PGAV DESTINATIONS

2020 VOICE OF THE VISITOR

Annual Outlook on the Attractions Industry

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2020 VOICE OF THE VISITOR

THE RESEARCH FOR *VOICE OF THE VISITOR 2020* WAS CONDUCTED IN THE FALL OF 2019.

This year's report was written during the first week of 2020, before the **COVID-19 pandemic** was publicly and widely known in the western world. Therefore, many of our forecasts about this year's economy and attraction visitation rates simply no longer apply. However, **2019's data provides a critical baseline** for when the tourism industry reopens and we strive to understand "the new normal" of guest behavior and attraction health. Additionally, many of the demographic insights and strategic recommendations will maintain their importance into the future.

THE MAGNETISM OF HOME

"A relaxing atmosphere where we can all be together. Plus FREE"

- Consumer Survey Response

WE LIVE IN STICKY TIMES.

There's certainly the blur of the 24-hour news cycle, and how headlines complicate our professional and personal strategic decisions, but the real headline is that those who were once eager **attraction visitors are now becoming more stuck to their couches.**

Only a decade ago, your key competitors were the other regional zoos, museums, theme parks, and historic sites, which jockeyed – or at times collaborated - for residents' and tourists' weekend time. In 2020's high-tech world, oft-predicted by futurists of centuries-past, **the comfort and familiarity of home** – and binge-worthy TV series, movies-on-demand, video games, and voice-assisted entertainment and education – are alluring prospects that are more and more keeping people at home with their friends and family, rather than visiting you.

While we cannot pass judgement on a societal trend of growing interest in closer-to-home entertainment and self-enrichment, we cannot deny that it mandates critical, institutional shifts to entice these once-reliable markets to visit attractions. **Destinations must quickly advance to offer exciting, new, high-fidelity experiences that "outsell" the comforts of home,** enriched by the opportunities only you can offer, the stories and knowledge only you possess, and the comfort and growth only you can offer in times of unrest.

2020
VOICE OF THE VISITOR

Annual Outlook on the Attractions Industry

AQUARIUMS

ART GALLERIES

BOTANICAL GARDENS

FAMILY ENTERTAINMENT CENTERS (FEC)

HISTORIC HOMES & MANSIONS

ART MUSEUMS

BREWERY/WINERY TOURS

NATURAL WONDERS

NATIONAL/STATE PARKS

DINNER THEATERS/CRUISES

ZOOS/ANIMAL ATTRACTIONS

HISTORICAL LANDMARKS

WATER PARKS

LARGE FORMAT THEATERS

THEME PARKS

SIGHTSEEING TOURS

SCIENCE CENTERS

HISTORY MUSEUMS

CHILDREN'S MUSEUMS

THEATERS

To uncover what attraction managers across the country might be able to do in the face of new challenges and changing demographics, we're primed to share our fifth annual ***Voice of the Visitor: Outlook on the Attractions Industry.*** We've once again partnered with our long-standing collaborator **H2R Market Research** to survey 1,500 Americans who visited an attraction in 2019 or are planning to do so in 2020, with a +/-2.5% margin of error and 95% confidence interval. Our report remains the first of its kind in the industry, and endeavors to provide attraction leadership with the most comprehensive analysis of destination guest behavior, mentalities, and intentions for the coming year.

We cannot deny that we live in tumultuous, uncertain times. Some of the greatest opportunities, greatest innovations, and greatest discoveries have come in times of upheaval and change though. **We are here to share these trends, these opportunities,** so that you and your teams will be prepared to plan for and act upon the needs, desires, and at times fears straight from –

THE **VOICE** OF THE **VISITOR.**

Incidence of attraction visitation has remained relatively flat over the five years of our study, varying between **93.8%** and **96.3%** of our respondents visiting any attraction in a given year, and only a **1.2%-point increase in 2019.** Preliminary forecasts indicate year over year demand grew by only **0.6%** last year, but is forecasted to rebound healthily by **1.9%** this year.

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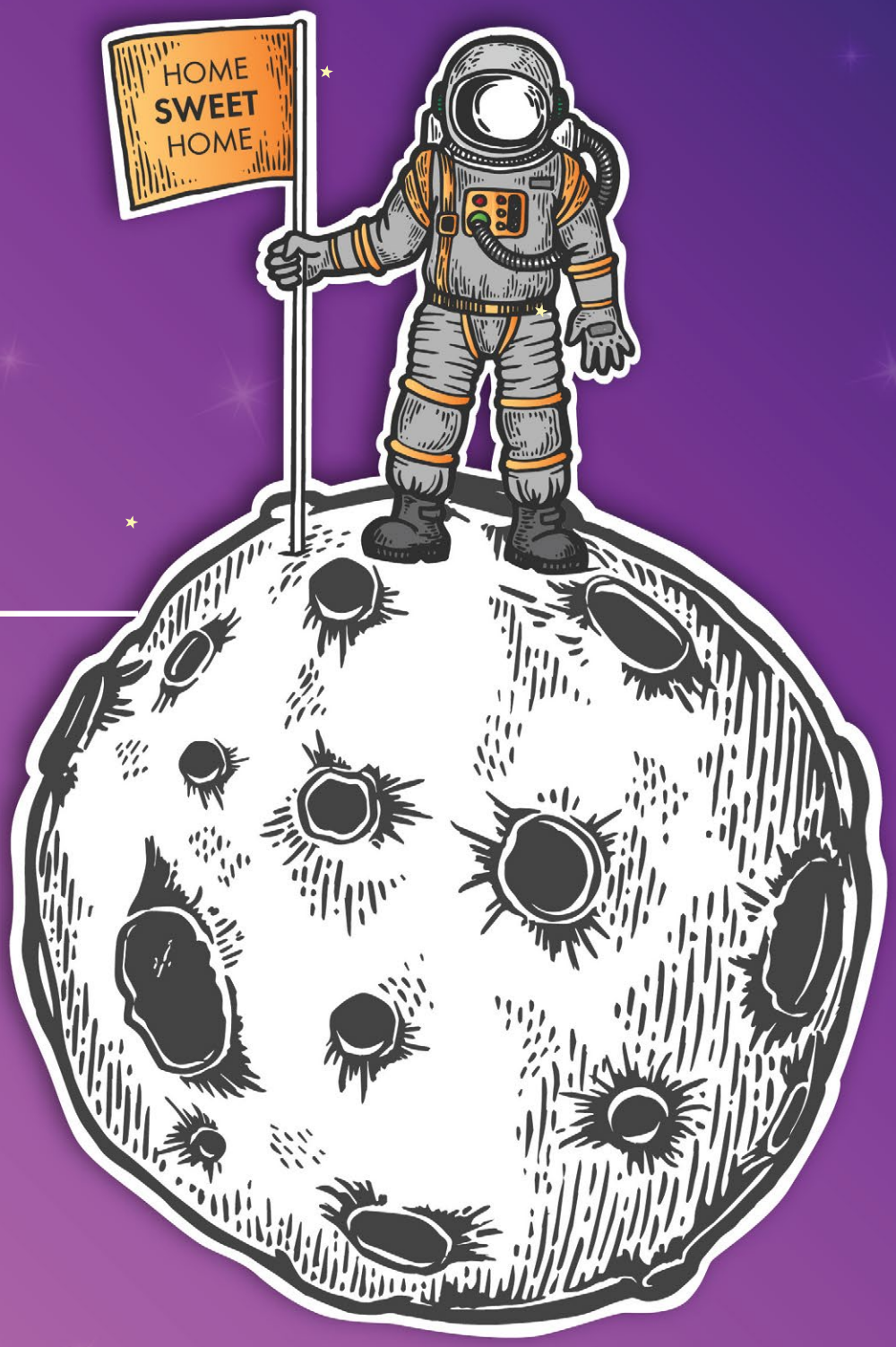
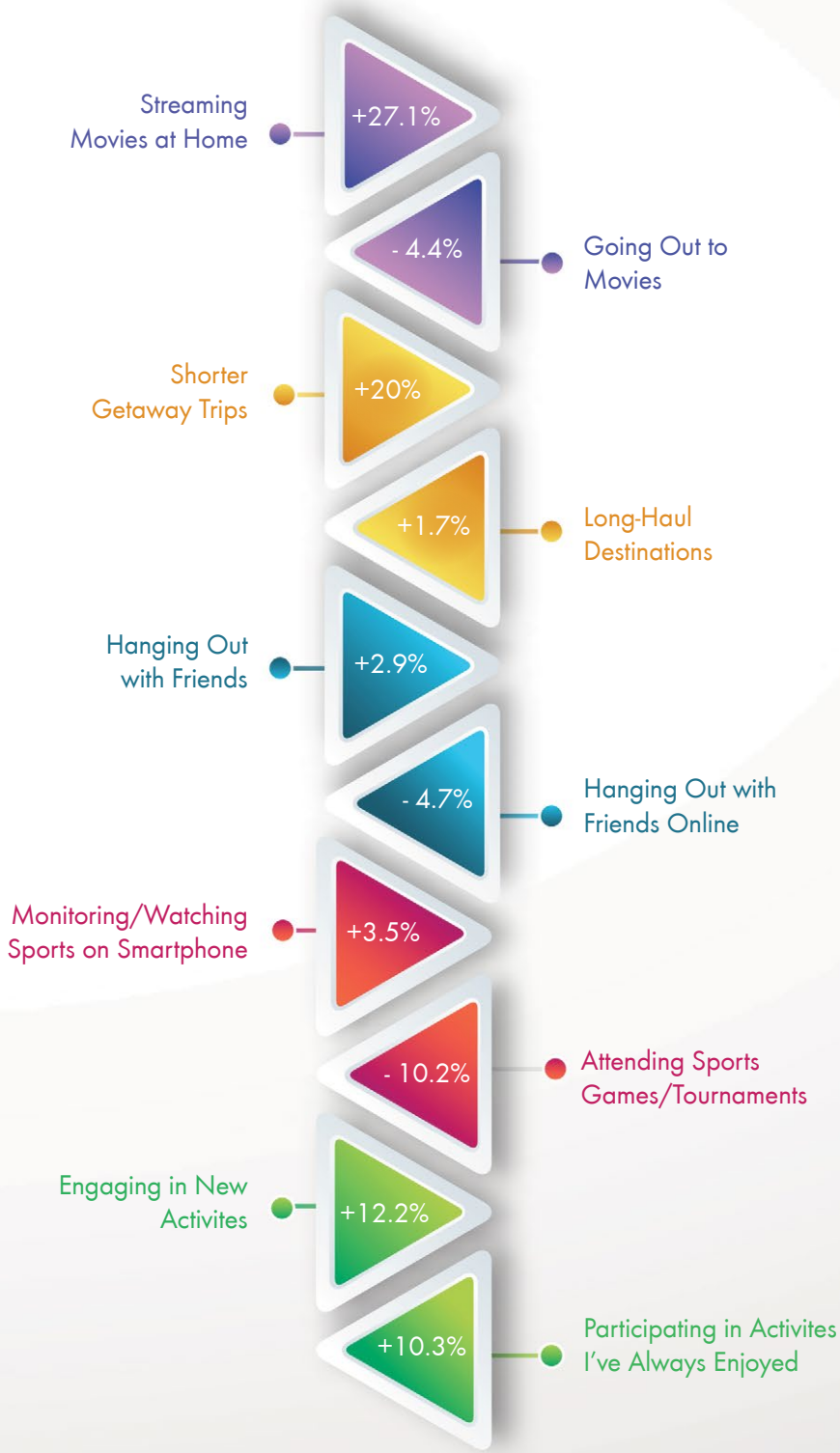
HOME BASING



ACTIVITY TRACKER

Activites done more or less today than 5 years ago.



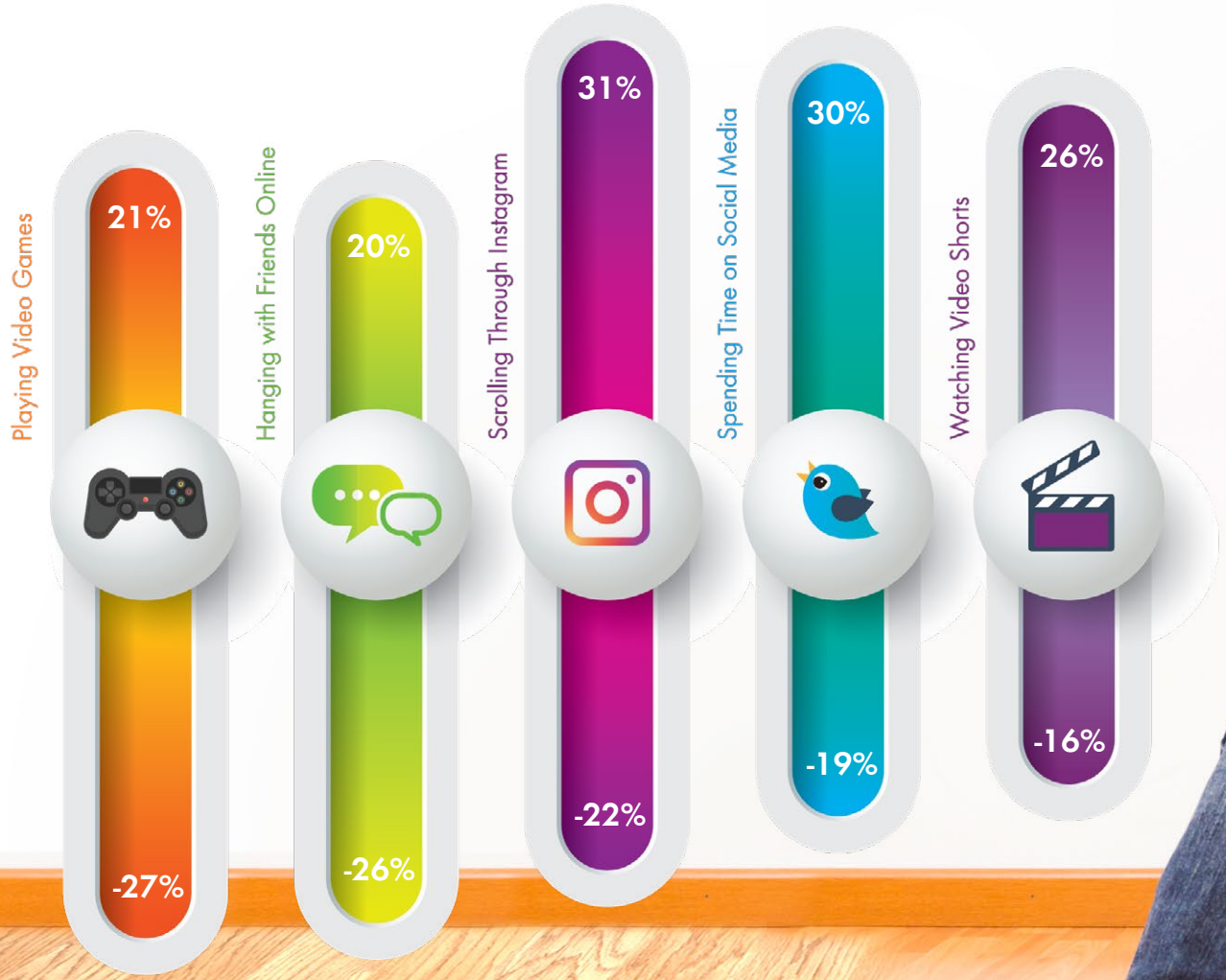
We all love the comforts of home. It gives us a strong sense of control, whether it's the fact that we can wear whatever we want (including that onesie from Christmas 2013), we know where everything is, we can set the temperature, lights, and even the alarm clock for our Sunday nap. Looking at several of our findings this year, we're learning that we're not alone.

The theory of Home Basing is a trend we're seeing where people are opting to spend more time at home, rather than venturing too far outside of their communities. We asked our respondents to **rate a number of activities by whether they were doing more or less of them than they were five years ago.** Looking at net change, respondents had largely switched to streaming movies at home ***(+27.1%)*** vs. going out to movies ***(-4.4%)***, despite the onslaught of superhero sequels, reboots, and finales.. There was a large rise in Shorter Getaway Trips ***(+20% net)***, while Long-Haul Trips only rose by **1.7%** net. These respondents also reported a net **3.5%** rise in watching sports on their smartphones, paired with a net **10.2%** decrease in attending the games in person. This finding mirrors the live vs. streaming sports statistics from our 2018 ***Destinology, The Fight for Attendance.***

PASSIVE DIGITAL CONNECTION

DOING MORE

DOING LESS



The trend of Digital Social Connectedness is continuing to transform as we are seeing less active interaction through video games and online hangouts, and more passive interaction through curated social content.

These at-home digital activities are also becoming more passive, rather than active. In this year's data, we saw a net **6% decrease** in playing video games and chatting online, but a net **9% increase** in scrolling through Instagram, net **11% increase** in viewing social media in general, and a net **10% increase** in watching short videos online.

In *Home-based Digital Leisure: Doing the Same Leisure Activities, but Digital*, a study out of Universidad EAFIT, researchers Jori Lopez-Sintas and Laura Rojas-DeFrancisco cite numerous instances where at-home, digital choices have replaced previous ***"real-world"*** experiences. Where one might have once gone to the library to do research, the same information is now accessible through home internet. To learn a skill, one might have attended a night class, but can now learn the same skills through YouTube. Dining out has now been replaced by Door Dash; brick-and-mortar shopping by Amazon; pinball arcades by Playstation. Even the thought of programmed television or radio would have friends and family gather around the home device at a particular time; but now with on-demand streaming, people's days can fill up with binge-watching rather than running that errand they needed to. They'll just have the "thing" delivered!

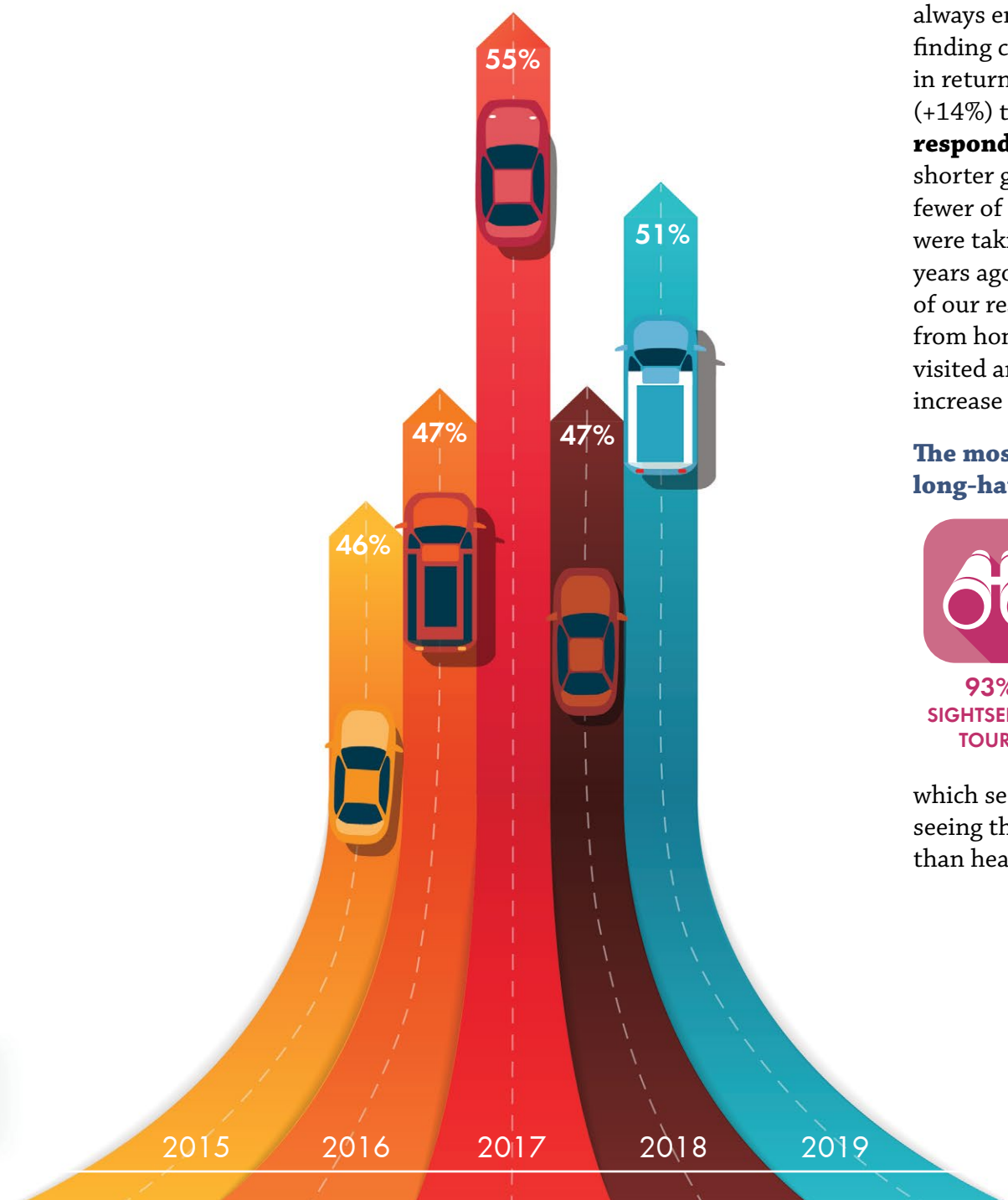
For attraction managers, this may mean a refocusing on marketing to nearby residents. Beyond simply the marketing messages and methodology, a concentration on creating new attractions and exhibits that would give residents a strong reason to come back – or attend for the first time – is perhaps critical. These additions and messages need to be high-fidelity and incredibly effective to cut through the noise; as we detailed in *Destinology,* the competitive field for leisure indulgers is wider and deeper than ever before. If you want PGAV to report the trend of **"Attraction Basing"** rather than **"Home Basing,"** it's time to strengthen your reasons for residents to visit.

LUGGAGE NOT REQUIRED

2020 VOICE OF THE VISITOR

ATTRACTIONS VISITED

WHILE TRAVELING



Home Basing doesn't mean becoming a recluse and holding court about Disney+ with a dozen housecats day after day. Some people are simply tightening their comfortable leisure range, using their homes as the launchpad. We found that attraction visitors are more likely to participate in activities they've always enjoyed (+16%), honing their hobbies and finding comfort in the familiar, and more interested in returning to the attractions they know and love (+14%) than they were five years ago. **35% of our respondents** noted that they were taking more, shorter getaways, while **15%** noted they were taking fewer of these trips. While **28%** of people noted they were taking more long-haul trips than they were five years ago, **21%** reported taking fewer big trips. **80%** of our respondents took a leisure trip over 50 miles from home, down two points from 2018, but **51%** visited an attraction while doing so, a four-point increase from 2018.

The most popular attractions during these long-haul trips were...

93% SIGHTSEEING TOURS

77% NATIONAL/STATE PARKS

74% HISTORICAL LANDMARKS

which seems to suggest these trips may be about seeing the nation and rediscovering its history, rather than heading to a specific destination.

"Has always been our getaway for fun... something we both enjoy together"

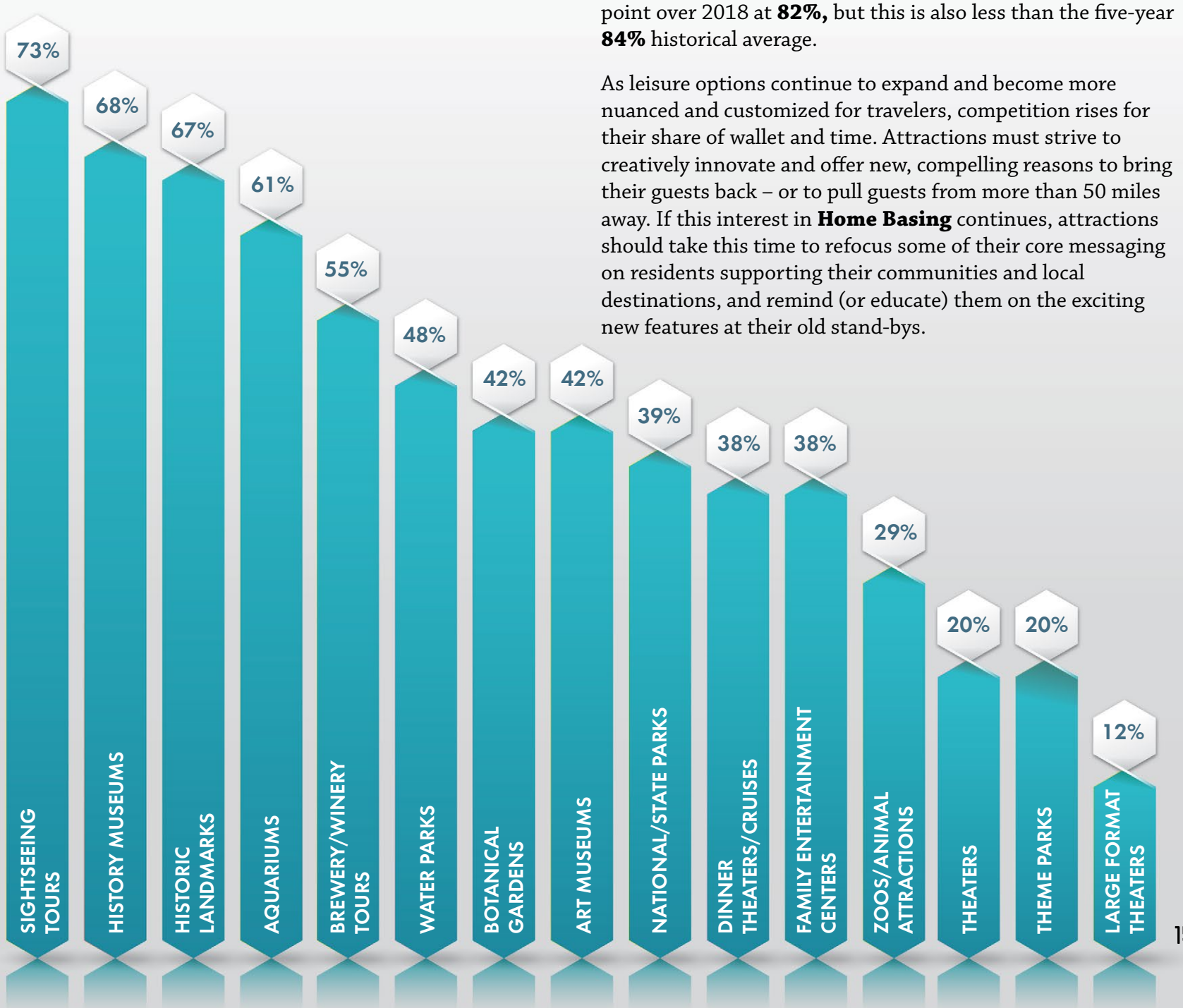
- Consumer Survey Response

2019 FIRST TIME VISITORS

BY ATTRACTION VISITED MOST RECENTLY

When it comes to specific attractions, **first-time visitation fell by 5 points** under 2018 as guests returned to their old familiars. Intent to repeat that 2019 visit in 2020 only edged up by **0.6 points from last year to 63.2%,** which is still under the five-year average of **66% for intent to revisit.** Intent to travel for leisure in general is up one percentage point over 2018 at **82%,** but this is also less than the five-year **84%** historical average.

As leisure options continue to expand and become more nuanced and customized for travelers, competition rises for their share of wallet and time. Attractions must strive to creatively innovate and offer new, compelling reasons to bring their guests back – or to pull guests from more than 50 miles away. If this interest in **Home Basing** continues, attractions should take this time to refocus some of their core messaging on residents supporting their communities and local destinations, and remind (or educate) them on the exciting new features at their old stand-bys.

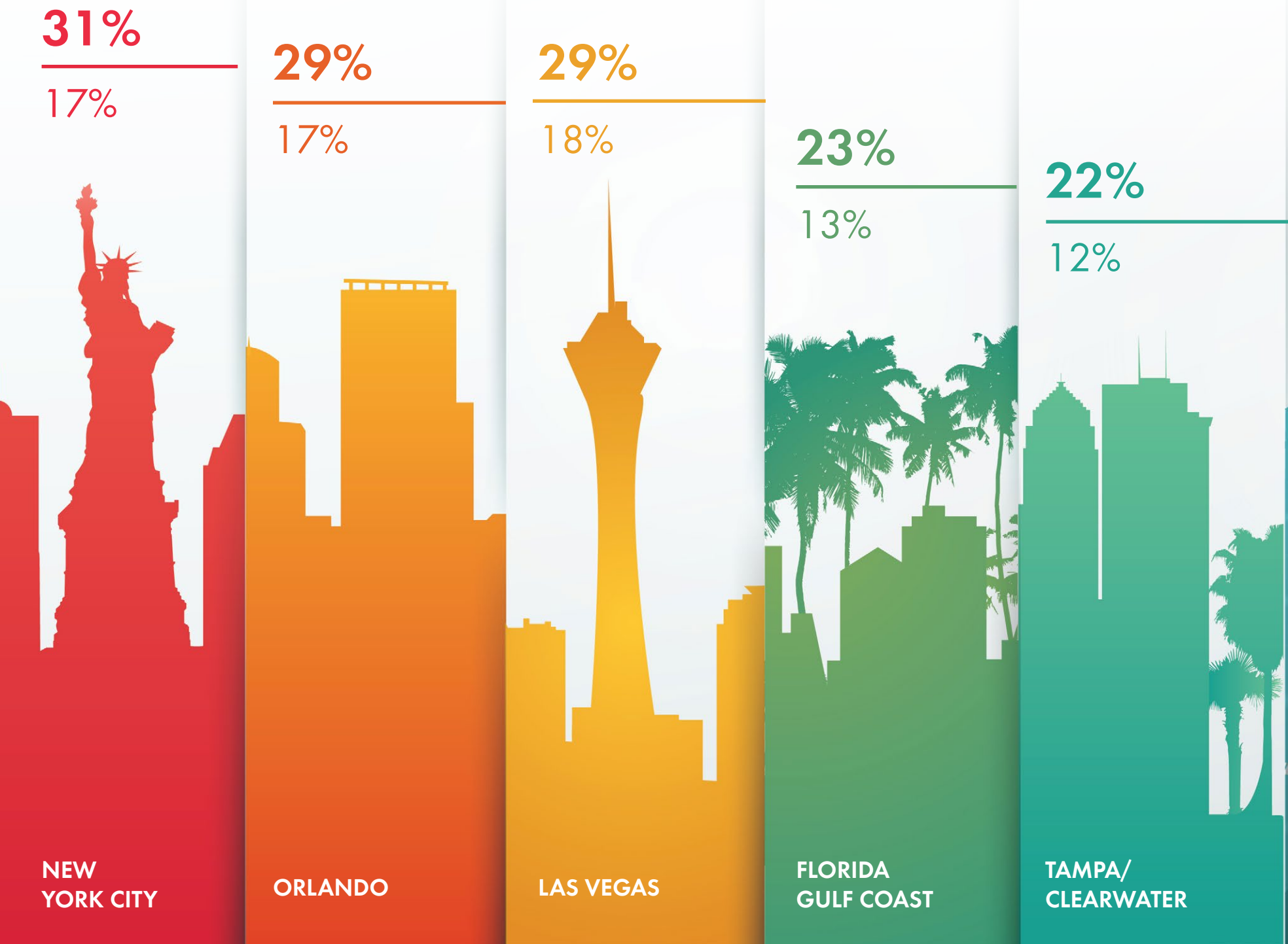


INTENT TO VISIT SELECT US DESTINATIONS

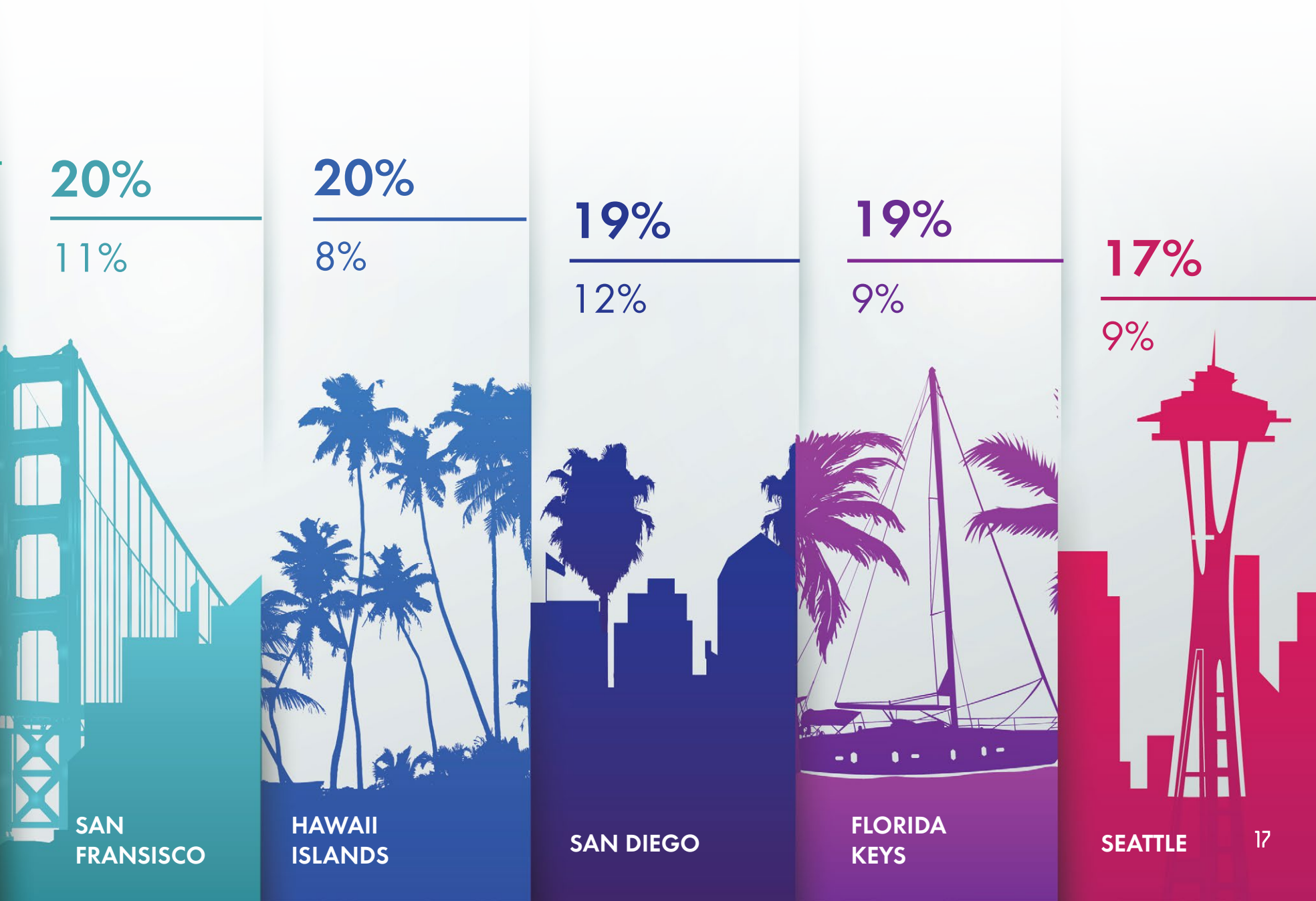
Attractions visitors traveled to fewer mainstream destinations in 2019, and they expect to visit in fewer numbers in 2020 as well.

% PLAN TO VISIT IN THREE YEARS

% VISITED IN THE PAST 12 MONTHS



Although we commonly report that New York, Orlando, and Las Vegas are the top domestic regions that our travelers seek – and they still are - the rates at which they visit these cities declined in 2019, and the intent to visit these top places is projected to decrease this year as well. While volcanic eruptions or an unknown Vegas entomologist conference could explain these phenomena, our researchers surmise that it's simply a continuation of the trend that travelers have "been there, done that," and are setting their sights on new horizons.



THE GREAT(ER) OUTDOORS

For the past several years, we've explored the phenomenon of **Permanxiety**: ***the constantly-stressed state-of-mind that many of us experience through a more digitally-connected, 24-hour social, professional, and media-cycle.*** The stress had become so immense that France – known for its 35-hour work week – enacted legislation in 2017 that gave employees the "right to disconnect" from work communications after the workday had ended, without threat of employer reprisal.

Last year we found that **16%** net of our respondents were spending more time outdoors than they were five years ago; and coupled with Permanxiety, we called this trend **"Logging Out"** – escaping the digital world to find peace and relaxation in nature. While a third of our respondents in both 2018 and 2019 said they were spending more time outdoors, those who were **"doing less"** dropped by five percentage points, raising the net 2019 outdoor enthusiasts notably to **21%.**

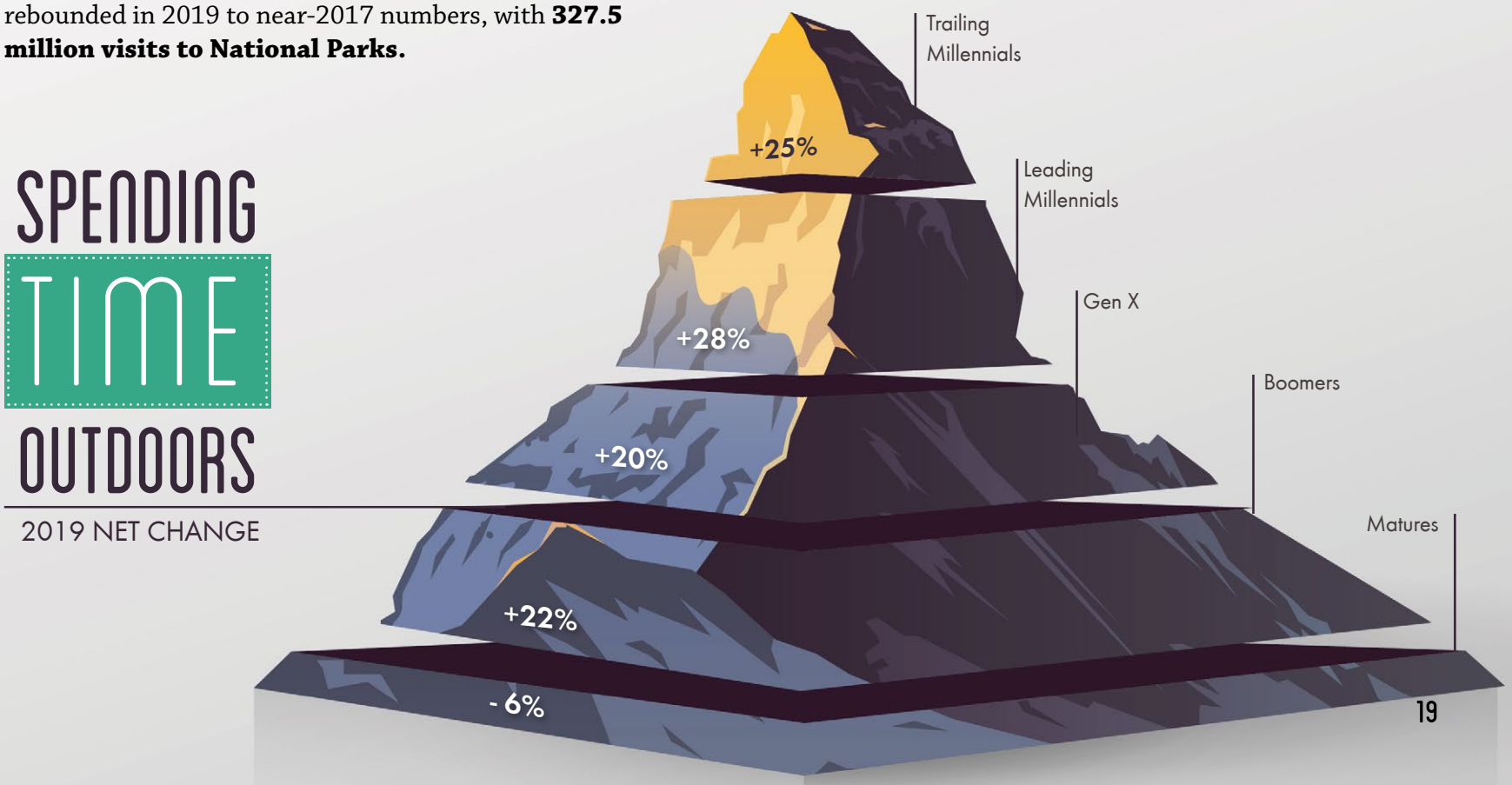
Millennials and Generation X had the largest gains in spending time outdoors, while Asians were the only cultural segment to decline – six percentage points.

Despite the interest and intent to spend more time outdoors, other numbers are showing a dissonance between desire and dedication. APM Research Lab discovered in 2019 that **two thirds of American adults spend time in nature only once or twice a month**, with one in six Americans reporting that they never spend free time in nature. **"Too much work to do"** was cited as the highest barrier ***(31%)*** between respondents and the great outdoors.

Due to volcanic activity in Hawaii, wildfires raging across Central and Western America, and a lack of exciting solar eclipses over America, the National Park Service reported a 13 million visitor decline to parks in 2018, down from 330.8 million in 2017. Park attendance healthily rebounded in 2019 to near-2017 numbers, with **327.5 million visits to National Parks.**

We have seen numerous studies about the benefits of maximizing our time outdoors, including memory improvement, stress reduction, energy increases, mental and psychological health, and the desire to protect these natural spaces that comes from spending time in them. Communities, conservation groups, schools, parks, and attractions are excellent candidates to work together to craft outdoor activities that can interest the diversity of America, including age, culture, country of origin, gender, sexual orientation, and more.

Destinations are ideal settings for getting people outdoors and in-touch with nature, and all it takes is a little creativity, collaboration, and design. According to the numbers, we could all use a bit of fresh air right about now...



HARDER TO PLEASE

2020 VOICE OF THE VISITOR

When consumers do feel confident enough to spend their disposable income and head out into the world, **the three emotional drivers that send them to attractions have remained stable over the years.**

TOP 3

EMOTIONAL DRIVERS

A place where we can all have fun together

22%

A unique experience that is out of the ordinary

20%

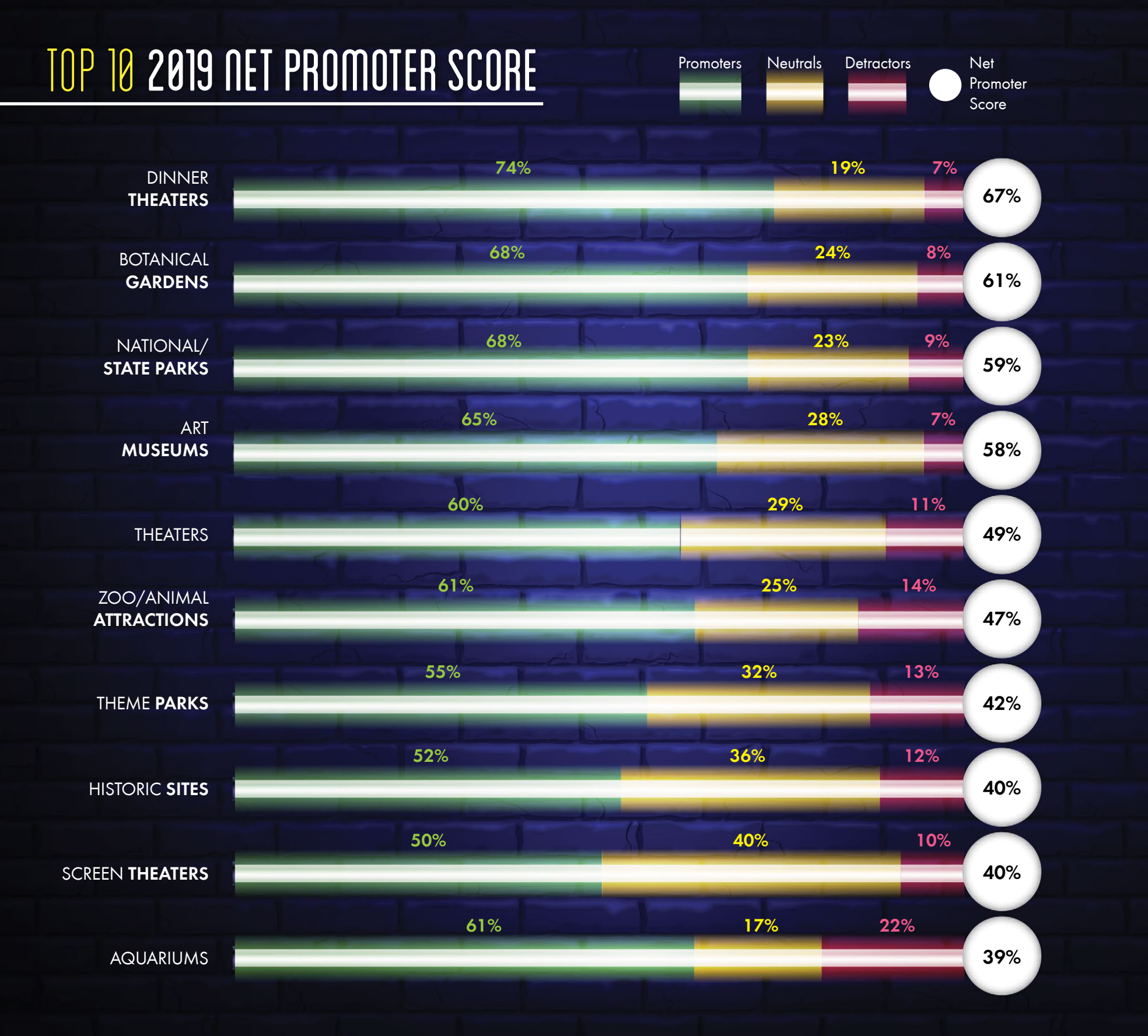
Entertaining for both adults and children.

19%

When we explored the open-ended responses to what was most memorable for your family at this attraction experience, we found a common thread previously unreported. **One of the top three answers revolved around seeing children's reactions to the experiences.** Nostalgia is a strong motivator in all of us – many long for the sights, smells, and sounds that remind them of their youth, and the freedom and carefree nature which defines childhood. As adults, whether we're Boomers or hipster Millennials, it's often a badge of honor to have "seen it all," and at times express being jaded at wonder. But seeing youth moved by something, inspired by something they're witnessing for the first time – or the hundredth (if we hear Let It Go one more time…) - is a powerful emotion that's hard to deny. That inspiration in youth is the reason many of us entered the attractions industry in the first place…

Despite these warm emotions, attraction guests are simply getting harder to please. **Overall satisfaction dropped by 3%** in 2019 to a **historic low of 4.27 out of five.** People of color and Trailing Millennials (roughly ages 22 – 28) felt the biggest drops in satisfaction, by **0.25 and 0.39 points**, respectively from their five-year historic averages. Overall Net Promoter Score (NPS) fell by five points across the attractions industry last year, with just **over half *(57%)*** of visitors willing to recommend their recent attraction visit to friends and family. NPS varies wildly across attraction types though, with Dinner Theaters ***(74%),*** Botanical Gardens ***(68%),*** National/ State Parks ***(68%),*** and Art Museums ***(65%)*** having the highest rate of Promoters, and FECs ***(38%)*** and Brewery/ Wine Tours ***(44%)*** the lowest.

TOP 10 2019 NET PROMOTER SCORE



THERE ARE SEVERAL THEORIES THAT ATTEMPT TO EXPLAIN WHY THIS MIGHT BE HAPPENING.

FIRST

People of color are largely less satisfied with their attraction visits; and the younger an American is, the more likely they are to represent a more diverse lineage. It is possible that some attractions are not reflecting these populations proportionately in their leadership and boards, and are therefore not adapting their content, messaging, and attractions/interests to meet these populations' interests and styles.

SECOND

The category of satisfaction which saw the greatest decrease was with lines and wait times. In an on-demand world of streaming video, Amazon GO groceries, and "Hey Google" inquiries, hours in queue just won't cut it anymore for today's younger attraction visitors. There's too much instant gratification, convenience, and entertainment to choose from to spend one's life waiting in line.

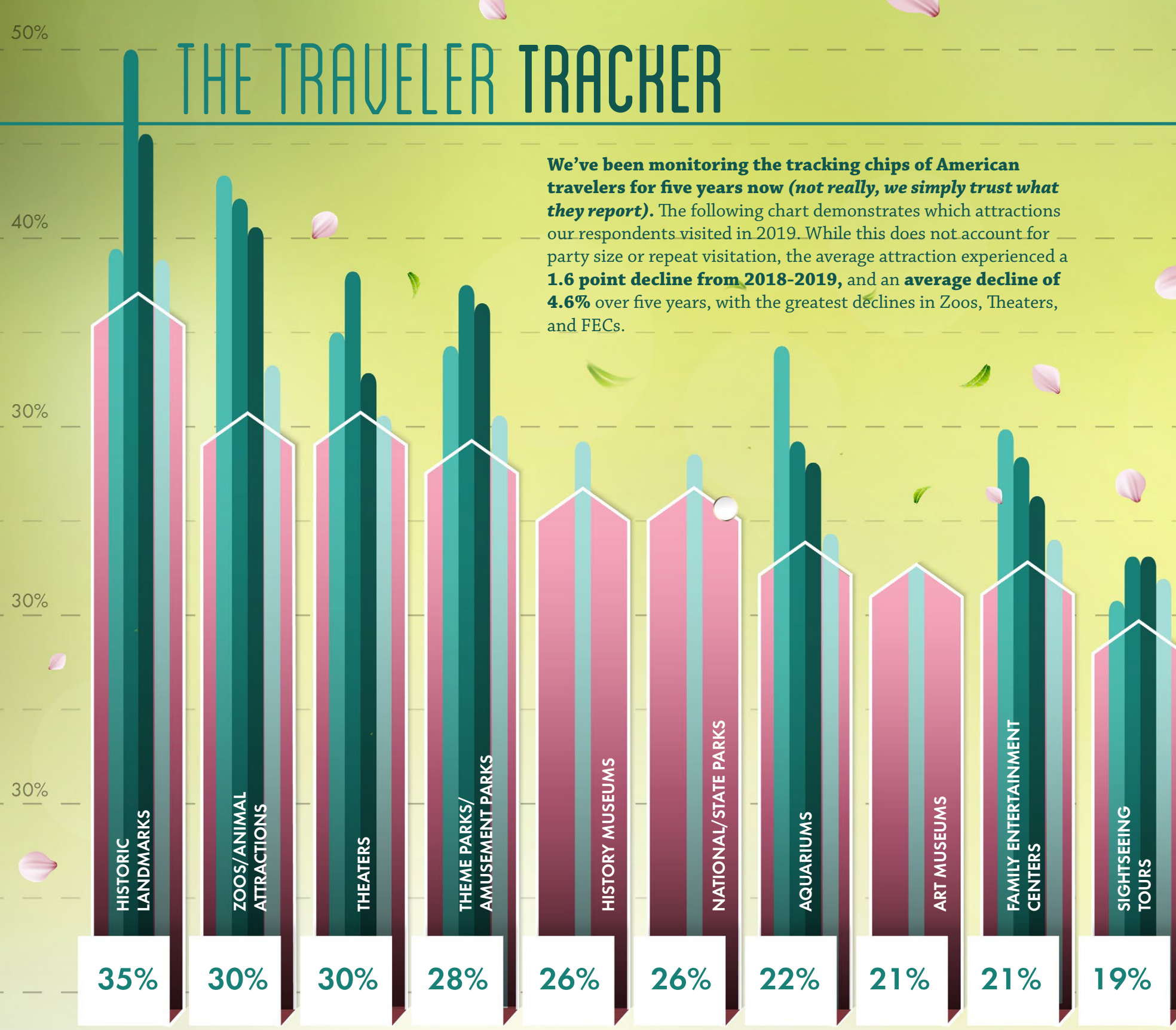
LAST

These top NPS attractions – Parks, Gardens, and Theaters– all seem to reflect a naturally, constantly-changing offering. The flora and fauna of the outdoors hide and reveal as the seasons rotate, flowers bloom, the leaves transform, and different productions and actors constantly grace the stage. For travelers who are often seeking fresh, unique, and new experiences, these destinations inherently offer the variety they seek.

For attraction managers, the implications are clear: implementing systems that provide the opportunity to rapidly respond to guest pain points is essential to resolve conflict and keep visitors satisfied and coming back. **Better understanding unique - yet growing - cultures will help create more relevant content and communications,** and keeping that content and corresponding attractions fresh and new will encourage these visitors to come back through your front door.

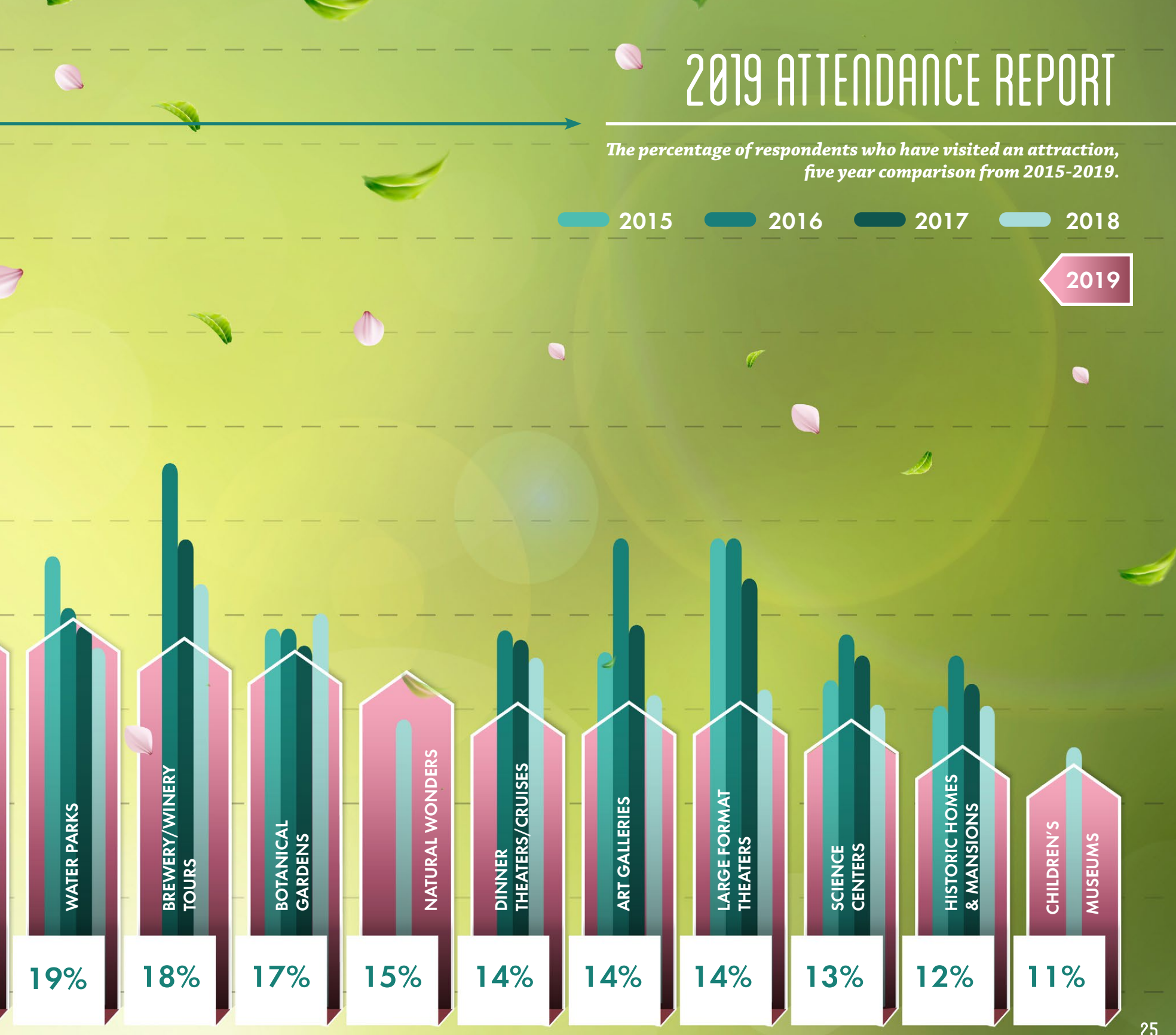
THE TRAVELER TRACKER

We've been monitoring the tracking chips of American travelers for five years now *(not really, we simply trust what they report).* The following chart demonstrates which attractions our respondents visited in 2019. While this does not account for party size or repeat visitation, the average attraction experienced a **1.6 point decline from 2018-2019,** and an **average decline of 4.6%** over five years, with the greatest declines in Zoos, Theaters, and FECs.



2019 ATTENDANCE REPORT

The percentage of respondents who have visited an attraction, five year comparison from 2015-2019.



WELCOMING DIVERSITY

In The Experience Economy, author Joe Pine discusses how mass customization is an essential component of today's business success. But it's far more than being able to provide a wide array of options; easily combined in a myriad of choices; quickly, efficiently, and cost-effectively. The key to success is better understanding people, and celebrating and empowering our differences.

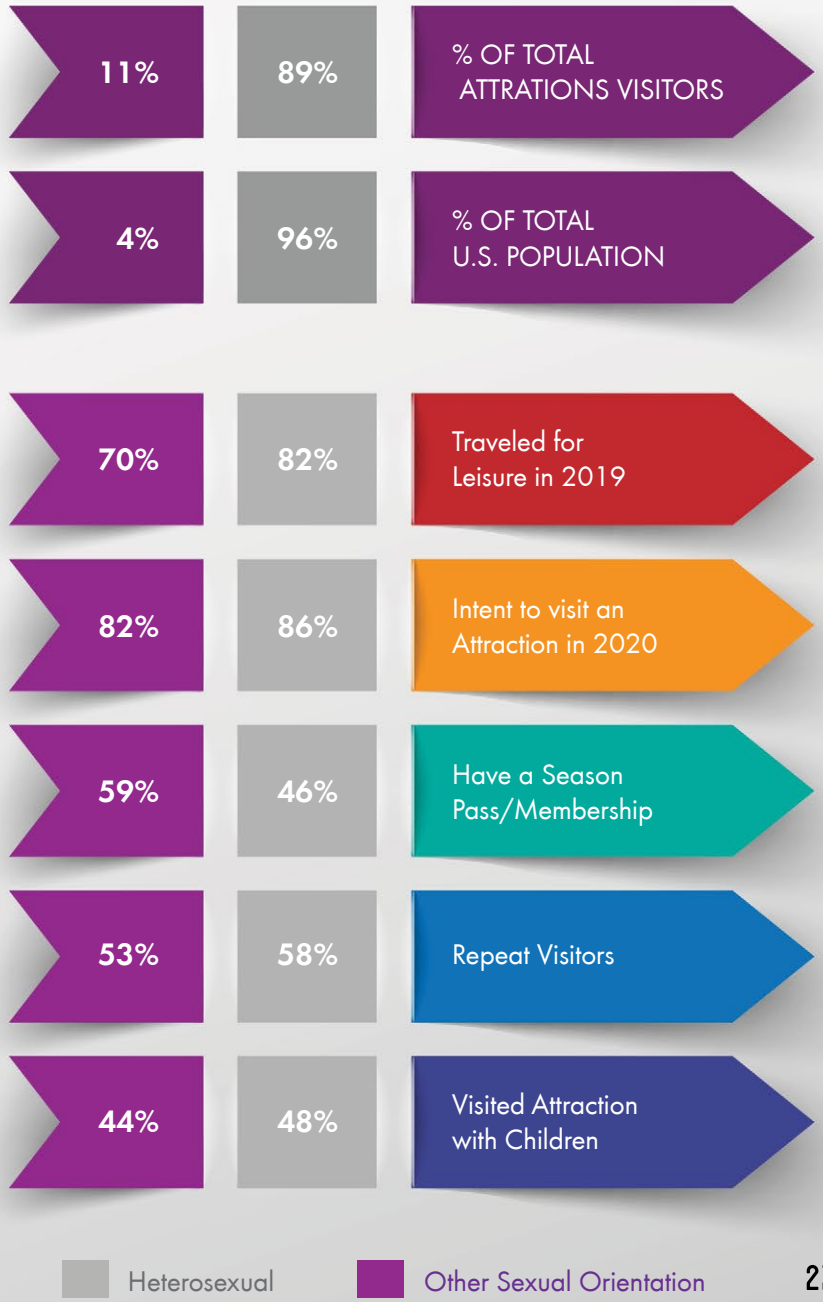
Our 2020 Voice of the Visitor is the first of our annual reports or Destinologies to explore the Lesbian, Gay, Bisexual, Transgender, Queer, and more (LGBTQ+) communities. While the acronym representing these populations can extend much further (e.g. "LGBTTTQQIAA" and beyond), we have focused on some of the largest communities for the sake of our study.

11% of 2019 attraction visitors identify with the LGBTQ+ population, a significantly larger share than their representation in the American population at **4.5%** *(UCLA Williams Institute)*. Looking at our data, these attraction-goers statistically share a number of similarities with their heterosexual counterparts. They intend to visit attractions at roughly the same rates, both visit in the summer in similar proportions, are similarly repeat visitors, visit attractions with children, and both find feeling welcome comparably important. However, beyond making up significantly smaller portions of the population and attraction visitors, those in LGBTQ+ were far less likely to travel for leisure last year, less likely to have a season pass or membership; and like people of color, far less satisfied with their attraction visit.

Although smaller in headcount, this sector of traveler plays a critical economic cornerstone. The World Trade Organization estimates that there will be **180 million LGBTQ+ global tourists this year.** Community Marketing & Insights showed that this demographic spends **33% more than** their heterosexual counterparts while traveling - often called the "pink dollar/pound" in practice - equating the global **LBGTQ+ travel market at $211 billion** *(Out Now Consulting)*.

LGBTQ+ TRAVELERS

Approximately **One in Ten Attractions Visitors** have a sexual orientation other than heterosexual



TOP TEN BEST/WORST PLACES

FOR LGBTQ+ TRAVEL

MOST DANGEROUS

1. NIGERIA
2. QATAR
3. YEMEN
4. SAUDI ARABIA
5. TANZANIA
6. IRAN
7. SUDAN
8. BARBADOS
9. MALAYSIA
10. MALAWI

MOST TRAVELED

1. COPENHAGEN, DENMARK
2. NEW ZEALAND
3. TORONTO, CANADA
4. PALM SPRINGS, USA
5. SITGES, SPAIN
6. BERLIN, GERMANY
7. SKIATHOS & MYKONOS, GREECE
8. NEW YORK CITY, USA
9. REYKJAVIK, ICELAND
10. MONTEVIDEO, URUGUAY

While **Lyric and Asher Ferguson** have created the

LGBTQ+ DANGER INDEX

to identify regions unsafe for LGBTQ+ travelers,

Lonely Planet has identified those destinations

MOST WELCOMING

of the demographic.

LEFT GRAPH

So how can you attract this community, excel in hospitality, and keep them coming back? While several CVBs around the country, like Los Angeles and Philadelphia, have enacted permanent LGBTQ+ tourism campaigns - with Philadelphia proudly touting that it was the first in the nation to do so - Richard Gray of the Fort Lauderdale CVB notes that simply existing isn't enough. "Some destinations actively marketing to LGBT travelers aren't doing so authentically, and travelers know the difference," says Gray, LGBT managing director for the CVB. "Destinations which aren't bold in their efforts to reach this traveler segment are often viewed as unenlightened and out of touch."

To help fill this authenticity communication gap, The International LGBTQ+ Travel Association (IGLTA) is a worldwide network of LGBTQ+-friendly accommodations, transportation, destinations, service providers, travel agendas, tour operators, events, and travel media. The organization connects these providers in over 80 countries to other providers and travelers to assist in trip-planning, travel education, and special tours.

What can attractions across America do to attract these communities and grow their satisfaction?
The advice is parallel to that of the people of color communities: working to reflect this population internally; reviewing marketing, programming, and exhibit materials; conducting focus groups; reaching out to leverage local CVB messaging and tactics; and undergoing LGBTQ+ diversity training. As providers of incredible experiences and education, attraction managers are not only best empowered by understanding their guests, but also empathizing with them to craft environments that are truly for them.

"Being in an atmosphere that is beautiful is a great way for a peaceful experience with family."

- Consumer Survey Response

ARE ATTRACTIONS FOR PEOPLE OF COLOR?

In 2019, we relayed the findings of the Brookings Institution that the United States is projected to be a **minority white nation by 2045.** The growth in people of color populations has shown no signs of slowing, with 2020 on track to be the first year in the history of the United States where the entire under-18 population will be majority non-white. In less than a decade, Americans under 30 will be majority non-white.

And more and more, attractions don't seem to be for them.

People of color comprised **24% of attraction visitors** in 2019, while making up **40% of the US population.** While this gap shrank slightly since our 2019 report, largely driven by Latinx communities visiting more attractions, these populations are even more dissatisfied with their attraction experiences than last year.

Compared to non-Hispanic whites, people of color exhibit significantly lower satisfaction with their attraction experiences. Whether it's their overall satisfaction, the friendliness *(or rudeness)* of attraction staff, or feeling welcome, people of color just aren't perceiving the same quality experiences as non-Hispanic whites. They also have a significantly lower instance of recommending attractions to friends and family, as well as a much lower intent to visit attractions this year, compared to their demographics' average over five years.

SO WHAT'S WRONG?

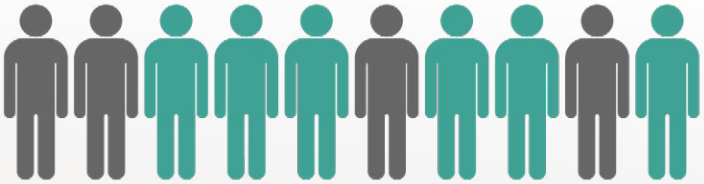
Wanting to feel welcome is a universal ethos that we feel everywhere we go – our family, our work place, and our leisure pursuits; and what influences the feeling of welcome-ness takes many forms: how we're treated, how safe we feel, how the environment reflects our identity and values, how much we feel part of the present community, and more.

Unfortunately, there are a number of societal indicators that may point to the fact that 2020's America is not quite welcoming to people of color. According to the recent Pew Research Center study ***Race in America 2019***, more than seven in ten black Americans say that race relations in the U.S. are generally bad. **Eight in ten black persons** agree that the legacy of slavery affects the position of black people in American society today a great deal/fair amount, while **56% of adults** say being black hurts people's ability to get ahead in the United States. **65% of Americans** said that it has become more common for people to express racist or racially insensitive views in the last three years.

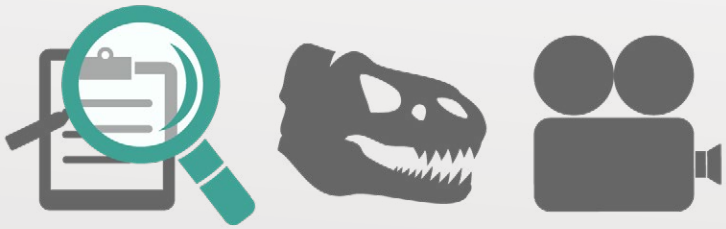
There are many theories too wide and too detailed to fit into our annual ***Voice of the Visitor*** that endeavor to academically and culturally explain the origins and continuation of these phenomena.

OUR **ADVICE**

ALL OF OUR SUGGESTIONS FROM 2019 STILL HOLD TRUE FOR ATTRACTION MANAGERS ACROSS THE COUNTRY...



Aspire to have staff, volunteers, and boards proportionally reflect population demographics.



Review the content of marketing, exhibit, and programming materials to gauge their societal relevance and reflection.

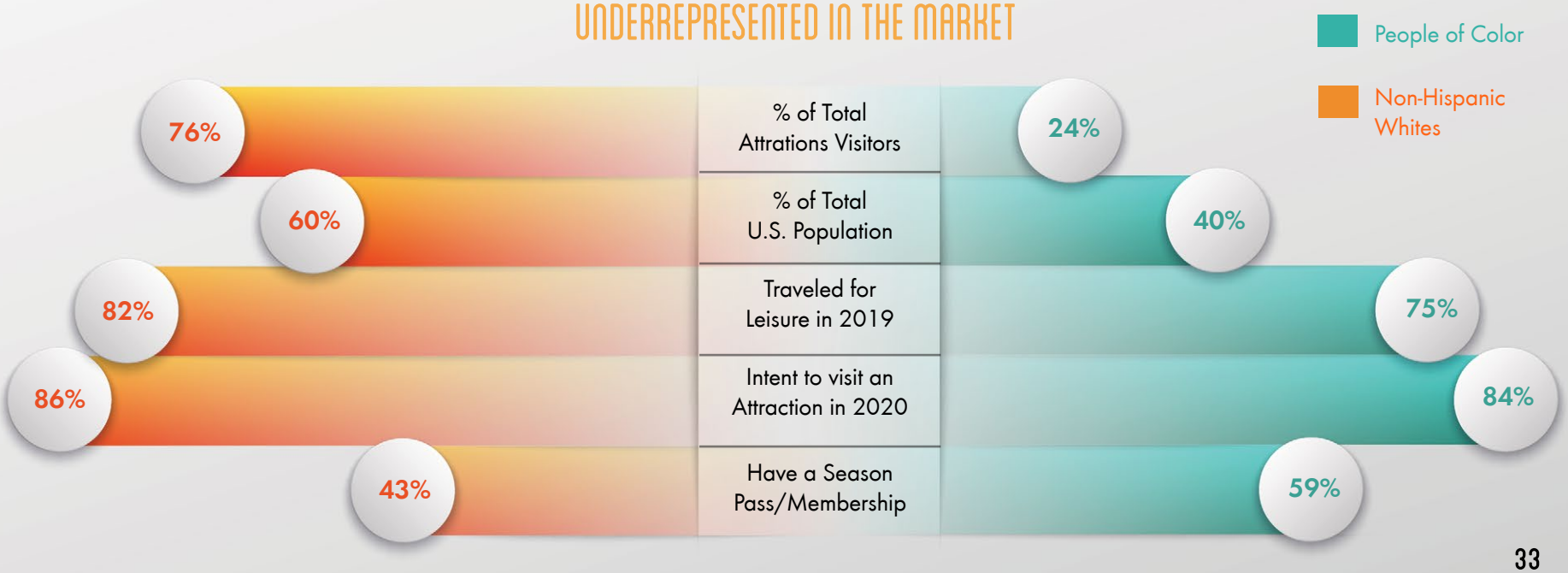
From our 2019 data, people of color were most likely to visit Theme Parks ***(36%),*** Zoos ***(30%)*** Water Parks ***(29%),*** and Aquariums ***(27%),*** while they were least likely to visit Natural Wonders ***(11%),*** Art Galleries ***(10%),*** and Historic Homes and Mansions ***(7%)*** – with Children's Museums ***(34%),*** Historic Homes and Mansions ***(35%),*** and Art Galleries ***(37%)*** being their least-likely prospect in 2020. American Historic Homes, Landmarks, and Art Galleries have, on the majority, been the long-standing place of white history and white culture, which is not always reflective of the values, interests, and stories of people of color. Continuing to find ways to celebrate these diverse stories, perspectives, and achievements at these kinds of destinations is a key case study in making these groups welcome.

After two black men were arrested in a Philadelphia Starbucks while they waited for a friend before ordering coffee, the beverage titan closed more than 8,000 stores to address racial bias and diversity training with its staff. Monica Williams, a psychology professor at the University of Connecticut, supports this approach, noting that it's the right time for employers to refresh their company-wide diversity training (or begin it, if they've never done it before). Luis H. Zayas, professor of social work and psychiatry at the University of Texas at Austin, also notes that organizations have the opportunity to form "safe spaces" where oppressed/marginalized groups "can share information and comfort each other." Hundreds of thousands of attractions have the room to host these kinds of events, and talented staff trained at interfacing with the public.

Attractions might not have created this problem, but they may be an incredible source for the solution as epicenters for engaging storytelling and providing safe and welcoming places for their communities.

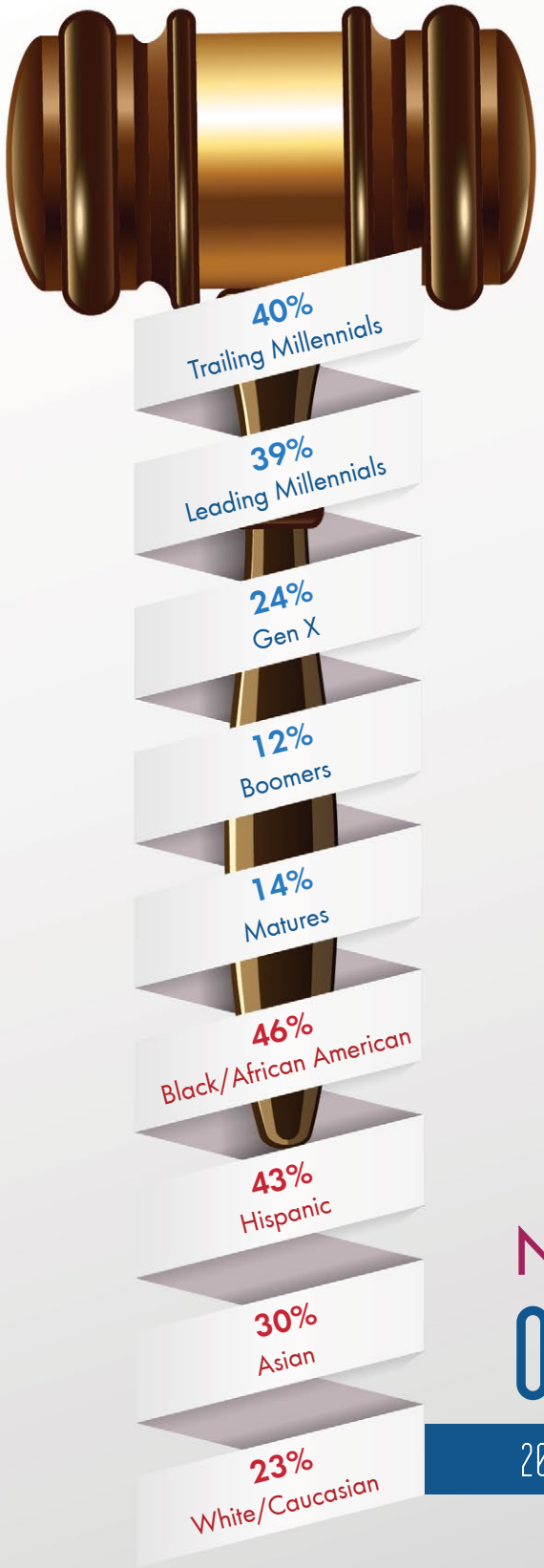
PEOPLE OF COLOR

UNDERREPRESENTED IN THE MARKET



WHEN POLITICS & MISSION COLLIDE

2019's American Alliance of Museums conference was an electrified environment, full of dedicated and passionate practitioners asking hard questions to advance the museum field. An umbrella session, 'What Is a Museum in 2019,' demonstrated the overarching challenge, where countless sessions explored AAM's current charge in its Diversity, Equity, Accessibility, and Inclusion (DEAI) initiative. But numerous sessions addressed the white (or red) elephant in the room, and how museums should relate: A Conversation on Cultural Diplomacy When a Nation Must Be "First;" Fake News, Flat Planets, and Hot Winters; and Public Policy and Advocacy: Championing Museums in Volatile Times.



With many attractions' missions based on educating the public and bettering their communities, museums are struggling with how they should interpret – or act upon – one of the most globe-spanning, politically-contentious environments in modern history.

So we asked their visitors.

62% of attraction visitors vote in elections, which is on par with the national rates for 2016 and 2012. However, fewer than half of attraction guests – **46%** - expect attractions to actively support causes that align with their missions. Even fewer – just **26%** - agree that attractions should take a more active political role on issues that directly affect them or their customers.

The demographic break-down provides even more interesting insights. Generally speaking, **the older an attraction guest is, the less they want to hear about politics during their attraction visit.** People of color are significantly more interested in attractions interpreting politics, but still none of the micro-segmentation shows a majority in favor – blacks with **46%** represent the largest group. When evaluating by orientation, fewer than a third of those in the LGBTQ+ community – **29.8%** - feel that attractions should engage in politics, while heterosexuals come in even lower at **26%.**

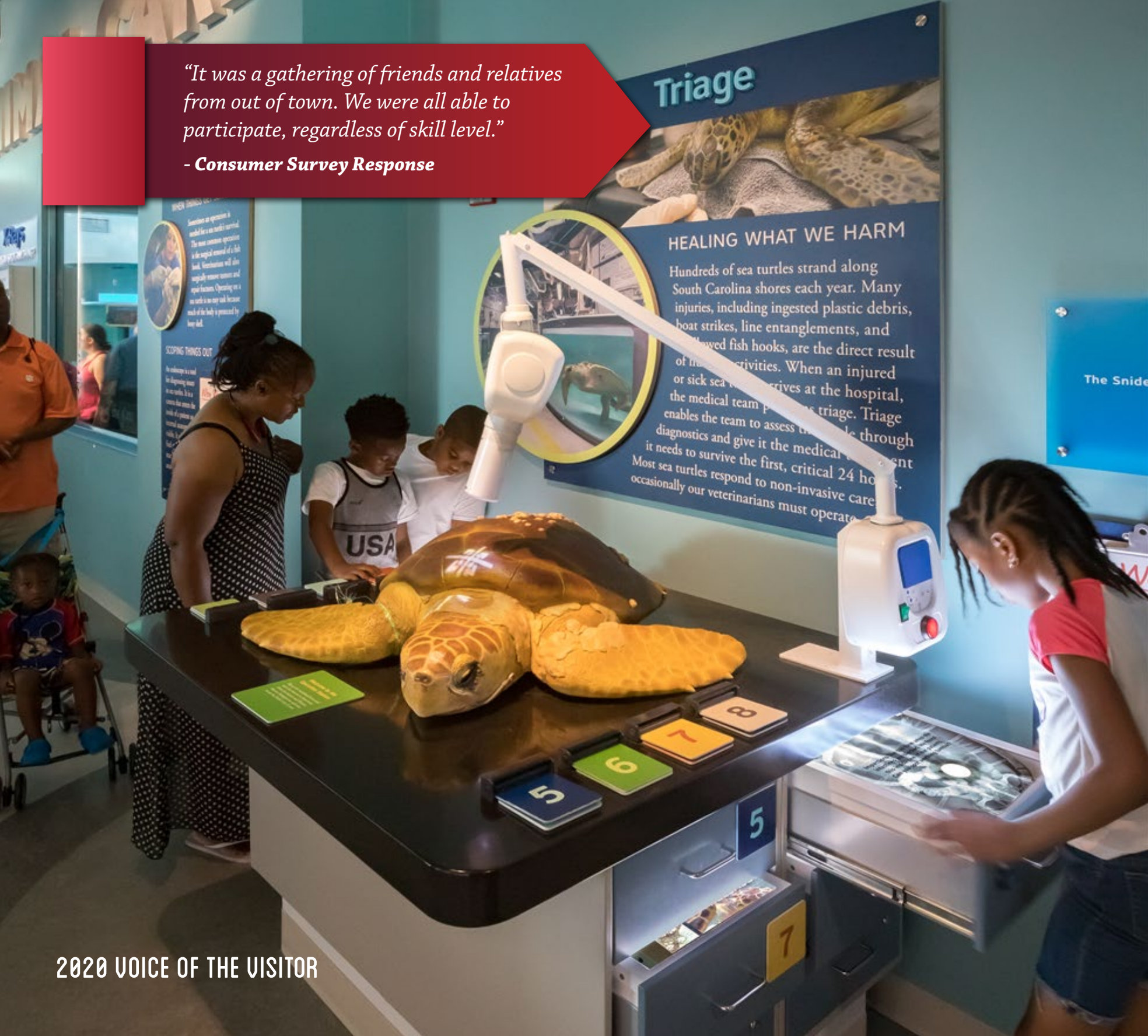
NOT SO FAST ON POLITICS

2019 % AGREE /STRONGLY AGREE

Attractions should take a more active political role on issues that directly affect them or their customers.

"It was a gathering of friends and relatives from out of town. We were all able to participate, regardless of skill level."

- Consumer Survey Response



We might hypothesize that attractions whose functions are largely educating the public about history or science – two realms strongly influenced by political policy – would have stronger support for political interpretation. However, **History Museums *(24%),* Historic Homes *(19%),*** and **Historic Landmarks *(18%)*** are among the four lowest-ranked attractions that have this kind of support from visitors. While surprising at first, a sizable proportion of these patrons are often white, older generations, which we've seen statistically aren't largely in favor of this kind of commentary at their attractions.

With these lower numbers, attractions might assume that if giving guests what they want is the priority, then maybe they should back off of political commentary and activism. However, remember that **the largest demographic segment of attraction guests are Millennials** – especially those with children; and that by 2030, the majority of people under 30 will be non-white, and the nation's population will be a people-of-color majority by 2045. So when planning for the future, these groups are more interested in political commentary than today's older generations or dominant demographics.

In practice, numerous museums around the world have decided to engage in political discourse, whether overt changes in their collections, launching touring exhibitions which comment on current policy disagreements, and executives resigning from their institutions or launching grassroots *"Museums are not neutral"* campaigns. David Fleming, director of National Museums Liverpool opened the Federation of International Human Rights Museums conference with the statement that it is hypocritical for museums to claim they are apolitical, "the issue isn't whether it's right or wrong to be political – the issue is that all museums are, so why do people pretend they are not?"

While some attractions have the ability to decide their level of engagement in politics, some simply can't avoid it. Many National Park Service sites were created out of federal legislation and subject to future policy, detailed on their ***"Shaping the Political Landscape"*** landing page. The North Carolina Aquarium was recently the site of announcing state funding decisions, which was contentious between political parties and the state's governor. Last year's government shut-down effected all of the Smithsonian Institutions – yet the animals at the National Zoological Park still needed to be taken care of during the closure. A member of the Presidential family contentiously highlighted on Instagram the effectiveness of barriers at zoos, while these institutions often try to focus on the closeness, authenticity, and immersion between guests and animals. Even the most-attended theme park in the world has had to continuously remove re-election campaign banners from Main Street, Splash Mountain, and even its Broadway production of *Frozen* – banning one individual from all Disney properties in perpetuity.

Whether or not attractions should engage in political interpretation is a decision that has guests and the industry divided; and **for some, it's unavoidable.** The question is an important one though that destinations should continue to ponder openly with their staff, volunteers, boards, visitors, and non-visitors, and carve a path into the future that's best for their missions and communities.

AKA GENERATION Z

2020 VOICE OF THE VISITOR

Philanthroteens, iGen, Pluralists: Generation Z has long been the enigma that researchers and marketers have sought to define. Now in the midst of college, readying for the work force, and preparing for their first presidential election, the largest generation in history is getting ready to make a big impact on the world.

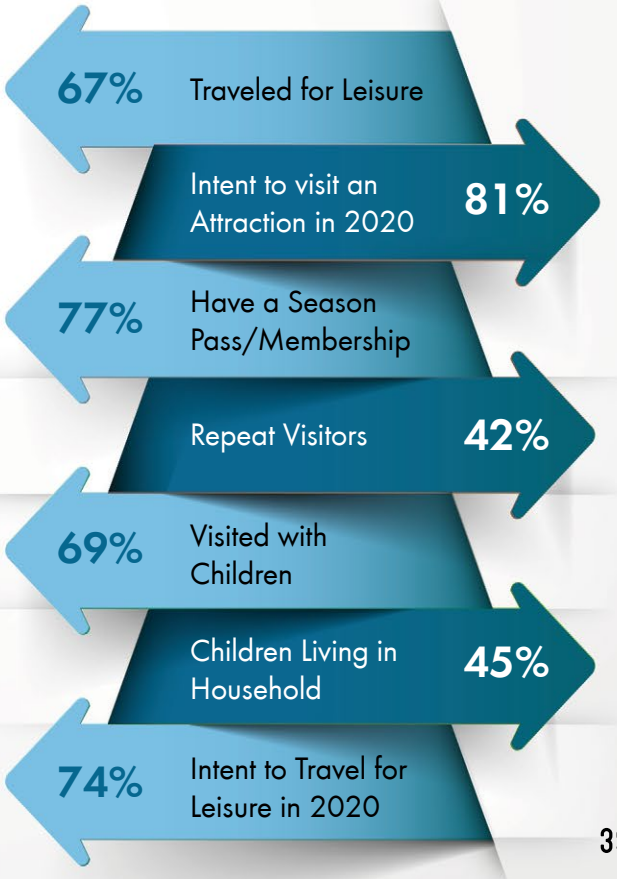
Born between 1996 and 2010, members of Gen. Z are the **largest, most ethnically-diverse, most connected**, **and most college-attending generation in history;** and upon their impending graduation, will be entering the workforce and earning disposable income. An incredible **97%** of our Gen. Z respondents visited an attraction last year, with **67%** traveling for leisure. Expectedly, these young adults are far from average though. They are **30 percentage points more likely** to have a season pass or membership to an attraction, and are **18 percentage points more likely** to have an optimistic outlook on the economy.

However, this generation is **31 percentage points less satisfied** with their attraction visitation than average, **35 percentage points less satisfied** with attraction employees, and **31 percentage points less likely** to recommend attractions to friends and family. The most likely theory relates to the demographics in our first chapter: if by 2030, most Americans under 30 will be non-white, and currently people of color are largely unsatisfied with their attraction visits, then the Gen. Z demographic aligns with those satisfaction rates. Secondarily, this generation has grown up in a permeating culture of reviews and feedback, from social media Likes to Yelp and TripAdvisor reviews. Even airport restrooms have a button you can press upon exit to gauge your satisfaction. Immersed in that mentality, **Gen. Z might have much higher standards** and criteria that need to be met than previous generations to earn that ***"Like."***

GENERATION Z

18 - 22 YEARS OLD

A new generation is entering the market, bound to upset the status quo.



FAST FACTS ON GENERATION Z

As Gen. Z ages and spreads out into the world, we learn more about them every day. The following are Gen. Z statistics from across the web!

2026
by this year,
GENERATION Z
will be the most
VALUABLE
CONSUMER POPULATION
AT $82 MILLION

30%
have already
DONATED
to an organization

96%
own a
SMARTPHONE
and spend ***at least***
10 HOURS A DAY
on an
ELECTRONIC DEVICE

24 MILLION
GEN. Z MEMBERS
are eligible to vote this year,
★★★ making them the ★★★
LARGEST
voting age demographic

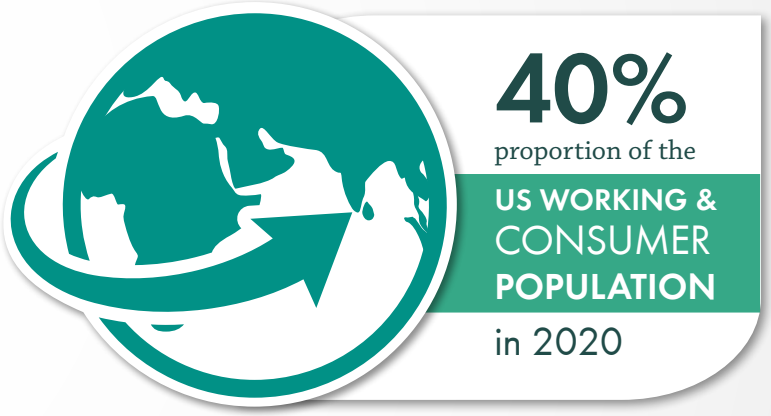
70%
NOTE THAT SALARY
IS THEIR TOP
WORKPLACE MOTIVATOR

68%
Proportion who feels
"the US is headed in the wrong direction"

76%
ARE WORRIED
ABOUT THE PLANET

60%
want jobs that have
SOCIAL IMPACT
as compared to
31% OF MILLENNIALS

88%
Are **optimistic**
about their
PERSONAL FUTURE



While Gen. Z largely parallels Millennials' social priorities, they still have a lot of differences. Nimble and smart attraction marketers should be making plans this year – if they haven't already – **to cater to this immense demographic.** As travel writer *Geoff Whitmore* identified last fall in ***Forbes***, Gen. Z is far more excited about wholly unique opportunities, that often involve educational opportunities like a mixology class *(rather than just sipping the Pina Colada on the beach)*, and make more sustainable and eco-friendly choices during their travel than previous generations. Unsurprisingly, they're far more adept at new and nimble technologies in coordinating travel, like booking flights through Twitter DMs, but are also far more interested in the new *"bleisure"* trend: **eagerly taking work trips, and extending those trips by a few days to explore the local tourism scene.**

Attraction managers may look to Gen. Z's top priorities, concerns, and engagement styles to begin retooling their destinations to peak their interests.

Digital, community-based, social cause-minded, unique, authentic, growth-oriented experiences

MAY BE THE HALLMARK OF YOUR

FUTURE GUEST BASE.

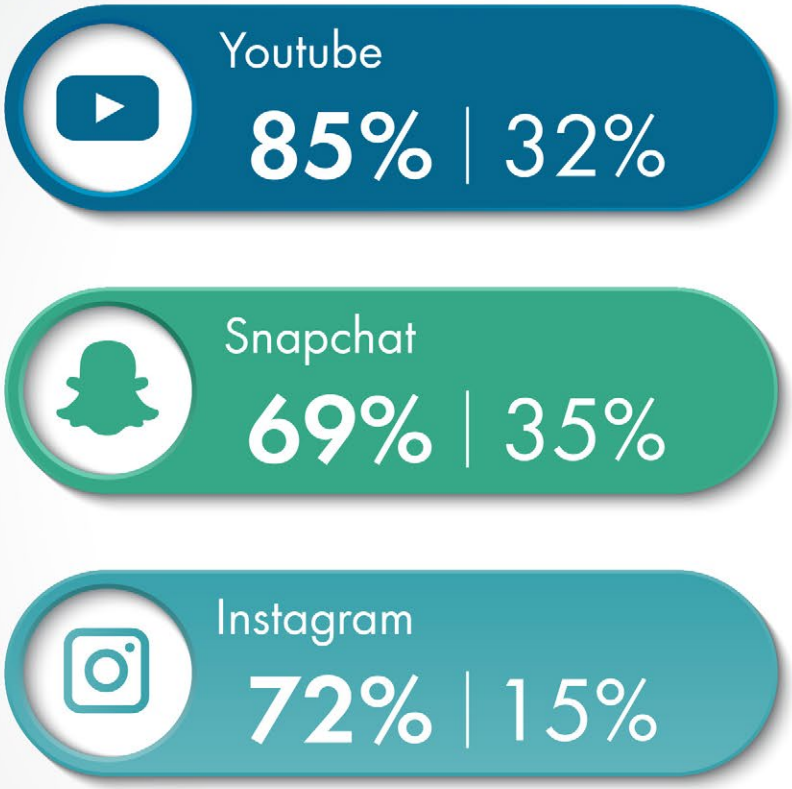
SOURCES: ***BusinessInsider, Concordia University St. Paul, The Nation, ITA Group, Digital Marketing Institute, Vision Critical, and Classy***

"A place where I can just be myself and not be judged for who I am."

- Consumer Survey Response

WHAT ARE GEN Z'S FAVORITE **SOCIAL MEDIA PLATFORMS?**

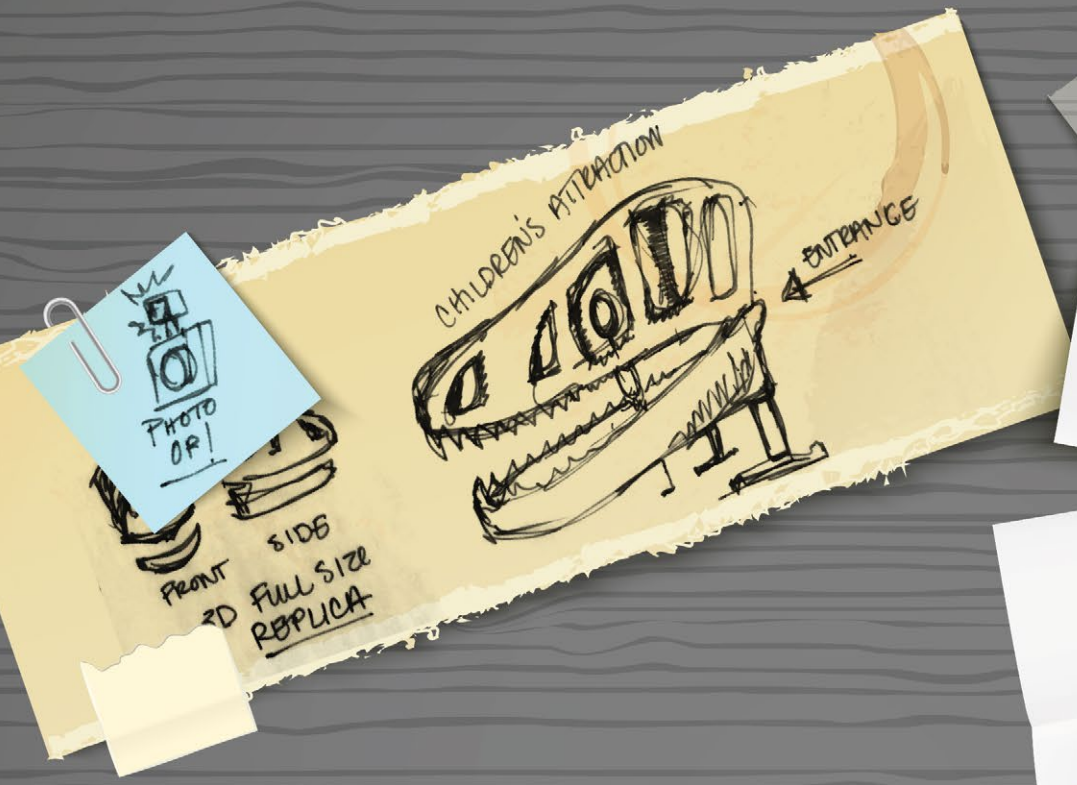
Percentage that use the social media platform | Percentage that use the platform more than any others

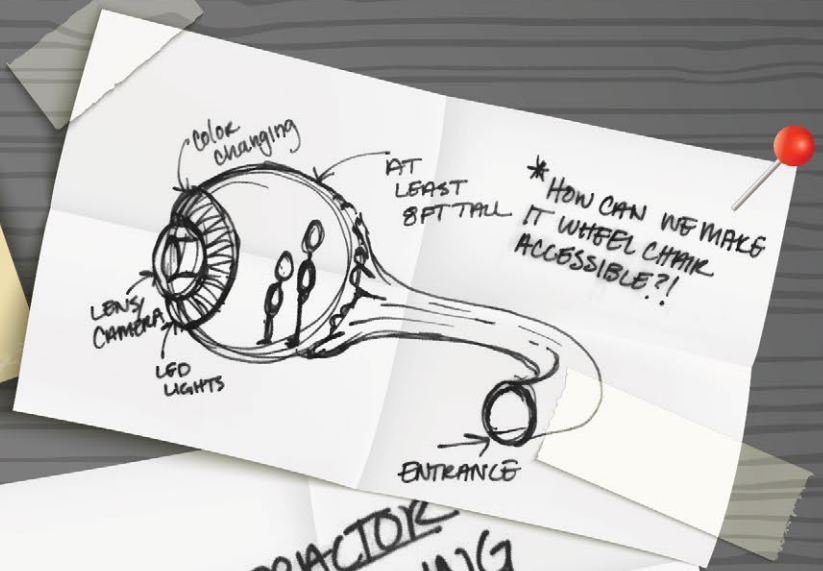


Gen. Z is certainly digitally connected, and attractions know that they have to advertise on social media, but **which channels do Gen. Z use – and use more than others?**

While attraction marketers, front-line staff, and designers are strategizing to meet the style and interest of Generation Z, researchers are already looking farther down the road at Generation Alpha. Born after 2010, this generation hasn't quickly adopted technology as a tool, but have found swiping smartphones and talking to voice-assisted devices integral parts of daily life. The starting year of this generation marked the release of the iPad, and the word of 2010 was *"app."* Coined by McCrindle, this *"Screenager"* generation is used to digital glass being the primary disseminator of information, as opposed to paper or in-person, and the medium is, *"kinaesthetic, visual, interactive, connective and portable format."*

While Gen. Alpha may be too young to be basing master plan and design decisions on, attraction managers may look to Gen. Z's top priorities, concerns, and engagement styles to begin retooling their destinations to meet their interests. Digital, community-based, social cause-minded, unique, authentic, growth-oriented experiences may be the hallmark of your future guest base.





SMARTLY STARTING THE DECADE

People around the world experienced tumult and trepidation in 2019 leading into 2020, **but those stories don't have to become trends.** Attraction managers have the resources, the intelligence, the empathy, and the teams to listen to the public, digest what they've gone through, and provide fresh new experiences to cater to what they need – through entertainment, education, and comfort.

A central tenant in that successful course correction is the greater understanding of more specific demographics such as **LGBTQ+, people of color, and Generation Z** – and where and how those groups overlap. Reacting and planning with an empathetic wisdom to those insights will be key in crafting places of employment, volunteerism, and leisure that are relevant, empowering, and welcoming to today's growingly-diverse population.

We see in our data that Americans are seeking more therapeutic time in the outdoors, yet are trending to either stay at home with family and friends – with the world at their swipe left/right digital fingertips – or to venture out locally to their familiar haunts. **We must strive to better understand this growing need for the *"comfortable familiar,"*** and identify our inimitable values – both physical and intangible - that cannot be replicated with the tap of a black mirror or a voice command in the living room.

"The children are our future," the common adage goes. They absolutely are: they are our future attraction leadership, board members, donors, guests, staff, and voters. As Millennials and Gen. Z assert their proportional dominance in the consumer and attraction economy, attractions will adapt – strategically or naturally – to meet their needs, interest, and cultures. **This diverse market is set to greatly influence the industry landscape as we know it;** and we have the choice to resist change and rely on business as usual, or embrace change and evolve.

RUBY FALLS
Chattanooga, Tennessee

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