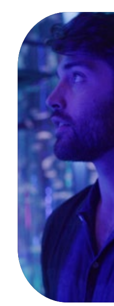
2025

PCA VOV

VOICE OF THE VISITOR



CONTENTS

PGAV'S VOICE OF THE VISITOR 2025 marks a significant milestone—its 10th edition! Over the past decade, the travel and attractions industry has experienced remarkable shifts.

Trends have ebbed and flowed: Facebook giving way to Instagram and TikTok, the rise of digital technology, updated safety and cleanliness protocols, but the fundamental motivations behind travel have remained steady.

People still want to explore, connect with loved ones, and make memories.

CORE DESIRE TO TRAVEL

The human urge to explore, connect, and experience remains unchanged.Attractions still thrive on their ability to create memorable moments and provide an escape from daily routines.

IMPORTANCE OF CUSTOMER SERVICE

Personalized, high-quality service continues to be a key differentiator in attracting and retaining guests.

INDUSTRY SHIFTS

While many things remain steady, the industry is witnessing shifts:

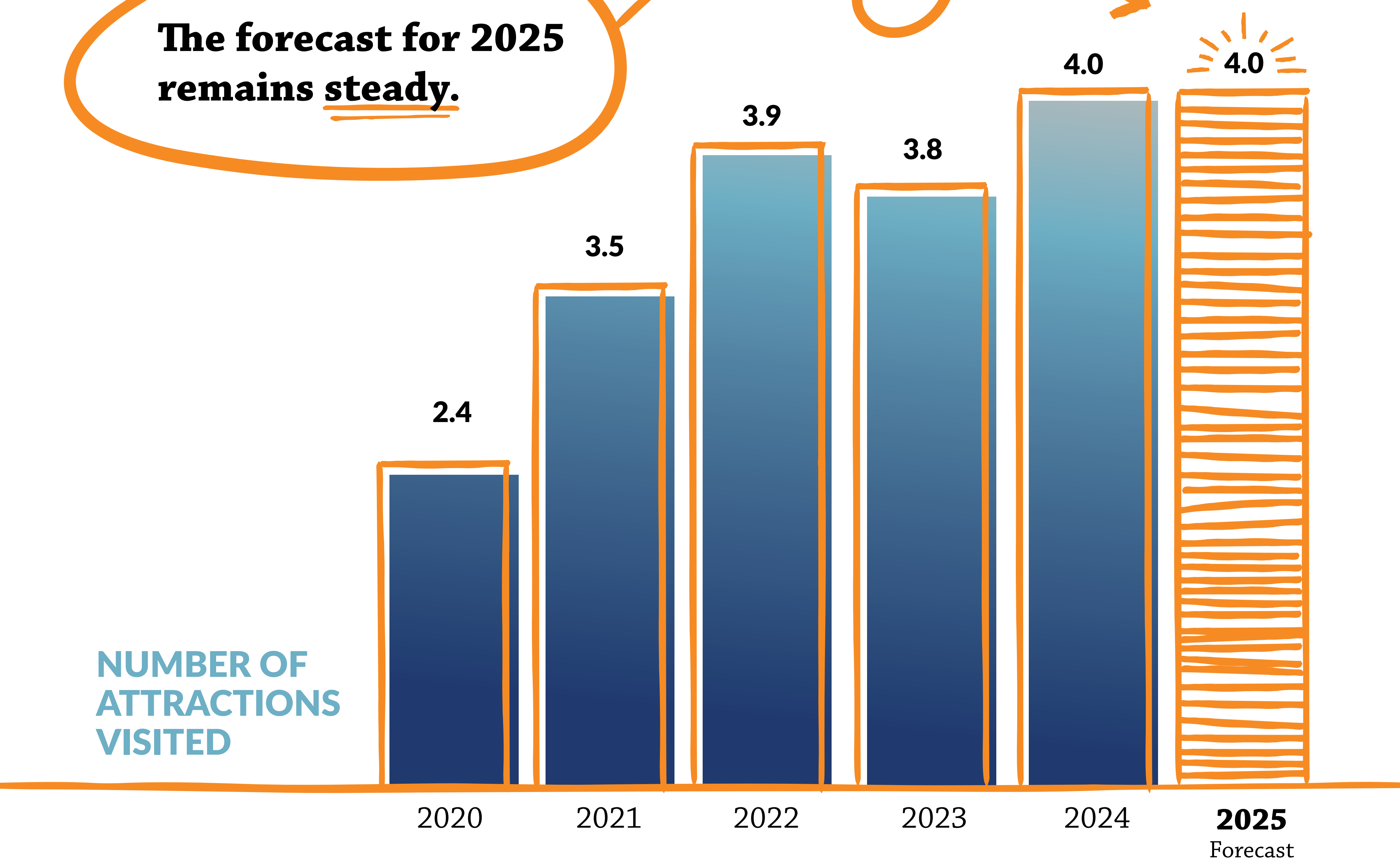
- **The Rise of Experience-Seekers:** Visitors are increasingly drawn to new experiences, prioritizing exploration and discovery over revisiting familiar destinations.
- **Next-Gen Navigators:** Decision-making power is shifting toward younger travelers, who often drive group choices focusing on diversity of activities and inclusivity.
- **Multigenerational Travel Dynamics:** Family travel is evolving, with a growing emphasis on accommodating multiple generations.

“By prioritizing guests’ basic needs—like clear wayfinding, intuitive visual cues, and thoughtful points of interaction—we set the foundation for a great guest journey. When guests feel confident navigating a space, they can fully engage with the story. Every design choice is made so the guests ultimately reach the pinnacle of the experience: a transformational, memorable moment that stays with them long after they leave.”

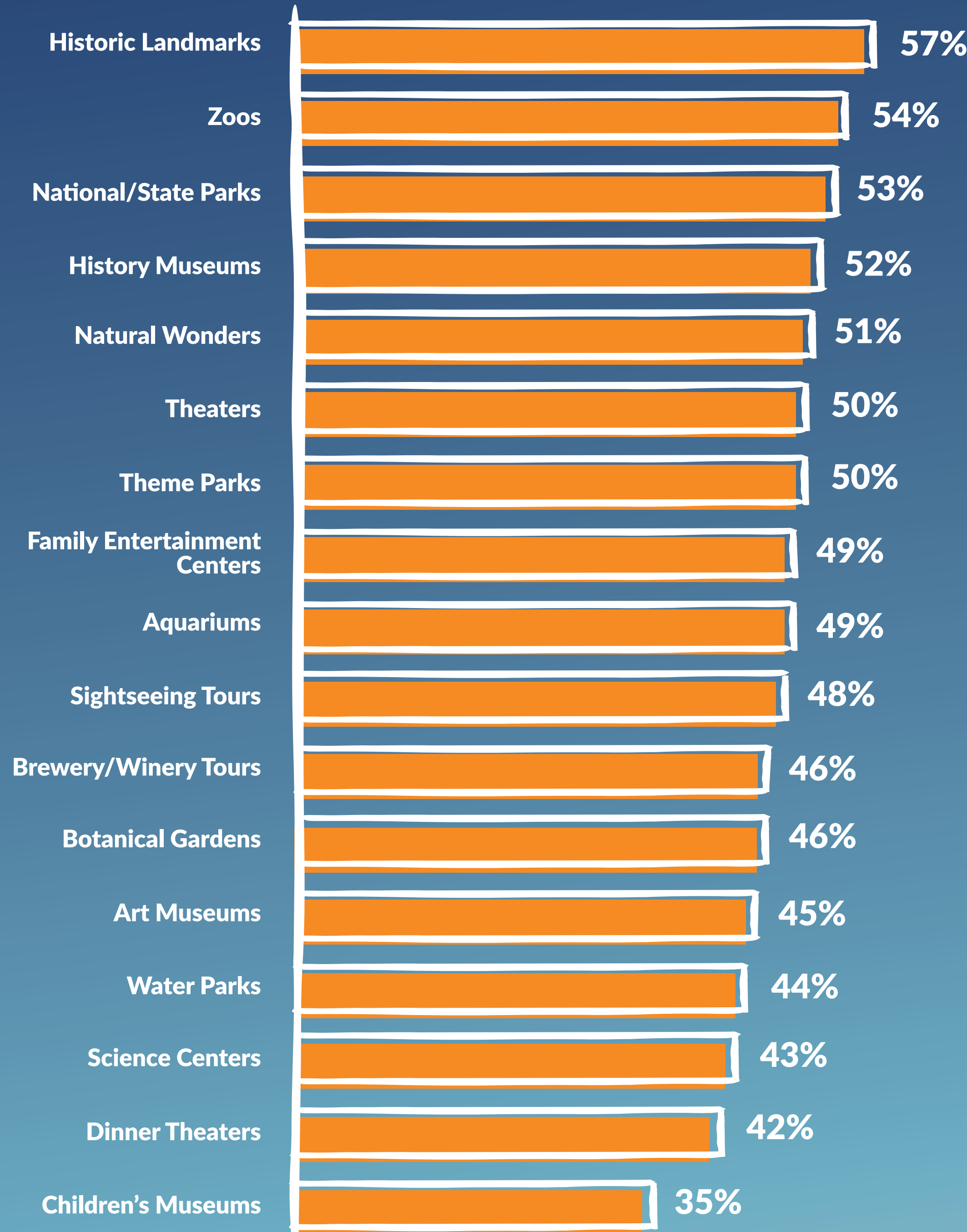
DIANE LOCHNER
PGAV Prinicpal

STATE OF THE INDUSTRY

The forecast for 2025 remains steady.



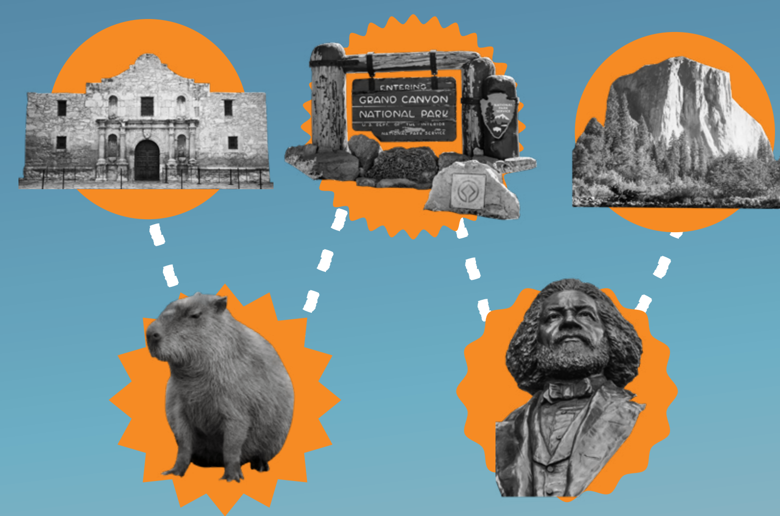
INTENT TO VISIT ATTRACTIONS 2025



The overall intent to visit attractions in 2025 has increased slightly, rising from 47% to 48%.

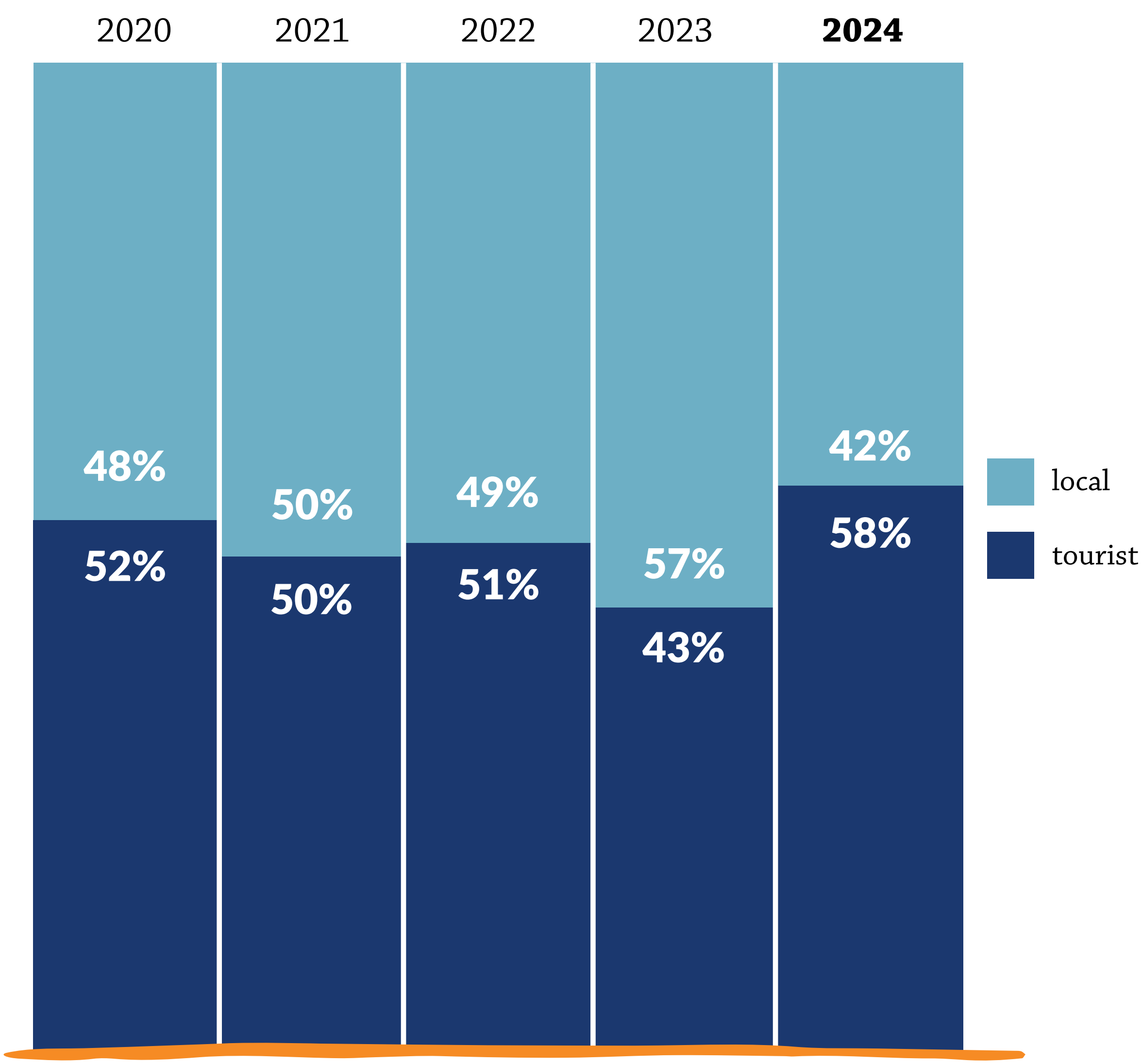
The attraction sectors showing the highest intent to visit include historic landmarks, zoos and animal attractions, national and state parks, history museums, and natural wonders.

Note: A smaller target audience can make intent-to-visit numbers look lower than broader attractions. For example, children's museums cater to a more specific audience.



Other notable bits of information...

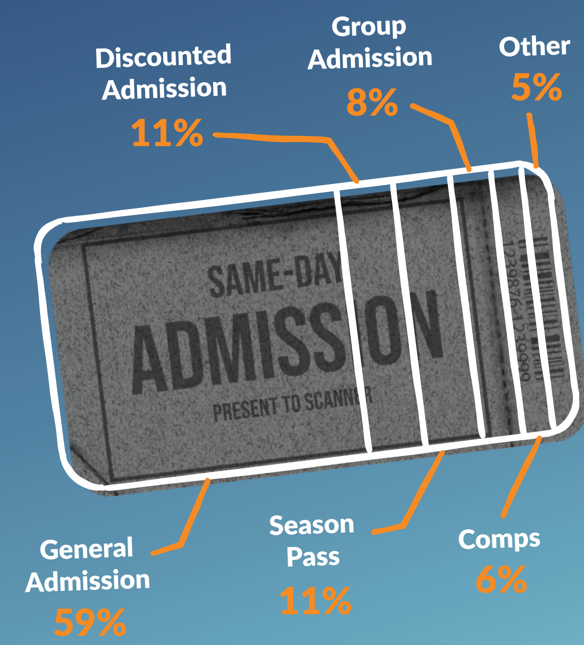
LOCAL VS TOURIST



Local attraction defined as within 50 miles of home.

TICKET TYPE

The ticket type remains similar to last year, including season passes, which accounted for 11%.



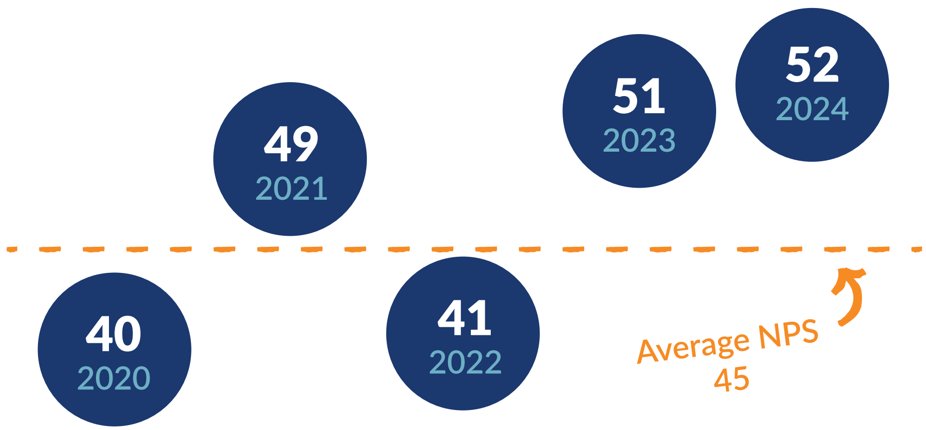
AVERAGE HOUSEHOLD INCOME

$89,000

At 52, the Net Promoter Score is up from last year's 51 and the norm of 45.

Net promoter scores were highest for national/state parks, botanical gardens, and theme parks.

NET PROMOTER SCORES OVER TIME



HOW IT'S CALCULATED

"On a scale of 0 to 10, how likely are you to recommend this attraction to a friend or family member?"

0-6=Detractors

7-8= Passive

9-10=Promoters

% Promoters
− % Detractors
= NPS

2024 NET PROMOTER SCORES BY ATTRACTION TYPE

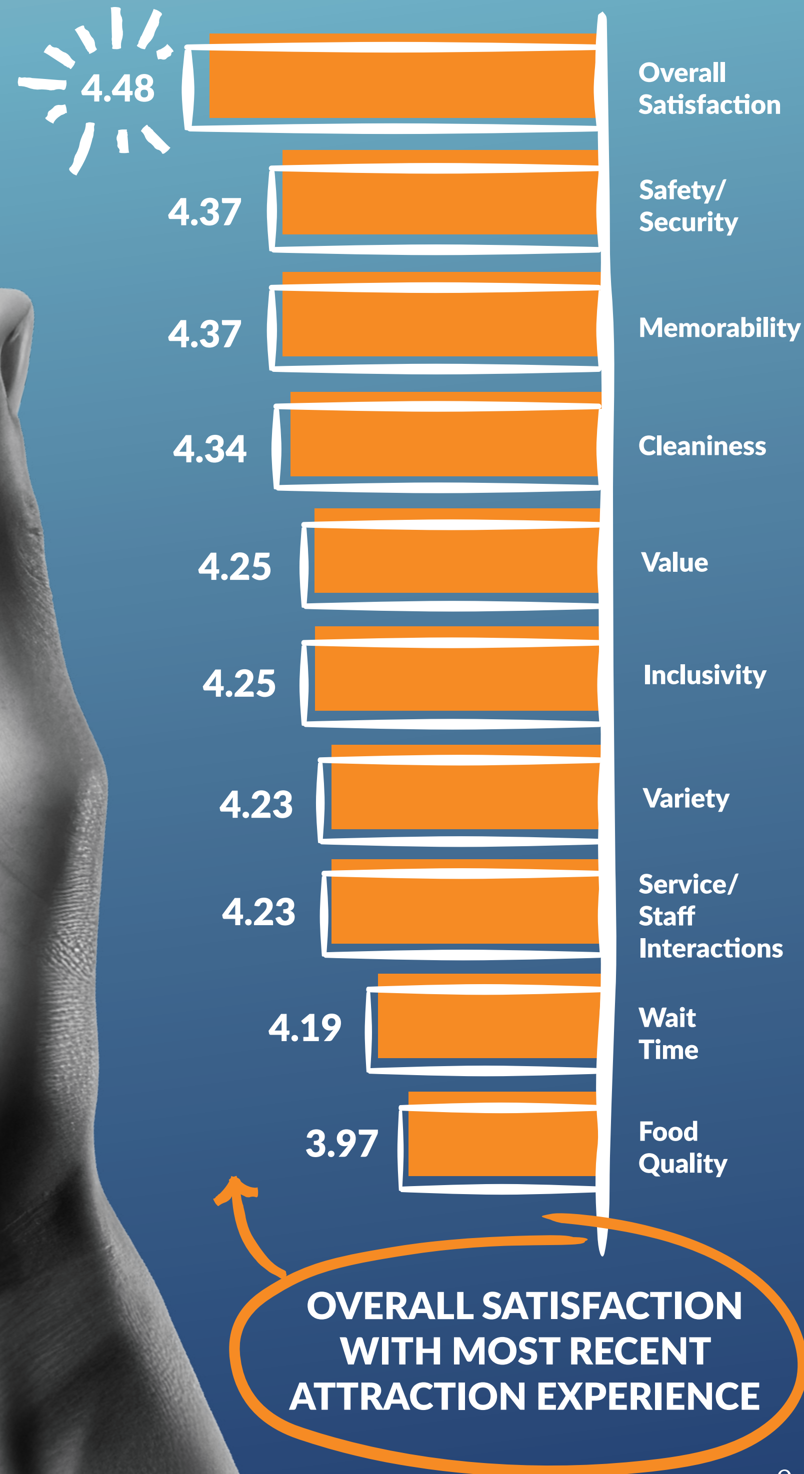
National/State Parks	**67**
Botanical Gardens	**63**
Theme Parks	**62**
Natural Wonders	**58**
Zoo/Animal Attractions	**56**
Aquariums	**52**
Live Theatrical Performances	**50**
Dinner Theaters	**49**
Sightseeing Tours	**47**
Brewery/Winery Tours	**44**
Water Parks	**43**
Museums	**43**
Historic Sites	**43**
Art Musems	**41**
Family Entertainment Centers	**35**
Science Centers	**38**

VOV 2025 reveals the second-highest overall satisfaction rating in the past decade.

Guests expressed the greatest satisfaction with the experience's memorability, as well as with safety and cleanliness. Most categories performed within typical ranges, showing relatively consistent results.

OVERALL SATISFACTION RATING

2025:	**4.48**
2024:	**4.39**
2023:	**4.19**
2022:	**4.33**
2021:	**4.25**
2020:	**4.27**
2019:	**4.40**
2018:	**4.35**
2017:	**4.28**
2016:	**4.52**



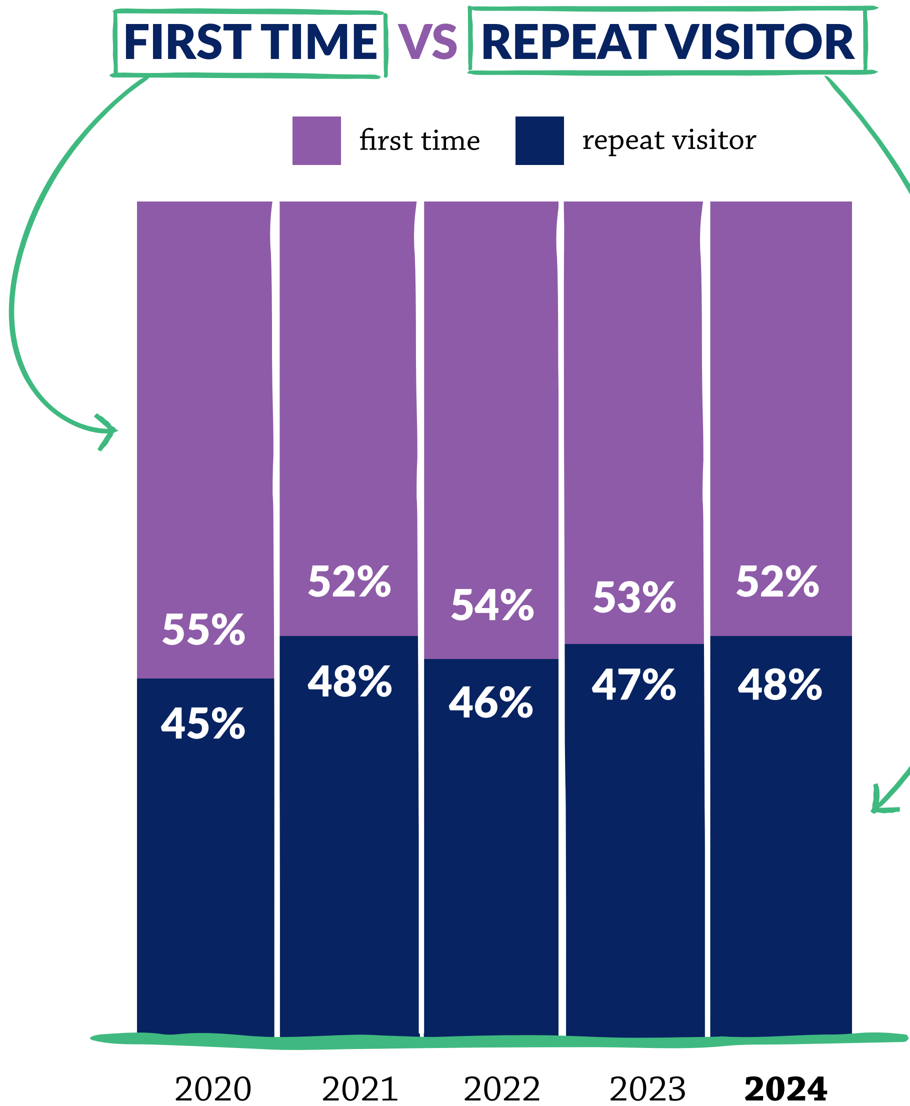
DRIVEN BY DISCOVERY

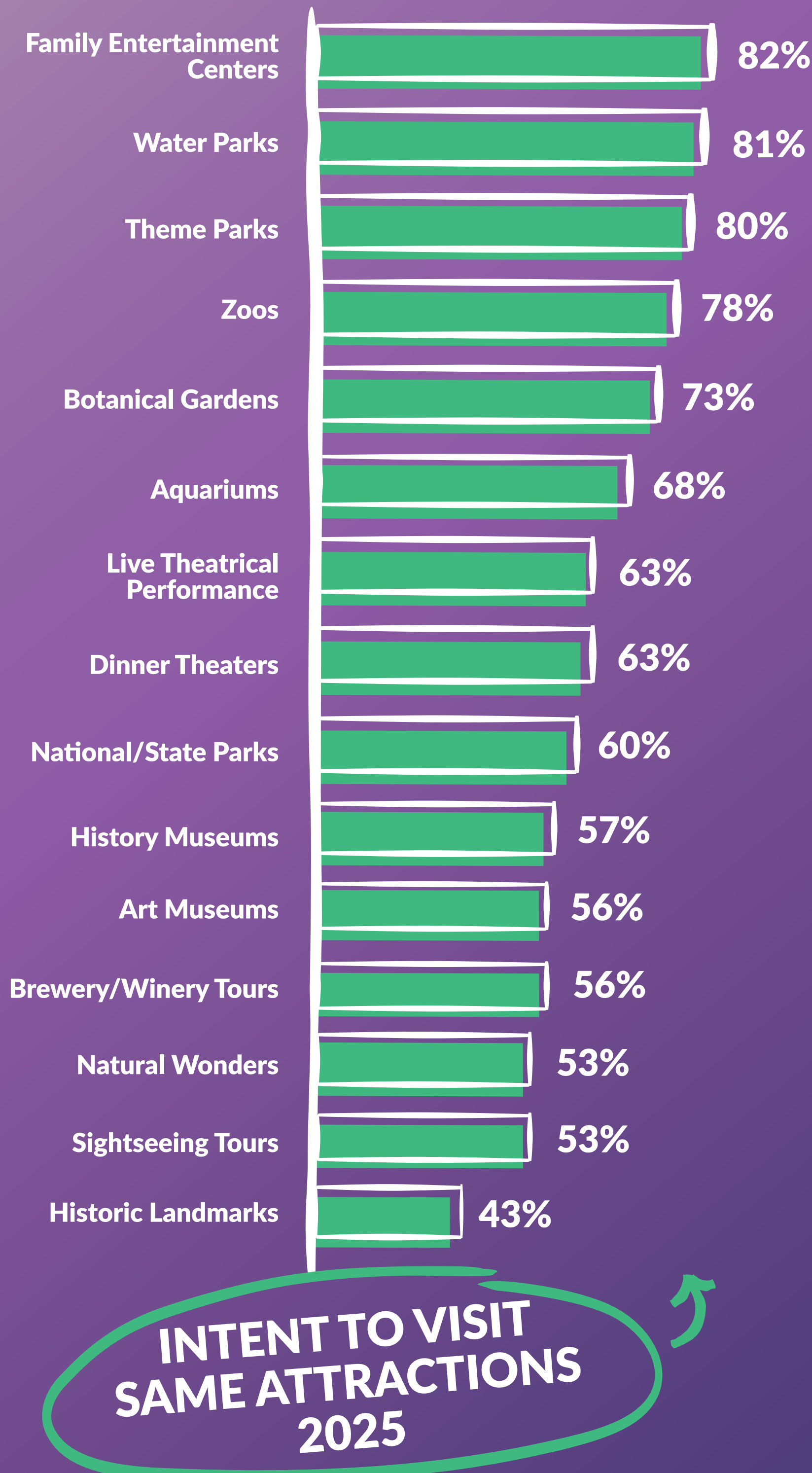
First-time visitation remains elevated.

Think of attractions like a favorite book—some readers love to revisit familiar pages, while others want a brand-new story. There's a rising trend of visitors looking for a new book and opting for fresh destinations instead of returning to the same ones.

VOV 2025 respondents reported that first-time visitation remained elevated at 48%, four percentage points higher than the average. Attractions visitors in *VOV 2025* are also less likely to return to the last attraction they visited than a decade ago (67% intend to visit the same attraction versus 72% in *VOV 2015*).

These visitors are motivated by the excitement of trying something new and the value they place on unique and fresh experiences. A report from Skift highlights that 73% of millennials and Gen Z travelers prioritize discovering something new over revisiting familiar destinations.





Low visitation to destinations perceived as "been there, done that" shows a growing aversion to repetition.

Modern visitors often seek experiences that feel exclusive or tailored to them rather than revisiting familiar spots that might lack the excitement of discovery.

Some sectors, like family entertainment centers and water parks, have high repeat visitation. They cater to a wide range of age groups, have varied offerings to ensure there's something for everyone, and may be more affordable and conveniently located.

Additional trends, such as the influence of social media, where sharing novel experiences and uncovering hidden gems are highly valued, also play a role.

“I think the customization of experiences will continue to be a priority for visitors in the next 5-10 years. When looking for exclusive experiences, the ability to customize that experience based on specific interests, hobbies, knowledge, or niche fandom will be a driver for guests looking for unique getaways and truly immersive experiences.”

DAVE COOPERSTEIN
PGAV Senior Creative Director

Food and beverage continues to be a focus for visitors, influencing guest satisfaction and intent to return.

According to Pinterest Predicts, pickles are taking the culinary spotlight, making it the perfect time to embrace the trend. The possibilities are endless, from pickle cake and pickle fries to pickle margaritas.

Not ready for the pickle milkshake? The Food Network predicts more interest in freeze-dried foods, including gummy bears and cheesecake.

Beyond food and beverage, variety in activities and a commitment to accessibility and inclusivity are also critical drivers of visitor loyalty. By offering engaging, inclusive experiences and diverse, high-quality culinary options, attractions can ensure guests leave satisfied—and eager to return.

- **28%** Food Quality
- **21%** Variety of Things to Do
- **19%** Accessibility/ Inclusivity
- **18%** Memorability
- **18%** Value
- **17%** Overall Satisfaction
- **16%** Service/Staff Interaction
- **15%** Cleanliness
- **13%** Safety/ Security
- **12%** Wait Time

CHOICE DRIVERS

Satisfaction rating correlated with intent to return.

“Guests, no matter their age, want to experience something truly authentic—and they want to experience it together in a seamless way. The more we remove barriers and create opportunities for people to share those moments, the greater their satisfaction and desire to return.”

EMILY HOWARD
PGAV Prinicpal

VISITOR PROFILE

As Baby Boomers reduce leisure travel with age, millennials and Gen Z are expected to dominate the travel market.

Generationally speaking, boomers remain a significant economic force, particularly in travel. Boomers typically have more disposable income and wealth than younger generations, thanks to decades of savings, investments, and homeownership. They frequently travel for leisure, cultural experiences, and family visits. They tend to prefer comfort and quality over budget travel, boosting sectors like cruises, guided tours, and luxury accommodations. Longer lifespans and better health in later years mean boomers travel more and stay active longer than previous generations of retirees.

However, the tide may be shifting. As Baby Boomers reduce leisure travel with age, millennials and Gen Z are expected to dominate the travel market. Projections suggest that by 2030, these younger generations will account for over half of U.S. leisure trips, up from a third in 2023. These groups prioritize unique, adventurous, and eco-conscious travel experiences.

GENERATIONAL TIMELINE

GREATEST GENERATION: 1901-1927
Many are centenarians in the late stages of life.

SILENT GENERATION: 1928-1945
Enjoying retirement.

BABY BOOMERS: 1946-1964
Entering or already in retirement.

GEN X: 1965-1980
Mid-career, balancing work and life.

MILLENNIALS: 1981-1996
Entered the workforce, starting families.

GEN Z: 1996-2012
The oldest of the generation are early in their careers. Some are still in high school/college.

GEN ALPHA: 2013-2024
Small children to approaching teen years.

GEN BETA: 2025-
Wait, what?!

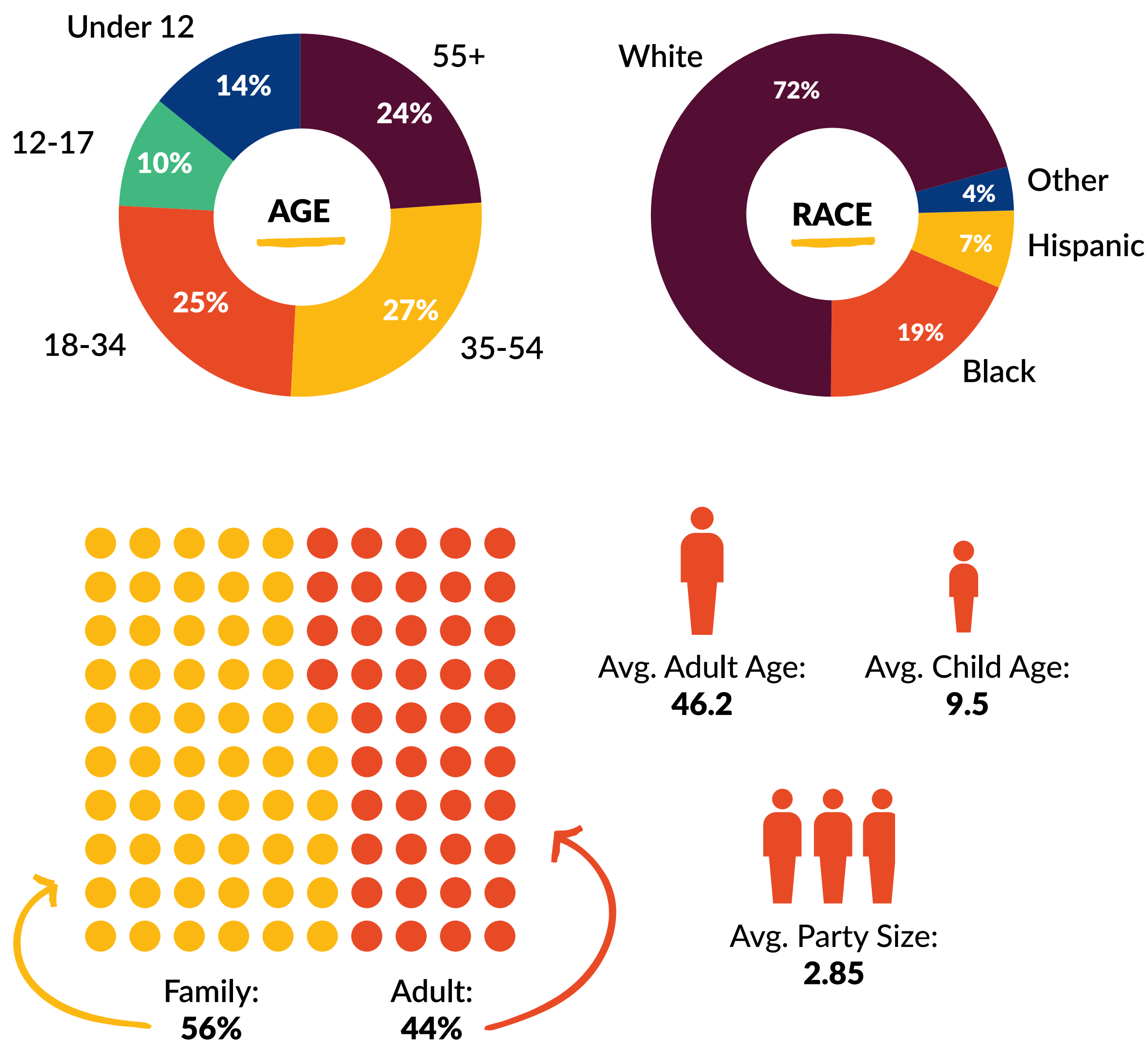
Other notable bits of information…

For the first time, **the 18-34 age group (25%) surpassed the 55+ age group.** The 35-54 age group also increased, rising to 27%. This year also saw the largest ratio of 12-17 year-olds (10%).

Family visitors rose to the highest percentage, **56%.**

28% of visits were from people of color. While this is slightly up from the past few years, people of color remain underrepresented at attractions.

VISITOR DEMOGRAPHICS



“We, as visitors, travel and explore destinations to fulfill an unconscious emotional need. Whether that need is to escape our everyday, spend time with family and friends, or explore new worlds, we lead with our hearts. Understanding visitors’ needs and motivations can help attractions provide opportunities for these needs to be met and exceeded with things like great customer service and stress-free amenities. The more barriers you remove for visitors to achieve their needs, the more successful and memorable you will be.”

MELISSA SIMMONS
PGAV Exhibit Designer

Younger generations are more likely to prioritize experiences over material possessions. They often seek to build a diverse portfolio of unique experiences, aligning with exploring new places over revisiting old ones.

Young adults (18-34) are primarily drawn to thrills, tech-based experiences, and immersive attractions. Adults aged 35-54 prioritize fresh, new experiences and technology that enhance or bring attractions to life. This helps motivate their visits to theme parks and water parks that encourage repeat visits through immersive, multi-sensory attractions, family-friendly activities for all ages, loyalty programs, and frequent updates like seasonal events and new features that keep the experience fresh and engaging.

Visitors aged 55 and older often seek destinations that offer educational value and a connection to nature—experiences that tend to be more static and enduring. While these qualities may attract initial visits, they don't always encourage frequent returns unless the site introduces fresh programming or unique events. Similarly, while historic sites and natural wonders cater to families with activities, they may lack the dynamic, high-energy attractions found in theme or water parks.

At the same time, visitors of all ages often desire to step away from the hustle of daily life and reconnect with nature.

Emily Howard, PGAV Principal, says, “Zoos, aquariums, and similar attractions are well-positioned to meet the needs of people who are looking to disconnect, offering opportunities to pause and observe the sights and smells all around. This aligns with broader movements encouraging mindfulness and sensory experiences, including trends I’ve seen on social media, like walking barefoot through the grass. Opportunities and moments like this can be integrated into attractions reenergizing and grounding people in profound ways.”

By blending the timeless appeal of education and nature with fresh, interactive programming, destinations can cater to diverse audiences—offering meaningful connections that inspire both initial visits and lasting engagement.

VISITOR MOTIVATIONS

	Child <7	Child 8-11	Teen 12-17	Adult 18-34	Adult 35-54	Adult 55+
Educational Value	12%	13%	18%	28%	20%	**45%**
New Attraction	17%	22%	22%	25%	36%	28%
Thrills	10%	14%	24%	**48%**	**37%**	14%
Attraction for Whole Family	**39%**	**29%**	**38%**	31%	31%	16%
Tech Brings to Life	14%	18%	**36%**	38%	**46%**	13%
Being in Nature	10%	7%	8%	23%	33%	**48%**
Indoor Activities	**61%**	**34%**	23%	9%	18%	4%
Tech-based Experiences	21%	23%	**36%**	38%	32%	9%
Immersive Activities	15%	10%	20%	**49%**	34%	12%

Attraction visitors continue to prioritize food and beverage, onsite hotels, and merchandise as their top spending categories, but the most significant growth areas are personalized experiences and exclusive after-hours events.

There is also a noticeable decline in purchases like merchandise, photos, and locker rentals. These reflect a broader shift toward memory-making and unique interactions that guests value.

VARIANCE IN PRIORITIES VS. 2024

Top 3 Choices

Personalized experiences:	+3%
Exclusive after-hours events:	+2%
Express pass/Skip-the-line access:	+1%
Reserved Space:	+1%
Hotel located at the attraction:	+1%
Behind-the-scenes tour or private animal encounter:	+1%
Food and Beverage:	0%
Front-row/prority seating at a show:	0%
Preferred/close parking:	-1%
Locker rentals:	-1%
Photos/Photo passes:	-3%
Merchandise/souvenirs:	-4%

2025 SPENDING PRIORITIES

	Overall	Gen z	Millenials	X	Boomers
Food and beverage	59%	61%	53%	67%	63%
Hotel located at the attraction	32%	28%	35%	30%	32%
Merchandise/souvenirs	24%	21%	21%	27%	23%
Preferred/close parking	20%	23%	15%	18%	24%
Personalized experiences	18%	17%	23%	17%	12%
Express pass/Skip-the-line access	15%	14%	14%	16%	13%
Photos/photo passes	13%	16%	18%	13%	7%
Front-row/priority seating at a show	11%	16%	14%	9%	6%
Reserved space	10%	12%	16%	8%	4%
Behind-the-scenes tour or private animal encounter	9%	12%	13%	9%	4%
Exclusive after-hours events	9%	15%	10%	10%	3%
Locker rentals	5%	7%	6%	2%	2%

Credit: Georgia Aquarium

Justin Stichter, PGAV Vice President, says, “Guests are willing to pay for unique or exclusive offerings—those that feel special and not widely accessible—but there are limits to what most families can afford. Attractions must strike a balance. The baseline experience should remain rich, satisfying, and worthwhile for all visitors, regardless of how much extra they spend.”

While Baby Boomers continue to play a key role in the market, the preferences and spending power of younger generations are increasingly influential. To remain competitive, attractions must cater to both groups, offering high-value experiences that resonate across demographics. By doing so, they can foster loyalty, encourage return visits, and ensure long-term relevance in a changing economic landscape.

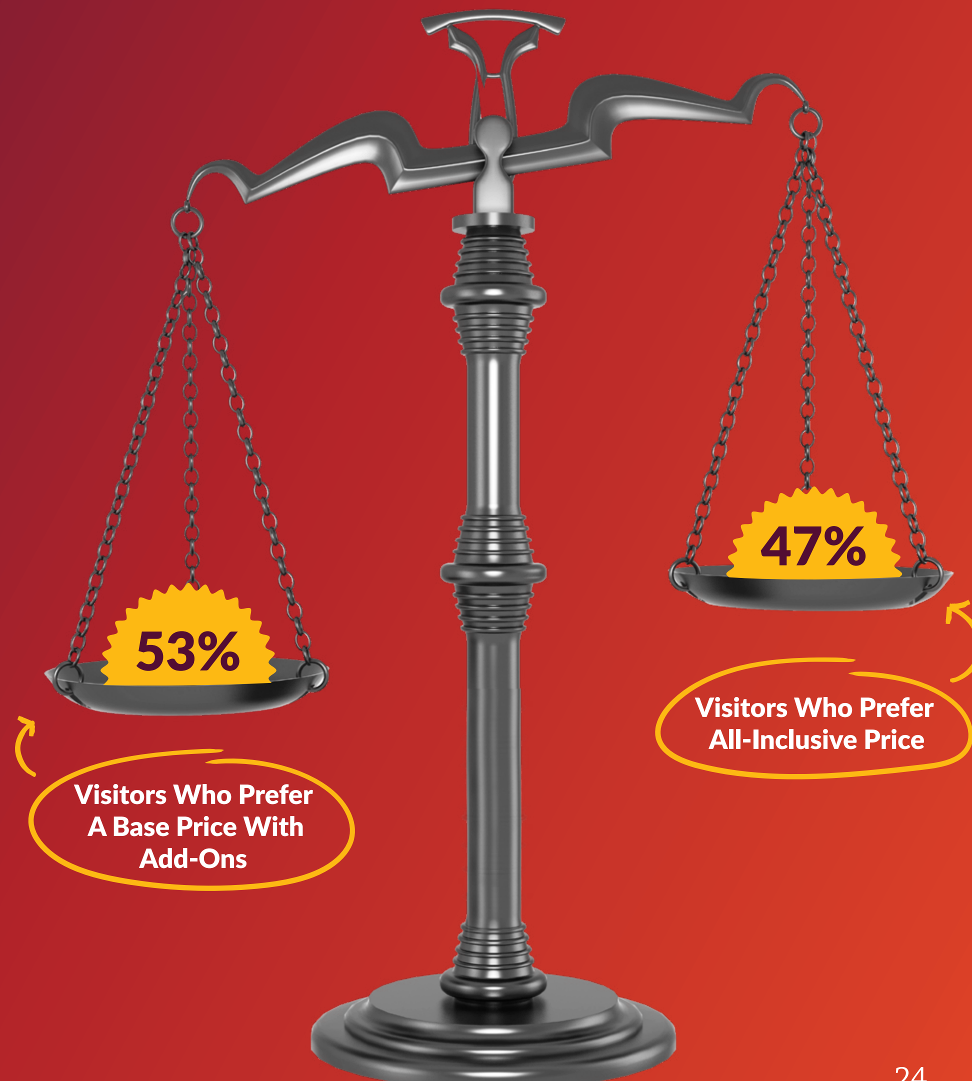
The fairly even split between visitors who prefer a base price with add-ons (53%) and those who favor an all-inclusive price (47%) highlights the diversity of preferences across demographics.

Baby Boomers show a slight preference for the base price model (58%), which may reflect their desire for flexibility in spending. This generation often values the ability to control costs by choosing only the extras that matter most to them.

On the other hand, a bundled package can reduce decision fatigue and create a sense of ease, making the overall experience more seamless for some visitors.

To cater to both, attractions could consider offering hybrid pricing structures that provide the best of both worlds. For instance, guests could select a base admission and add `a la carte items or choose from tiered packages that include various levels of amenities.

This strategy ensures that all visitors—regardless of demographic—feel they are getting value for their investment.



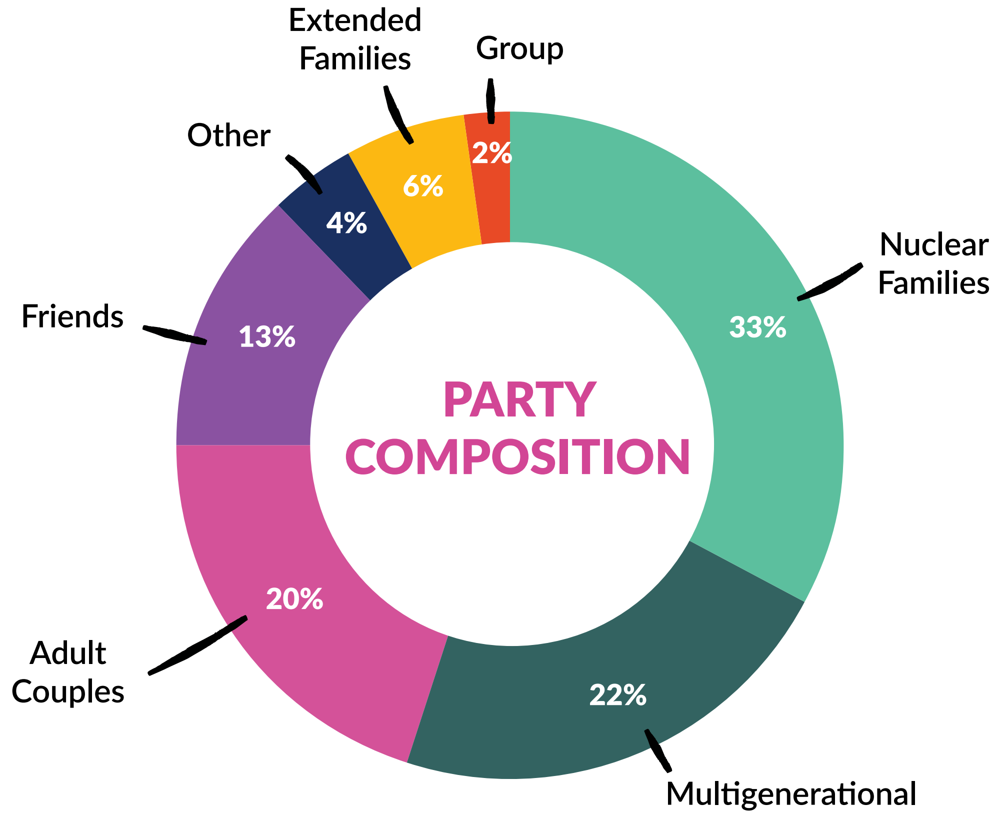
MULTI GENERATIONAL NEEDS

There has been a notable increase in family groups at attractions, particularly multigenerational families traveling together.

According to *VOV 2025* respondents, families with children under 18 accounted for 56% of all visits—a record for the largest ratio. Nuclear families accounted for 33% of attendees, followed closely by multigenerational parties at 22%.

The 2023 Family Travel Association Annual Family Travel Survey indicates that over 50% of parents plan to travel with both grandparents and children, contributing significantly to the growth of the family travel market.

Unsurprisingly, families tend to visit family entertainment centers, water parks, zoos and animal attractions, and theme parks.



These larger family groups have specific needs that influence their choice of attractions:

- **Accommodation Requirements:**
  They often seek lodging that can comfortably accommodate multiple generations, such as family suites, adjoining rooms, or vacation rentals with communal spaces.

- **Diverse Activity Options:**
  Attractions offering a variety of activities suitable for different age groups are preferred.

- **Accessibility and Convenience:**
  Destinations that are easily accessible and provide amenities catering to both young children and older adults are highly favored. This includes considerations like mobility access, availability of rest areas, and family-friendly services.

- **Cultural and Educational Experiences:**
  According to the 2023 Family Travel Association Annual Family Travel Survey, museums and cultural attractions are particularly appealing for “skip-generational” travel, where grandparents travel with grandchildren without the parents.

Credit: Smithsonian National Air & Space Museum

"Attractions that appeal to multigenerational groups offer a variety of activities and experiences that cater to different age groups and are intentional about the proximity of those various activities throughout the park. Imagine an area where roller coasters are the focus: Where do non-riders wait? What do they do while they're waiting? Is there a nearby café, a nice view, and a small playground? Considering these situations and providing convenient and enjoyable experiences are key to the success of a multigenerational attraction. And this should go without saying, but accessibility and inclusion are also vital!"

AMY STUBENFOLL
PGAV Project Designer

PGAV's Voice of the Visitor 2025 **celebrates a decade of insights into the attractions industry, highlighting enduring motivations alongside evolving trends.**

While the core desire to explore, connect, and make memories remains unchanged, shifting dynamics like the rise of experience-seekers, multigenerational travel, and the growing influence of millennials and Gen Z shape the industry's future.

Key findings reveal steady attraction visitation intent. Satisfaction metrics, bolstered by high Net Promoter Scores, underscore the importance of creating lasting impressions.

Visitors increasingly prioritize unique, first-time experiences, driven by social media's emphasis on novelty and exclusivity. Family travel, particularly multigenerational groups, continues to grow, with destinations adapting to diverse needs like accessibility and family-friendly services.

Generational shifts also redefine visitor motivations and spending priorities. Younger audiences value thrills, immersive technology, and fresh attractions, while older generations lean toward educational and nature-based experiences.

To remain competitive, the industry must balance the preferences of Baby Boomers with the adventurous, eco-conscious, and technology-driven desires of younger travelers. By embracing innovation while delivering high-quality service, attractions can continue creating unforgettable experiences for all.

At PGAV, we believe that understanding guests is essential to creating exceptional destinations.

By valuing research and insights, we help our clients stay ahead of evolving trends and changing guest expectations. Through tools like Voice of the Visitor, we analyze industry shifts and uncover emerging behaviors, enabling our partners to adapt strategies and craft experiences that resonate with their audiences. This commitment to data-driven innovation ensures our clients remain competitive while delivering unforgettable guest journeys.

2025 PGAVOV

VOICE OF THE VISITOR

Purpose: The purpose of *PGAV's Voice of the Visitor* research is to provide industry leaders with a comprehensive assessment of attractions' customer behavior and offer insight into visitors' outlook for the coming year. Now in its tenth year, this study compares many previously measured consumer behavioral metrics and examines new insights and behaviors.

Target Audience: *PGAV's Voice of the Visitor 2025* study was conducted among U.S. leisure attraction visitors who have either visited an attraction in 2024 or are planning to do so in 2025. In this study, "attractions" include aquariums, zoo/animal attractions, theme parks/amusement parks, water parks, museums of any kind, science centers/science attractions, family entertainment centers, historical landmarks, theaters/dinner theaters, botanical gardens, brewery/winery tours, national/state parks, or natural wonders.

Sample: 1,500 respondents were interviewed for this study, providing a maximum margin of error of +/-2.5% at a 95% confidence interval.

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.

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 170 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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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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