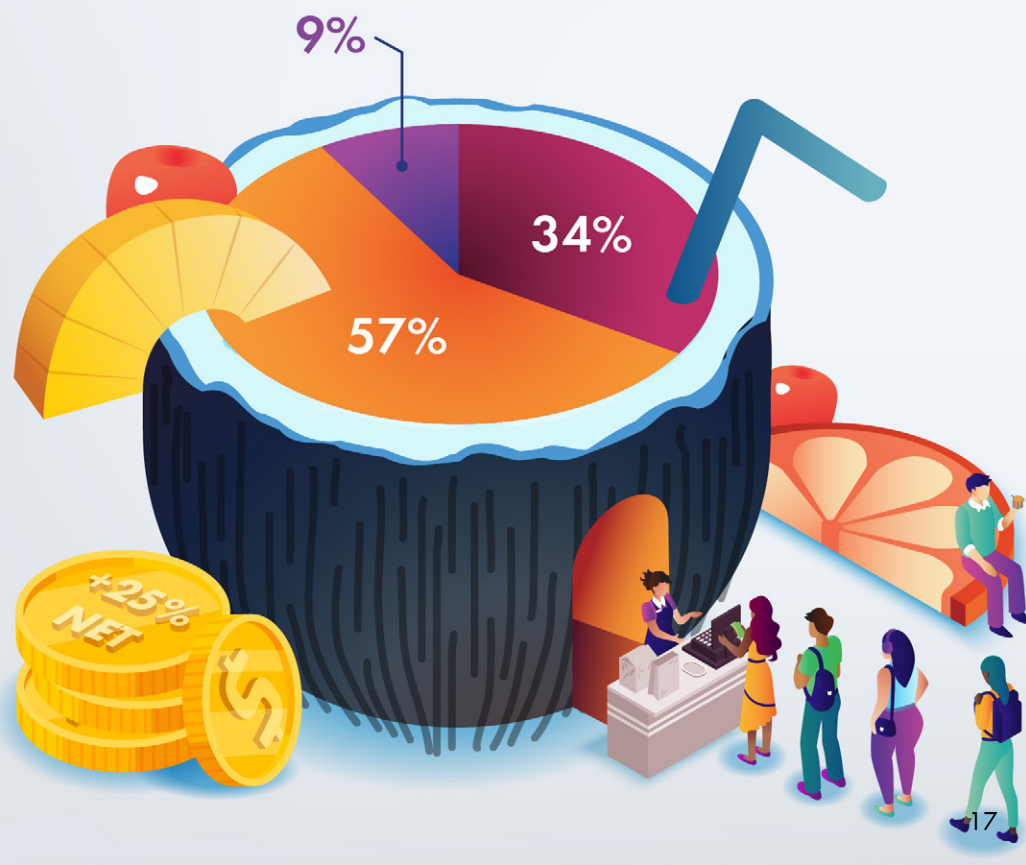


Repeat visitors in VOV 2023 reported spending **25%** more this year than they did on their previous visits. A [survey by the International Show Caves Association](#) and National Caves Association USA showed that direct spending at show caves was up **7%** globally.

Brad Wuest, President and CEO of Natural Bridge Caverns in San Antonio, Texas, said, “We’ve seen a **3%** increase in attendance, but spending is up **35%** across the board since 2019. We’ve been focused on providing an exceptional experience for our guests while maximizing visitor

spending. Our dynamic pricing model helps us keep our admissions pricing in tune with demand. And our guests are choosing to stay on property longer and spend more on attractions, retail, food, and beverage. Another factor of our success has been a **focus on taking care of our team** with competitive wages, benefits, and an enjoyable culture and work environment. This has allowed us to be fully staffed, which helps us maximize visitor spending by providing excellent customer service and having all revenue centers fully operational.”

**The summer provided [increases in spending](#)** at theme parks, with quarterly reports from Disney, Universal, SeaWorld, Six Flags, and Cedar Fair all reporting increased visitor spending.



## VISITOR SPENDING

### COMPARISON TO PREVIOUS VISITS

- Spent Somewhat/Much More
- Spent Somewhat/Much Less
- Spent About the Same

*Net spending: +25%*





# TRENDING

## TOPIC

## FOOD & BEVERAGE TRENDS

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### LET'S TOAST THE PROMISE OF 2023

***with a citrus-flavored non-alcoholic craft brew!***

PGAV's recent Food, Beverage, and Retail study showed that visitors want alcohol as an option. And that might be the key: an option. As interest in wellness trends grows, there's a rising tide of people interested in non-alcoholic beverages. [According to NielsenIQ](#), non-alcoholic beverage sales grew **20%** from August 2021 to August 2022. Sales of non-alcoholic beer, wine, and spirits all grew significantly.

**Jeff Stevens**, the founder of WellBeing Brewing, noticed the gap of non-alcoholic beers in the craft brew industry years ago. He wanted to find a way to make non-alcoholic beer taste good and hold its own against craft beers. WellBeing invested in technology that takes fully fermented beer but removes the alcohol. Stevens says this, "leaves the aroma, mouthfeel, body, and flavor—everything you love about craft beer."

Stevens adds that consumers have responded positively, commenting that ***"non-alcoholic options give people comfort in social situations. People don't miss moments."***

WellBeing is looking to innovate flavor profiles. "We look forward to mirroring craft beer's propensity to use an infinite number of ingredients to make non-alcoholic options, including electrolytes, mushroom and fungus, and CBD," Stevens says.

[\*\*\*Flavorman's 2023 Beverage Trend report\*\*\*](#) predicts consumers will seek more natural ingredients and a health-conscious focus, with ingredients like ginseng root and plant-based formulas. The report also shows a shift toward citrus flavors like orange, grapefruit, and lime, as well as berry.



© Wellbeing Brewing



On the food side, consumers are increasingly looking for sustainable options. Interest in plant-based eating continues to grow. Spaghetti squash pasta? Yes, please! The National Restaurant Association's [What's Hot 2023 Culinary Forecast](#) sees a focus on Southeast Asian flavors, healthier options, and an interest in adding to “*culinary passports.*”

“

*“People are looking to make up for missed moments, choosing to indulge in these moments that matter with high-quality spirits and ingredients. More so, they’re celebrating these occasions in places beyond traditional venues as they now have the opportunity to partake in cocktail experiences even in places like the park, cafe, and pickleball court.”*

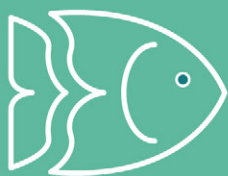
**Jacob Briars**

Global Trade Advocacy Director at Bacardi

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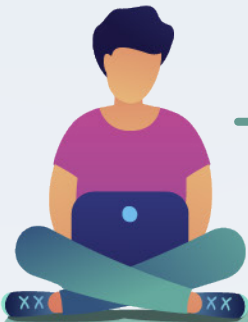
WHO'S  
VISITING?





## VISITOR DEMOGRAPHICS

# 2022



Average Visitor Age (Adults) **46.6**

Average Visitor Age (Children) **9.1**

% Under 12 in Visitor Party **15%**

% 12 - 17 in Visitor Party **9%**

% 18 - 34 in Visitor Party **24%**

% 35 - 54 in Visitor Party **26%**

% 55+ in Visitor Party **26%**

Party Size **2.77**

Family Visitors **55%**

Adult Visitors **45%**

Non-Hispanic White **73%**

African American/Black **13%**

Hispanic/Latin American **8%**

Other Ethnicity **10%**

Average Household Income **\$87.7K**

The desire to connect remains strong. Extended families are getting back together, friend groups are reuniting, and visitors are willing to make more than one trip.

## WHO TRAVELED IN 2022? FAMILIES.

Families once again broke a record, reaching **55%** of those surveyed. The age of the children is also **higher at 9.1**—are they finally tired of screen time? Or are adults just demanding that they leave the house?



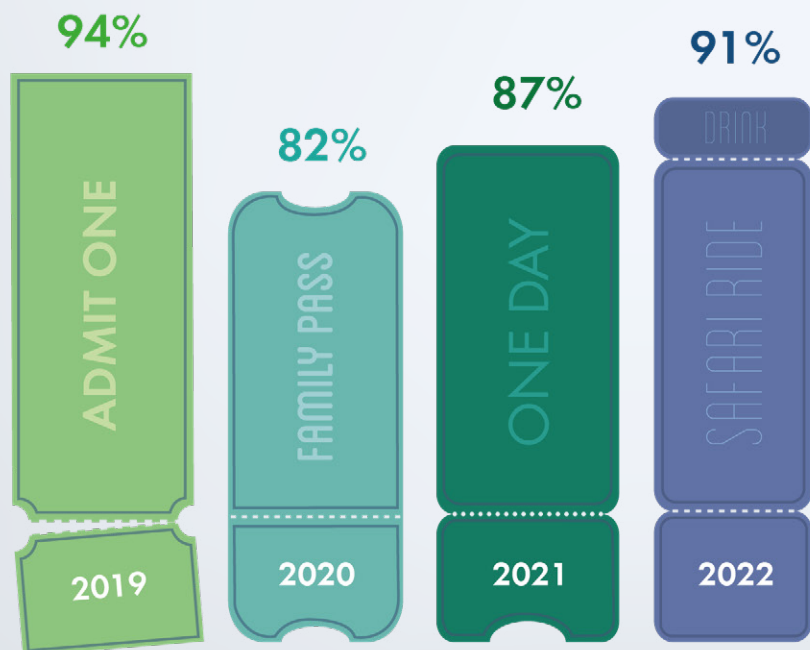
Additional research reinforces families traveling with children. [The 2022 US Family Travel Survey](#), conducted by the Family Travel Association in collaboration with the NYU School of Professional Studies Jonathan M. Tisch Center of Hospitality, found that **85%** of parents are very likely to travel with their children in the next 12 months, with travel intent this year higher than in 2019.

The survey showed that **76%** of respondents indicated children as the inspiration for their travel.

VOV 2023 shows attractions visitation continues to rebound (91%) but remains slightly below 2019 levels (**94%**). Party size gained **6%** and the number of different attractions visited was up **14%**.

Incidence of

## ATTRACTIONS VISITATION



## Party Size of MOST RECENT ATTRACTION VISITED

number of people in party

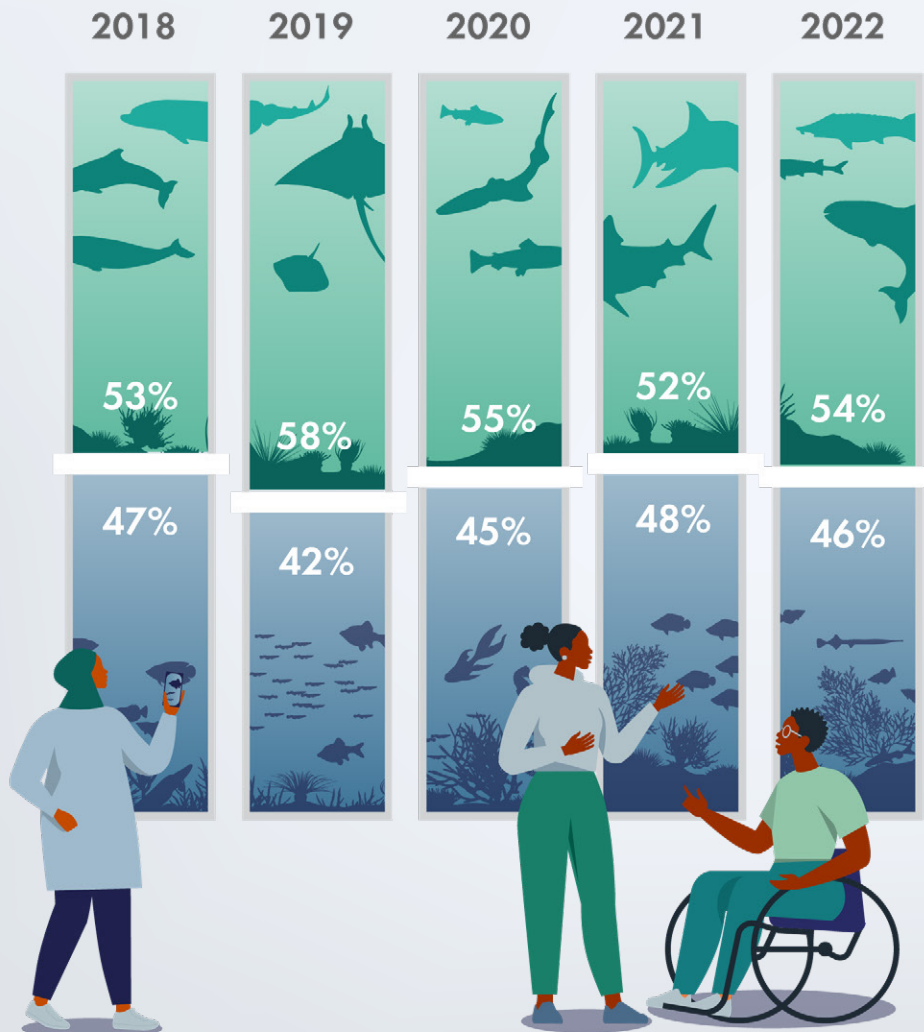
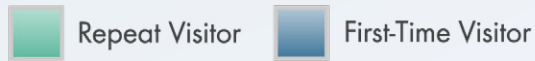




## REPEAT VISITORS

VS

## FIRST TIME VISITORS



First-time visitation among attractions visitors **(46%)** was higher in 2022 than the historical average of **43%**. It was particularly high among visitors to historic places and museums.

Historically important places have a **direct link to our present and future**. I feel it is invaluable to visit such places and learn as much as one can consume with clarity to embrace what has passed and what lies ahead.

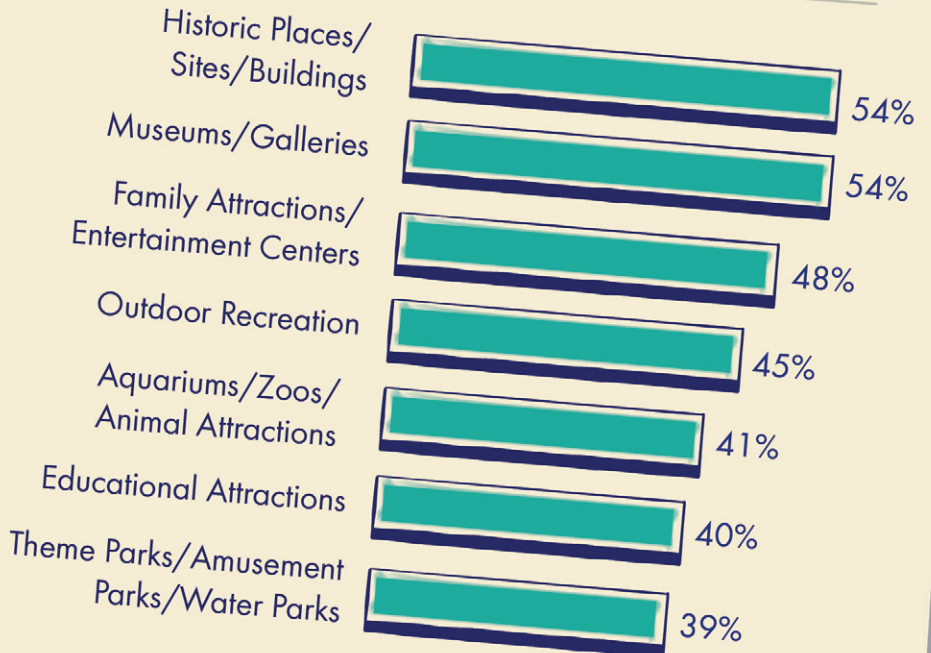
VOV 2023 SURVEY RESPONSE



2022

# FIRST-TIME VISITORS

by Attraction Most Recently Visited



To \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



# TRENDING TOPIC

## SUSTAINABILITY

Sustainability continues to be a growing concern for visitors, particularly Generation Z. Those visitors are increasingly interested in seeing authentic action. In Booking.com's [2022 Sustainability survey](#), **71%** of respondents said sustainable travel is important to them—a **10% increase** over 2021. And half said recent news about climate change influenced them to make more sustainable choices. Focusing efforts on sustainable choices provides an opportunity to connect with visitors and the local community in a valuable way.

Expedia's [Travel Trend Report](#) showed that electric charging stations, solar use, recycling, the elimination of single-use plastics, and eco-friendly LED lighting were factors visitors found valuable.





Sustainability isn't just about the environment, however. It also includes **protecting cultural heritage** and providing benefits for the local community. Social sustainability, including social inequity and racial injustice, is top of mind for many visitors. This can include fair working conditions and fair wages.



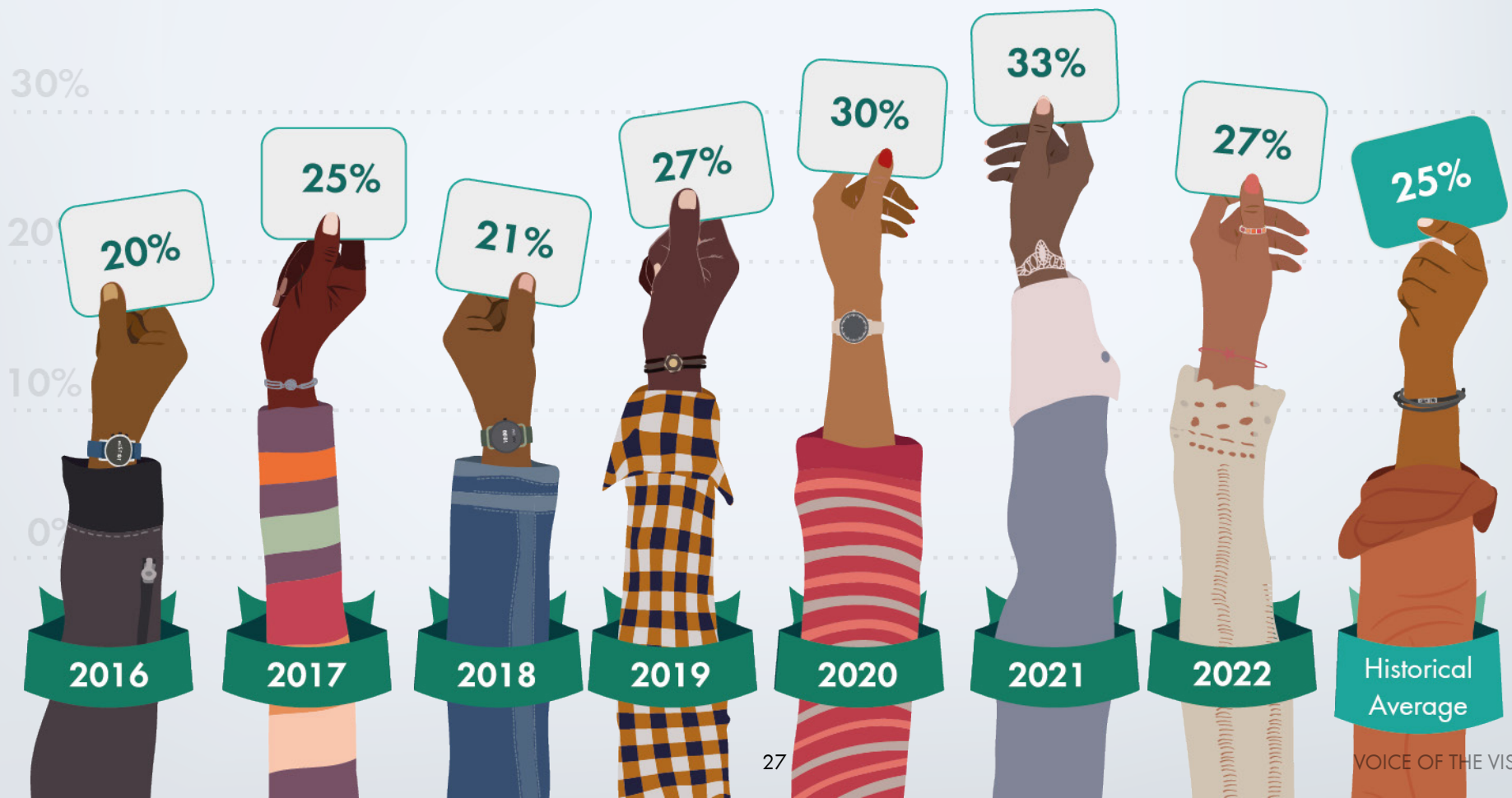
Your attraction can be an outlet for local artisans selling products made in the community, by the community. A t-shirt printed elsewhere may be cheaper, but one printed locally supports locals. Restaurants can focus on using regional and seasonal produce when possible.

Ruby Falls, home to an underground waterfall in Tennessee, is focused on environmental sustainability. Ruby Falls sees a positive environmental impact and guest reaction from protecting natural habitats, capturing rainfall for irrigation, and composting. Hugh Morrow, President and CEO of Ruby Falls, said, “By providing options like **efficient lighting, renewable energy, water use reduction, local culture, and waste reduction**, we have measurably increased our guests' satisfaction. Ruby Falls is committed to bringing even more options to our guests in the future. It is a winning strategy.”

Clearly explaining and being transparent about sustainable practices will go a long way with visitors. The explosion of **sustainability means people have a choice**—they can choose to visit attractions that also value and commit to sustainable practices.

# RATIO OF PEOPLE OF COLOR VISITING ATTRACTIONS

VOV 2023 revealed people of color accounted for **27%** of attraction visitors in 2022. This is above average (**25%**) but lower than 2020 and 2021. People of color account for **40%** of the U.S. population, so they remain underrepresented at most attractions.





[Maya Angelou said](#), “I have great respect for the past. **If you don’t know where you’ve come from, you don’t know where you’re going.** I have respect for the past, but I’m a person of the moment. I’m here, and I do my best to be completely centered at the place I’m at, then I go forward to the next place.”

Historic places and museums are working to tell stories more authentically and honestly, allowing them to connect to a broader audience and share more stories. Historic places and museums give visitors a tangible connection to the past. Images, artifacts, and stories breathe life into the words. And the stories of a wider swath of people are being told, allowing more of our visitors to feel a connection to the stories. [Visits to National Park Service historic sites](#) have steadily increased since 1979. Since 2000, which has shown strong visitation data, new sites that share the history of African Americans, women, Indigenous people, LGBTQ people, and immigrants have opened.

Historical sites that include authentic voices pave the way for visitors to better navigate the future by gaining a fuller understanding of the past. Belle Meade Historic Site & Winery in Nashville, TN, offers a “Journey to Jubilee” tour. The tour explores the horrors of slavery, including the enslaved people at Belle Meade and what happened to those people after emancipation. **Brigitte Jones, Director of Equitable Partnerships at Belle Meade**, feels that telling the story of slavery can help people understand current racial issues, including health outcomes, policing of Black communities, socioeconomics, and representation in the media.

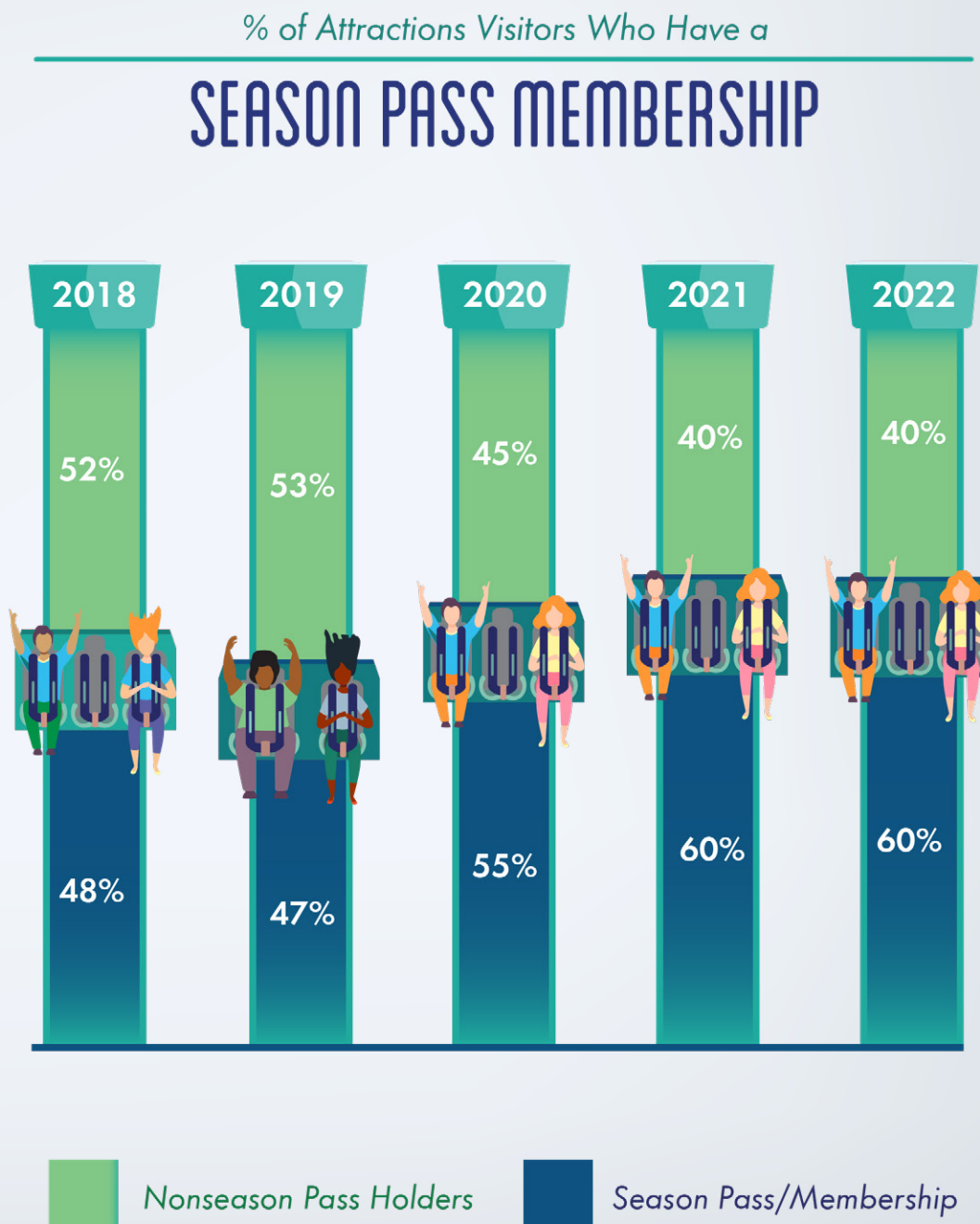
*Brigitte Jones*





Visitors continue their loyalty with season passes and memberships. **Sixty percent** reported they were season pass or membership holders. Most belong to theme parks, amusement parks, water parks, aquariums, and zoos. After people stayed close to home in 2020 and 2021, season pass memberships grew. The best news? The numbers held steady in 2022, higher than the 48% historical norm.

Jerry Henry, CEO of H2R Research, says, “I believe the Covid pandemic changed people’s perspective. It caused Americans to realize just how fragile life can be. Many attraction visitors purchased season/annual passes this past year because they anticipated and had every intention of returning to the local/regional attractions they’ve come to love over the years and to visit in much greater frequency.”



# 2022 SEASON PASS HOLDERS

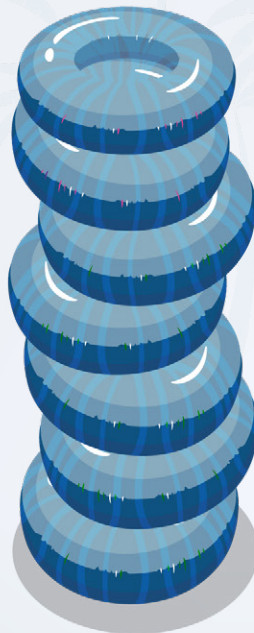
Percentage by Attraction

37%



Theme Parks/  
Amusement Parks/  
Water Parks

32%



Aquariums/Zoos/  
Animal Attractions

27%



Outdoor  
Recreation

20%



Museums/  
Galleries

19%



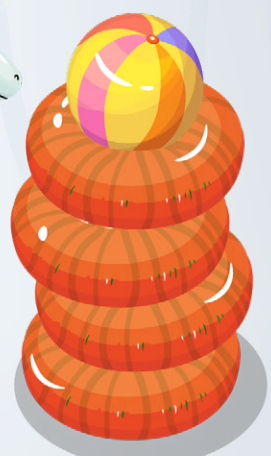
Educational  
Attractions

19%



Family Attractions/  
Entertainment  
Centers

19%



Historic Places/  
Sites/Buildings

33%

25%

18%

17%

17%

13%

12%

HISTORICAL AVERAGE



# TRENDING TOPIC

## EXPERIENCE-GIVING

Most people don't need more stuff. But many crave experiences—and those experiences create memories and drive connection. [A study](#) by the *Journal of Consumer Research* showed experiential gifts produce more connection and better relationships than material gifts, finding that giving an experience provides **“a stronger emotional response which led to improvements in personal relationships making the impact of the gift truly last a lifetime.”** Experiential giving allows the giver to tailor the gift—an art museum membership for the art lover, a theme park pass for the thrill-seeking family, and a cave tour for the nieces and nephews who love exploring.

**How can attractions capitalize?** First, make it easy. Memberships should be available online so that gift-givers can send them from a distance. What if the person already has a membership? Is it easy to use the additional gift as an upgrade or an extension? Ensure

limited-day experiences are easy to book with clear expectations of when they can be redeemed. And don't just think of the major holidays—givers want to connect all year long and celebrate everything from birthdays to graduations to holidays.

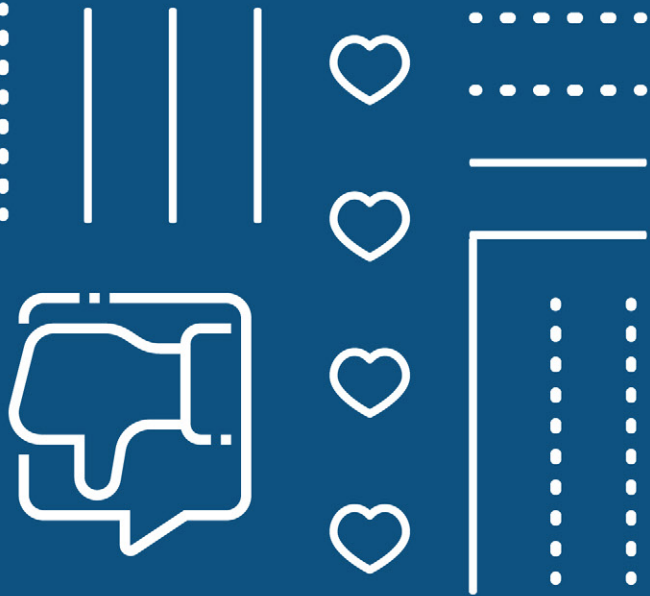
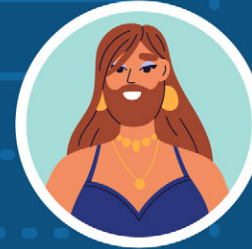
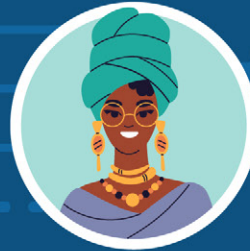
And who **wouldn't** want an hour hanging out with a penguin rather than another pair of slippers?





# SATISFACTION

## LOOK WHO'S TALKING



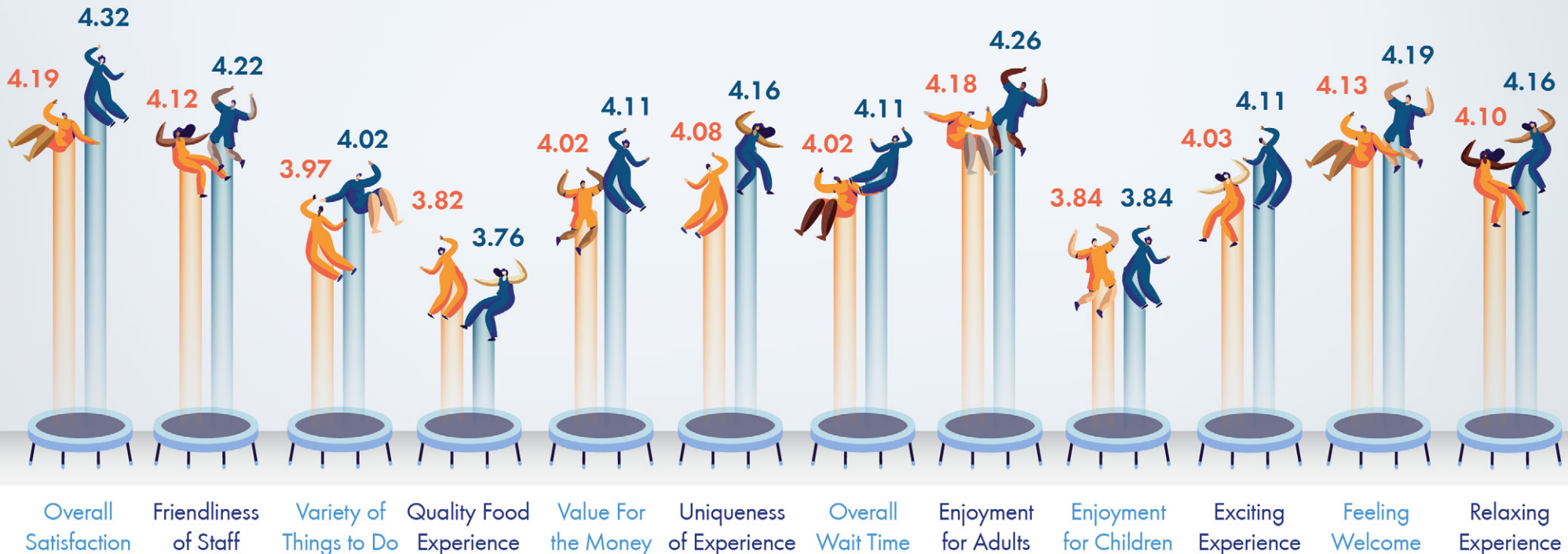
Overall satisfaction scores slipped relative to historical averages in 2022, **down 0.06 points**. Categories including staff friendliness, feeling welcome, and value for the money decreased. The only category that gained a little traction was the quality of the food experience. Attractions aren't alone

with dissatisfied customers. According to the *American Consumer Satisfaction Index*, customer satisfaction in the U.S. is incredibly low and has dropped **5%** since 2018.

## OVERALL SATISFACTION

WITH MOST RECENT ATTRACTION VISIT

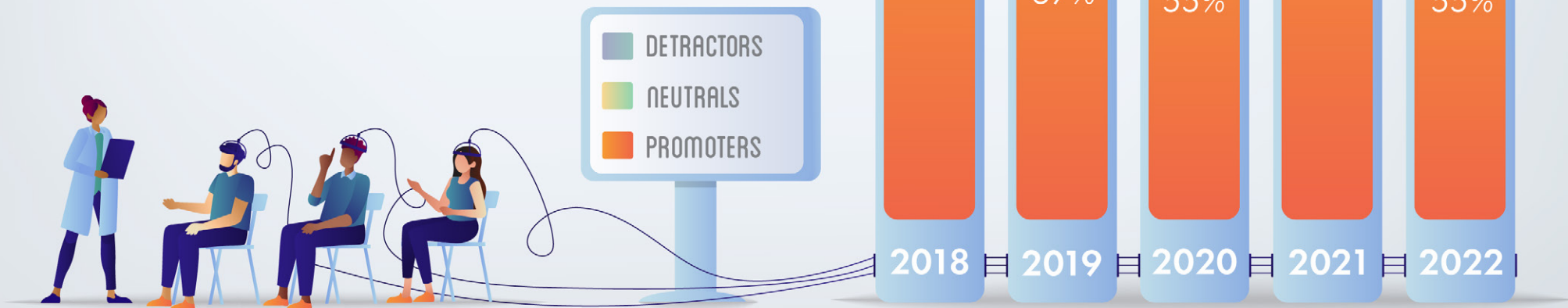
2022 HISTORICAL AVERAGE



# NET PROMOTER SCORES

## MOST RECENT ATTRACTION VISITED

Not surprisingly, net promoter scores also fell, but more significantly. In 2020 the net promoter score was **41%**. In 2021 it jumped to **49%**. It fell back to **41%** in 2022. We know people were excited and happy to be out of the house in 2021—did that lead to the big jump? Possibly. What’s contributing to the significant fall in 2022? That’s a great question. We have a few theories, which are likely a compounding set of issues.





[A survey by Bankrate](#) showed that **79%** of travelers experienced travel problems in 2022, with reports of high prices, long waits, and poor customer service. Plus, prices were (and remain) higher on flights, hotels, tickets, food, and extras like line passes. Many people felt like they were paying more for less.



## WHAT'S GOING ON?

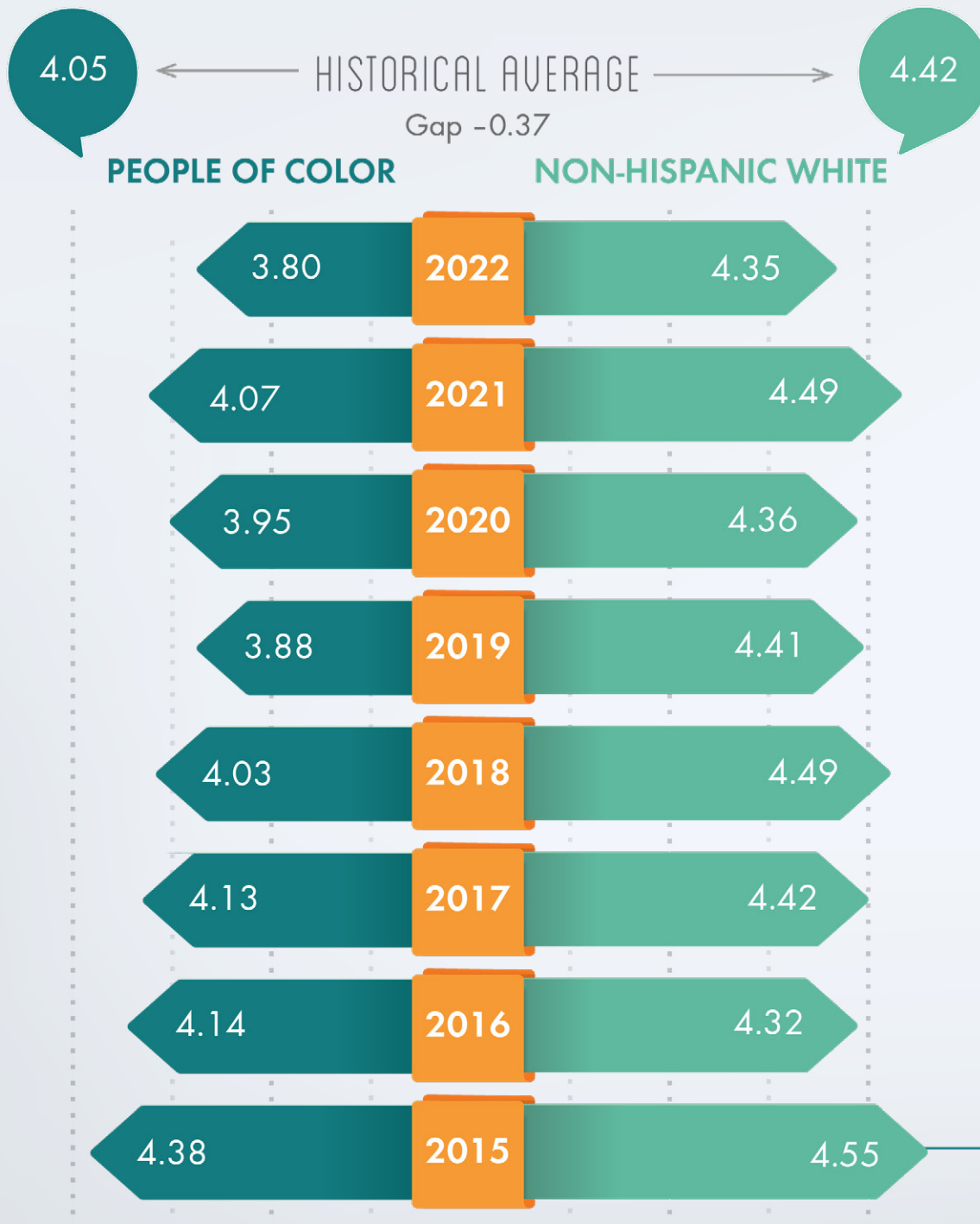
- **Multiple studies show customer expectations are soaring, but the customer service they receive is declining.** When trying to contact companies, [a survey by NBC](#) said people report unanswered calls and emails, time spent trying to reach someone, and un-informed agents as barriers to good service. [A 2022 Hubspot study](#) revealed that customer service leaders in the survey reported they don't have the resources to deliver the customer service that people expect.
- **Lower caps on visitors = happy visitors?** Many attractions relaxed visitation caps and returned to pre-pandemic levels. Are those additional crowds creating greater dissatisfaction among visitors? In June 2022, the Louvre in Paris began limiting daily visitors to 30,000. In January 2023, they made the cap permanent. A statement issued by the museum said they would limit visitors “to facilitate a comfortable visit and ensure optimal working conditions for museum staff.”
- **Labor shortages cause staffing problems.** Staffing problems can cause lower quality, higher pressure on staff, closures of food and retail locations, longer lines, and many other issues. All of that adds up to upset customers.

- Mobile technology continues to expand, including ticket sales and food service. The upside to mobile tech is well-documented, but it removes the human element from customer interaction. When you remove that interaction, the opportunity for real-time questions, feedback, and problem-solving is also removed. Balancing technology with the desire for a human element may be crucial moving forward.
- First-time visitors typically report lower satisfaction, and there have been a lot of first-time visitors in recent years (**46% of visitors in 2022**). But why are they less satisfied? Jerry Henry, CEO of H2R Market Research, explains, “First-time visitors don’t know what to expect when they visit an attraction and don’t know whether they’ll like it or not. Thus, it’s only natural that some enjoy the attraction and plan to

return, but others will not. Conversely, repeat guests know what to expect from the experience and have made an informed decision to return. Thus, a much larger proportion of repeat guests are typically satisfied with the experience than is true among first-time visitors.”

- An increasing number of people want to support socially responsible companies. Expedia’s [Travel Trend Report](#) shows visitors value businesses that are welcoming and accessible, with **70%** saying they are more likely to choose travel options that are more inclusive even if it costs more. **And visitors want to be represented in an attraction’s marketing efforts, with millennials reporting that 84% have made a travel choice based on representation in advertising.**





The satisfaction gap between people of color and non-Hispanic white audiences widened relative to the historical average. People of color cite various reasons for lower satisfaction scores, including being treated differently and that a lack of diversity among other customers creates a less comfortable environment. Another issue frequently raised is that the **content of some attractions is not culturally relevant**, decreasing engagement and leading to lower satisfaction.

## OVERALL SATISFACTION RATING BY RACE

Rated on a Scale of 1 to 5



In the past, many destinations ignored—and sometimes outright excluded—people of color and people with disabilities. Traveling while Black was so unsafe in many parts of the country that **“The Green Book”** provided Black travelers suggestions on safe places to eat, sleep, and purchase gas. And before the Americans with Disabilities Act of 1990, people who used wheelchairs had no guarantee they could travel anywhere or have access to destinations once they arrived.

The industry is making strides toward being more inclusive and realizing that inclusivity needs to be authentic. The supply chain vendors, social media and advertising representation, and employment statistics can all impact a destination’s diversity, equity, accessibility, and inclusion goals.

There are resources to help identify and improve diversity, equity, and inclusion (DEI) issues. **Tourism Diversity Matters** advocates for an inclusive and diverse workforce and guest experience through apprenticeships, education, and research. Travel Unity focuses on increasing diversity in travel through individual and community empowerment and [sets standards](#) for diversity, equity, and inclusion. These standards are meant to engage the travel industry in an ongoing dialogue and encourage sharing best practices in DEI.

Progressive and inclusive policies can aid connection and engagement. Last spring, the U.S. announced a gender-neutral option for passports. “The Department of State has reached another milestone in our work to better serve all U.S. citizens, regardless of their gender identity,” according to a press statement issued by **Anthony Blinken**, U.S. Secretary of State. “The Department is setting a precedent as the first federal government agency to offer the X-gender marker on an identity document. . . . We reaffirm our commitment to promoting and protecting the freedom, dignity, and equality of all persons—including transgender, non-binary and gender-nonconforming persons around the world.”



# TRENDING

## TOPIC

## ADDED VALUE

Connect with guests through regular emails in advance to share personalized welcoming videos, suggestions on where to eat, how to use the app, and specials for ordering in advance. Dining extras, souvenir photos, and line passes are also ways attractions can add value to their tickets. Visitors will feel they're getting more from the experience.

**Holiday World & Splashin' Safari** is located in a rural part of Indiana, within a three-hour drive from Indianapolis, St. Louis, Nashville, Cincinnati, and Louisville. The park was looking for ways to differentiate the park from other attractions and reinforce their image as a value-packed, family-friendly park. They found that opportunity in added-value pieces. Free unlimited soft drinks began at the park in 2000, later expanding to offer free sunscreen. Eric Snow, VP and Chief Marketing Officer of Holiday World & Splashin' Safari, said, "Our free offerings are always near the top of reasons why families say they visit Holiday World and

revisit. They appreciate not being nicked and dimed from the time they arrive until they leave. A family with a van full of kids doesn't have to worry about keeping everyone hydrated or protected from the sun. The pressure is off, and they can focus on having fun together. New guests don't quite understand or believe it and want to know what the catch is. You can sense a feeling of appreciation and joy when it settles in that there is no catch."

New in 2023, Holiday World offers a **free Pre-K pass**, providing free season pass entry to four- and five-year-old visitors. **They report double-digit pass revenue growth because of the free Pre-K pass program.**







While significant capital is spent on providing these complimentary amenities, Holiday World finds these added-value gestures worth the money. **“We want free drinks to be accessible and easy to find.** So much so that we pour enough free soft drinks to fill our large wave pool every year. Syrup, cups, ice, and labor supporting the program add to a large budget line item. There’s an argument about the opportunity cost of giving away parking, soft drinks, and sunscreen. However, we’ve seen a huge upside to offering freebies with admission. We have enjoyed increased length of stay, increased in-park spending, increased guest satisfaction scores, increased attendance, reduced first aid calls, and reduced complaints. Most importantly, our value proposition has helped to build relationships with guests by being transparent about what we offer and delivering on those promises. The psychological benefit of guests feeling we aren’t out to get them leads to positive, long-term business results,” Snow says.



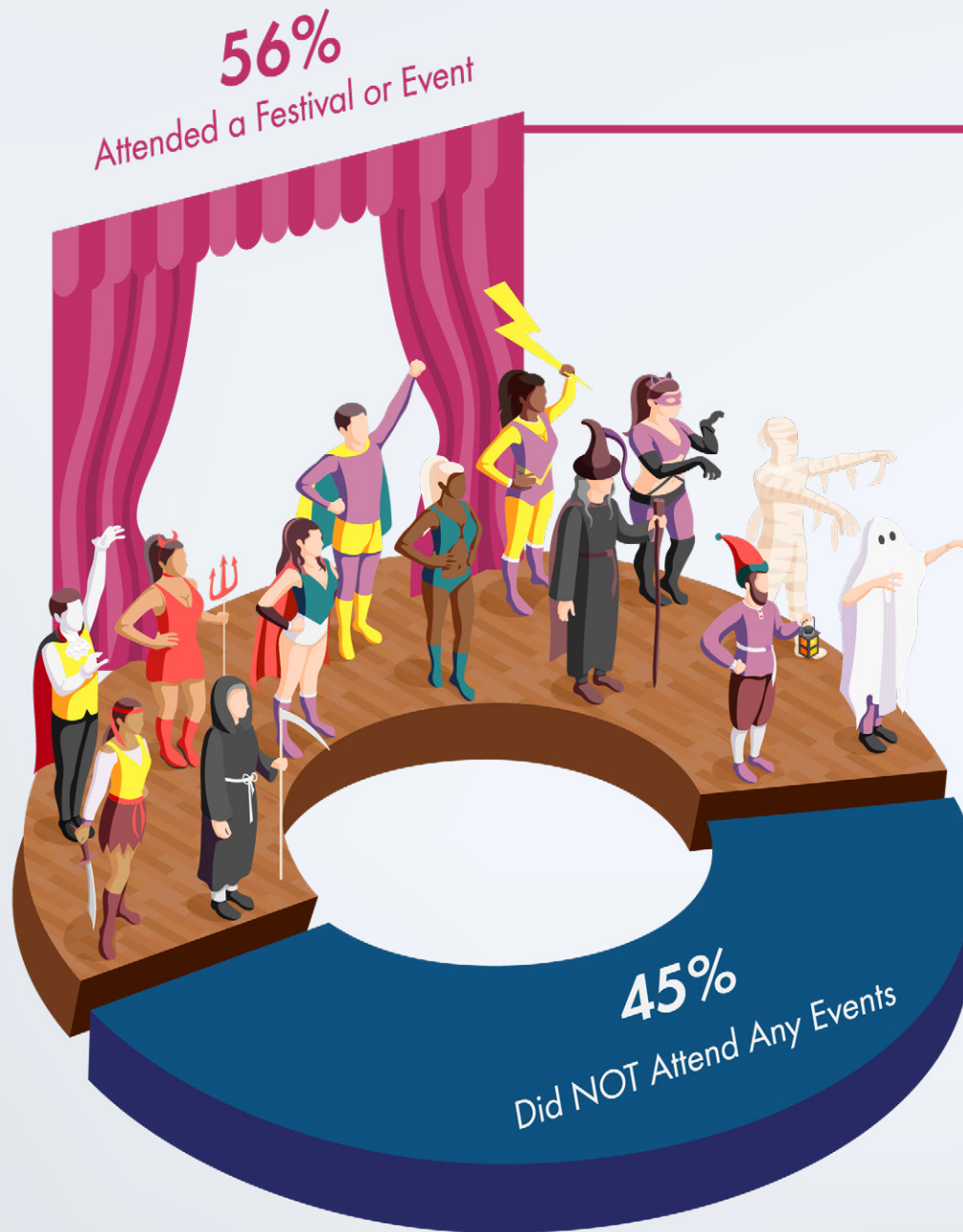


# FESTIVALS & EVENTS



## VISITORS WHO ATTENDED FESTIVALS OR EVENTS

# IN 2022

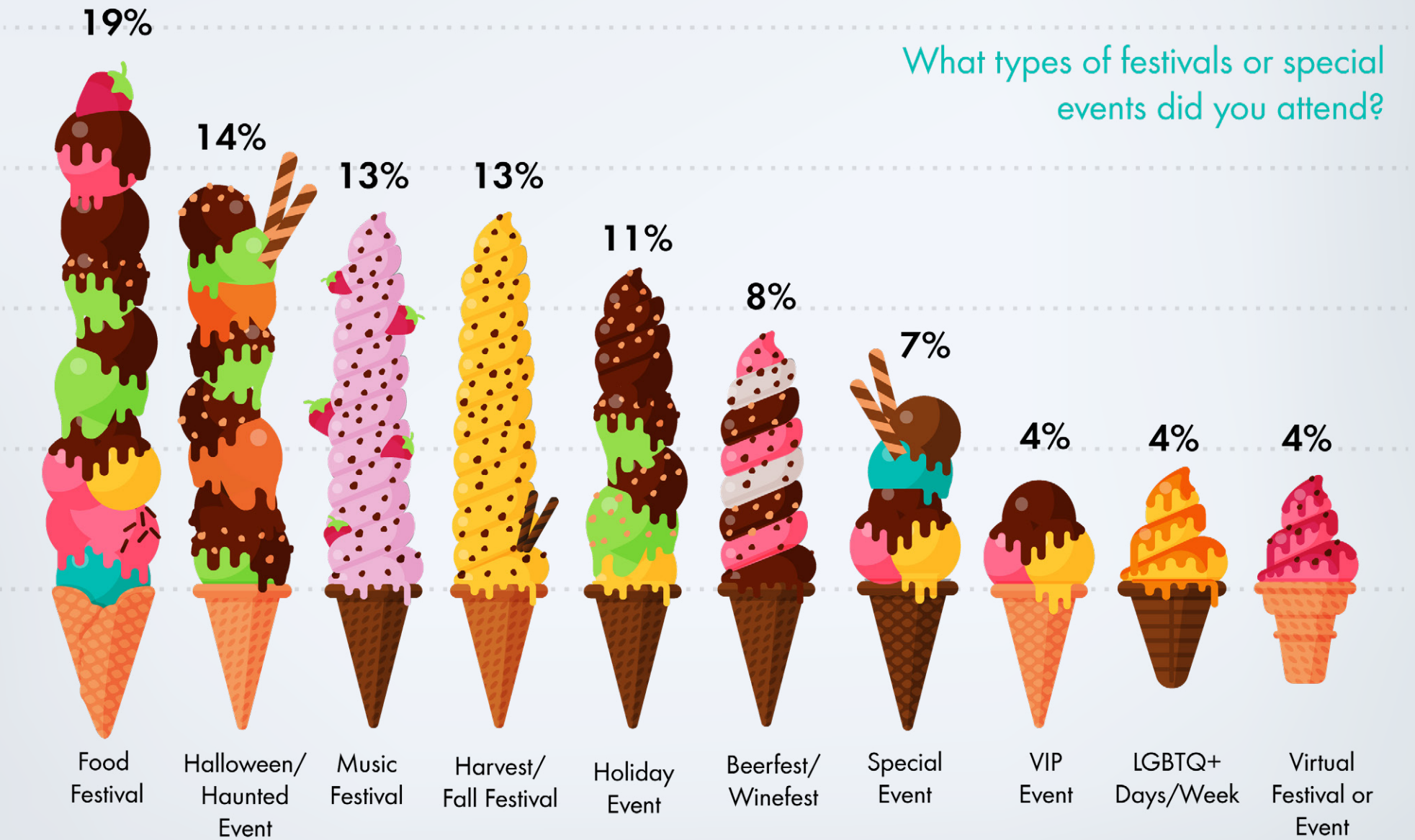


From a family stroll around the home-town carnival to the wild escapades at Burning Man, a solo guitar performance at the quaint pub down the street to the packed lawn at Coachella, festivals and events draw visitors to connect, learn about a culture, try new foods, and explore the world. Festivals and events can add a new dimension to an attraction and are a significant component of many attractions' calendars. VOV 2023 focused on event attendance and visitor desires regarding special events.

**More than half (56%)** of respondents reported attending a festival or event in 2022. People commonly attended a food festival, Halloween event, or music festival.

# TYPE OF EVENT ATTENDED

What types of festivals or special events did you attend?





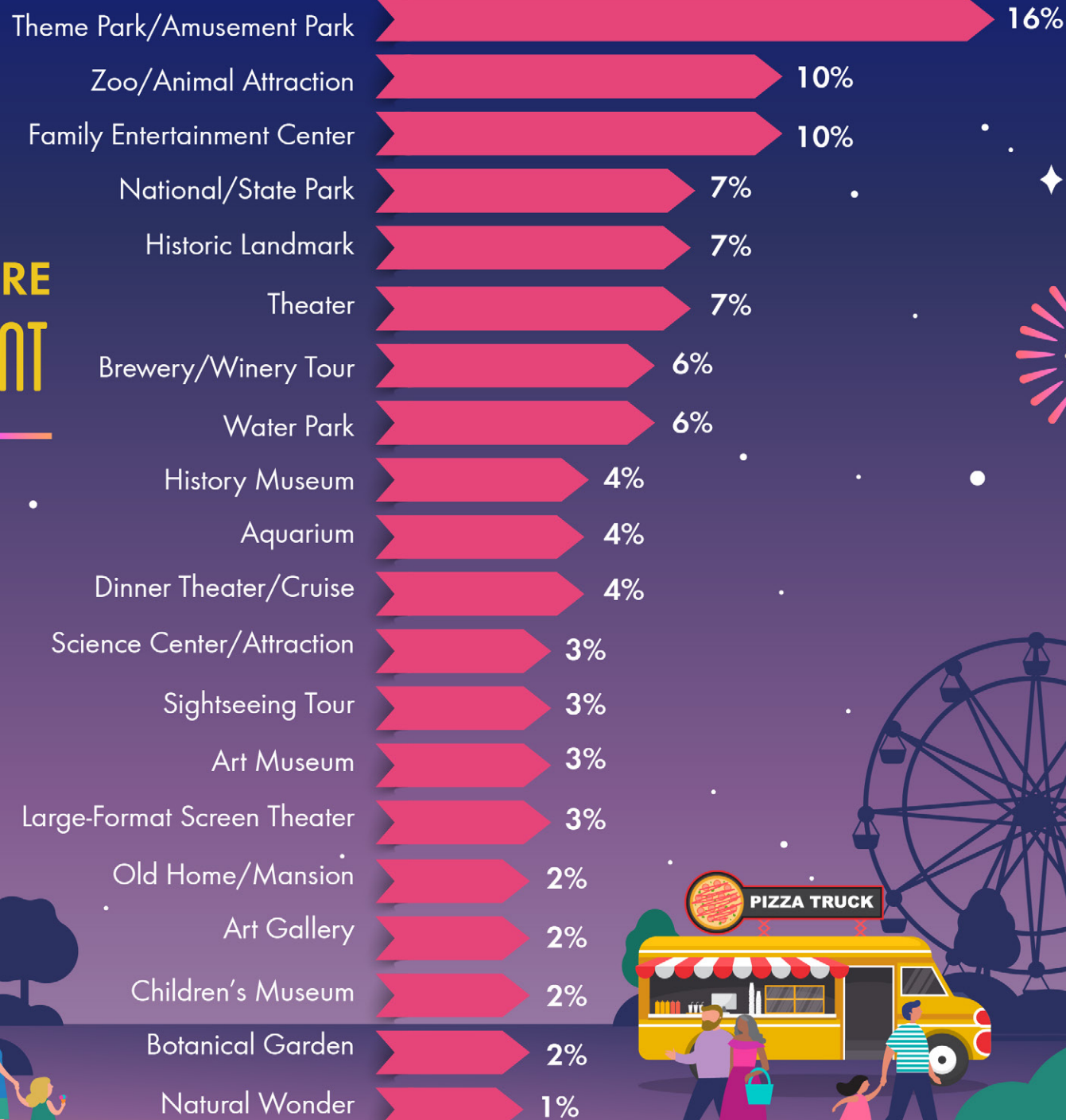
Most event attendance occurred at theme/amusement parks, zoo/animal attractions, and family entertainment centers. Not surprising considering places like EPCOT at **Walt Disney World** feature four festivals, covering nearly the entire calendar year. Additionally, **81%** of event attendees engaged in an active experience versus passive—think a holiday light walk-through at the zoo or yoga at the park.

When asked what attributes drew visitors to special events, **54%** reported music, followed by holiday atmosphere at **46%**. Wine and specialty drinks, lights and fireworks, and themed nights followed. Regarding the size of events, **37%** of visitors preferred events with up to 100 people, and **31%** preferred events with over 250 people.

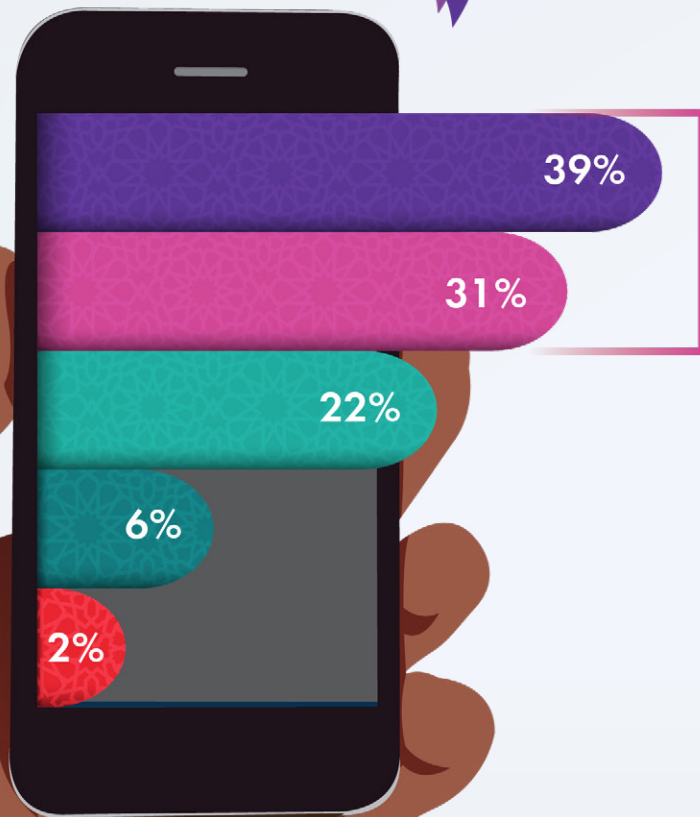


# ATTRACTION WHERE FESTIVAL OR EVENT

— WAS ATTENDED —



## INTENT TO ATTEND EVENTS IN 2023



**70%**  
Intend to  
Visit an Event  
in the Next  
12 Months

Not only did visitors attend events in 2022, but they intend to visit again, with **70% of respondents** indicating they plan to visit an event in the next year. The most popular types of events include holiday events (**56%**), food festivals (**49%**), harvest/fall festivals (**48%**), and Halloween/haunted events (**43%**). Only 28% reported intending to visit a virtual festival or event.

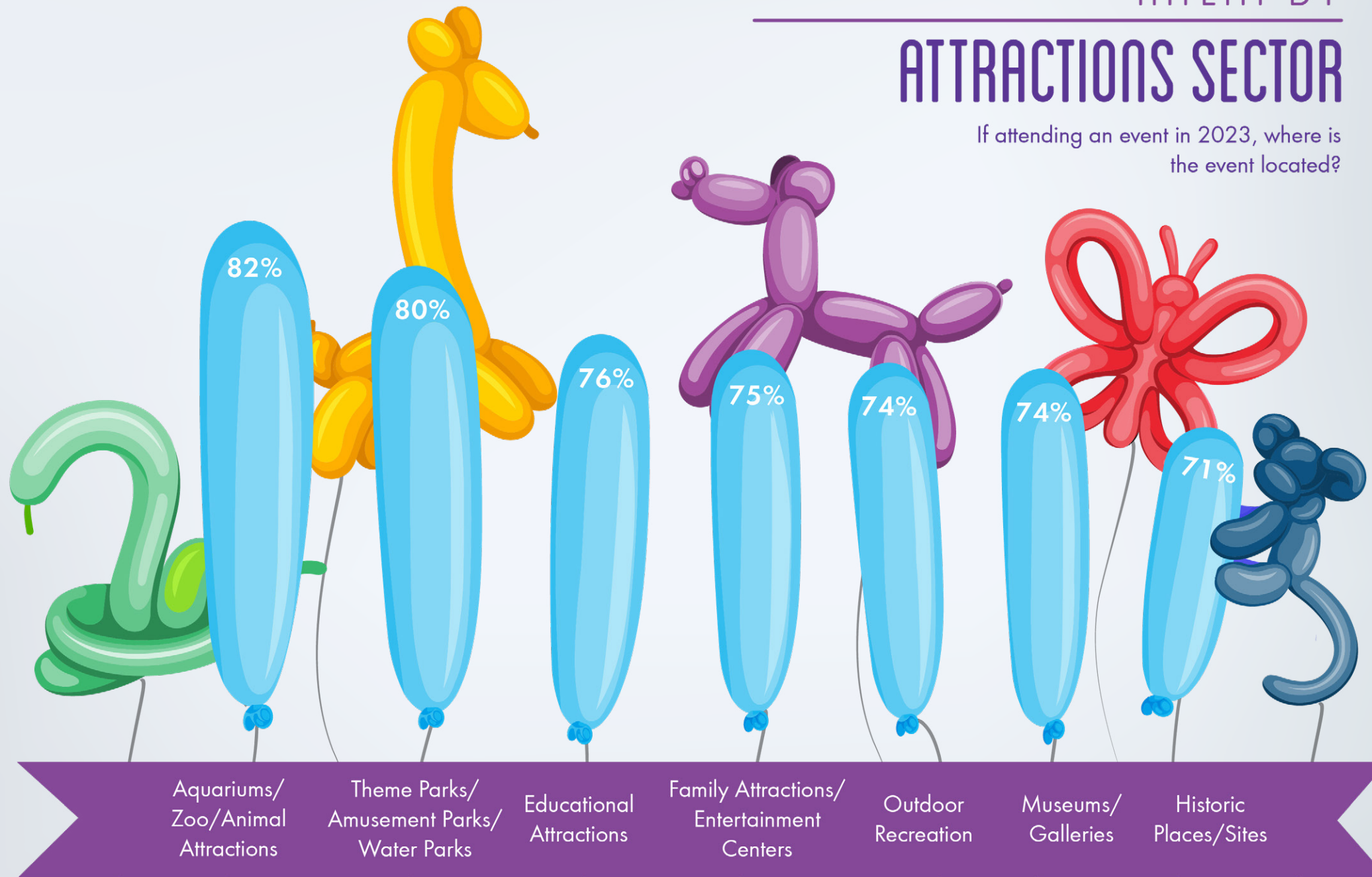
Theme park and travel journalist Carly Caramanna sees opportunities for regional parks and attractions to add festivals. “Disney was the lone wolf for a long time, but regional parks are seeing how successful these events are. **These festivals provide a chance to draw in a new audience** with people who may not be theme park fans but are interested in exploring events with like-minded adults,” Caramanna says.





# INTENT BY ATTRACTIONS SECTOR

If attending an event in 2023, where is  
the event located?



# TRENDING TOPIC

## CONNECTING TO NATURE

From visits to national parks to forest bathing (*yes, that's a thing*), people are finding connection and refuge in nature. Outdoor activities present many psychological and physiological benefits to participants and can present opportunities for attractions as well.

[A study by the Outdoor Industry Association](#) showed **164 million Americans** over the age of 6 participate in outdoor activities. That's **54%** of the population. Plus, interest is growing, adding **10 million new participants** since March 2020. National parks are welcoming a record number of visitors. Attractions are embracing outdoor enthusiasts and incorporating unique events onto their calendars, with events like goat yoga and walks through the Enchanted Fairytale Forest.

**Grandfather Mountain** in North Carolina invites visitors to ring in the New Year by selling limited passes to view the new year's first sunrise from the Mile High Swinging Bridge



© Grandfather Mountain Stewardship Foundation





© Grandfather Mountain Stewardship Foundation

and select evening visits to view the sunset. New Year's Day 2023 sold out with a full waiting list. **Landis Taylor**, Assistant Vice President of Marketing and Communications for Grandfather Mountain, said, ***"We love that our special events help us attract and engage with particular audiences and provide a deeper, more impactful learning experience."***

"We offered our Grandfather Glow events for the first time in 2022, and they were wildly popular. **Ticket sales actually broke our website!** These events focus on the bioluminescent creatures of Grandfather Mountain. Our park educators provided programming before dark, and then guests were guided up to the viewing area to observe the fireflies and glowworms after dark." Taylor said.

The limited events also offer guests a unique experience making them feel special. "Guests are generally thrilled over our after-hours events. Our park closes to guests before dark, so these after-hours events allow guests the rare opportunity to see the mountain in the evening," Taylor said.



# FINAL MESSAGE

**PGAVOV**  
VOICE OF THE VISITOR



## INNOVATION

From unique food offerings to special events to new experiences that immerse guests in a fascinating world, attractions innovate ways to entice guests and streamline operations.

## CONNECTION

Attractions allow our guests to connect with each other and the world.

## OPPORTUNITY

Opportunity surrounds us and we excel at creatively inviting new guests while welcoming loyal visitors.

## CELEBRATION

Prepare for more celebrations as the industry continues to not only recover but excel.





**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 eighth 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 2023 Study* was conducted among U.S. leisure attraction visitors who have either visited an attraction in 2022 or are planning to do so in 2023. 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, large-format screen theater, 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  $\pm 2.5\%$  at a 95% confidence interval. This in line with the sample collected in each of the previous seven years.







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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.

PGAV Destinations is recognized around the world as the leading master planner and designer of theme parks, zoos, museums, aquariums, heritage sites, destination retail, and brand-based celebrations. Our passionate staff includes more than 140 full-time dreamers, thinkers, and makers including planners, architects, brand specialists, earned revenue specialists, interior designers,

graphic designers, landscape architects, artists, and interpretive designers—all thrill seekers at the drawing board. No other firm in the industry offers such an integrated approach to destination design and strategy.

We take a holistic approach in creating experiences that exemplify your mission, brand, and heritage, leveraging leading consumer insights and research that is often highlighted in [\*Destinology\*](#), our on-line publication. With a passion for place-making, we design incredible destinations that enrich the lives of your visitors through engaging, immersive, memory-making moments.



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Your customers are talking. Instead of just sharing their experience with friends over coffee, H2R brings their voice to your conference table. When you're asking, "Where should we expand? Did our ad generate more revenue than it cost? Why are customers choosing our competitor?" H2R reveals the answers.

Our clients make decisions based on insight from rigorous research and the expertise other market research firms envy. And that helps shareholders, owners, and employees all breathe a sigh of relief. We've partnered with some amazing companies. Some large, some small. Some local, some national, and some international. So whether your company fits into a category or not, you'll fit with us.





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