

Elevating the Attraction Experience On Budget and On Mission

Sponsored by

REACH

POWER UP!



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PGAV Destinations

POWER UP!

ELEVATING THE EXPERIENCE

ON BUDGET AND ON MISSION

PGAVDESTINATIONS



2025
PGAV/VOV
VOICE OF THE VISITOR

HIGHLIGHTS

- **TRENDS**

- ESTABLISH THE LATEST TRENDS AND MOTIVATORS

- **UNDERSTANDING YOUR GUEST**

- REVIEW GUEST / BRAND / GOALS AND HOW TO CONNECT THEM

- **SMALL STEPS & BIG LEAPS**

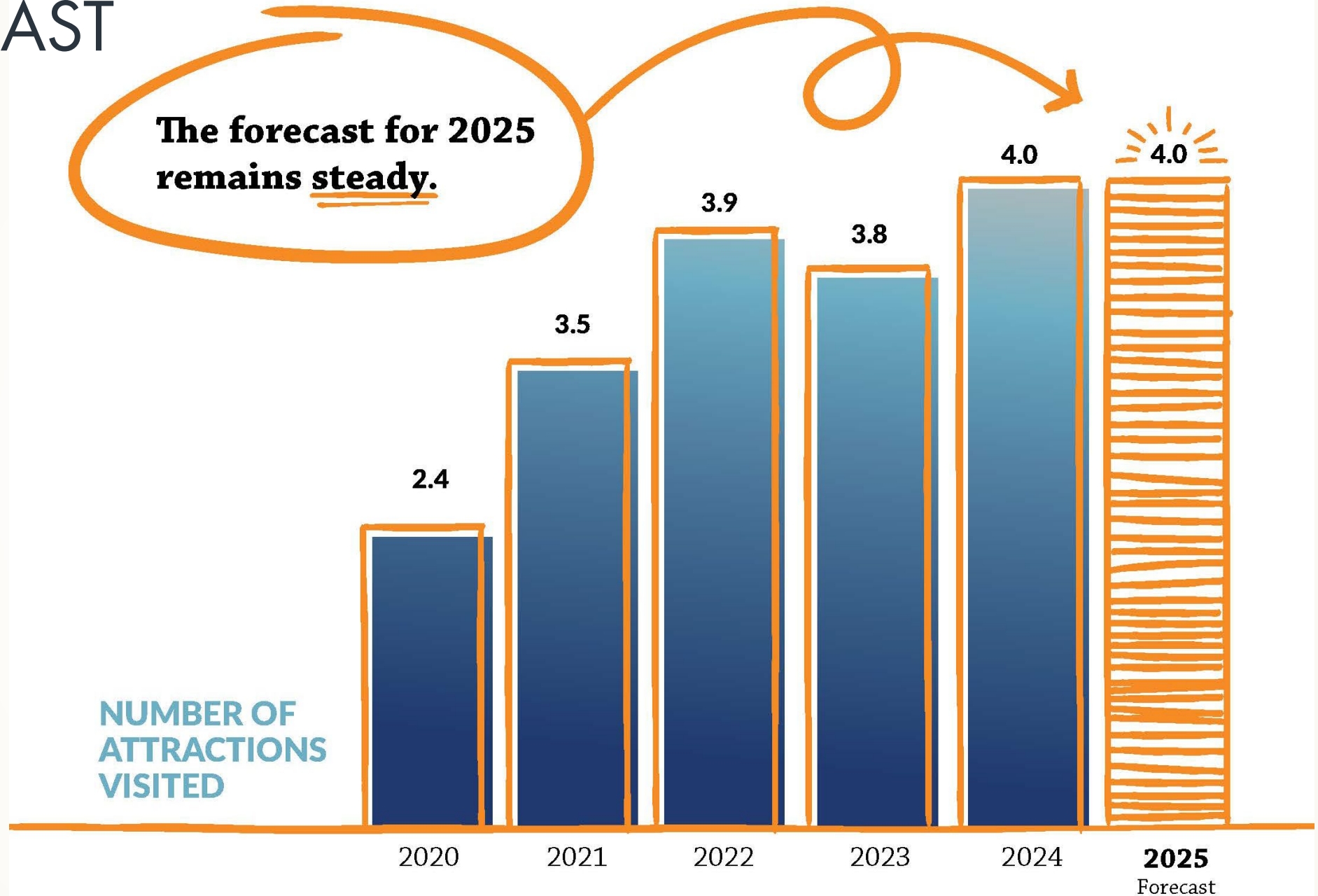
- WHERE TO FOCUS YOUR EFFORTS
- EVOLVE YOUR ATTRACTION TO ATTRACT GUESTS AT ANY INVESTMENT LEVEL

TRENDS



2025 FORECAST

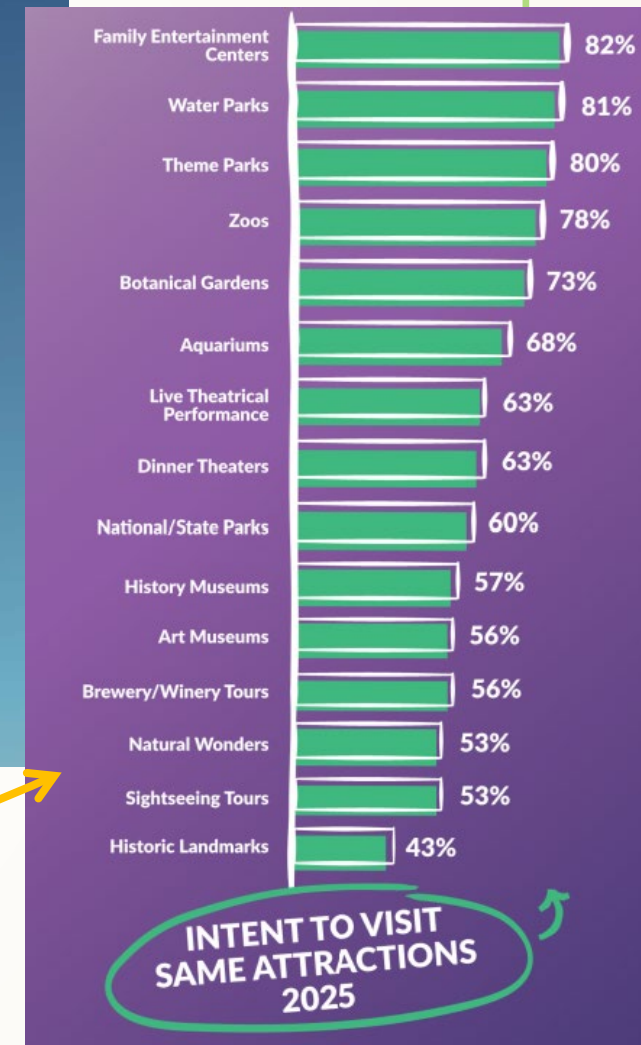
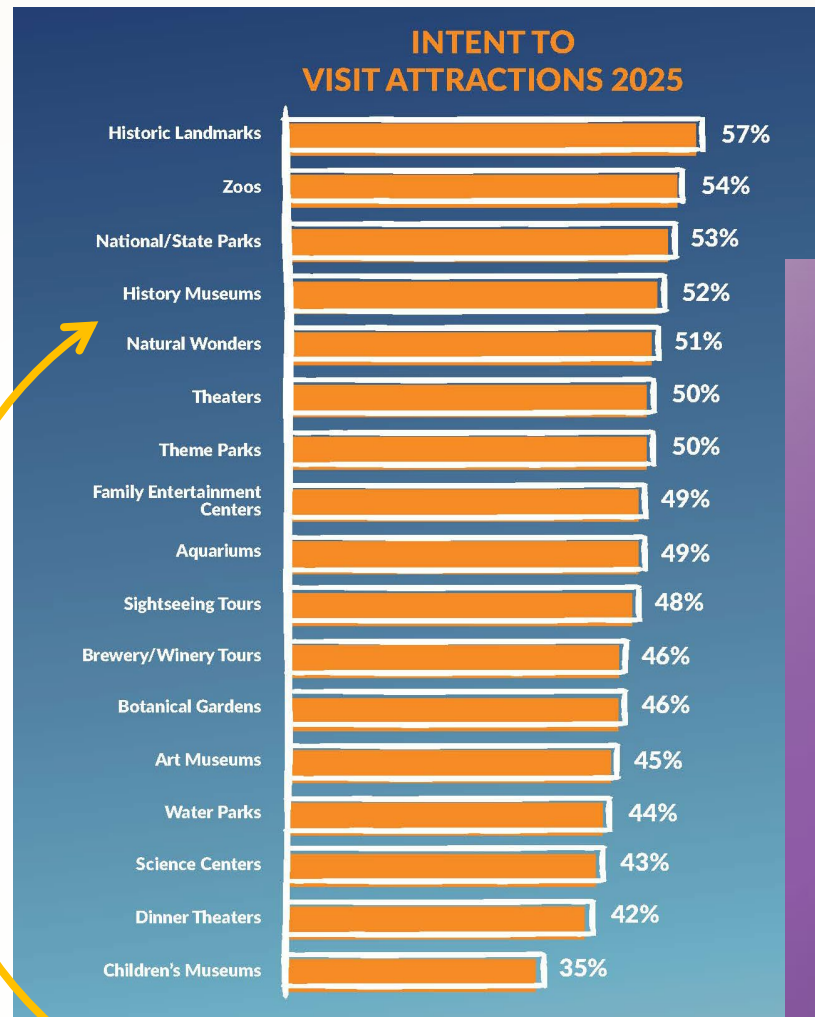
TRENDS



INTENT TO VISIT

TRENDS

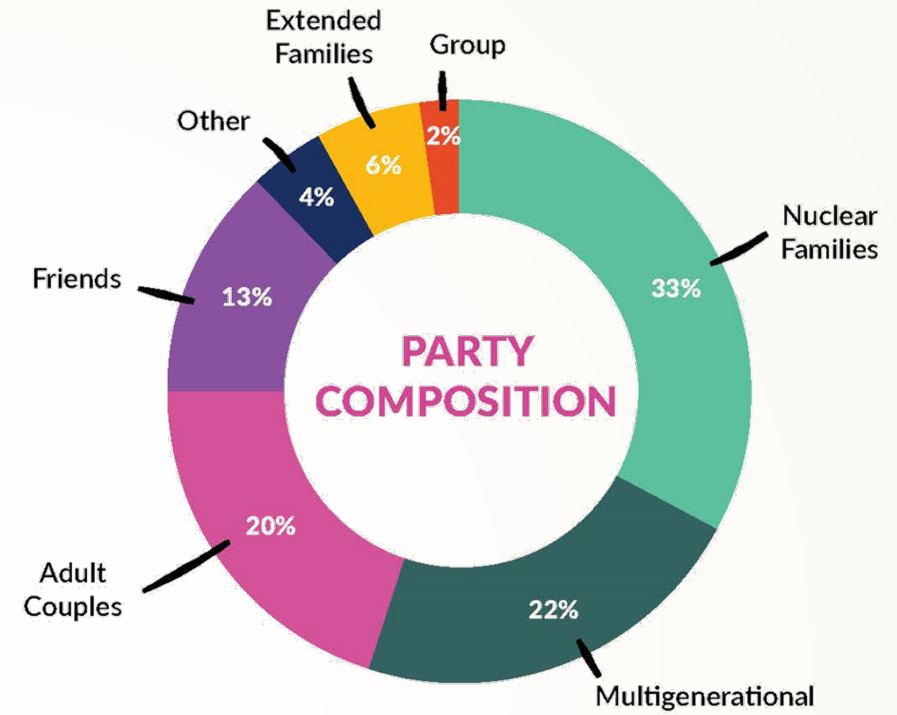
- OVERALL INTENT TO VISIT HAS INCREASED SLIGHTLY
- MAJORITY OF THE TOP ATTRACTIONS ARE NATURE/HISTORY-BASED
- NATURE/HISTORY-BASED ATTRACTIONS RANK LOW FOR REPEAT VISITATION
- ZOOS REMAIN HIGH IN BOTH



INDUSTRY SHIFTS

TRENDS

- THE RISE OF THE **EXPERIENCE SEEKER**
- **NEXT GEN** NAVIGATORS
- **MULTI-GENERATIONAL** TRAVEL

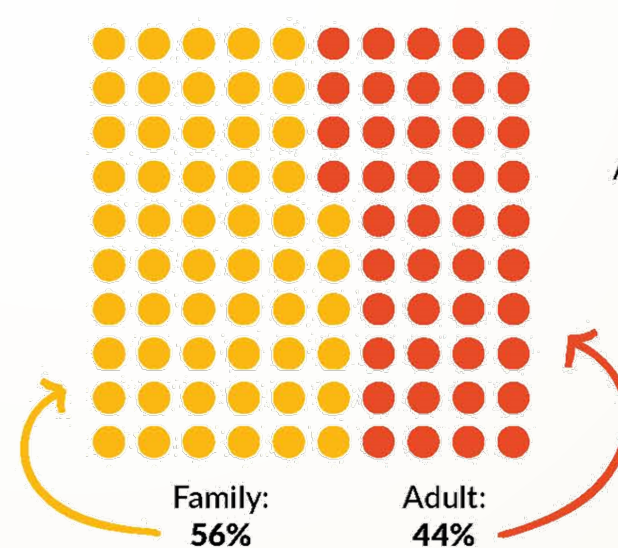
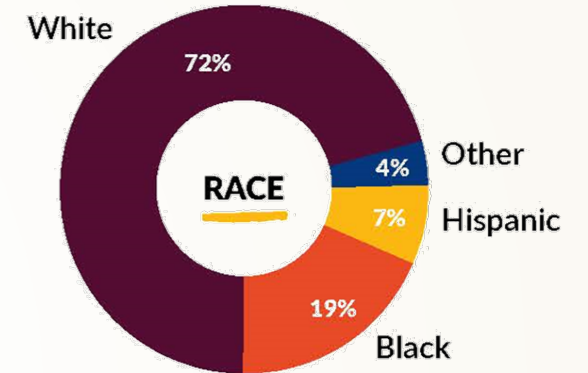
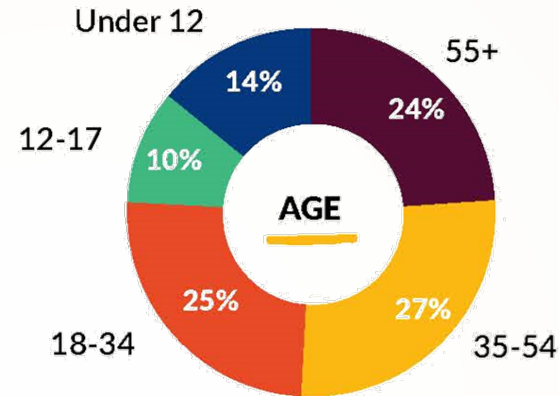


VISITOR DEMOGRAPHICS

TRENDS

- INCREASING YOUNGER TRAVELERS
- INCREASING FAMILY TRAVEL
- INCREASING PEOPLE OF COLOR

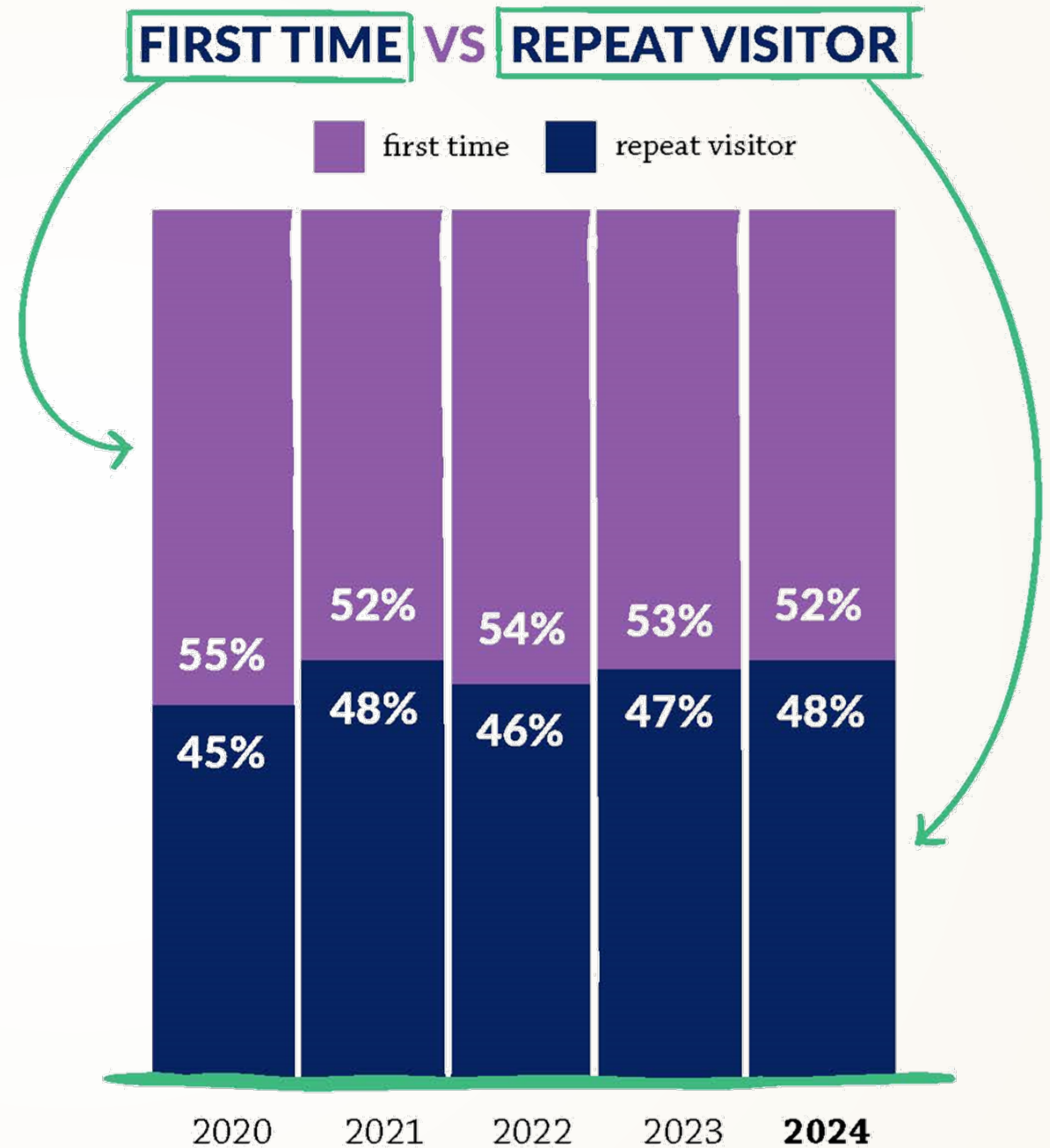
VISITOR DEMOGRAPHICS



FIRST-TIME VISITATION

TRENDS

- FIRST-TIME VISITATION REMAINS ELEVATED
- PEOPLE WANT TO TRY SOMETHING NEW
- WANT UNIQUE / FRESH EXPERIENCES

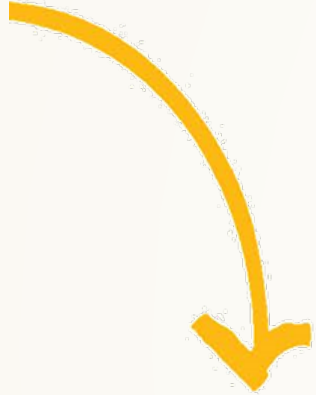
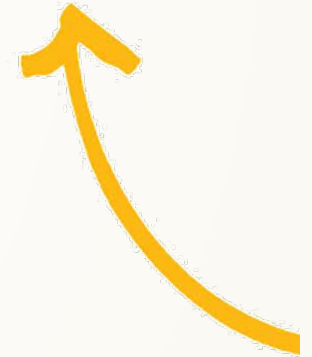


VISITOR MOTIVATIONS

TRENDS

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%



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EXPERIENCE PRICING

TRENDS

- OPPORTUNITIES FOR AUTHENTIC / UNIQUE EXPERIENCES
- OPPORTUNITIES FOR VIP EXPERIENCES





UNDERSTANDING YOUR GUEST

WHO IS YOUR GUEST?

UNDERSTANDING YOUR GUEST

- **DEMOGRAPHICS**

- AGE
- INCOME LEVEL
- LOCAL OR TOURIST
- ETC

- **WHAT DO THEY LOVE ABOUT YOUR DESTINATION?**

- DISCUSS
- HOW DOES IT MAKE THEM FEEL?

- **WHAT DO THEY NOT LOVE ABOUT YOUR DESTINATION?**

- DISCUSS
- HOW DOES IT MAKE THEM FEEL?



DEFINE YOUR BRAND

UNDERSTANDING YOUR GUEST

- **WHAT IS A BRAND?**

- YOUR BRAND IS WHAT PEOPLE SAY ABOUT YOU WHEN YOU'RE NOT IN THE ROOM

- **YOUR OFFERINGS**

- HOW DOES THIS RESONATE WITH THE DEFINITION OF YOUR GUEST?



DEFINE YOUR GOALS

UNDERSTANDING YOUR GUEST

- **SHORT TERM**

- WHAT DO YOU NEED / WANT TO DO IN THE NEXT 6 MONTHS?

- **LONG TERM**

- WHAT DO YOU NEED / WANT TO DO IN THE NEXT 5 YEARS?

- **BHAG**

- WHERE DO YOU WANT TO BE IN 5 / 10 YEARS?
- WHAT / WHO DO YOU WANT TO INCLUDE IN YOUR ATTRACTION?
- WHAT IS YOUR DREAM ATTRACTION?



MAKING THE CONNECTION

UNDERSTANDING YOUR GUEST

- **WHAT CAN YOU DO NOW?**

- ENHANCE THE GUEST EXPERIENCE
- PROVIDE MORE / BETTER OFFERINGS
- PROVIDE GREAT SERVICE
- WHAT MAKES THE VISIT MEANINGFUL / MEMORABLE?

- **WHAT IS YOUR BRAND?**

- WHAT DO YOU WANT PEOPLE TO SAY ABOUT YOU?
- HOW DO YOU USE THIS TO MARKET YOUR ATTRACTION?

- **WHAT ARE YOUR GOALS?**

- KEEPING GOALS IN THE FOREFRONT
- REACHABLE / BHAG'S



SMALL STEPS & BIG LEAPS



WHAT YOU CAN DO

SMALL STEPS & BIG LEAPS

• WHERE TO FOCUS

- FIRST IMPRESSIONS
- WEBSITE / FRONT GATE / STAFF
- AUTHENTIC EXPERIENCES
- FOOD AND BEVERAGE
- LONG TERM GOALS / IMPROVEMENTS



CHOICE DRIVERS
Satisfaction rating correlated with intent to return.

WHAT CAN YOU DO

TRENDS

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%

VARIANCE IN PRIORITIES VS. 2024

Top 3 Choices

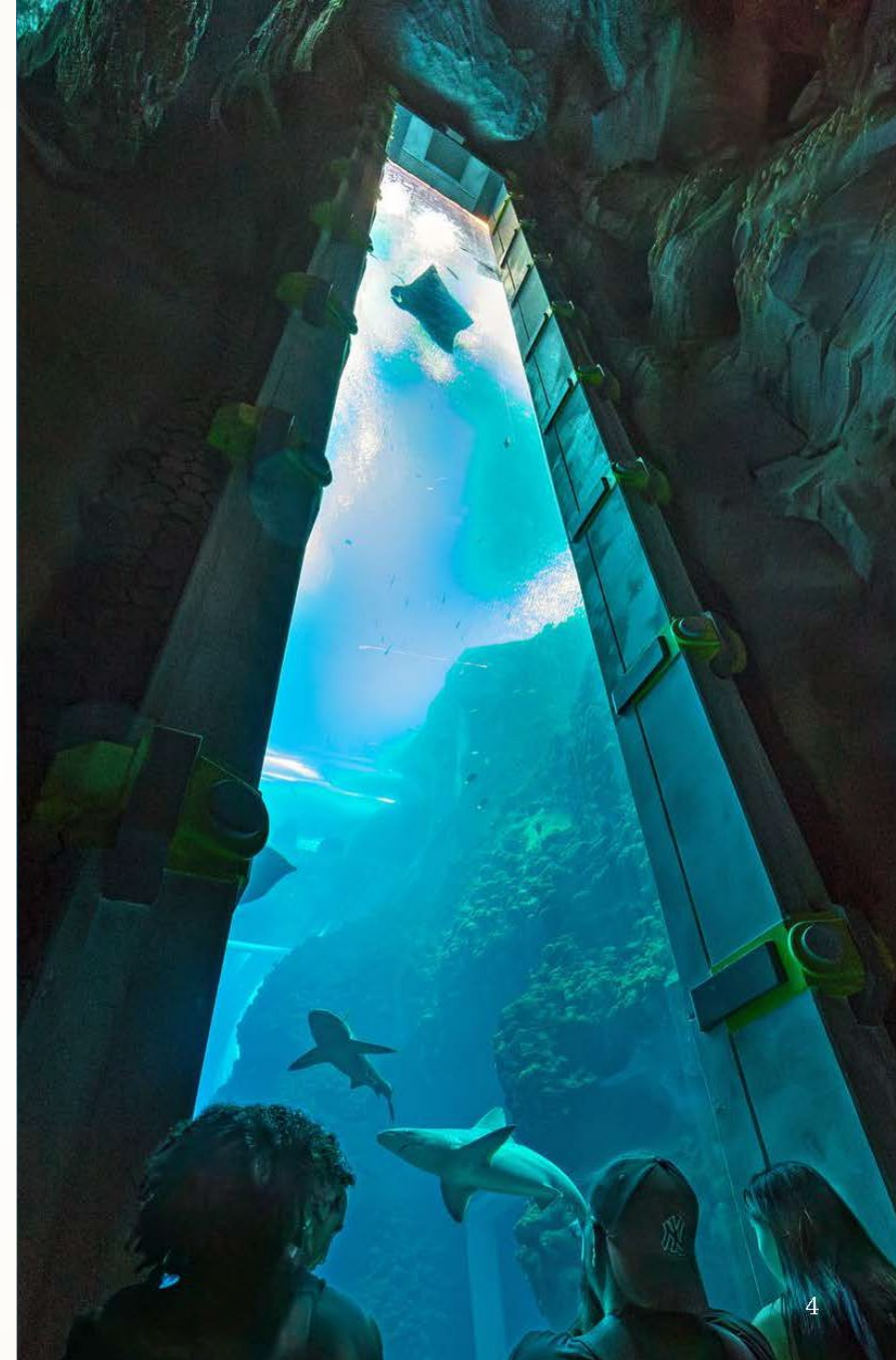
Personalized experiences:	+3%
Exclusive after-hours events:	+2%
Express pass/Skip-the-line access:	+1%
Reserved Space:	+1%
Hotel located at the attraction:	+1%
Behind-the-scenes tour or private animal encounter:	+1%
Food and Beverage:	0%
Front-row/priority seating at a show:	0%
Preferred/close parking: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

WHAT YOU CAN DO

SMALL STEPS & BIG LEAPS

• KEY TAKEAWAYS

- YOU ONLY HAVE ONE CHANCE TO MAKE A FIRST IMPRESSION
- AIM TO IMPLEMENT SHORT TERM GOALS QUICKLY
- MAKE EACH GUEST FEEL WELCOME AND SPECIAL;
NEXT GEN / MULTI-GENERATIONAL
- SET LONG TERM GOALS THAT ARE REACHABLE AND
THAT ARE BHAG'S
- HELP GUESTS MAKE MEANINGFUL MEMORIES
- DREAM BIG AND HAVE FUN!



QUESTIONS?



COMING UP NEXT!

General Session #4 3:30pm

“Innovation by Design”

POWER UP!