PGAV DESTINATIONS

2021
VOICE OF THE VISITOR

Annual Outlook on the Attractions Industry

READY, WILLING, & ABLE

a letter from Mike Konzen, Chairman

We are pleased to present our sixth edition of *Voice of the Visitor*, PGAV Destinations' annual study of the attractions industry based on consumer input. Produced in partnership with H2R Market Research, this 2021 outlook covers twenty different attraction types. This year we transitioned to a flexible digital format to allow the direct sharing of links. But if you are a data-diver and would like even more *Voice of the Visitor* consumer survey results emailed straight to you, please let us know!

2021 will certainly tell the story of COVID-19 recovery. We started this year much as we ended the last, with cases trending high. As we saw throughout last year, an increase in COVID-19 cases directly correlates to decreased travel intent. Yet looking into the coming months, we see cause for optimism, especially related to recovery.

How much recovery will occur in 2021? When will recovery begin for different types of attractions? We see this as primarily driven by three key factors: **Ready, Willing, and Able.**

READY

Readiness to travel will ultimately play out as a function of two factors: vaccine deployment and risk tolerance.

Vaccine distribution has begun and will accelerate throughout 2021. It is anticipated that a substantial amount of eligible Americans will be vaccinated by the summer season. According to Adam Sacks of Tourism Economics, **vaccines will start to positively affect travel volume by the 2nd Quarter.**

Readiness also relates to risk tolerance, based on each individual's willingness to venture out, attend attractions, and generally return to pre-pandemic travel behaviors. Our research identified five psychographic segments based on risk tolerance that we will examine.

WILLING

Willingness is an expression of one of the most powerful aspects of recovery for the travel industry: pent-up demand.

If you are like us, you've been fantasizing about traveling to your favorite places for the past several months. As we have seen with past economic downturns such as the Great Recession, **pent-up demand will fuel this recovery in a way that may surprise us.** We will discuss how attractions can best tap into this powerful desire.

ABLE

Our ability to travel is likely to be fueled at least in part by a stunning increase in personal savings.

According to the Bureau of Economic Analysis (and reported by the *New York Times*), between March and November 2020, **Americans' personal savings grew by 173% as compared to the same months in 2019.** This savings combined with the stimulus package passed on December 21st and potential subsequent stimulus legislation are likely to provide many Americans with more than adequate resources to resume travel.

Like you, we are strongly anticipating the recovery that is likely to occur over the coming several months. But even more importantly, we are excited to see how our industry moves forward, incorporating all that we've learned during this pandemic.

Mike Konzen
Chairman

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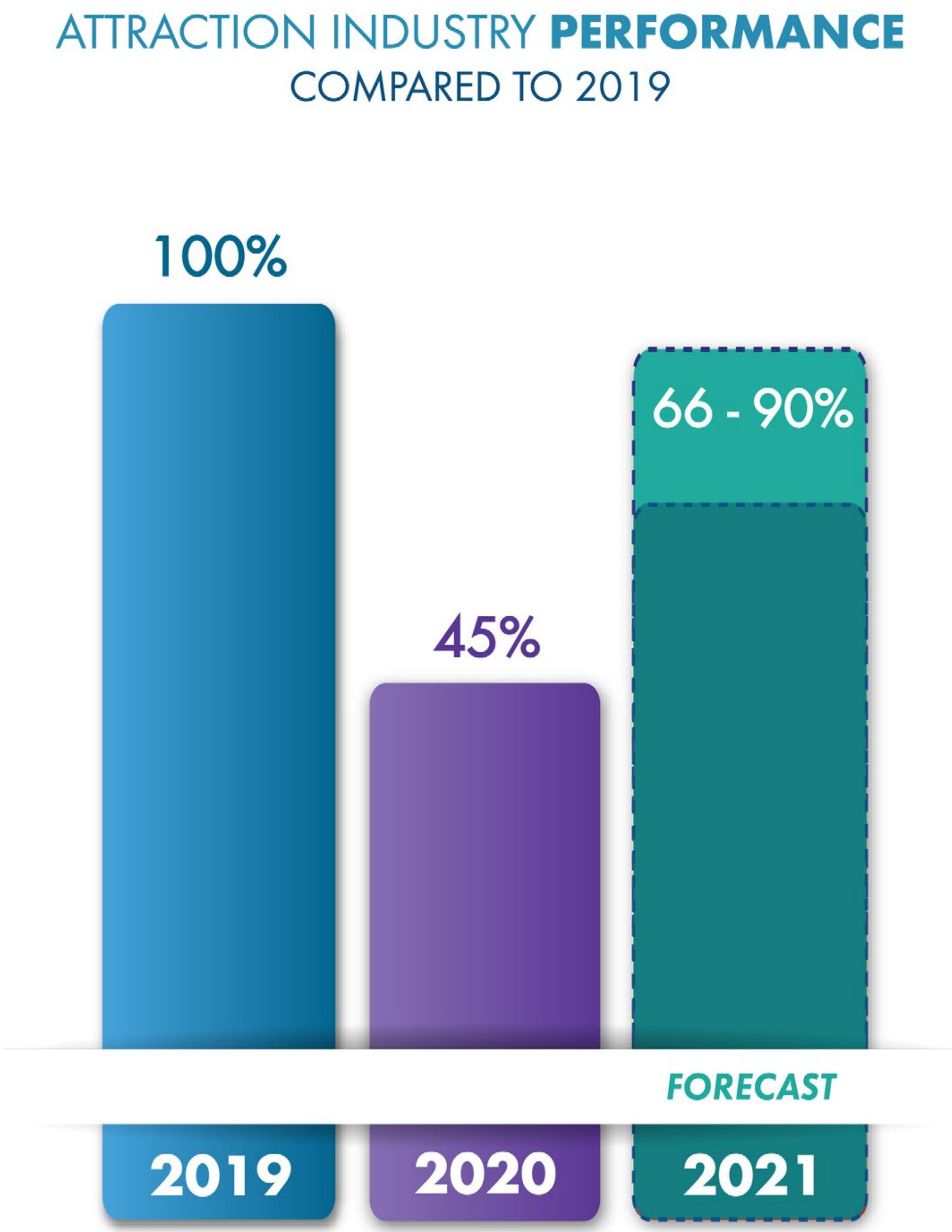
PEDAL TO THE METAL

If you've ever been in a car with an "energetic" toddler, you know the frustration and stress of throttling through speed traps on the rush to grandma's house. Your child's pent-up desires to GET OUT are seething screams of inertia, akin to the desires of destination travelers at the top of 2021.

During the 2020 COVID-19 travel bust, overall attractions attendance fell 55%. *Voice of the Visitor* reveals that as of December 2020, the industry is expected to rebound back to 66% in 2021. Adam Sacks of Tourism Economics echoes this optimism and extends the prediction of leisure travel volume to 90% by the end of 2021 and 101% by 2022. **But when does it start?**



ARE WE THERE YET?

For all travelers (whether they ventured out in 2020 or not), the average date of their next leisure trip is expected to occur around June 2021. Factors such as school/work schedules, COVID-19 testing availability, and the anticipated physical and emotional comfort of vaccines are major drivers of this future-forward date.

TRAVELERS EXPECT THEIR NEXT LEISURE TRIP TO OCCUR IN

DOMESTIC BLISS

In the USA, situations such as state-to-state travel restrictions have encouraged local travel. More people visited an attraction that was located within 50 miles of their home (+6% over 2019). Season passes and memberships increased in 2020 and were much higher than the historical average across all attraction types. Intent to return to these same attractions in 2021 also had a significant 6-point increase over 2019 levels.

With international travel under a patchwork of restrictions, many notable countries are also experiencing or expecting a surge of local momentum. The management consulting firm McKinsey & Company reports that due to confidence in health and safety measures, domestic travel in China is almost back to the level seen prior to the pandemic, and high-end domestic travel is actually ahead of it. Similarly, last summer it was "Europe for the Europeans" with 51% of respondents to a Tiquets survey of Europeans vacationing in August reporting that they would not leave Europe during their travel.

AVERAGE TIME

TO NEXT TRIP BY ATTRACTION

"I SEE IT FIRST!"

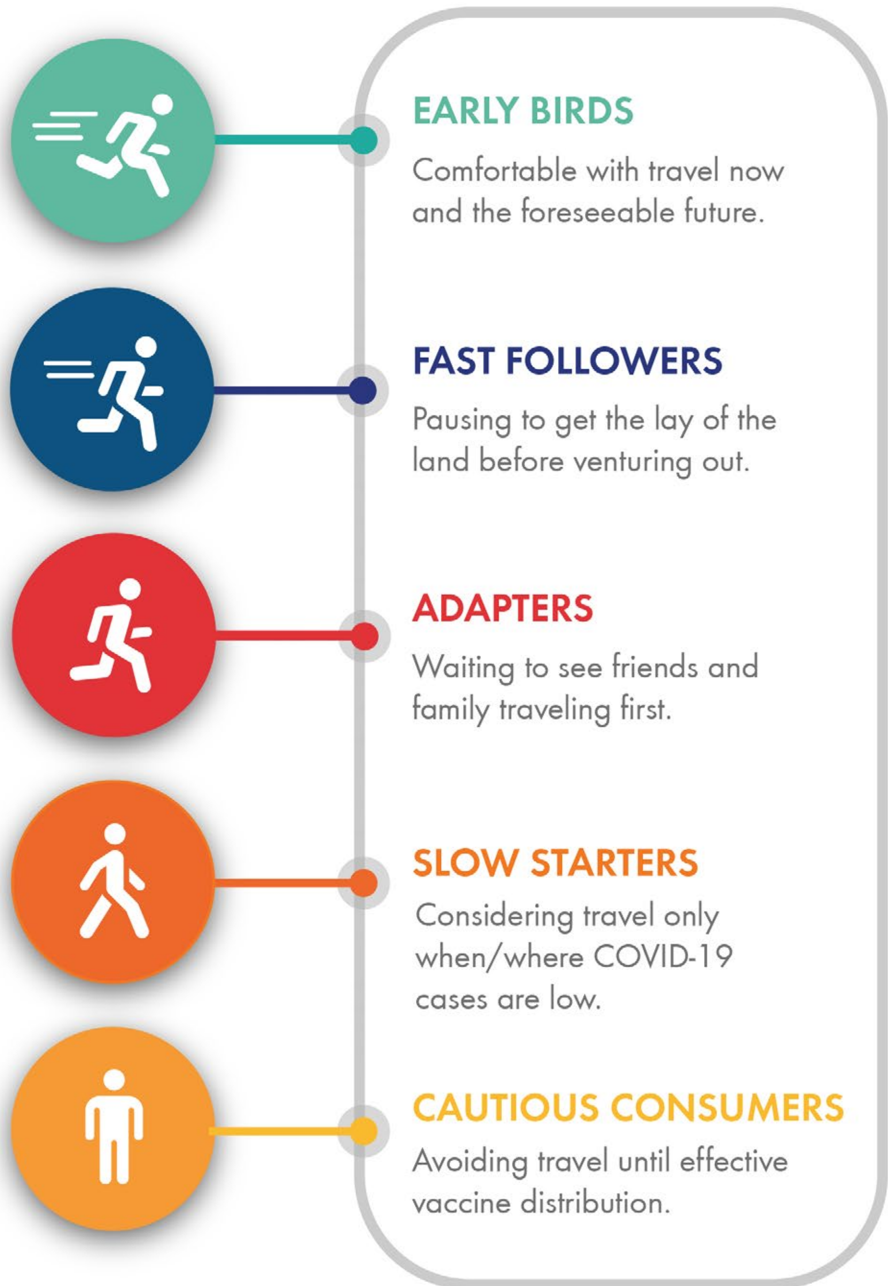
Attractions recovery will look different depending on attraction type. Families with young children will be eager for children's museums by spring break, with theme parks and science centers following quickly. Live theater trails the list, with Broadway officially shut down until at least May 2021.

3, 2, 1 GO!

As destination operators and designers, our goal has always been to entice and retain visitors by creating amazing experiences that anticipate their needs. 2020 challenged and changed our needs. Because while some toddlers are yearning to hold grandma's hand and collect sea shells, others can't wait to hold on to her waist and motorcycle up the mountain.

A RACE TO THE STARTING LINE

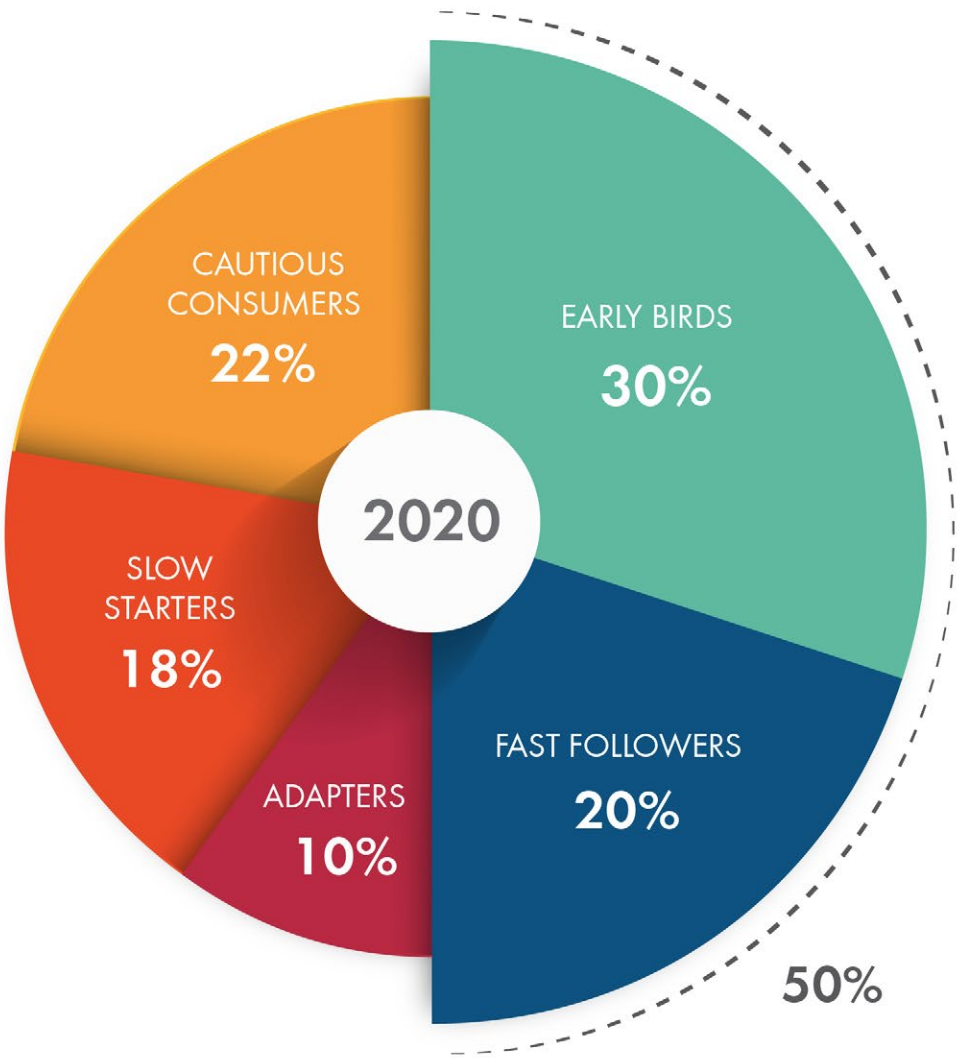
TRAVELER
RISK-TOLERANCE GROUPS



The concept of a "comfort zone" is wrapped in layers of emotion and personal history. Though there have always been segments of the population that have made vacation choices based upon their health, COVID-19 made this a reality for everyone. The diversity of responses to this new factor led to *Voice of the Visitor's* examination of personal risk tolerances. The result was the identification of **five visitor segments**, each with a distinct mindset. And just as not every Gen Xer loves street food, or every millennial 'grams' their meal, these mindsets will influence visitor behavior but not define it.

2020 VISITOR

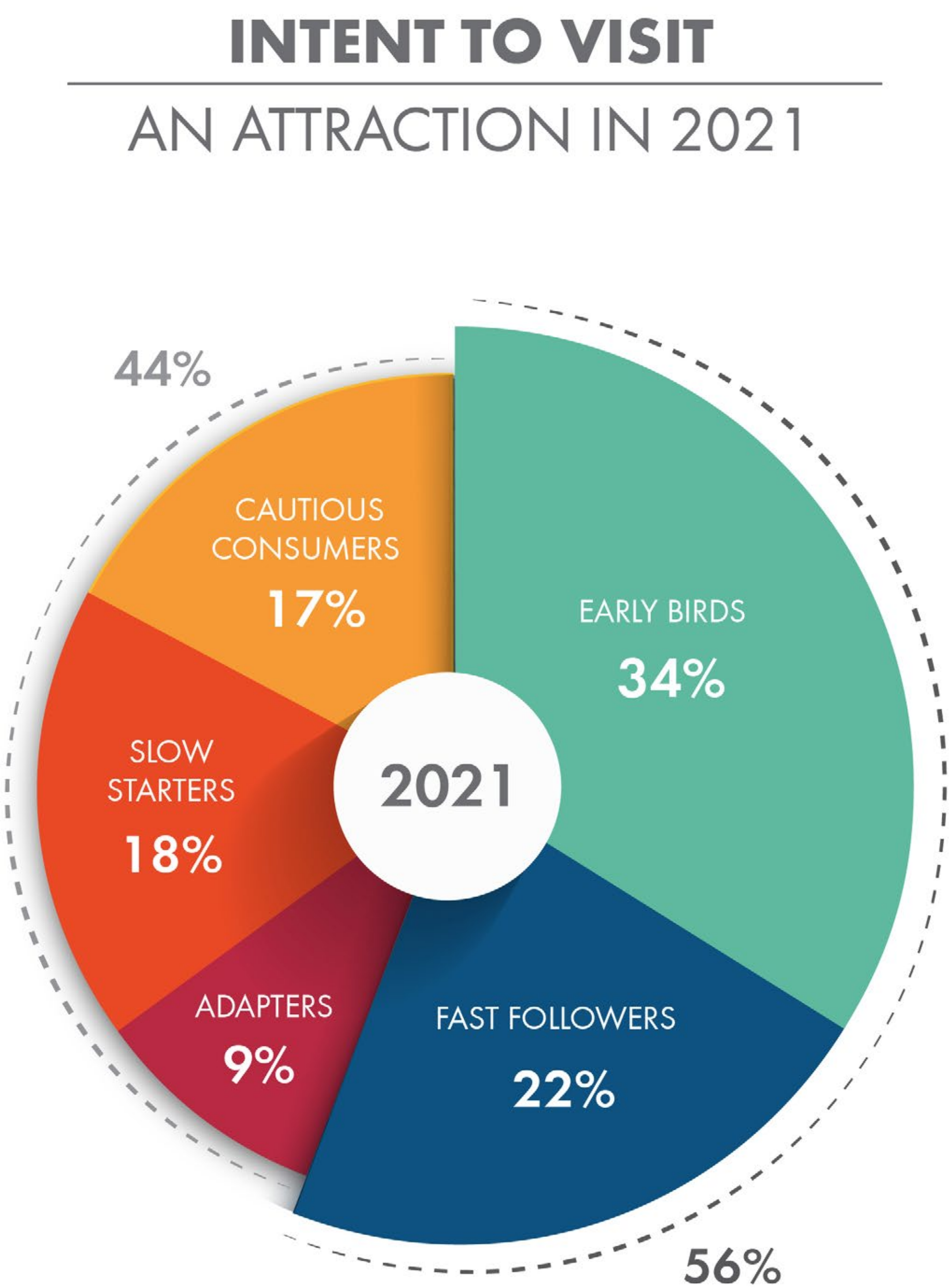
RISK TOLERANCE POPULATIONS



Early Birds and Fast Followers make up 50% of today's travelers. They tend to be millennials with families and are comfortable trying new places for the first time. On average, they visited 3-4 attractions in 2020 and intend to visit even more in 2021.

Adapters and Slow Starters are more cautious but are still willing to travel to locations they feel are safe. When they do decide to go out, they will likely stay close to home and revisit attractions they have gone to before. Safety precautions will be important to these visitors, and they may consider friends' and family's experiences when choosing a destination.

The Cautious Consumer is carefully monitoring vaccine distribution in their community and following CDC guidelines to the letter. They tend to be older and have more disposable income. They were by far the heaviest travelers in January and February of 2020, but by April, only a few ventured out. These frequent travelers are the epitome of pent-up demand!



IT'S ALL ABOUT THE...TIMING

Early Birds and Fast Followers make up 56% of travelers planning on pushing through the 2021 turnstiles. This means that almost half of 2021 travelers will come from the more risk-conscious groups. And as vaccine rollout picks up among older Americans (over 20% of the US population had received at least one dose of vaccine by mid-March), the pie keeps shifting. Reporting from the Daily Beast in February 2021 states that Spring Break may be the vacation of the Baby Boomers.

Since so much of this year's travel is conditional, timing becomes an evolving target for marketing. At the top of the year, marketing teams may find success by focusing on the first two groups. As the year progresses, destinations may want to broaden their approach to reach the last three groups. In other words, advertising buys on Instagram may benefit you **now** while Facebook and print ads may benefit **later.**

A CLEAN GETAWAY

SAFETY
IS THE #1 MOTIVATOR
FOR VISITING ATTRACTIONS

CRACKING THE SAFE(TY) CODE

Safety ranked number one with each of the five risk tolerance segments, from the Early Birds, who continued to travel during 2020, to the Cautious Consumers, who are waiting to see the effects of a proven vaccine. (See page 10 for segment descriptions.) We're predicting that health and safety will continue to affect the attractions industry for years to come, so don't put away those foamy hand sanitizers just yet!

Having highly visible precautionary measures and procedures in place lets visitors know the level of safety you require. Some of the most popular measures visitors noted include mask requirements, deep cleaning, and providing hand sanitizer. Choosing which safety measures to implement and how can depend on your specific audience. For example, if you tend to draw an older crowd, they may need to see policies firmly in place and strictly enforced. If your audience is young families, they might prefer requests for safety measures rather than requirements.

PRECAUTIONARY MEASURES

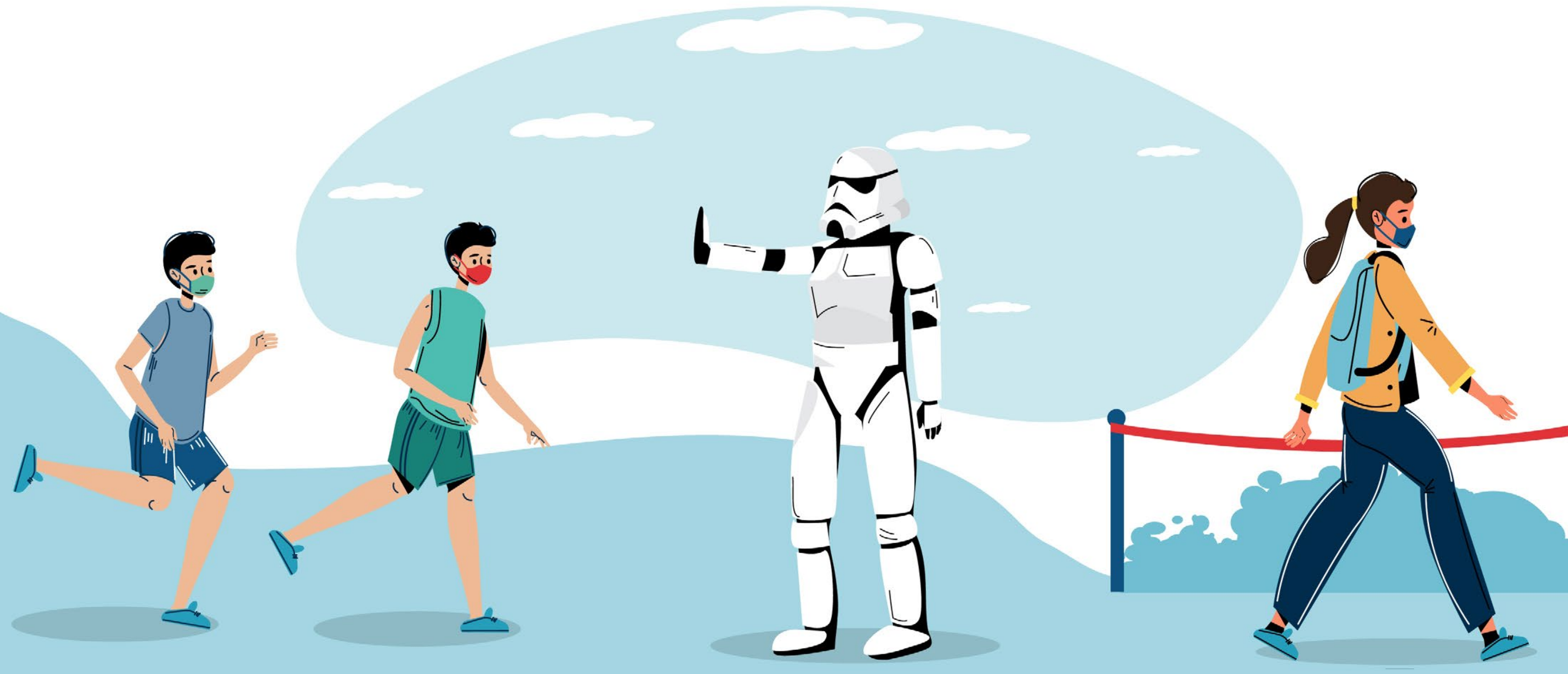
MOTIVATORS FOR VISITING ATTRACTIONS

REQUIRE CUSTOMERS TO **WEAR MASKS**	42%
DEEP CLEANING OF ALL SURFACES	42%
HAND SANITIZER AVAILABLE	41%
CAPACITY IS LIMITED FOR SOCIAL DISTANCING	39%
EMPLOYEES SCREENED FOR SYMPTOMS	35%
DINING **TABLES SEPARATED** AND **PLACED OUTSIDE**	31%
IMPROVED **AIR FILTRATION** SYSTEMS	28%
VISITOR **TEMPERATURE CHECKS** AT ENTRY	27%
EMPLOYEE HAND WASHING ENCOURAGED	27%
PLEXIGLASS BARRIERS INSTALLED AS NEEDED	24%

SAY IT WITH A SMILE

The attractions industry is no stranger to communicating and enforcing safety rules. Attraction staff enforce rules every day such as seatbelts, height requirements, and safety barriers. Pandemic safety does add another layer to that experience, but after months of lock-down, visitors are just grateful for a place to go that isn't their living room.

Just because the new safety rules are "rules," doesn't mean you can't have fun with them. Thinking outside of the take-out box, some restaurants have thought up creative ways to enforce social distancing - care to dine in a rooftop cabin, a restaurant yurt, or next to a table of mannequins? Now more than ever, people are looking to visit their favorite attractions to break away from their everyday lives and relive memories they may have from when life was "normal."



MESSAGING MATTERS

Regardless of your visitor demographic or tolerance for risk, clear safety messaging is a must. Before they arrive, visitors want to know:

1. **YES**, you are open!
2. What **MEASURES** are you taking to keep them safe?
3. What is **EXPECTED OF THEM**–policies regarding face coverings, maintaining social distances, temperature screenings at entry, etc.?

Not only should precautionary measures be clearly explained before arrival, they must also be posted repeatedly throughout the site—from turnstile to toilet!

THE POWER OF LOVE

Attractions visitors and attractions have a love-love relationship. *Voice of the Visitor 2021* research shows that 89% of attractions visitors would have enjoyed one or more attractions in 2020 had the pandemic not occurred.

2020 MISSED ATTRACTION VISITS

BASED ON INTENDED VISITATION PER ATTRACTION TYPE

This unrequited love was not equally shared as more missed visits in 2020 were reported for **zoos, theme parks, and live theaters than botanical gardens, art galleries, and children's museums.** What the data also shows is a pent-up demand for guests excited to show they have *Endless Love* for you.

JUSTIFY MY LOVE

While traveler income levels vary greatly, a large portion of attractions visitors have higher household incomes compared to non-visitors (almost 40% higher on average), and primarily work in non-service-related fields. Many of those able to work from home also saw a decrease in their outside spending due to a lack of entertainment options (no concerts, sports, etc.) as well as limited travel opportunities.

According to the U. S. Bureau of Economic Analysis, consumer spending fell 12.6% in April 2020 as states implemented lockdowns. This is in line with the *New York Times* report that found between March and November 2020, many Americans' personal savings grew by 173% compared to the same period in 2019. Jordan Holman from *Bloomberg* recently said, "There is a group of Americans that is sitting on savings. There is more pent-up demand than we expected so there is an estimate that Americans are sitting on 4.3 trillion dollars in household savings, and that's a record."

MISSED VISITS + INCREASED SAVINGS =

A POWERFUL HUNK OF BURNING LOVE FOR THE ATTRACTIONS INDUSTRY

LOVE WILL KEEP US TOGETHER

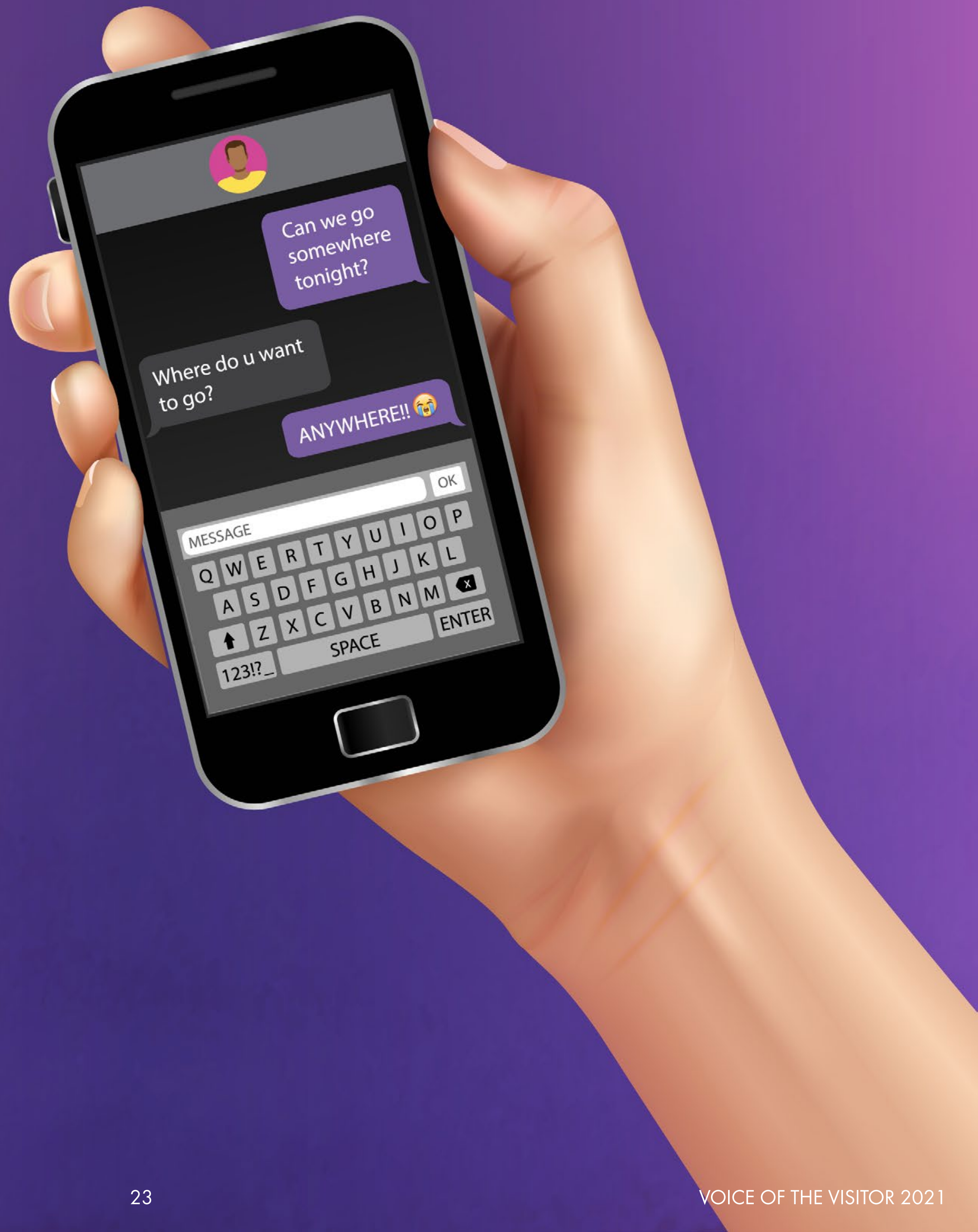
Many attractions visitors are already planning their 2021 leisure trip, and according to Heather Long of the *Washington Post*, they are "*... willing to spend ... and putting down-payments for vacations.*" TravelPulse reports that hotels and resorts in mountain and beach locations are already showing signs of recovery, even exceeding 50% occupancy in some markets. Cruise lines are also seeing strong booking trends, with most of the larger lines opening up in late spring/early summer. Many cruisers may fall in love with boutique-style experiences on small ships because they can create strict entry and itinerary conditions.

In an old-is-new twist, many families will opt for road trips, stopping along the way to enjoy unique roadside destinations. Travel marketing firm MMGY Global reported that one in five travelers is willing to drive more than 500 miles each way for a leisure trip. The novelty of enjoying the journey will give Generation Z a new flavor of memories and provide roadside attractions with the opportunity to reach new markets.

ATTENDANCE IS DOWN
BUT SPENDING IS UP

Attractions attendance dropped in 2020, but by fall, operator anecdotes pointed to an increase in per capita spending. Pent-up demand and increased personal savings was encouraging visitors to spend more money on food, merchandise, and premium experiences than they have spent in previous years. Data soon followed with SeaWorld Entertainment reporting that their fourth quarter 2020 in-park per capita spending increased 9.5%. To capitalize on this spending trend, attractions may want to refresh their seasonal offerings and merchandise.

GET ME OUT OF HERE



After being stuck inside for a year, even a trip to the grocery store with your partner sounds like a romantic vacation. In fact, the abrupt lack of travel opportunity in 2020 led to countless canceled trips and frustrated families, leaving potential attractions visitors desperate to get out!

TOP EMOTIONAL DRIVERS

FOR VISITING ATTRACTIONS

THE NEED TO ESCAPE

With every curveball that 2020 threw our way, our need to relieve stress has risen exponentially. PGAV's *Voice of the Visitor* research noted that **experiential, upscale rejuvenation trips will be in high demand for those with saved money who are looking to alleviate pent-up mental stress**, specifically with front-line workers, parents working from home while homeschooling, and travelers looking for a family getaway. While safety is the #1 criteria, other motivators such as relaxation, entertaining the family, or just finding a place to have fun continue to drive visitors forward.

Some industry-watchers, including Steve LeVine at Marker, predict that the 2020s could become the next 'Roaring Twenties.' "As increasing numbers of people are vaccinated and the country reopens, Americans are likely to bolt into a bacchanalia of dining, drinking, travel, and other revelry. Travel businesses are already seeing bookings that would carry this pent-up partying all the way through 2022 and into 2023."

TWO TYPES OF PLANNERS

When we look at the ways in which people are planning to get away when "all of this is over" (or at least when they feel safe enough to travel), we see two types of planners: the Long-Range Planner and the Spontaneous Traveler.

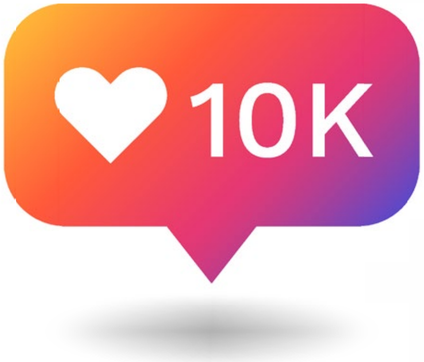
The Long-Range Planner channels their energy into the design and organization of their dream vacation. They've been bookmarking websites, ogling Instagram, and binge-watching the Travel Channel. Global research from *Forbes* measured, "70% of people are already planning their 2021 break or about to start doing so soon…Prolonged periods at home during the pandemic is only going to have heightened people's sense of adventure and search for escapism."

On the other end of the spectrum is The Spontaneous Traveler who will wait until the last minute to determine it's safe enough, cost-effective, and convenient to visit a destination. AARP predicts "last-minute getaways will be all the rage," even for those who used to plan months in advance.

According to a trends report from the vacation rental site HomeToGo.com, the average time between booking and check-in from March – September 2020 was 50 days—a drop of almost 38%. This more spontaneous, wait-and-see approach to travel is likely to continue.

A CROSS-GENERATIONAL AFFAIR

The need to escape clearly isn't limited by age, or by gender, or by most any other factor. In a small sample of PGAVers from multiple generations, it became clear that the need to travel in 2021 is real, palpable, and could happen in many forms.



JESS SOLOMON

Graphic Designer, Proud Millennial

"I would love to be able to travel again in 2021. Notably, I'd like to be able to go on my 2-week honeymoon that was scheduled for May of 2020 to Italy and England. 2021 just started, and we've already taken a long weekend to Innsbrook, MO. Simply being in a cabin in the woods (not being in our own house) for a few days was amazingly refreshing."

JUSTIN STICHTER

Architect, strong-willed Xennial

"I don't know what was harder, telling my kids we couldn't take our Spring Break 2020 trip to Galaxy's Edge at Walt Disney World, or realizing it myself. We are definitely going as soon as possible—hopefully Christmas 2021."

TOM OWEN

Vice President, Self-Confessed Boomer

"A lot of cabin fever at the Owen house. We are looking into a beach trip late this summer. We have lots of reward miles left over from 2019!"

LIGHT AT THE END OF THE TUNNEL

Whether they are Long-Range Planners who stay sane through action, or Spontaneous Travelers sustained by dreams, the goal of future destination travel is keeping many people strong. Planning their next trip to a destination or attraction may just be what gets them through the end of this pandemic, and finally getting to go there (when it's safe to do so) may be the ultimate reward.

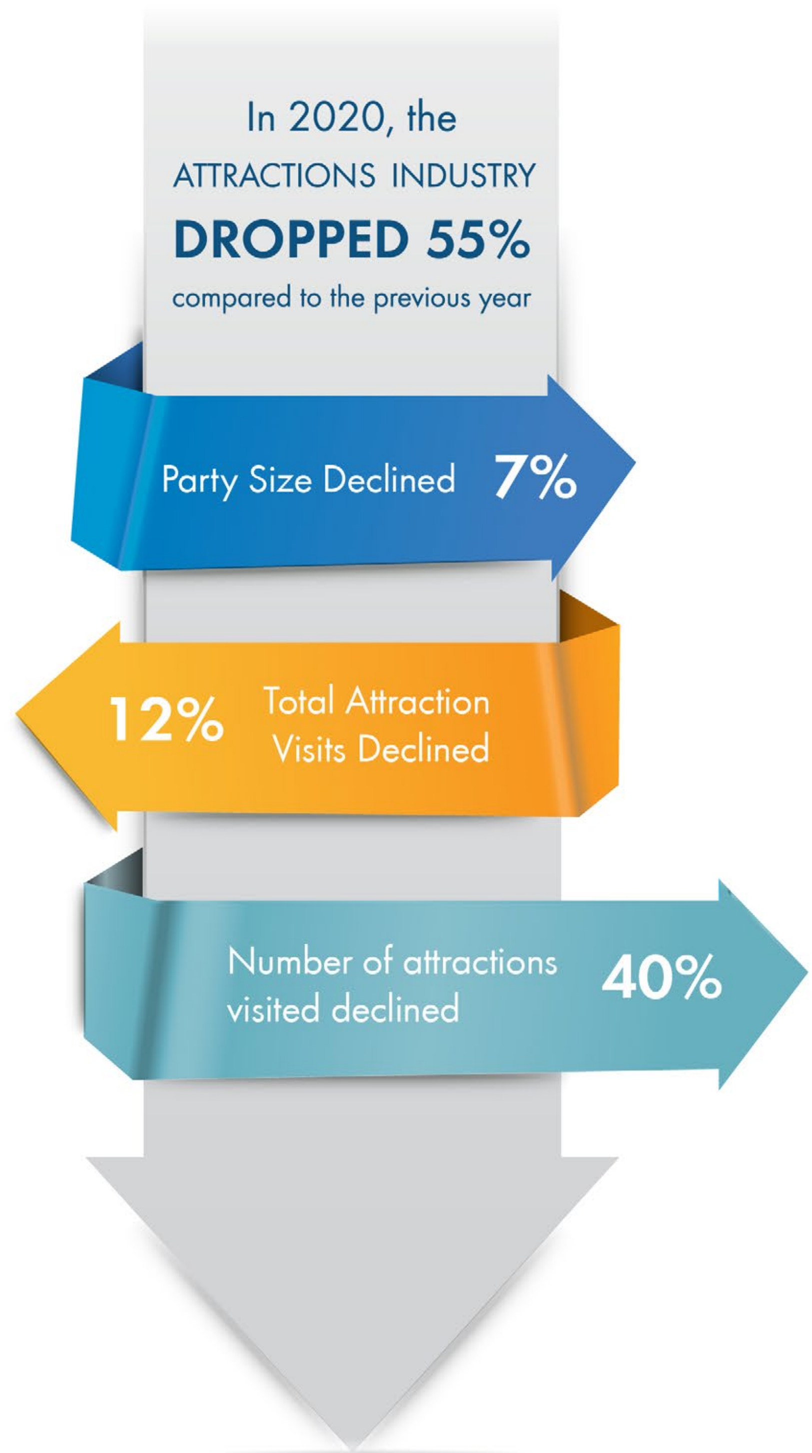
WANT MORE DATA?

For a comprehensive data packet that includes all *Voice of the Visitor 2021* statistics, email us at spot@pgav.com

IT CAN ONLY GO UP FROM HERE

2020 may have felt like rock bottom, but we think of it like one big bounce on a trampoline: you go down deeper than you thought you would, but spring back up higher than you thought possible!

LET'S LOOK AT THE BOUNCE DOWN.



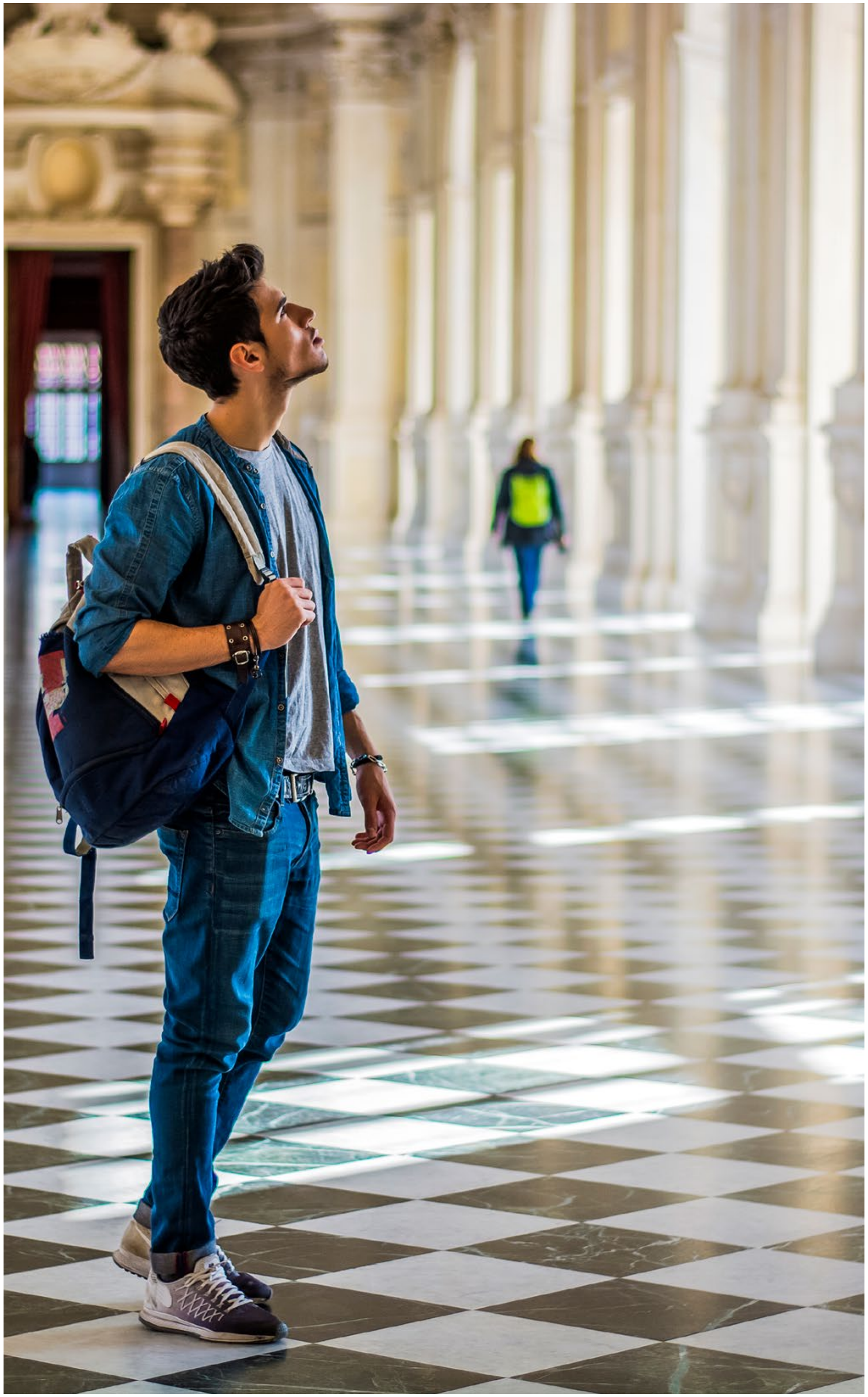
ATTRACTIONS VISITED IN 2020

Variance to Historical Average	Attraction	Percentage Visited in 2020
-1	NATIONAL/STATE PARKS	25%
-15	HISTORIC LANDMARKS/PLACES	24%
-13	ZOOS/ANIMAL ATTRACTIONS	22%
-8	FAMILY ENTERTAINMENT CENTERS	16%
-16	THEATERS	16%
+1	NATURAL WONDERS	16%
-15	THEME PARKS/AMUSEMENT PARKS	15%
-8	HISTORY MUSEUMS	15%
-10	AQUARIUMS	14%
-5	ART MUSEUMS	14%
-7	BREWERY/WINERY TOURS	13%
-5	BOTANICAL GARDENS	13%
-8	SIGHTSEEING TOURS	13%
-6	WATER PARKS	13%
-5	DINNER THEATERS/CRUISES	11%
-7	ART GALLERIES	10%
-4	OLD HOMES/MANSIONS	10%
-9	LARGE-FORMAT SCREEN THEATERS	9%
-6	SCIENCE CENTERS/ATTRACTIONS	9%
-3	CHILDREN'S MUSEUMS	8%

Some attractions bounced down lower than others. Movie theaters and theme parks had their incidence of visitation cut in half while some outdoor parks and natural wonders hardly felt a pinch. You might remember how on beautiful days last spring, many state parks reached capacity by midmorning because they were full of picnickers and hikers. And as winter settled in, ski resorts like Cannon Mountain in New Hampshire and Vail Resorts in Colorado reported a 20% increase in individual pass sales.

Percentage Visited in 2020

Variance to Historical Average



ATTRIBUTES AND ATTITUDES

2020 saw significant changes in visitation patterns driven by age and children.

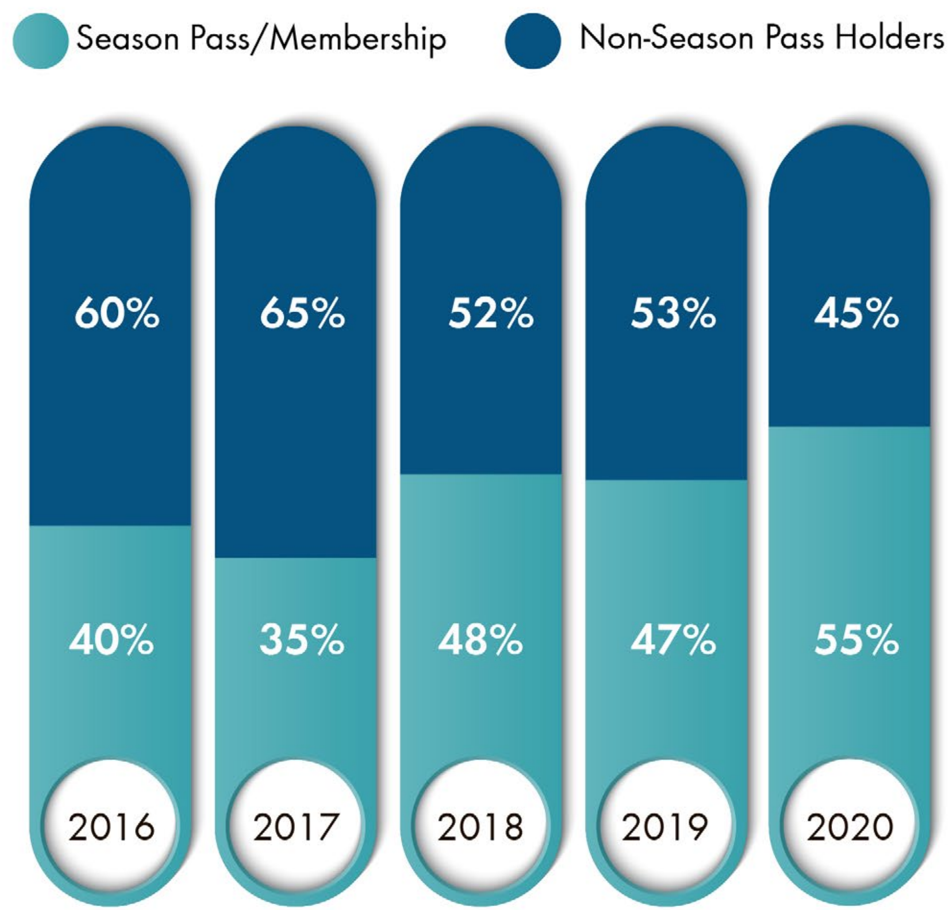
Attractions visitors were younger and more likely to have children than those who visited an attraction in 2019. There was an overall visitation decline of 4% among people 55 and over as they opted to stay away from public spaces. This trend, along with the [CDC's statement] about the smaller rates and more positive outcomes of COVID-19 among children, contributed to a 5% increase in family visitors and 6% decrease in adults visiting without children.

STAYING LOCAL

As we noted in our earlier section Domestic Bliss (see page 7), travel limitations kept us close to home, with more attractions visitors choosing an attraction that was within 50 miles of their front door (+6% over 2019). Across the board, locals suddenly accounted for a larger portion of visitors. Museums, Educational Attractions, and Family Attractions experienced the largest increases in local visitation (7%, 4%, and 4% respectively), which is consistent with the data on increased family visitors. It also supports the data about social distancing since many museums have palatial rooms and corridors that make social distancing a breeze.

Many of these locals were first-time visitors, and all attraction types saw an increase in first-time visitation. The largest bounces again went to Theme/Amusement/Water Parks (8%) and Educational Attractions, Museums, and Galleries (7%).

The cherry on top of this locally-made sundae was that season passes reached a five year peak. This industry-wide increase was particularly dynamic with Educational Attractions and Family Attractions. Perhaps the countless parents forced to homeschool without adequate preparation were glad to take advantage of engaging learning opportunities close to home.



THE GOOD, THE BAD, THE MEH

We tracked satisfaction using 12 different factors: seven saw negligible change, but five are worth noting.

A PERFECT FLIP

Enjoyment for Children

After spending days doing math—alone—at a computer, going somewhere was straight fire!

Quality Food Experience

Even hot dogs tasted like ambrosia when someone else microwaved them!

THE FLIP SIDE

Overall Satisfaction

Burnt out, sad, and frustrated, the 2020 traveler may have had unrealistic expectations about what an attraction can do to lift your mood.

Enjoyment for Adults

Perhaps they really wanted a brewery tour, but they chose a walk at the arboretum. It was nice but …

Friendliness of Staff

In addition to their regular work, 2020 front line staff was expected to keep all visitors—even those willfully disregarding the health of others—safe from a deadly virus. What a historic expectation! If their cheer wasn't so cheery, well, it is certainly understandable.

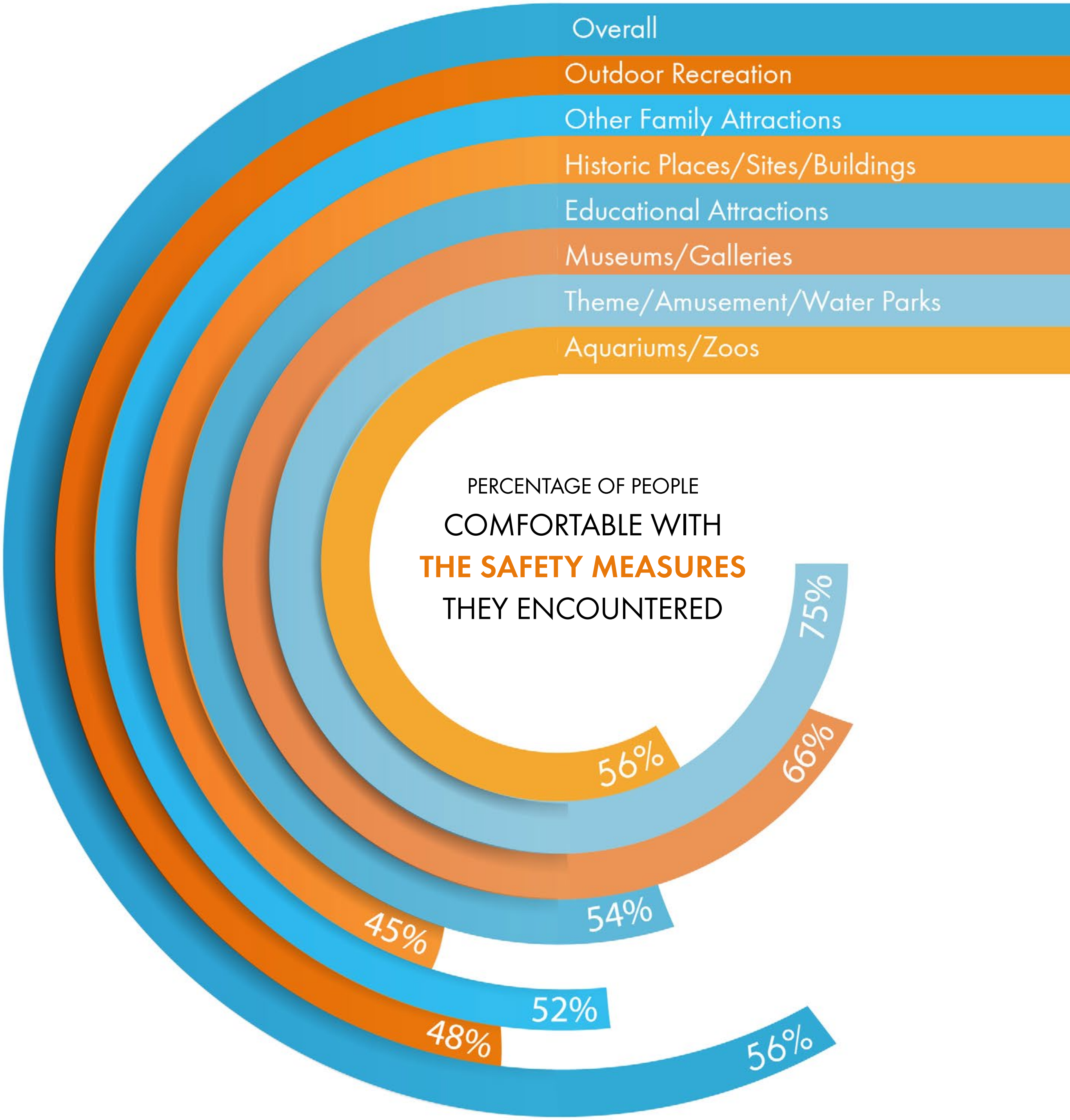
We will all do better in 2021—we really will—and these scores will bounce up and off the trampoline.

NET PROMOTER SCORES

The likelihood of someone recommending an attraction to someone else is called the Net Promoter Score. Attractions' aggregate Net Promoter Scores only slipped slightly in 2020, with the exception of Outdoor Recreation. This is a sandbox of irony since Outdoor Recreation was practically limitlessly popular throughout the year. Were visitors' expectations too high? Were people who had never hiked before suddenly in the woods on a muggy, buggy day and realized there were no clean toilets or funnel cake stations? (i.e. The grass may have been greener on the mountain, but it was still grass.) Or were natural places so much busier than normal that visitors did not get that "get away from it all" feeling they were desperately seeking? Whatever the reason for this slippage, it is only a cause for a pause, not a cause for worry. Again, we will do better in 2021, we really will.

SAFETY

And speaking of doing better, let's take a moment and recognize **how well we did do** in 2020 in the most important factor—COVID-19 safety. The majority of attractions visitors (56%) felt that the COVID-19 safety measures they encountered were appropriate to prevent the spread of coronavirus. And three cheers for Theme, Amusement, and Water Parks for scoring 75%. Though their larger sizes and outdoor venues certainly helped with social distancing concerns, their team members still deserve a shout-out!



SOARING
TOGETHER

Visitors are ready, willing, and able—and so are we!

READY

We know the safety measures they want, and we communicate them effectively.

WILLING

Visitors are emotionally primed to explore and relax in numbers that will challenge and excite us.

ABLE

Last year's cancellations are this year's cash.

The 2020 trampoline might have felt like mush, but the springs on 2021 are tight. Let's defy some gravity!

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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 across 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 120 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.

WANT MORE DATA?

For a comprehensive data packet that includes all *Voice of the Visitor 2021* statistics, email us at spot@pgav.com

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