2022 PCAV VOV
VOICE OF THE VISITOR

PCAV DESTINATIONS

REBOUND & RESILIENCY

a letter from Mike Konzen, Chairman

We are pleased to present our **7th Edition of PGAV's *Voice of the Visitor* (VOV 2022).**

As with prior editions, VOV 2022 enables us to evaluate the prior year's industry performance and look forward to the coming year. Across **twenty different attraction types,** we paint a picture of the many factors that will shape 2022's performance for the thousands of attraction destinations across America. We are proud that so many of VOV's readers have come to rely on it as a valued resource in planning their success strategies for the coming year.

While VOV 2022 is developed by surveying attraction visitors, the results are also shaped by larger societal forces in play at the time. Whether it is a presidential election, rising or ebbing economies, consumer confidence, or a global pandemic, these forces affect the travel and tourism industry in dynamic and often surprising ways. As we look back on the industry's performance over 2021 and as we enter a third year of the COVID-19 pandemic, one thing is abundantly clear:

THE ATTRACTIONS INDUSTRY IS AMAZINGLY RESILIENT.

While variants to COVID-19 may bring challenging periods of time in the years to come, we know that resiliency will help attractions and their visitors adapt.

Perhaps even more importantly, VOV 2022 demonstrates that the factors which led to the remarkable rebound of 2021 will continue to play out in force in 2022 and include notable findings, such as:

- By nearly all of our key metrics, 2021 performance for the overall attractions industry exceeded our VOV 2021 projections. In fact, we heard from so many of our clients that 2021 represented their best year ever on a financial basis.

- Pent up demand, combined with a continuation of strong personal savings, will continue to drive attraction visitation throughout 2022.

- Increased per capita spending – one of the happy surprises of 2021 – will likely continue through 2022 as almost two-thirds of survey respondents indicated that they will continue to "splurge."

- This year we dramatically increased our sample size so as to perform a deeper assessment of issues that are specific to people of color. In particular, we learned many important findings regarding their motivations, barriers to visitation, and other factors.

- In many ways, the industry has reinvented itself. We have used the last two years to experiment, and we have discovered some remarkable things. Targeted messaging, the benefits of timed ticketing, and more efficient staffing are certainly lessons we will carry into the future.

We invite you to review our presentation of VOV 2022. And as always, please contact us with any thoughts or questions. We love your feedback!

Mike Konzen
Chairman

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PCA VOV

VOICE OF THE VISITOR

Annual Outlook on the Attractions Industry

PGAVOV
VOICE OF THE VISITOR

RESILIENT, RESOURCEFUL, AND RELEVANT

2021 IN REVIEW

As an industry, we have demonstrated that we're amazingly **resilient** and **resourceful.** And visitors have shown us that we're more **relevant** than ever. That ideal combination positions us for success in 2022 and beyond.

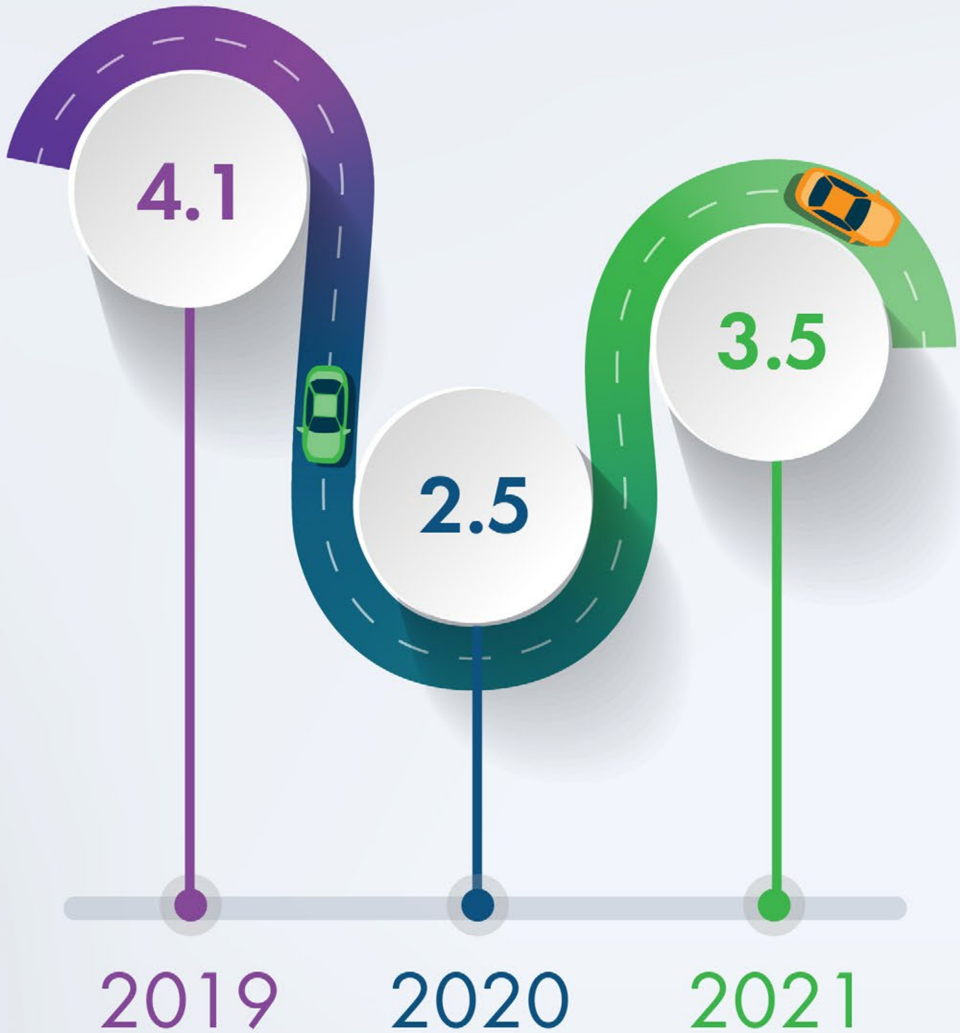
PGAV's *Voice of the Visitor 2022* (VOV 2022) report provides plenty of evidence to back this assessment of the industry's strength, and many reasons for optimism for the year(s) ahead. At the same time, these survey results reveal an urgent need for attraction owners to maintain that resilience and resourcefulness, as visitors' priorities continue to evolve along with society's array of challenges.

YOU'RE STILL THE ONE

Let's start with relevance because that's where we find many of these reasons for optimism. One message came through loud and clear throughout VOV 2022 survey results: visitors crave the experiences we offer. That's always been true, of course, but desire for the escapism we provide has only grown as people cope with the unique challenges presented by COVID-19.

ATTRACTIONS INDUSTRY PERFORMANCE

COMPARED TO 2019



NUMBER OF ATTRACTIONS VISITED IN 2021

In 2020, the overall performance for the attraction industry fell to **45%** of 2019's numbers due to the coronavirus pandemic. Last year, the industry rebounded to a healthier **73%** thanks to vaccine rollouts and visitors learning to cope with the virus.

> **EVEN BETTER NEWS**
> In 2022, the industry is forecasted to return to pre-pandemic levels.

WE JUST CAN'T GET ENOUGH

One of the factors contributing to improved industry performance was a **45%** increase in the number of attractions visited last year. In 2021, visitors averaged **3.5 attractions**, which is only **15%** shy of pre-pandemic numbers.

But venturing out and experiencing more attractions last year did not fulfill all of visitors' intent. During 2020, unconverted visitor intent was at an all-time high of **65%**. (Historically, visitors report that around **46%** of their intent to visit attractions is unfulfilled during the year.) At the end of 2021, visitors noted that there are still many places they want to visit in 2022, keeping unconverted intent high at **62%**. That pent-up demand points to significant potential for robust performance in 2022 and beyond.

What is the biggest indicator of attractions' relevance in today's environment? People are looking for opportunities to relax and unwind … and arguably, that need has never been more pronounced for our generation. It was the number-one motivator cited for attraction visits, edging out safety, which unsurprisingly topped the list in VOV 2021. Other studies back up this finding, with Expedia's 2022 Travel Trends Report finding that **38%** of U.S. travelers are most looking forward to truly relaxing "without their daily responsibilities."

READY TO TRAVEL

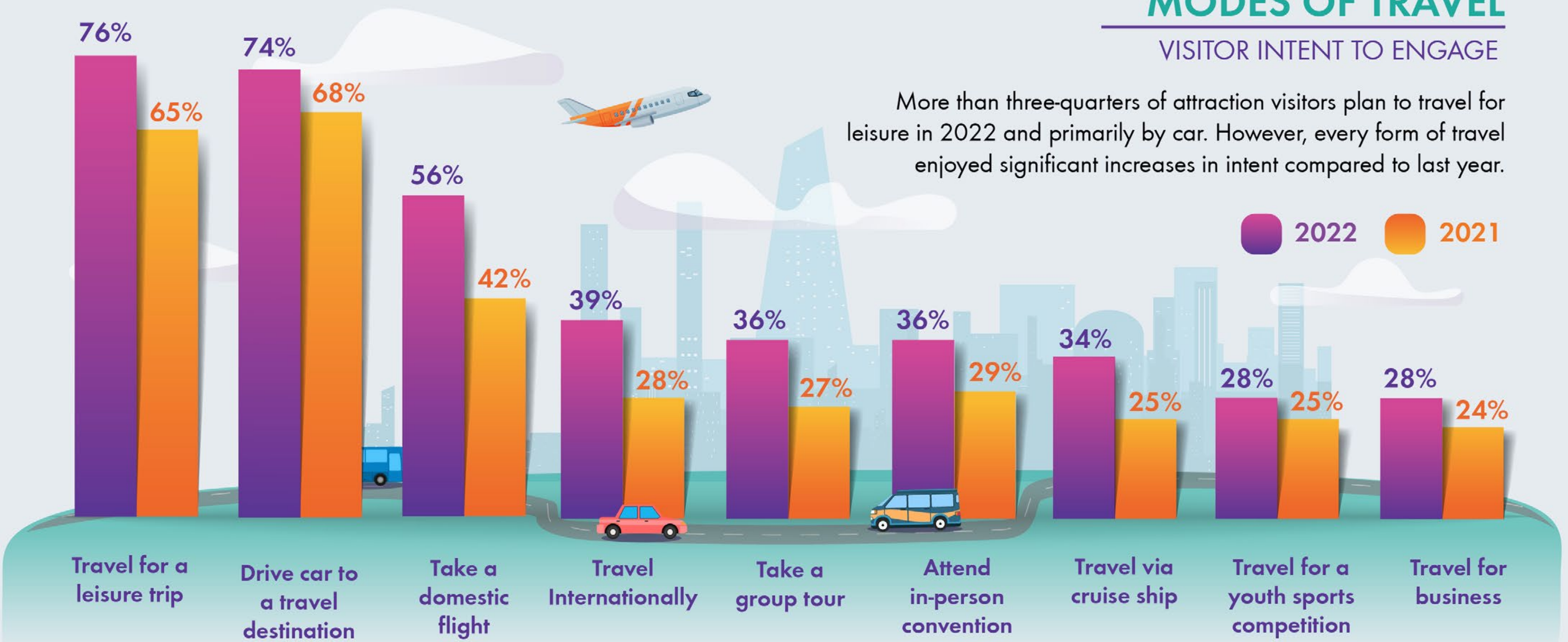
VIA PLANES, SHIPS, AND (MOSTLY) AUTOMOBILES

VOV 2022 showed that **76%** of attraction visitors planned to travel for a leisure trip in 2022, an 11 point jump over 2021. Driving is still the top mode of transportation, with **74%** of respondents planning for a leisure road trip this year. But all modes of transport are on the upswing with domestic air travel at **56%** (up 14 points), international air travel at **39%** (up 11 points), and cruise ship travel at **34%** (up 9 points). And let's not overlook train travel! Passenger rail was allocated $66 billion in the November 2021 infrastructure bill and Amtrak expects ridership and revenues to recover to roughly **80%** of 2019 levels in 2022, a significant improvement over the **37%** ridership recovery they reported in 2021.

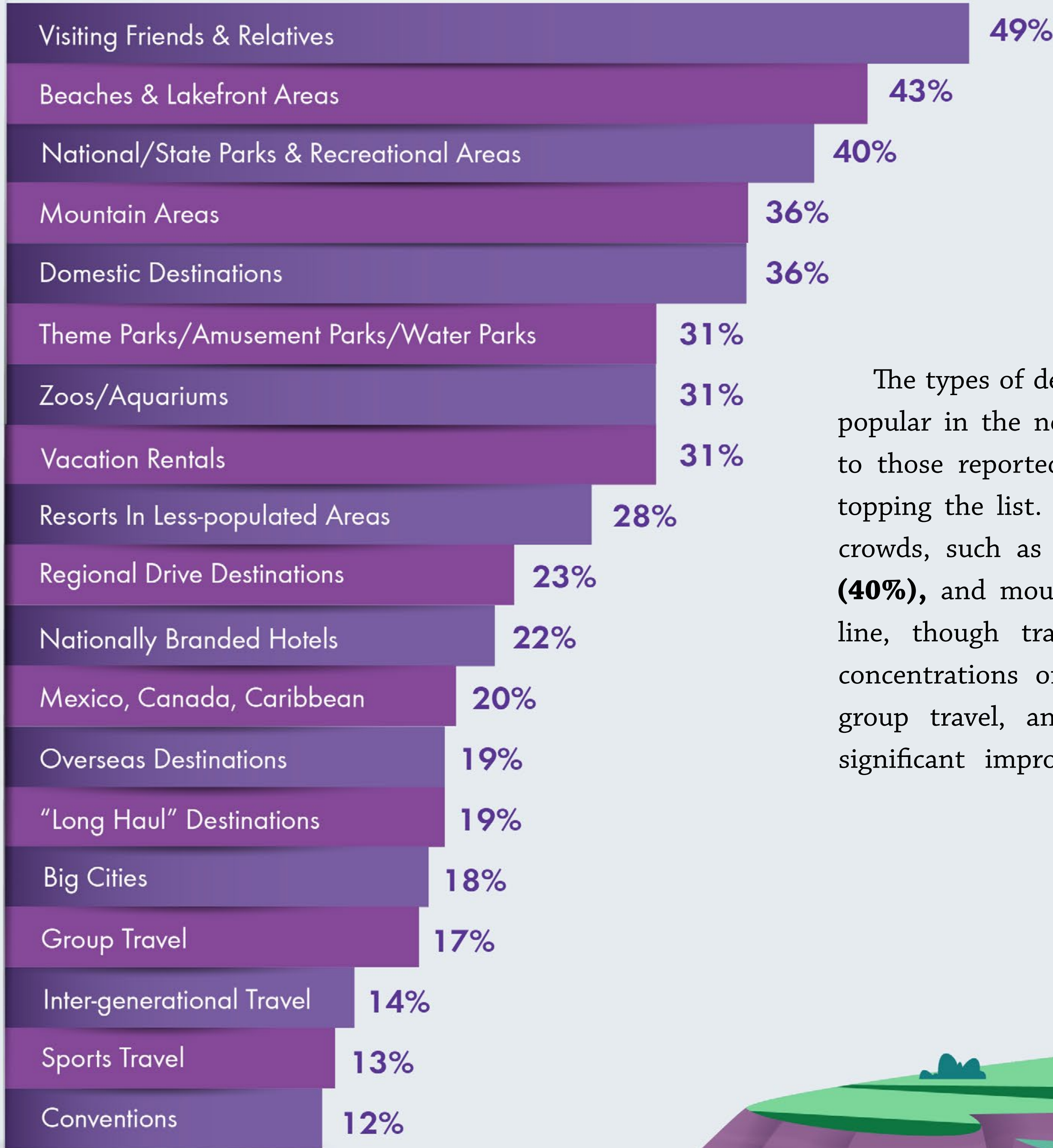
MODES OF TRAVEL

VISITOR INTENT TO ENGAGE

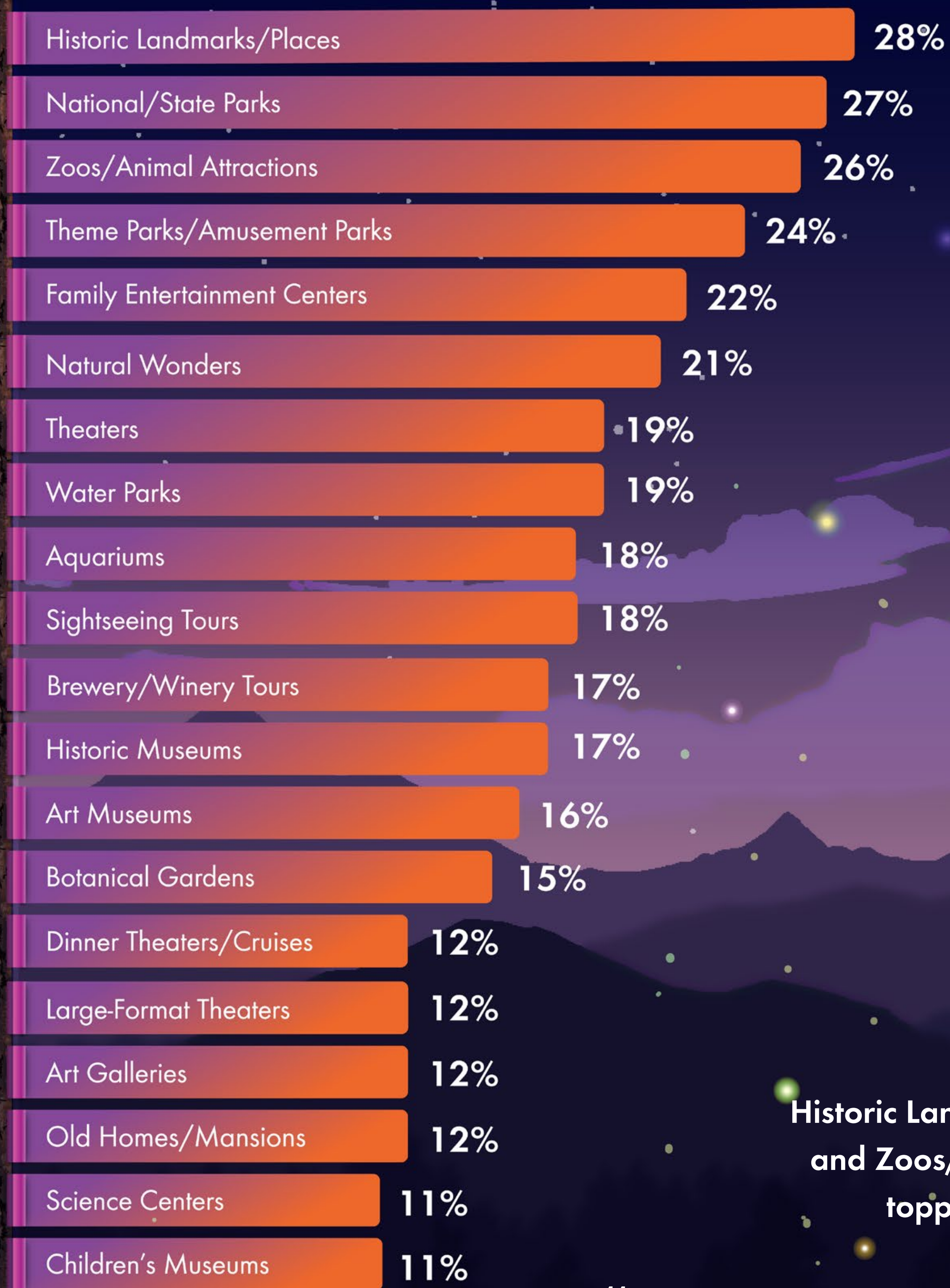
More than three-quarters of attraction visitors plan to travel for leisure in 2022 and primarily by car. However, every form of travel enjoyed significant increases in intent compared to last year.



2022 EXPECTED POPULAR TRAVEL



The types of destinations travelers expect to be popular in the next few years are largely similar to those reported last year, with visiting family topping the list. Smaller attractions with sparser crowds, such as beaches **(43%),** national parks **(40%),** and mountain areas **(36%),** are next in line, though travel situations involving larger concentrations of people, such as theme parks, group travel, and overseas destinations, show significant improvements compared with 2021.



2021 ATTRACTION VISITATION

Historic Landmarks, National/State Parks, and Zoos/Animal Attractions once again topped the list of attractions visited.

A RETURN TO 'HIGHER RISK' ATTRACTIONS

The push-pull between the need to relax and the need to feel safe is where our industry's resourcefulness comes into focus. It likely explains the continued strong performance of outdoor attractions like historic landmarks, national parks, and zoos in 2021. However, as the chart on the previous page shows, attractions like theme parks **(+9 pts),** family entertainment centers **(+6 pts),** and water parks **(+6 pts)** saw a significant increase in attendance during 2021, demonstrating that visitors are becoming more comfortable venturing out to these types of attractions again.

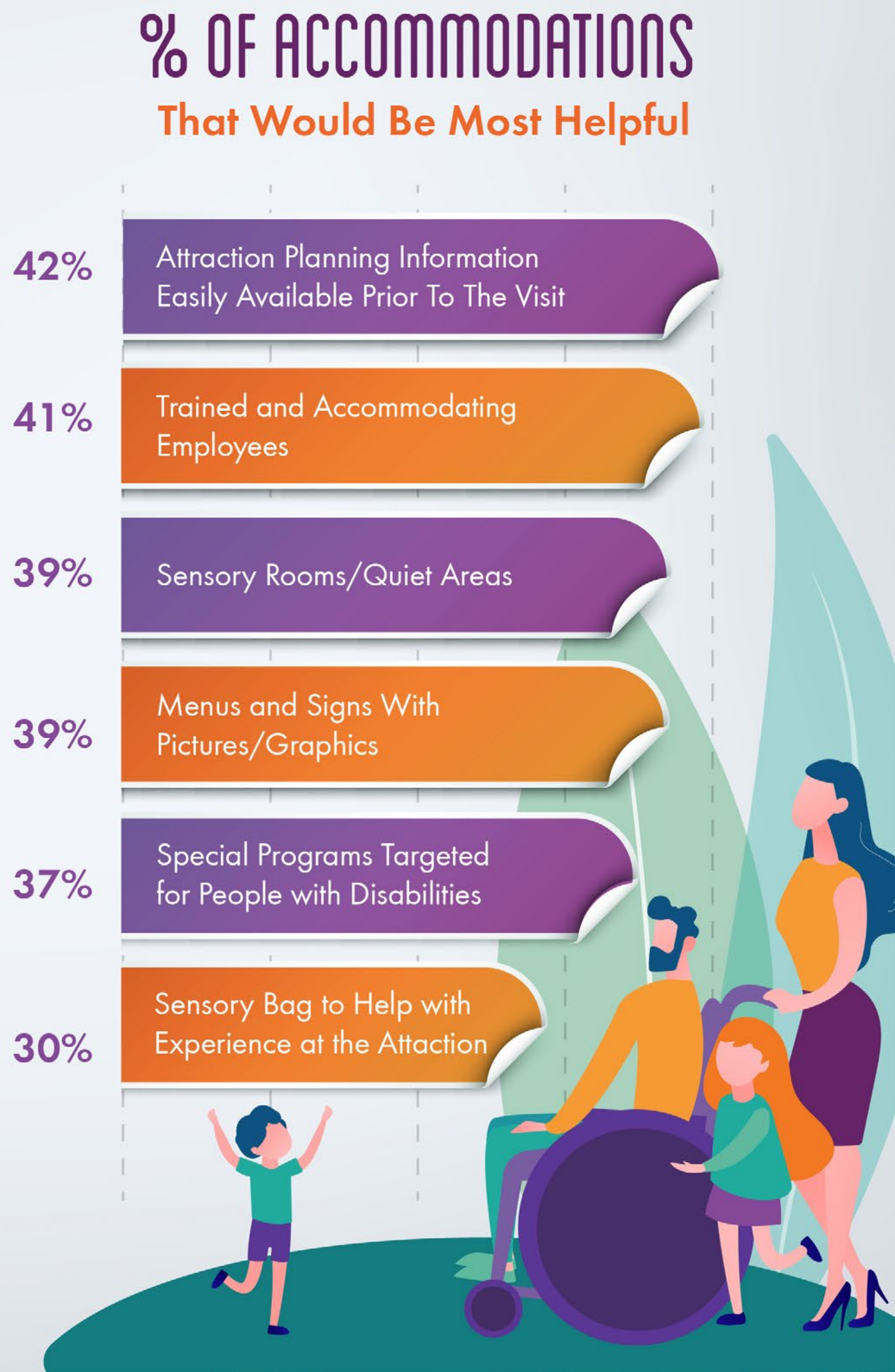
This growing comfort is even more evident in the types of "must see" attractions that visitors listed for 2022. Family entertainment centers topped the list, with **83%** of respondents intending to visit this year. Breweries and wineries, movie theaters, and theme parks followed closely behind at **81%.**

> FAMILY ENTERTAINMENT CENTERS, BREWERIES, WINERIES, & MOVIE THEATERS
> TOP THE LIST OF ATTRACTIONS PEOPLE INTEND TO VISIT IN 2022.

OPENING NEW HORIZONS WITH THE NEURODIVERGENT

More and more attractions are positioning themselves to be more relevant to people who are neurodivergent. Neurodiversity refers to the concept that certain developmental disorders are normal variations in the brain. The term neurodiversity takes a wider view of "normal" and includes people on the autism spectrum, and people with ADHD and learning disabilities such as Auditory / Visual Processing Disorder and dyslexia. This is an increasingly important priority across the travel industry, as the International Board of Credentialing and Continuing Education Standards reports that **89%** of families with a member on the autism spectrum are unsatisfied with the travel options available to them.

Nearly 1/3 of VOV 2022 respondents visited an attraction over the past five years with a neurodivergent companion. And of those visitors, **70%** noted that the needs of the neurodivergent person influenced their decisions. They indicated that the most important needs they were looking for included ample information for planning purposes **(42%),** trained and accommodating employees **(41%),** sensory rooms or quiet areas **(39%),** and menus and signs that included photos and/or graphics **(39%).** All evidence supporting the need for us to work together as an industry to ensure that every visitor can fully enjoy every experience.



READY TO SPEND, AT LEAST FOR NOW

The resilience and resourcefulness we've shown in addressing safety concerns not only brought many visitors back but also paid dividends in 2021. About **30%** of VOV 2022 respondents indicated that they spent more money on their most recent visit than they had in the past. The top drivers for increased spending? It all goes back to that need for R&R, with respondents citing "tired of being cooped up" and "wanting to treat themselves" as top motivators.

Equally encouraging, **64%** of those who spent more in 2021 indicated that they planned to do the same in 2022. **53%** of respondents indicated that they were more economically optimistic about 2022, compared with only **23%** who were less optimistic, a record-setting net of **30%.** Average annual household income of attraction visitors rose to $91,000 in 2021, compared with $85,200 in 2020, providing some evidence to back up that optimism.

These findings track with a February 2022 report from Forbes Advisor that indicates consumer confidence is continuing to improve despite recent growing inflation. This increase in spending confidence could be driven by anticipated tax returns and higher wages resulting from many companies raising their pay floors during reopening. CVS Health, Costco, Target, and Wells Fargo are all examples of national companies that are taking the lead in higher wages.

THE VAGARIES OF THE VARIANTS

VOV 2022 surveys were conducted in 2021, after the COVID-19 Delta surge but before the Omicron variant peak. It's true that new COVID-19 variants or other developments could impact 2022 visitation, but evidence from multiple sources indicates an increasing consumer determination to "get on with life," particularly as vaccines and now-familiar safety measures proved effective in reducing the impact of Omicron.

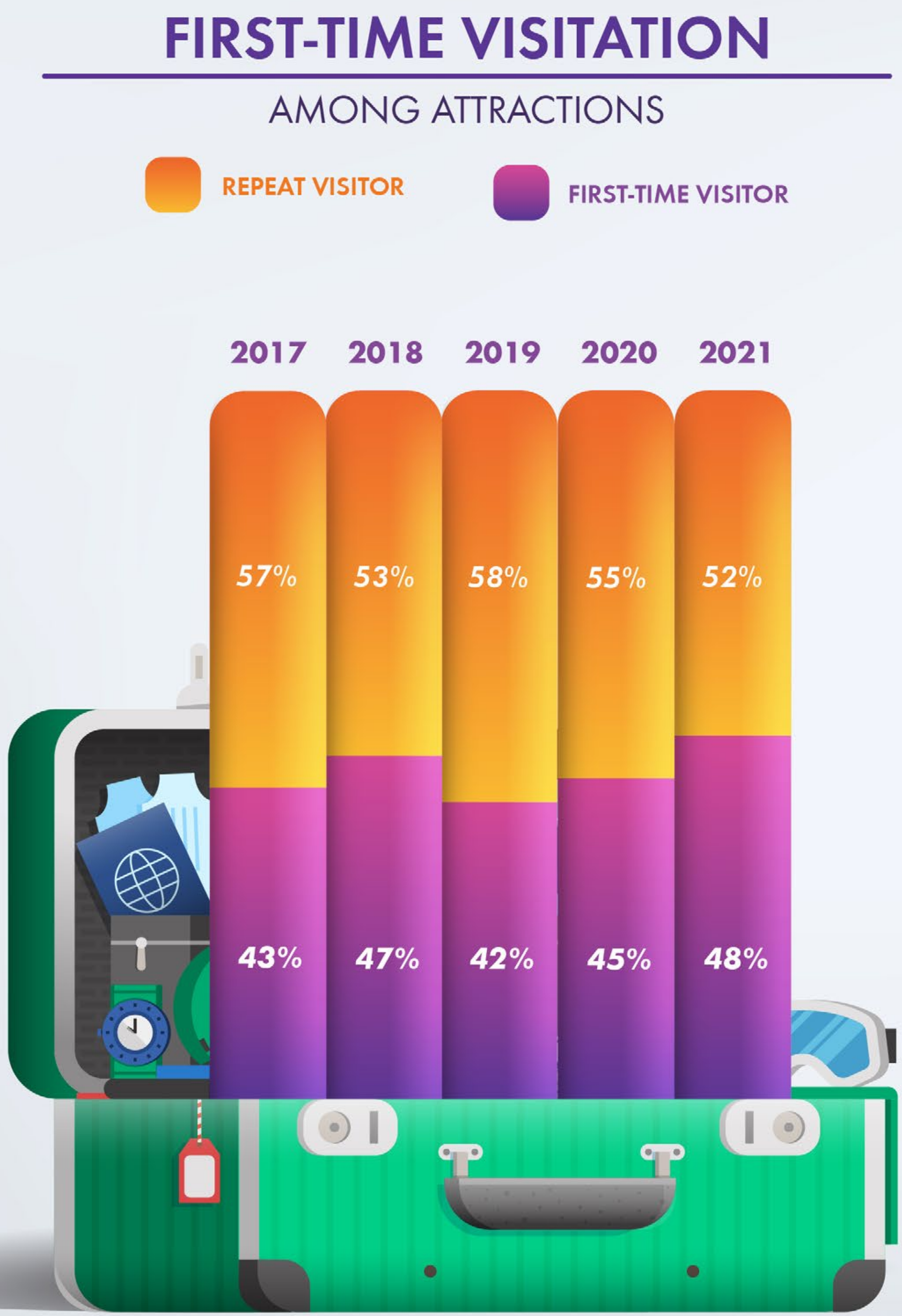
Air travel data from the Transportation Security Administration (TSA) illustrates this trend. In 2020, air travel dropped precipitously starting in March as the initial wave of the pandemic hit. Traveler numbers started to bounce back in the spring and summer of 2021 as vaccines became readily available, though they remained notably lower than 2019 numbers. When the Delta variant peaked in late summer and fall of 2021, a smaller dip in traveler numbers can be seen, though it's nothing like the severe shift seen in 2020. But as the 2021 holidays approached and the Omicron variant began to spike, traveler numbers were inching back to 2019 levels, even **surpassing 2019 on a few days during the peak travel season.**

The World Travel & Tourism Council announced in February 2022 that their economic models project that **U.S. travel & tourism may reach almost $2 trillion** in U.S. GDP contribution—exceeding pre-pandemic levels by **6.2%.** This, combined with recent guidance from health experts that COVID-19 may be moving to an endemic phase, tells us that our optimism, while still tinged with caution, is nevertheless warranted.

VOV 2022 results indicate that millions more people are out there, inching toward the moment where they act on that pent-up desire to relax and unwind. Their willingness to venture out again will depend to an extent on variables outside of our control, but thanks to our collective resilience, resourcefulness, and relevance, we'll be ready when they are.

WHAT'S ON YOUR BUCKET LIST?

VISITATION TRENDS



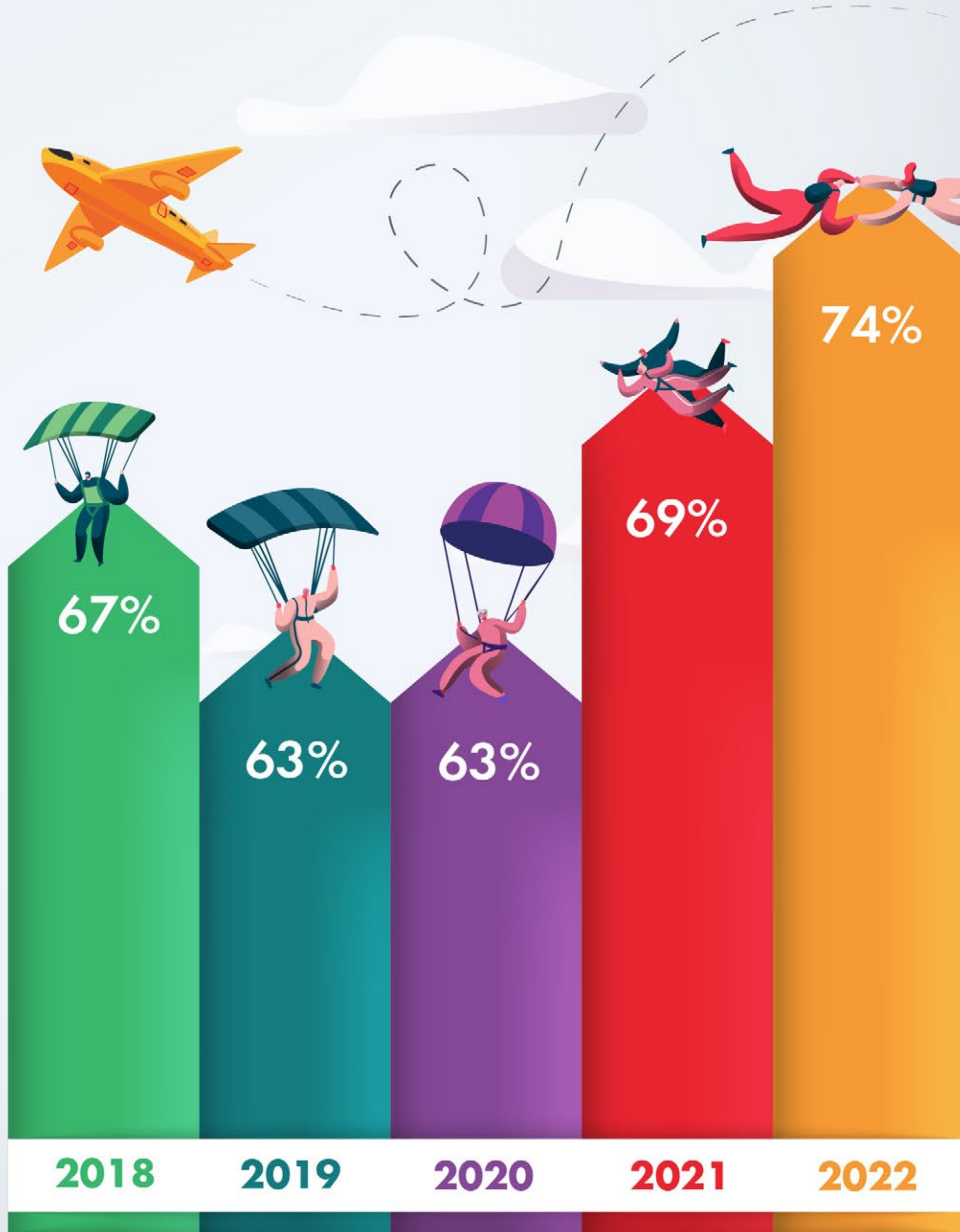
It's a bittersweet phenomenon that has been documented and analyzed by experts ranging from travel specialists to mental health professionals. In a nutshell, these experts have concluded that the pandemic reminded us that life is short, and it's up to each of us to make the most of it.

VOV 2022 provides further evidence of this bucket-list trend, as **48%** of respondents indicated that they visited a specific attraction for the first time in 2021. Museums and galleries, historic places, and outdoor recreation attractions led the way in first-time visitors, though the boost was consistent across all attraction types.

And while this finding certainly backs the concept of a bucket-list phenomenon, there is a twist. Attraction visitors aren't subscribing to the concept of checking a box on their lists and moving on. Visitors also set a new VOV record for intent to return to the same attraction in 2022, with a staggering **74%** of respondents saying they probably or definitely will return, a jump of **5 points** over 2021. Amusement parks, educational attractions, and zoos and aquariums performed especially well in this category, though again, intent to return was higher than historical averages in every attraction category.

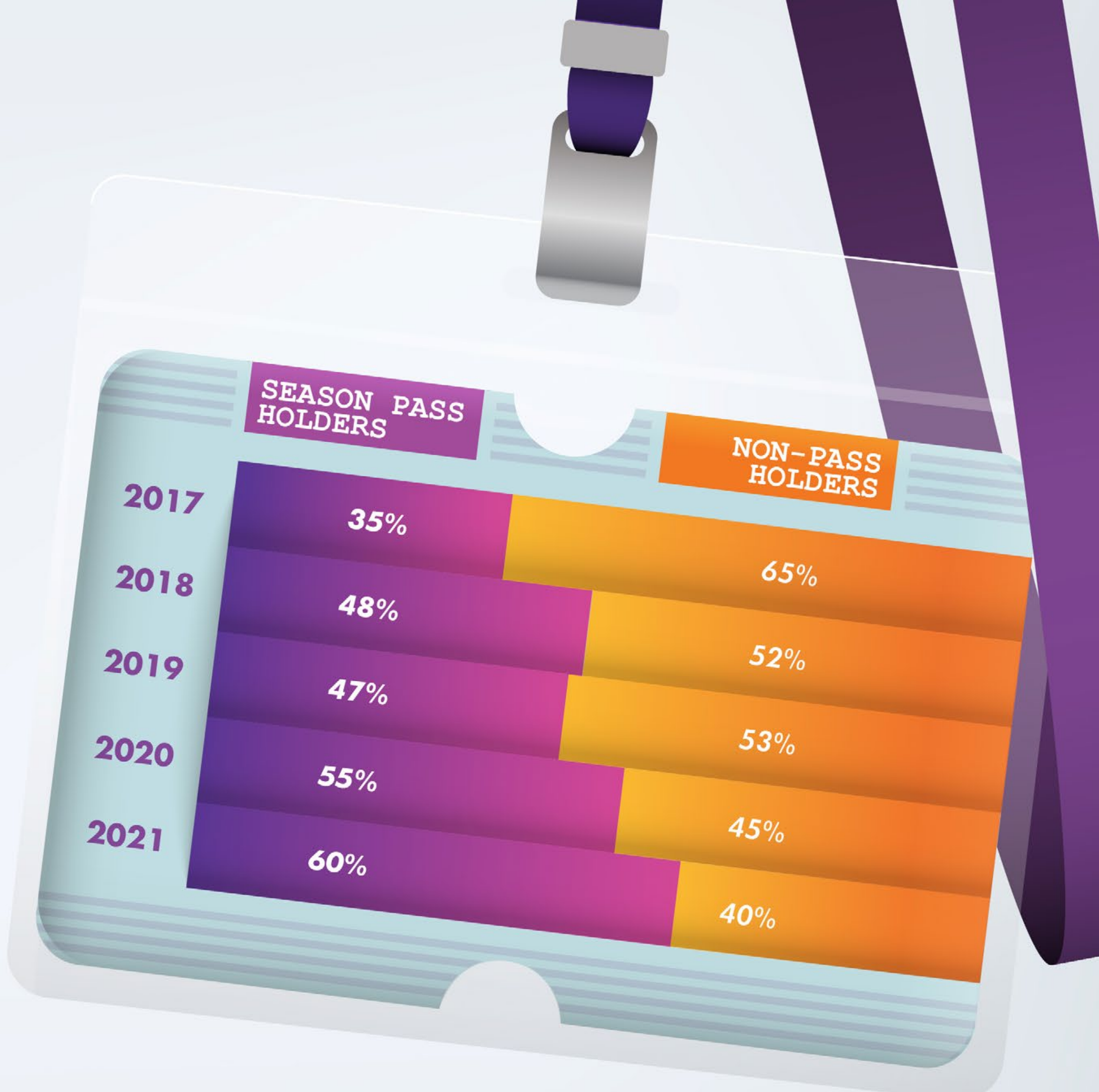
REPEAT VISITATION

VISITOR INTENT TO RETURN TO THE SAME ATTRACTION



Supporting the high intent to return, we also saw loyalty at a record high, with **60%** of respondents indicating they held season passes or memberships in 2021 to at least one attraction. Not to mention that **62%** of attraction visitors indicated that they would recommend the attraction they visited to friends and family!

All these results bode well for the industry. The resilience and resourcefulness we demonstrated over the past two years is paying off, positioning us to capitalize on the bucket-list phenomenon. And rising enthusiasm and loyalty reinforces the relevance of attractions.



SEASON PASS MEMBERSHIP

AMONG ATTRACTION VISITORS

RECOVERY READY?

PENT-UP DEMAND & THE 2022 SURGE

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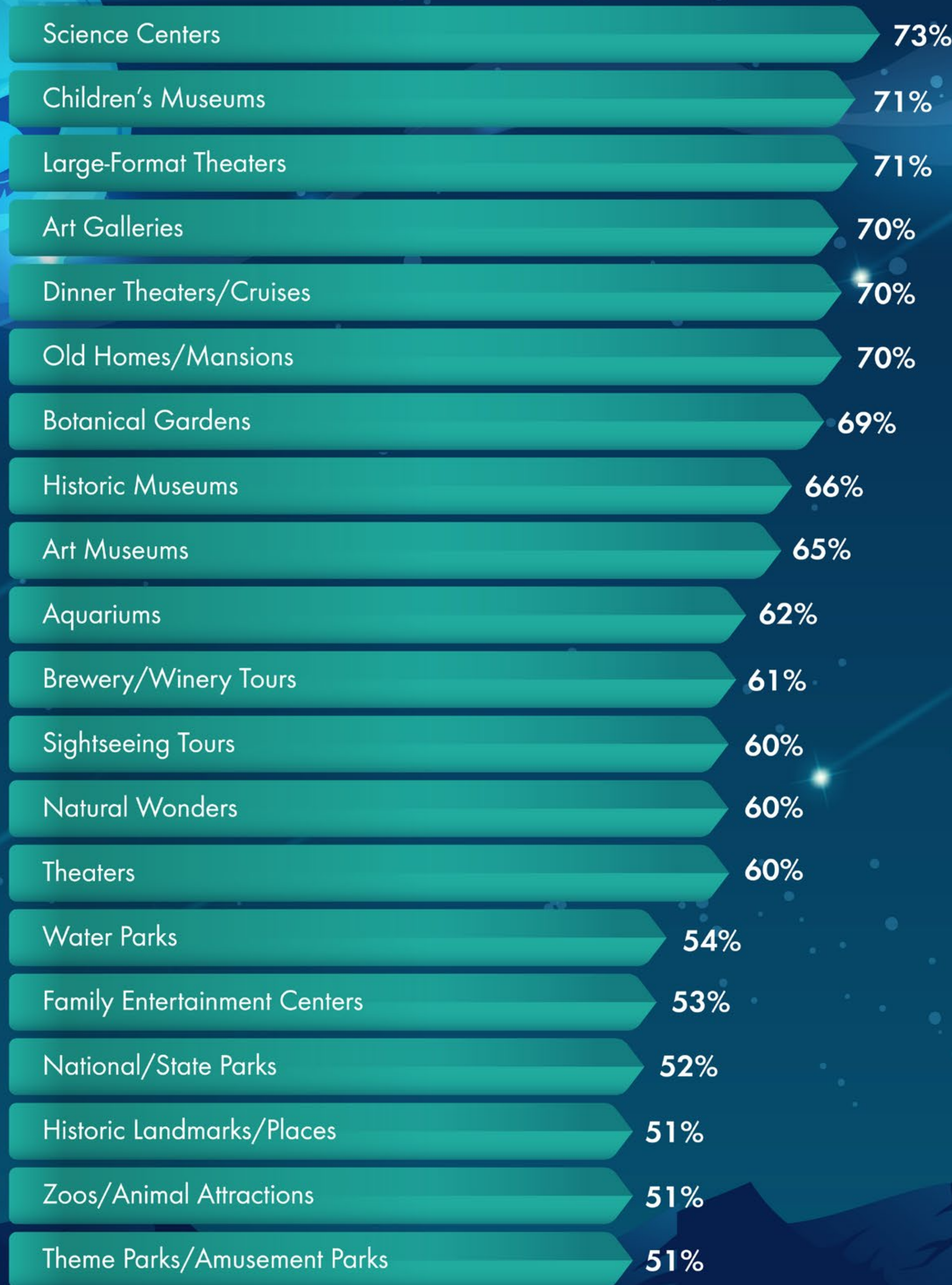
After a terrible, horrible, no-good, very bad 2020, the attractions industry saw plenty of reasons for optimism in 2021. We proved our resilience and resourcefulness as we positioned ourselves for a rebound that was bound to happen eventually … right?

Right. Last year showed us that we're more relevant than ever for visitors, who are craving rest and relaxation. But VOV 2022 results reveal that the second act of this recovery could be much more than just getting back to business as usual. In fact, we're seeing massive pent-up demand that could result in a surge in attraction visitors in 2022 and beyond.

PENT-UP DEMAND IS STILL A DRIVING FORCE

Unconverted intent to visit an attraction hit an all-time high in 2020, with **65%** of visitors wanting to visit an attraction but not actually doing so that year. Even with the solid rebound the industry saw in 2021, VOV 2022 revealed that unconverted intent remains extremely high at **62%,** compared to the historical average of **46%.**

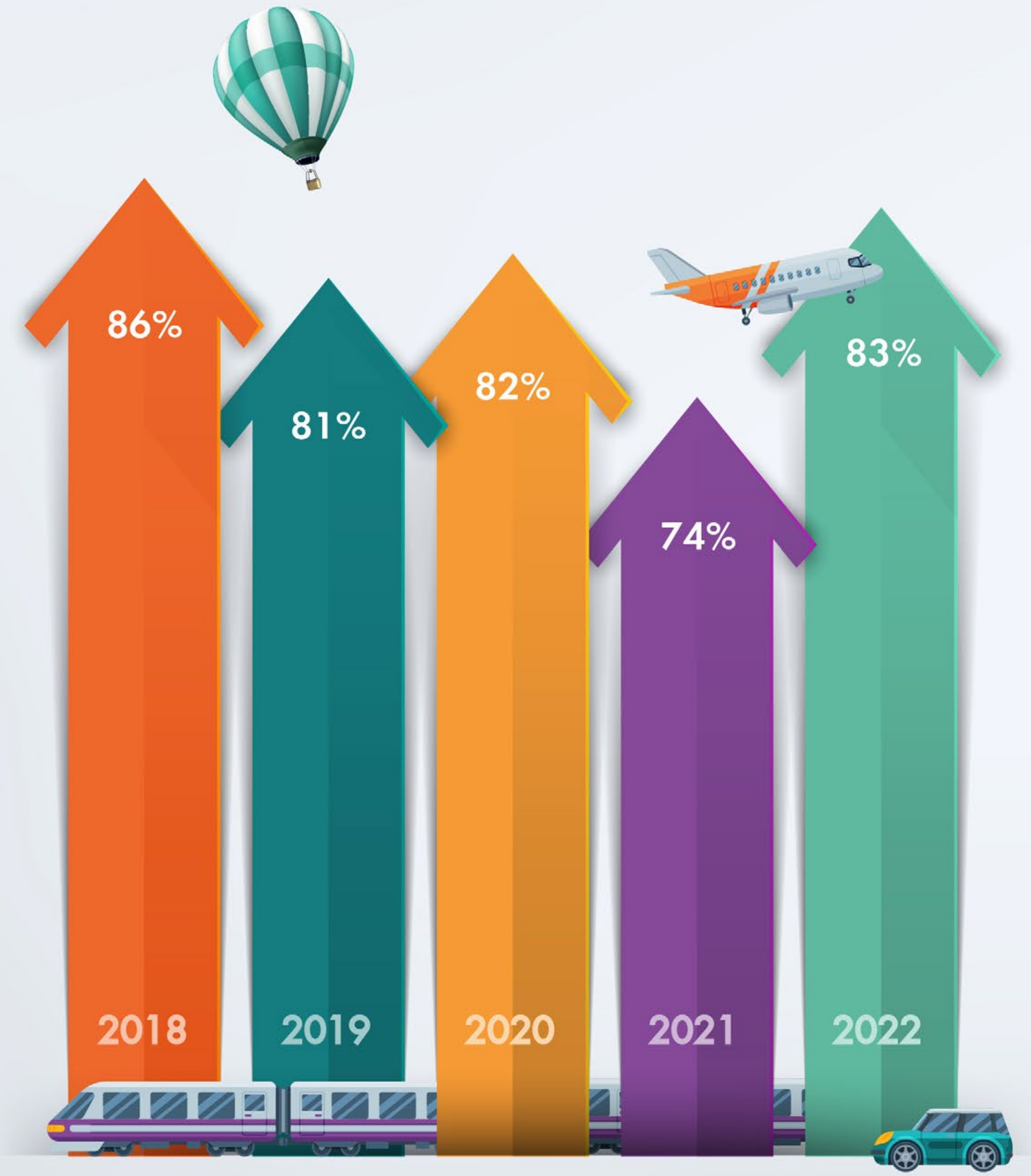


UNCONVERTED INTENT

Ratio Of Intent Remaining After Incidence Is Removed

Science Centers **(73%),** Children's Museums **(71%),** and Movie Theaters **(70%)** experienced the greatest loss in potential visitors, though every attraction category saw above average unconverted intent last year.

INTENT TO TRAVEL FOR LEISURE **IN 2022**



But it's not just the attractions that people are missing. Intent to travel is up, and **83%** of visitors say they plan to travel for leisure in 2022, a return to pre-pandemic levels. Also good news –

> Visitors are indicating they're planning to visit
> **4.3 ATTRACTIONS**
> **ON AVERAGE IN 2022,**
> up from 3.5 in 2021.

These VOV 2022 results match up with other studies predicting travel and tourism trends for 2022. Signs are there that 2022 could provide more than a recovery; it could bring growth beyond pre-pandemic levels.

CONTROL WHAT WE CAN AND MANAGE THE REST

While VOV 2022 results demonstrate that more people are looking forward to visiting attractions, and their intent to do so is strong, there are some big "ifs" that impact this shift from demand to action, including progress in the battle to mitigate the pandemic, as well as our own ability to accommodate growing waves of visitors.

We obviously can't control the twists and turns of COVID-19 variants, but we can and should manage accordingly. VOV 2022 demonstrated that visitors still value safety measures like regular deep cleaning **(51%),** providing hand sanitizer **(51%),** requiring masks when not eating and drinking **(47%),** and limiting capacity to better enable social distancing **(45%).**

Staffing is another factor that attraction owners should consider as they contemplate accommodating visitor levels at or above pre-pandemic levels. We're all well-aware of the labor shortages that have impacted many industries over the past few years, and hospitality is certainly no exception. It's worth considering what can be done to fine-tune HR strategies, benefits packages, and employee training to help ensure that you're ready to not only accommodate more visitors, but that they have great experiences once they arrive.

Supply chain issues are another consideration, with recent studies showing significant challenges for the broader hospitality industry in maintaining supplies of food and beverage items, cleaning products, and other necessities. It's a good idea to consider sourcing and potential problem areas as you anticipate a busier 2022 and beyond.

While COVID-19 remains the biggest variable on how much visitor intent will turn into action in 2022, these other factors are important in ensuring that attractions are ready to successfully serve larger volumes of visitors when they come marching in.

THE SPENDING SPREE

VISTOR SPENDING PROJECTIONS

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VOICE OF THE VISITOR

Visitors are excited to return to attractions, and when they do, they are spending money. This fact comes through loud and clear, both in 2021 attraction per caps and in PGAV's VOV 2022 survey results. It's a much-needed one-two combination of good news for our resilient industry. Yet, it does lead us to wonder if this trend will be a flash in the pan, or something with staying power.

SPENDING COMPARISON

TO PREVIOUS VISITS

VISITORS HAVE NO INTENTION OF SKIMPING ON THE FUN

Respondents reported spending an average of $72 per person and $187 per party in 2021. When asked how this compared to spending at attractions in previous years, **30%** of visitors reported that they spent more on attraction visits last year, compared with only **11%** who said they spent less. This leaves a substantial net of **19%** spending more in 2021, signaling that attraction visitors are ready and willing to spend more on those memorable experiences. Theme parks, museums, and zoos and aquariums fared the best among those bigger-spenders, but net spending was up across all types of attractions.

SPENDING INCREASE

REASONING AMONG VISITORS

> **ALMOST TWO-THIRDS** of VOV 2022 respondents **(64%)** indicated that they were likely to continue spending more in 2022.

When asked what they believe were motivators for increased spending, visitors suggested that it was driven primarily by people wanting to get out again after extended periods of quarantine **(81%),** a desire to treat themselves and their families **(77%),** a heightened sense of wanting to savor family time **(72%),** and increased savings **(64%).** And it doesn't stop there.

A SUSTAINABLE VISITOR SPENDING SURGE?

VOV 2022 data gives us a mixed bag when trying to predict longer-term spending implications. Visitors reported household income in 2021 that was **9%** higher than historical averages, and net expectations for the economy to improve in 2022 is at **30%,** the highest ever recorded for VOV. On the other hand, federal stimulus money was cited as a significant source of increased spending, with **62%** of respondents saying it was a factor.

Economic experts offer similar mixed assessments when trying to gauge overall consumer spending trends. Fidelity notes record-high net worth, strong savings, and a healthy employment market as positives, but also cautions that inflation and the conclusion of major stimulus programs could dampen spending. Other experts, including Wells Fargo and McKinsey & Company, predict short-term spending increases, but cite inflation and continued uncertainty around COVID-19 as reasons for caution.

While variables remain, VOV 2022 data indicates that attraction visitation is likely to return to pre-pandemic levels in 2022. Other entities, such as the World Travel & Tourism Council, predict a similar **30%** increase in travel and tourism industry spending. The combination of pent-up demand and extra savings could very well result in a short-term boost beyond 2022. **Whether a visitor surge extends that far, boils down to two key factors:** will consumers maintain their renewed focus on their bucket lists? And will their wallets allow them to continue to pursue those lists?

HOUSEHOLD INCOME

AMONG VISITORS

ALL ARE WELCOME

ELEVATING THE TOPIC OF DIVERSITY

VOICE OF THE VISITOR

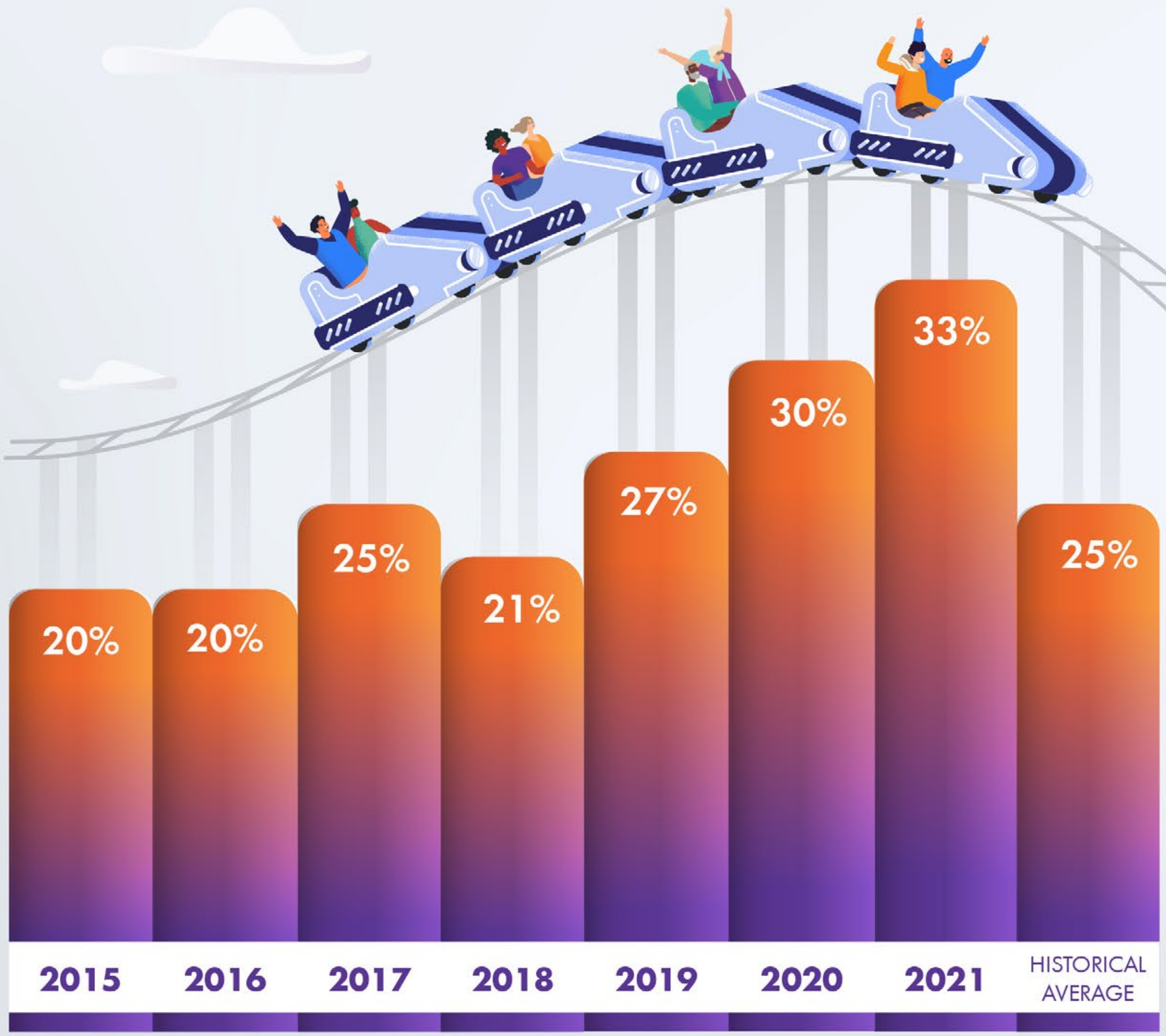
It's an uncomfortable truth, but a truth nevertheless: across society, we are working to rectify a long heritage of systemic racism. We are, by and large, making strides in the right directions, but more progress is needed to achieve full equity and inclusion.

This assessment also applies to the attractions industry. We have improved in many ways, and we continue to take steps forward. But we cannot and should not forget the unfortunate aspects of our history when it comes to inclusion. (For quick and shockingly-true history stories, click on these articles to learn about 20th century American mayors draining swimming pools rather than integrating them; government agencies restricting access to state and national parks; art galleries refusing to show Black art; and theme parks propagating racial stereotypes.) We need to recognize these gross mistakes and learn from them.

In pursuit of insights, VOV 2022 expanded to focus on visitors' perceptions and experiences with diversity while traveling. In addition to our general sample of 1,500 visitors, we collected an oversample of 400 people self-identifying as any race other than non-Hispanic white. We follow the AP Style Book and use the term people of color when referring to these respondents. We sincerely apologize in advance if this choice creates discomfort, and we welcome any reader to contact us and continue the discussion.

VISITORS OF COLOR

RATIO OF PEOPLE OF COLOR VISITING ATTRACTIONS



VOV 2022 results clearly show both the progress we've made, and the need for continued focus on diversity, equity, and inclusion. Those identifying as people of color made up a record-setting percentage of attraction visitors in 2021, and they indicated strong enthusiasm to try more new attractions in 2022. But VOV 2022 also showed a significant gap in satisfaction with attraction visits among people of color ... as well as examples highlighting racism and inequity that still exists today.

BIG OPPORTUNITIES WITH ENTHUSIASTIC AUDIENCES

Of our respondents, those identifying as people of color made up **33%** of attraction visitors in 2021 – a new VOV record. And these respondents showed a strong enthusiasm to visit attractions they have never visited before; when compared with those identifying as non-Hispanic white, people of color visited **6%** more attractions in 2021, and were **16%** more likely to be first-time visitors. As a whole, **72%** said they planned to visit even more attractions in 2022.

ENTHUSIASTIC VISITORS

RESPONSE BY DEMOGRAPHIC

		BLACK	ASIAN	HISPANIC	MULTI-RACIAL	NON-HISPANIC WHITE
2021	Incidence of Attraction Visitation in '21	85%	84%	93%	87%	87%
2021	Household Income	$68.2K	$99.4K	$104.5K	$86.9K	$90.4K
2021	2021 Attractions Frequency	3.6	3.3	4.5	4.0	3.5
2021	% First-Time Visitor	49%	48%	52%	47%	45%
2021	% Local Attraction	58%	52%	62%	59%	45%
2021	% Report Spending More Than in Past	39%	24%	49%	45%	26%
2022	Intent to Visit ANY Attraction in '22	92%	88%	91%	86%	89%
2022	Intent to Return to SAME Attraction in '22	80%	68%	80%	75%	70%
2022	Frequency Intent for '22	4.4	4.2	4.6	4.8	4.1
2022	% Expect to Continue Spending More	72%	70%	71%	63%	62%

GUEST SATISFACTION
AMONG RACIAL GROUPS

In 2021, those identifying as Hispanic were particularly active when compared to other ethnicities. They visited more attractions (4.5 attractions), made more first-time visits, and spent more money than they had in the past. In comparison, people identifying as Asian indicated notably lower-than-average attraction visitation last year (3.3 attractions). And while Hispanic and Asian respondents tend to have the highest household incomes ($104,500 and $99,400 respectively), all people of color report being more likely to continue spending more in 2022 when compared with non-Hispanic white respondents.

Looking specifically at visitation intent for 2022, those identifying as Black reported the highest intent to visit ANY attraction, also with high intent to return to a previously visited attraction. The number of attractions to visit in 2022 ranked highest among Multiracial respondents (4.8 attractions), though again, all groups are planning to visit more attractions this year compared to non-Hispanic whites.

These responses show us that travel and attractions are valued by all, independent of race. And as racial and ethnic lines soften due to family blending, more young Americans consider themselves both white and members of a minority racial or ethnic group. It is expected that by 2045 less than half of Americans will consider themselves white-only.

IDENTIFYING THE BARRIERS TO IMPROVEMENT

Despite the industry's advances, VOV 2022 also shows us areas where more work is needed. First on the list is addressing the pronounced – and growing – gap in satisfaction. While collectively, overall guest satisfaction (ranked on a 5-point scale) among people of color is 4.07 compared to 4.49 for non-Hispanic whites, this satisfaction varies among racial groups. Respondents identifying as Hispanic may have been visiting more attractions and spending more money in 2021, but on average, they reported the second lowest guest satisfaction score (4.08). The lowest score was found among Multiracial respondents, who are planning to visit the most attractions in 2022. **So, what is the root of this dissatisfaction?**

VISITOR DISSATISFACTION

RESPONSE FROM PEOPLE OF COLOR

We posed the following question to all respondents:

"Previous research studies have revealed that people of color tend to experience lower levels of satisfaction when visiting some types of attractions in the United States. Why do you think that is?"

Compare this representative sample of responses from people of color (left) to this sample of responses from non-Hispanic whites (below).

"Uneducated."

"No jobs."

"Not as culturally well rounded."

"Chip on their shoulders."

Though not every non-Hispanic white commented in such blatant and hurtful stereotypes, (indeed, **16%** recognized that racism plays a role in dissatisfaction), the very existence of such comments illustrates that racism at attractions remains a significant problem today.

SCRATCHING THE SURFACE

As we stated earlier, of our respondents, people of color made up **33%** of attraction visitors in 2021. While we take this record breaking number as good news, we also keep in mind that people of color make up **40%** of the U.S. population today, signaling that they are a significantly underserved population at attractions. It requires no leap of logic to assume that the same issues that dragged down visitor satisfaction could also contribute to others deciding to skip an attraction visit altogether.

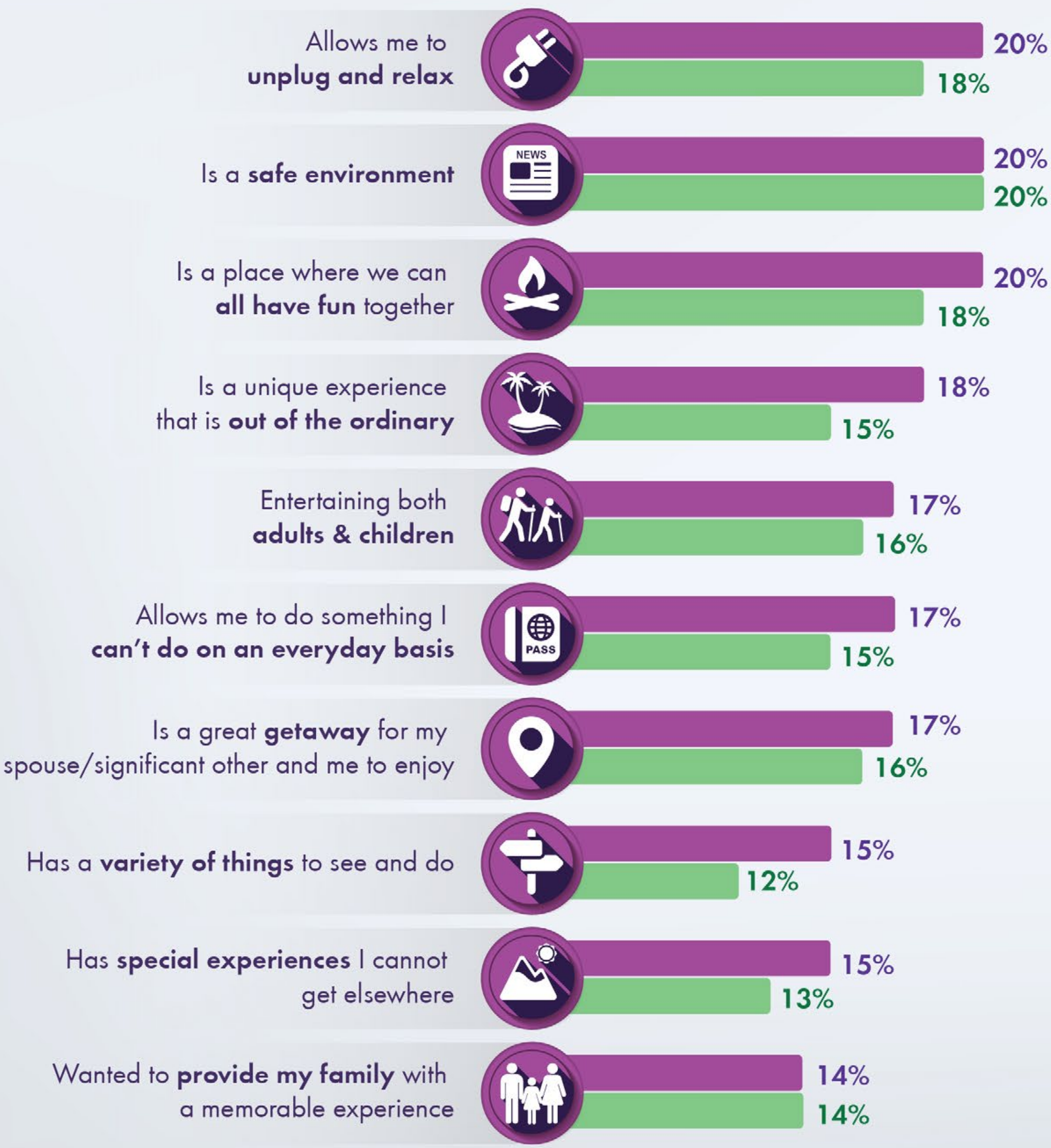
Should you have questions about how to improve in diversity, equity, and inclusion, we suggest starting by opening dialogues with diverse groups within your community.

EXPERIENCES & SAFTEY
MUTUALLY EXCLUSIVE?

People are ready to relax and have fun, but safety remains top-of-mind as we continue to grapple with COVID-19. Attractions face continued challenges in balancing these priorities, but it's not all bad news. VOV 2022 results indicate that visitors think we're doing a pretty good job in maintaining this balance, and some of the safety-inspired innovations we've implemented actually enhance the overall visitor experience.

WHAT ARE VISITORS LOOKING FOR TODAY?

2020 2021



VOV 2022 results are loud and clear when it comes to visitor motivations: they want to unplug and relax, stay safe, and have fun. Those three responses were virtually tied as the top motivators in this year's survey and were the same top motivators cited for 2020. (Notably, safety was in 14th place in 2019.)

One thing we are seeing this year is the prioritization on some safety measures – communication of COVID-19 protocols and requiring guests to wear face masks – over the search for authentic experiences, which dropped from 9th place in 2019 and 2020 to 14th place in 2021. While authenticity is still important, this reinforces visitors' ongoing struggle with managing the pandemic and reminds owners that safety protocols are still vital in attracting some guests.

TRENDS THAT ARE GAINING TRACTION

Precautions like mask wearing, hand sanitizing, and deep cleaning may need to remain for the foreseeable future, though it's likely that most visitors and attraction operators alike would put them in the "necessary evil" category. Thankfully, though, not all safety innovations spurred by COVID-19 fall in this bucket. Some trends that were accelerated by the pandemic are likely here to stay, mostly because they improve the overall visitor experience, and in many cases, also enhance efficiency for operators.

Of the new and "pandemically experimental" options that guests used in 2021, we can expect several to continue, while others will slowly fall away. Food delivery services, online reservations, and mobile app ordering on-site have the highest expected continuance at **78%, 75%,** and **74%** respectively. While the growth of these services over the past two years was inspired by safety, the benefits they offer extend well beyond mitigating pandemic concerns. These services also make attractions easier to navigate and create an improved overall experience, especially for guests who are neurodivergent or physically disabled.

GUEST BEHAVIORS

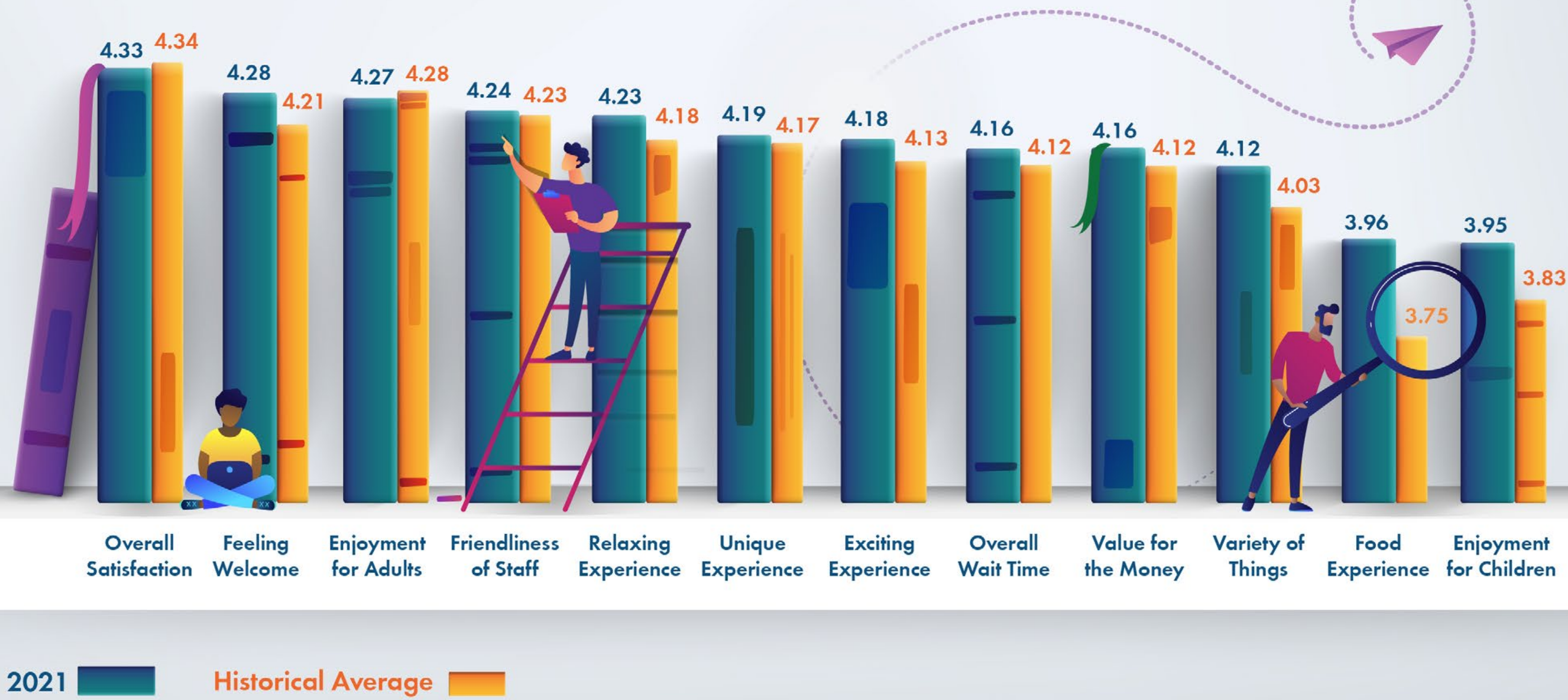
GUEST BEHAVIORS PROMPTED BY THE COVID-19 PANDEMIC

ONLINE RESERVATIONS, FOOD DELIVERY, AND MOBILE APPS are the behaviors visitors were most likely to have engaged in, and the ones they expect to continue.

Adding up those necessary evils and visit-enhancing innovations, visitors overall seem very satisfied that the attractions industry is doing a good job in navigating these rapid changes and delivering safe and relaxing experiences. Satisfaction scores were up in most categories, with the highest jumps over historical averages occurring for quality food experience (+0.21), enjoyment for children (+0.11), and variety of things to do (+0.10). Again, good indications that the industry is finding the right balance between safety and fun.

OVERALL SATISFACTION
WITH MOST RECENT ATTRACTION EXPERIENCE
RATED ON 1 TO 5 SCALE

Many satisfaction scores increased relative to Historical Averages, up 0.09 points on average *(and up 0.06 points compared to the average in 2020)*.



PROVIDING A PUBLIC SERVICE

Last year, the National Alliance on Mental Illness Help Line, which offers support for mental health and substance abuse issues, received 1,027,381 calls. That's up **23%** from 2020, when call volume was already up **27%** over 2019. In an environment where stress is high and mental health concerns are mounting, it's important to remember that attractions can play a role in helping to ease this crisis.

The mental health benefits of vacations are numerous and well-documented, and VOV 2022 results demonstrate that people are craving those vacations like never before. As we navigate continuing and ever-shifting challenges, we should keep in mind that our efforts not only help to ensure the future of our businesses, but also provide important and valuable services to visitors and society as a whole.

REBOUND CHAMPIONS

PCAVOV
VOICE OF THE VISITOR

The attractions industry is on the rebound—though not in the basketball-missing-the-target way, more in the here-they-come and we've-got-this way!

And we do have this.

WE ARE RESILIENT.
2021 exceeded all projections.

WE ARE RESOURCEFUL.
Many pandemic-inspired innovations are too good to give up.

WE ARE RELEVANT.
Listening and adapting to all of our guests' needs (and to all of our guests) is a vital action more attractions are taking.

So power up your ticket scanners, order more toilet paper, and brighten your smiles for an amazing 2022!

PROJECT OVERVIEW

Purpose. The purpose of PGAV's *Voice of the Visitor* research is to provide industry leaders with the most comprehensive assessment of attractions' customer behavior available and to offer insight into consumers' outlook for the coming year. Now in its seventh 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 2022* Study was conducted among U.S. leisure attraction visitors who have either visited an attraction in 2021 or are planning to do so in 2022. 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/Places, Theater/Dinner Theater, Old Home/Mansion, Botanical Garden, Large-Format Screen Theater, Sightseeing Tour, Brewery/Winery Tour, National/State Park and Natural Wonder.

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

Oversample. In addition to the general population sample of 1,500, an oversample of 400 people of color (self-identifying as any race other than non-Hispanic white) was collected to provide further insights into this community. These results are reported separately where applicable.

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 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 2022* statistics, email us at spot@pgav.com

www.h2rmarketresearch.com

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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PGAV VOV

VOICE OF THE VISITOR