



Navigating the New Leisure Landscape Insights for Strategic Navigation

PGAAV **DESTINATIONS**



We all feel
less confident



So What To Do?

The Top 10

PGAVDESTINATIONS



Price vs. Value

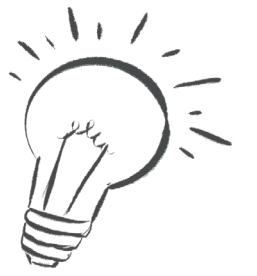
Affordability is no longer a question of price



- “Is it worth it?”
- “Does it matter?”

Price vs. Value

Affordability is no longer a question of price



- “Is it worth it?”
- “Does it matter?”
- **Demonstrate your value and all that you provide**

Pricing Strategy

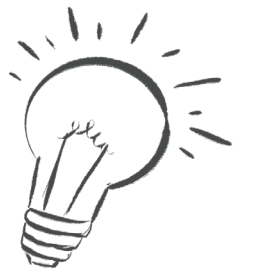
Expectations vs cost



- High industry costs and high visitor expectations are colliding.

Pricing Strategy

Expectations vs cost



- High industry costs and high visitor expectations are colliding
- **Align your pricing with benefits and motivation**

Transparency

Trust is an asset



- What do you stand for?
- How do you make an impact?

Transparency

Trust is an asset



- What do you stand for?
- How do you make an impact?
- **Articulate your mission clearly**

Membership

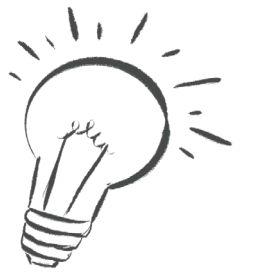
Recurring support as a stabilizer



- Members are vital and want to “belong with a purpose”

Membership

Recurring support as a stabilizer



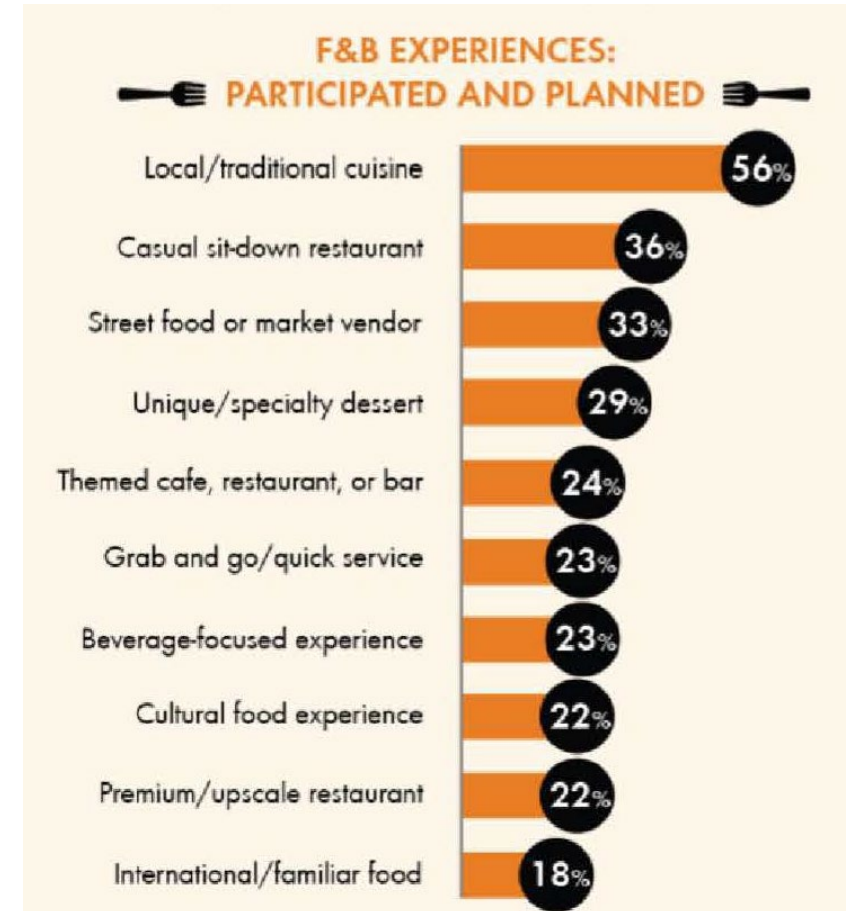
- Members are vital and want to “belong with a purpose”
- **Treat membership as a valuable relationship**

Unique Food and Beverage

It's a cultural experience

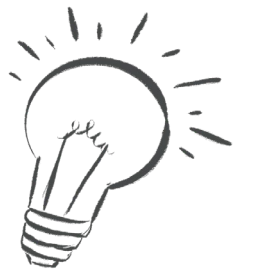


- Experiential cuisine is key
- Think about styles and offerings



Unique Food and Beverage

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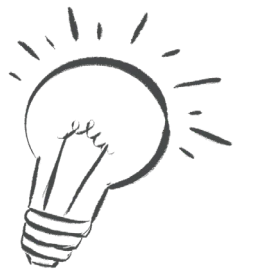


- Experiential cuisine is key
- Think about styles and offerings
- **Deepen the experience through food**



Purposeful Keepsakes

Memories to capture the moment

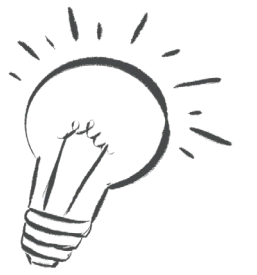


- Guests look for a way to remember
- Make it unique to you



Purposeful Keepsakes

Memories to capture the moment

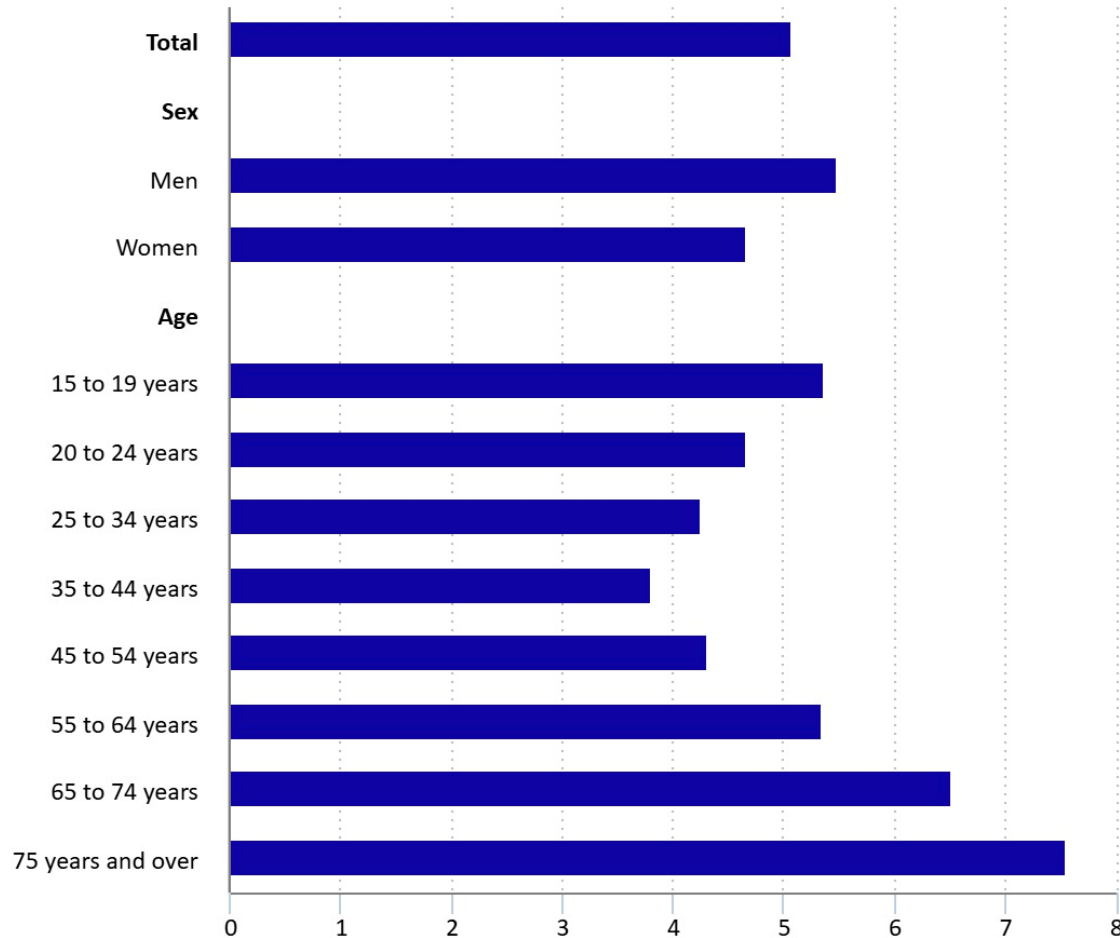
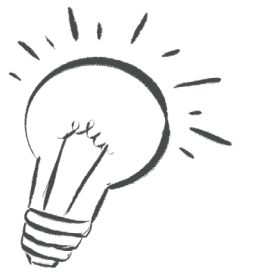


- Guests look for a way to remember
- Make it unique to you
- **Make it authentic and meaningful**



Leisure Time

Scarcity of leisure time is real



- Average hours per day spend in leisure and sports activities, by sex and age, 2024.

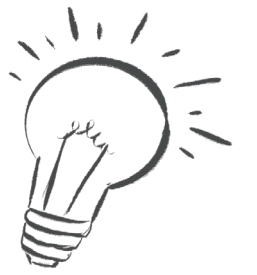


Leisure Time



- Give guests a reason to spend their valuable leisure time with you.
- Make the “micro visit” worth it

Leisure Time

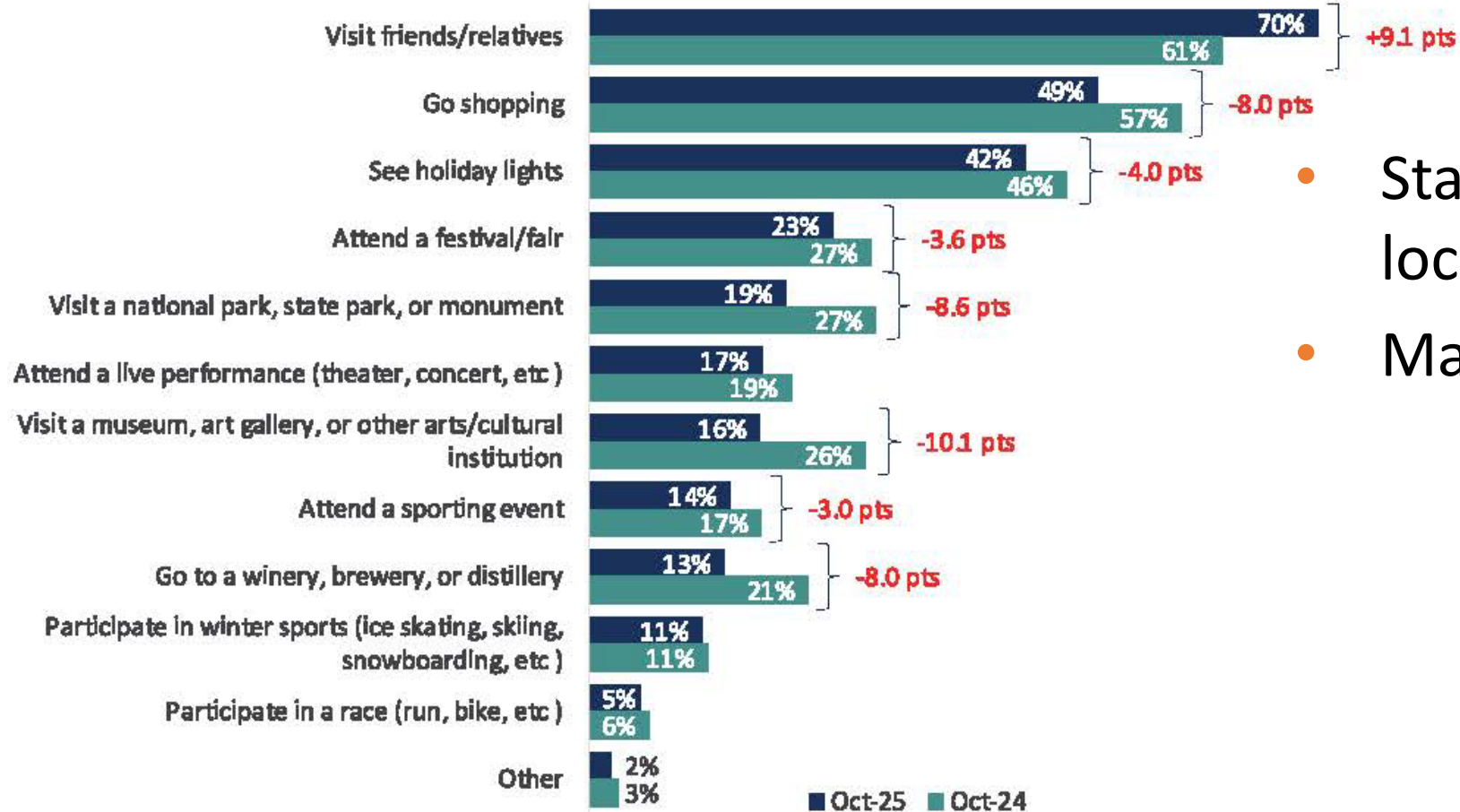


- Give guests a reason to spend their valuable leisure time with you.
- Make the “micro visit” worth it

- **Design for varied visit lengths and great experiences**

Localism

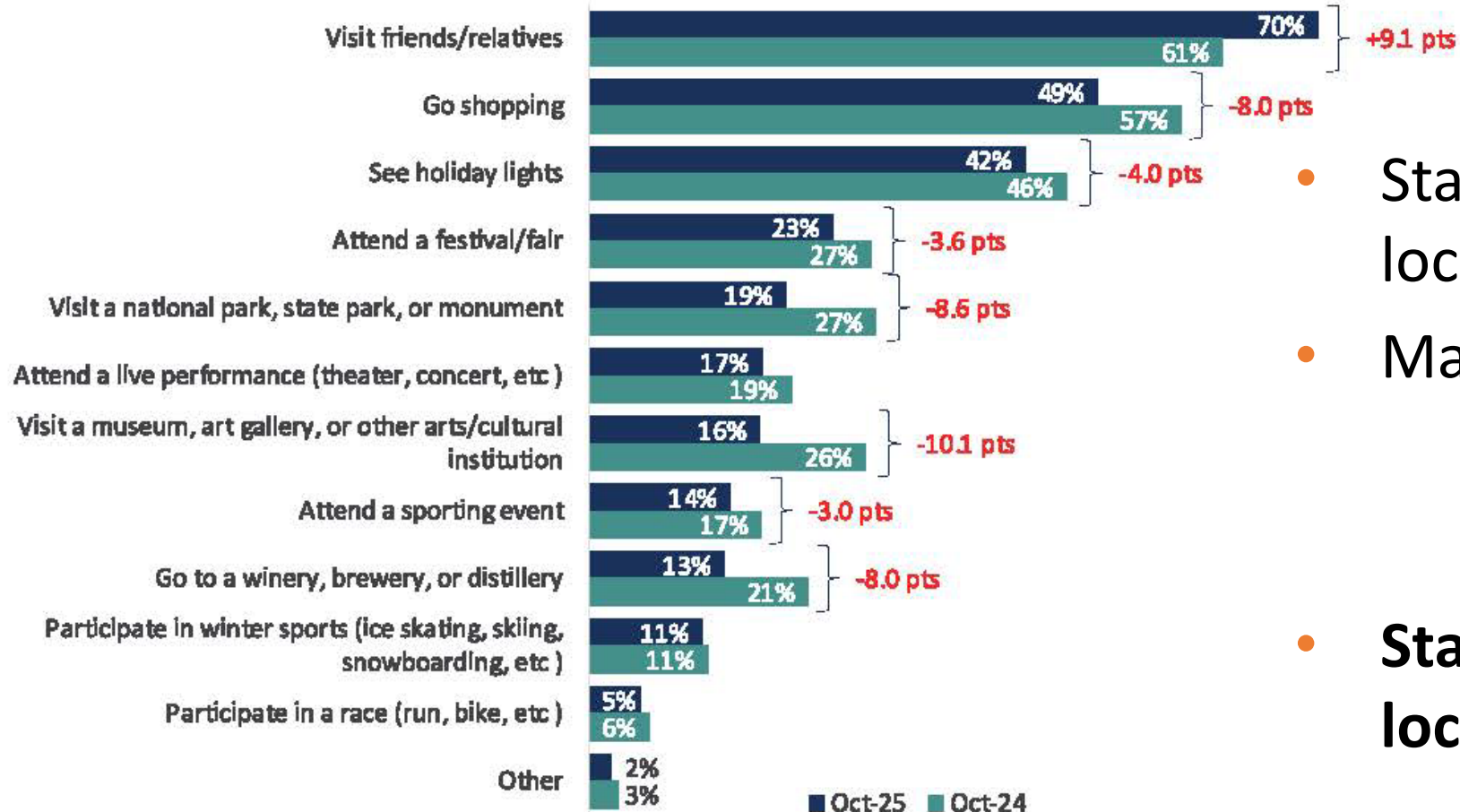
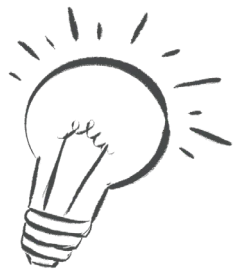
Relationships and proximity



- Stay top of mind with locals
- Make it easy

Localism

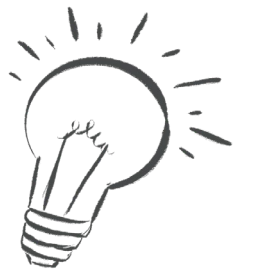
Relationships and proximity



- Stay top of mind with locals
- Make it easy
- Stay essential to your location

Freshness & Familiarity

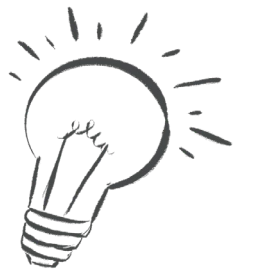
Give guests a reason to return...and bring others



- Keep your destination up-to-date with new things to see and do
- Make it relevant

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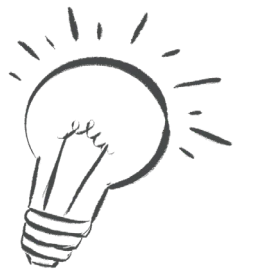


- Keep your destination up-to-date with new things to see and do
- Make it relevant

- **Personalize activities to provide choice and interest**

Use The Shoulders

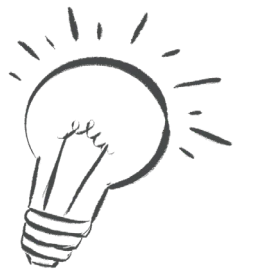
Overtourism is real



- “Underrated destinations” is one of the most popular filters within Skyscanner’s search.

Use The Shoulders

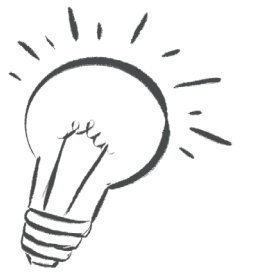
Overtourism is real



- “Underrated destinations” is one of the most popular filters within Skyscanner’s search.
- **Enhance your uniqueness to increase shoulder visits**

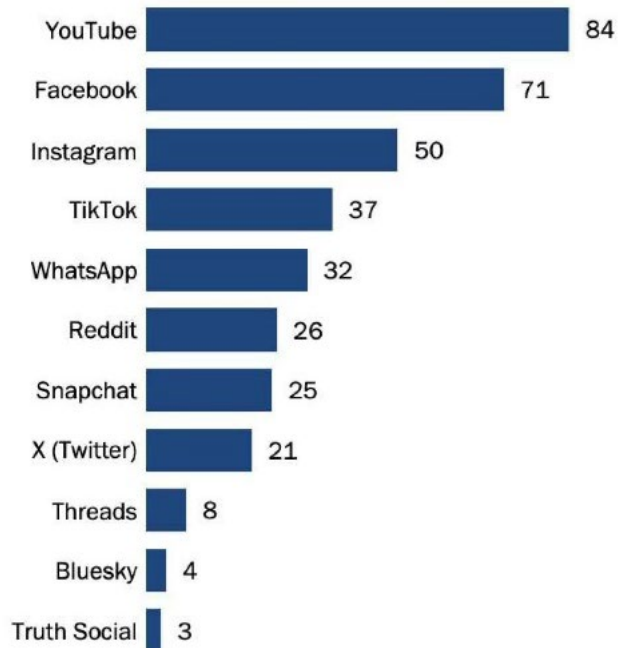
Maximize Marketing

Where do people look to find you?



Most U.S. adults use YouTube, Facebook; half report using Instagram

% of U.S. adults who say they ever use ...



Note: Those who did not give an answer are not shown. Refer to the questionnaire for full question wording.

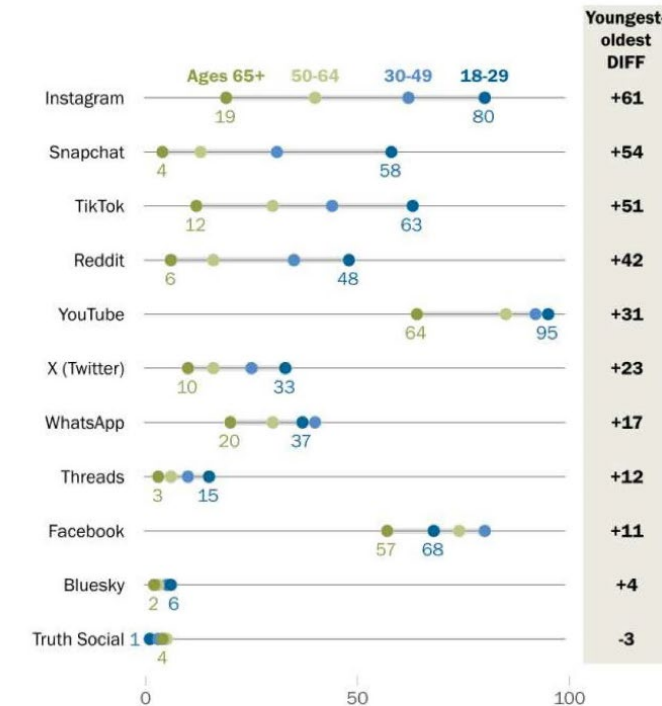
Source: Survey of U.S. adults conducted Feb. 5-June 18, 2025.

"Americans' Social Media Use 2025"

PEW RESEARCH CENTER

Adults under 30 are far more likely to use Instagram, Snapchat, TikTok and Reddit

% of U.S. adults who say they ever use ...



Note: All differences shown in the DIFF column are statistically significant. The DIFF values shown are based on subtracting the rounded values in the chart. Those who did not give an answer are not shown. Refer to the questionnaire for full question wording.

Source: Survey of U.S. adults conducted Feb. 5-June 18, 2025.

"Americans' Social Media Use 2025"

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- Social media influence is fragmenting while word of mouth gains power.



PCAV DESTINATIONS

Maximize Marketing

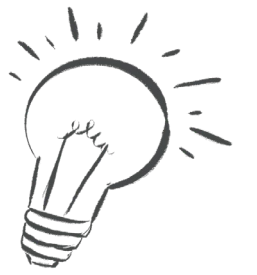
Where do people look to find you?



- AI as a whole new operating system for travel.
 - Inspiration
 - Research
 - Planning
- The confidence in AI is slowly building...and so is the worry....
- On the horizon is AI where multiple agents work together.

Maximize Marketing

Where do people look to find you?



- Social platforms / AI searches

Travel tips

Must-see's

Not worth the hype



- **Keep the consumer first in your marketing strategy**

2026 Trends

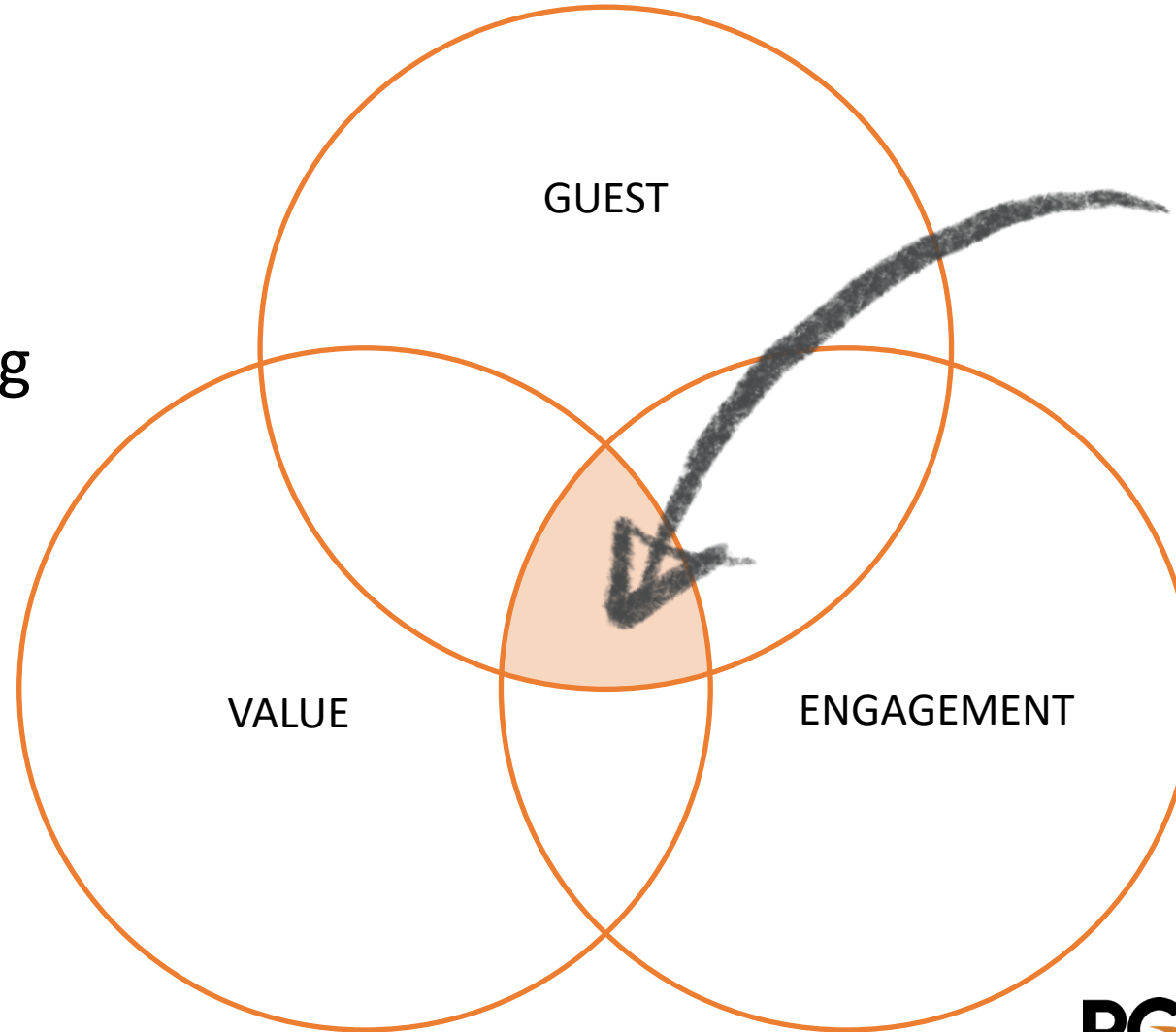
Strategic Navigation

PGA DESTINATIONS



So What Can We Do?

Create success through clearly articulating your **value**, understanding your **guest** needs, and providing unique, mission-driven guest **engagement**.

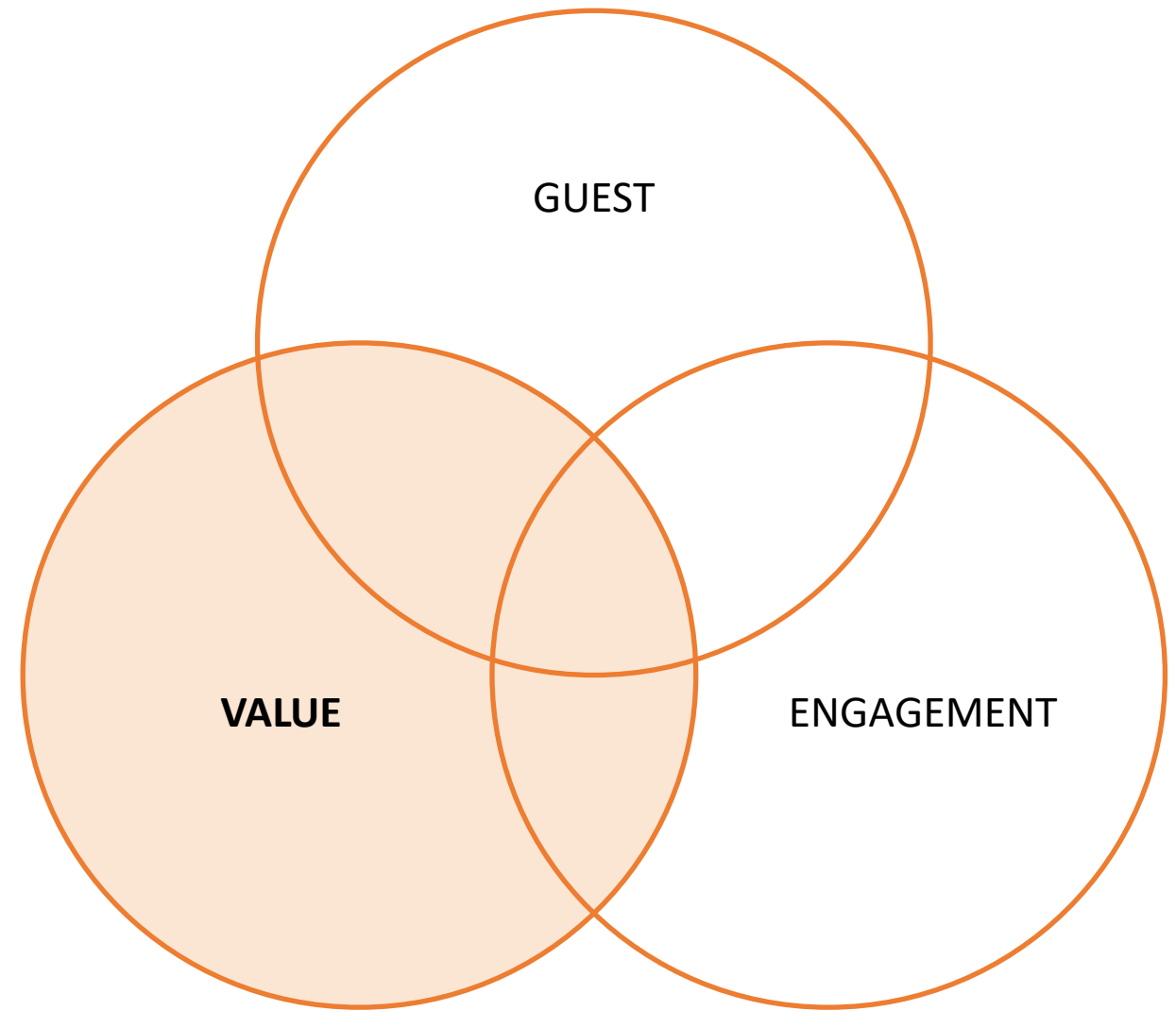


**STRATEGIC
NAVIGATION**



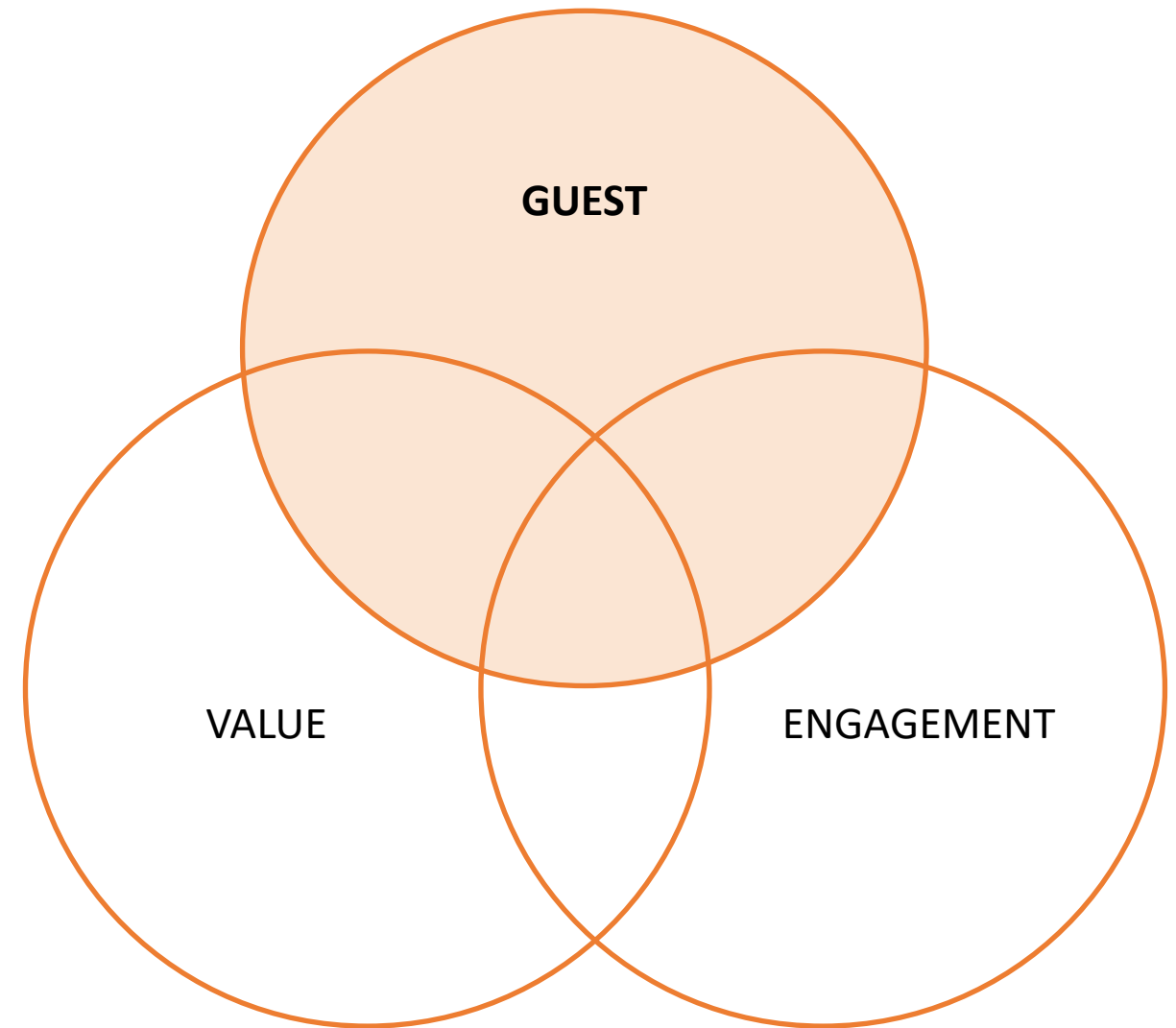
So What Can We Do?

- Leverage your offerings
- Bring clarity to benefits
- Celebrate your impact
- Make your value clear and make it matter



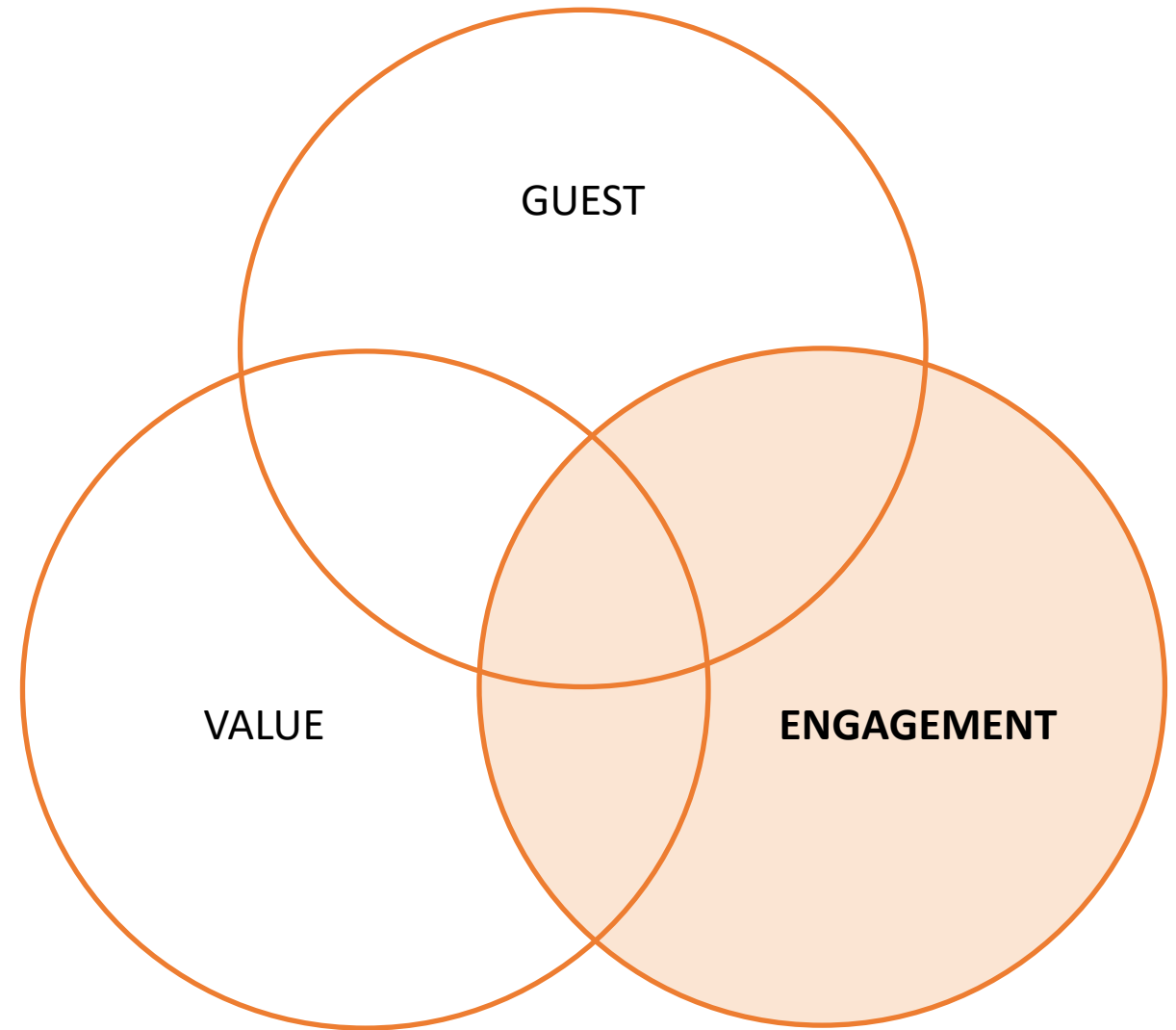
So What Can We Do?

- Members are valuable
- Support your community
- Target your offerings
- Create opportunities for 'micro visits'
- Create memories and enhance them through artisanal food and souvenirs
- Make it personal



So What Can We Do?

- Less stress and more FUN
- Deliver authenticity
- Curate the shoulder seasons
- Remember the importance of word-of-mouth





Keep telling
your stories!

Thank You!
Questions?

PGA DESTINATIONS

