

DIGITIZING DESTINATIONS 3.0

The Art & Science of Destinations

DESTINATIONS TECHNOLOGY

Volume 11 • issue 03 • October 2014



THE DIGITAL QUERY



“Any sufficiently advanced technology is indistinguishable from magic.”

Arthur C. Clarke,
most notably the co-writer of the screenplay for 2001: A Space Odyssey.

As destination designers, we live and breathe that idea every day. With each new attraction or exhibit, theme park or aquarium, we use different types of technologies like a painter uses pastels to blur the lines between the real and the fantastical to create magical experiences.

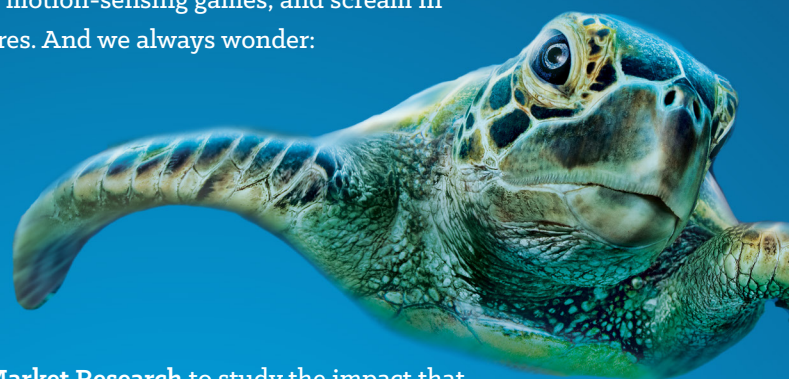
But sometimes we need to step back and ask ourselves, “**how much is too much?**” We observe destination visitors like Jane Goodall studied chimpanzees, and we watch them as they wander park trails staring into their smartphones; wiping their hands across touch screens with faces of wonder; jumping and playing in front of motion-sensing games; and scream in excitement as 4D rides launch them through adventures. And we always wonder:

DO THEY LIKE IT?

WHAT DO THEY LIKE THE MOST?

WHAT DO THEY WANT MORE OF?

WHAT'S NO LONGER RELEVANT?



This year, PGAV Destinations teamed up with H2R Market Research to study the impact that technology is having on America's destinations, and the preferences and opinions of today's destination visitors. We interviewed 500 destination guests from across the country that own or use internet ready mobile devices, and delved into their technological preferences, fears, skills, and knowledge.

The study's findings unravel the key mysteries of what's going through your guests' minds while they enjoy the lights, sounds, buzzes, and zips of your destination, and where you can make some strategic improvements to upgrade to Destination 3.0.



THE PHONE STARE

We've all seen it; and every single time, it's astonishing. The golden treasures of King Tutankhamen's tomb could be piled high to the ceiling; the Looney Tunes could be skipping and tumbling down Main Street in a grand parade; or a beautiful whale shark could be silently gliding by. And despite the spectacle, **visitors are staring down into the cool blue light of their phones.**

It's a perplexing, and oftentimes frustrating, phenomenon that every interpreter and ride operator witnesses on a daily basis – a phenomenon that barely existed five years ago! Despite the thousands of hours that go into the research, training, education, design, construction, and marketing of our attractions and exhibits, **74% of guests are still drawn into their little handheld screens**, missing beautiful moments and brilliant lessons. At last, PGAV Destinations has answered the one question that our front-line guest services staff has asked for the last two decades:

WHAT ARE THEY DOING?

We asked destination visitors point-blank, **"What do you use your device for when standing in front of an exhibit/attraction?"** We received every researcher's favorite answer: **it depends**, and it depends on what they're visiting. If guests are at a zoo, aquarium, theme park, or water park, they're most likely texting their friends specifically about the visit (**50% for zoos and aquariums, 52% for parks**). If they're visiting historic sites, old homes, museums, or art galleries, they're more likely to be looking up information related to the destination where they are (**52% for historic sites and old homes, 49% for museums and art galleries**).

Across all four sectors studied, **roughly 40%** of destination visitors said they were using their mobile device to check their email or post on Facebook about the visit; only 29% were responding to those emails; and roughly **14%** were listening to music or Tweeting about their visit.

What's just as interesting as what they are doing is what they're most likely not doing. Less than **10%** of the respondents said that they were reading unrelated online articles, and less than **4%** of respondents said they were chatting on social media with their friends about things unrelated to the destination (except for theme and water parks, at which 11% of visitors are out in the Twitter and Facebook-verse).

So despite the confusion and frustration you may have experienced witnessing **"the phone stare,"** all is not lost! The majority of guests are enhancing their experience at your destination by creating a dialogue around it with other people who aren't there – yet.

WHAT DO YOU USE YOUR DEVICE FOR WHILE VISITING A LEISURE ATTRACTION?



48%

Text friend about your visit



42%

Look up information related to this attraction



40%

Leave a post/photo on social media about visit



40%

Check your email



29%

Send email



INFLUENCES OF TECHNOLOGY

As destination managers, you're looking to create the most fantastic experience for your visitors: to inspire them, to teach them, to thrill them, or to move them to rally towards your cause. You're also trying to provide a great experience so that they'll support your business by buying tickets, memberships, annual passes, souvenirs, delectable dishes, and premium experiences. That **"fantastic experience"** secret sauce has plenty of key ingredients: outstanding customer service, clean and comfortable destinations, intelligent pricing, alluring attractions, and at least eight more herbs and spices if you're Colonel Sanders. **What impact does the presence of technology have on your guests' satisfaction and your bottom line?**

On a five-point scale ("**1**" being **"very dissatisfied"** and **"5**" being **"very satisfied"**), we asked destination visitors to rate their level of satisfaction with the specific technologies they experienced at the last destination they visited. What we learned was that as an industry, overall destinations aren't living up to guests' expectations. Maybe it's the overpromising visions of **Minority Report**. It could be marketing with a little too much hyperbole. Or maybe we can simply do better. Whatever the cause might be, it's time to give your webmaster a raise; because of the ten technological features studied, only websites got an average score above 4. Raking in ratings between 3.9 and 4 were the technologies featured at destination restaurants, on-site ticketing, and when technology is used to create

special effects at attractions. It's all downhill from there, including making experiences more interactive, being green, customizing guest experiences, speeding up queue lines, mobile websites, and mobile apps.

BUT DOES IT MATTER?

As we said, technology is just one ingredient in the mix of creating that fantastic visitor experience. How important is it?

TURNS OUT IT'S IMPORTANT.

Nearly two-thirds of all respondents (63%) said that improved technological features or advancements make them more likely to visit an attraction. More than a third (36%) of respondents said that improved technology inspires them to stay longer at your destination, and 36% said that it would make them more likely to talk about your destination with their friends.

Top quality technology drives visitors to come to your destination, stay longer, and to tell others. It's a major influencer in their satisfaction, and can drive them to become vocal advocates for you. The problem is, as an industry, we're not yet up to par with what they want. By listening to their concerns and offering premium technological experiences, scores of **"very satisfied"** are just a few mouse clicks away.



63%

Makes me more likely to Visit



36%

Makes me more likely to Stay Longer



22%

Makes me more likely to Spend More Money



20%

Makes me more likely to Bring Other Guests



36%

Makes me more likely to Talk About This Attraction With My Friends



18%

Makes me more likely to Talk About This Attraction On Social Media

HOW, IF AT ALL, DO TECHNOLOGICAL FEATURES AT DESTINATIONS INFLUENCE YOU?

HOW MUCH IS TOO MUCH?

For any parent that allowed their children to have all the technology they wanted, their kids might just become walking, talking androids themselves. According to a **Common Sense Media** study, **38% of children** under the age of two have used mobile devices for playing games, watching videos, or other media-related purposes. That wide-eyed stare into the digital realm only grows and expands as kids bound out into a tech.-saturated world with smartphones, tablets, video game consoles, FitBits, cars that talk back to us, and advertisements that play only when we walk by.

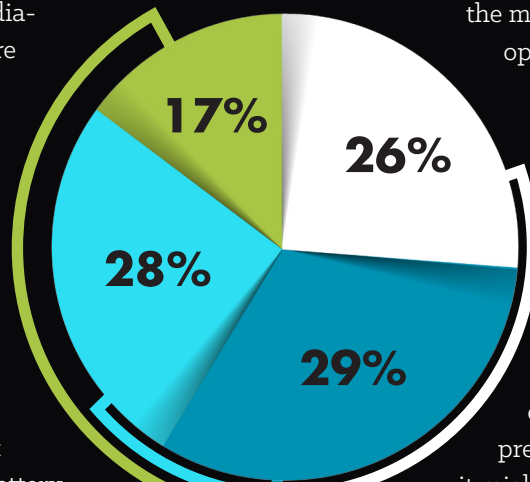
But how much is too much?

What's the ideal balance between the digital and the tangible when we visit destinations? Should there not be a battery within a hundred miles, or should we be like Johnny Depp's Will Caster character in this summer's **Transcendence**: fully one with the network?

What's most surprising, however, are the perceptions of **technology based on age**. We would tend to think that our older visitors would not be too interested in technology, while the youth would be looking for every opportunity to snatch it up. In fact, nearly a third of respondents **55 years and older** checked the third

option – use technology to bring a story to life (the highest response rate to that option); and **33% of respondents 35-54 years old** chose the second option, to use technology to make things more convenient (once again, the highest response rate for that option). **18-34 year-olds** were the most evenly divided with the first three options, and had the lowest-agreement rate with the final option, **16%**, to use technology wherever possible.

Could younger generations be experiencing technology overload, and seeking destinations as an escape? Or, being more immersed in technology day-in-day-out since they were two-years-old, are they more critical and skeptical of the technologies presented to them? Whatever the motivation, it might not be the teenagers you need to try and develop your technology for: it might be your parents.



HOW MUCH IS TOO MUCH?

When we asked guests in our study which phrase best described their beliefs, the results were not too-surprisingly evenly spread.

- 26%** I'd prefer attractions limit the use of technology. I am surrounded by technology every day and prefer to avoid it when I'm visiting leisure attractions.
- 29%** I believe the use of some technology is fine if it helps speed up lines and make a visit more convenient. However, I do not necessarily want technology used to enhance what's educating or entertaining visitors.
- 28%** I think the use of modern technology is good if it is used to help bring the experience to life and tell a better story. But I don't like the gratuitous use of technology just for the sake of adding some modern element to an experience.
- 17%** I'd prefer attractions use modern technology wherever they can. Technology makes attractions more appealing and efficient. If technology can be used to enhance the experience, I think it should be used.



SEGMENTING GUESTS

When you go on vacation with your family, you know that your **husband** is the king of maps – he'll have the spreadsheets and agenda for your journey down to the minute. Your **son** is the needy one – he'll need everything just perfect, from his brand of juice-box to his shoelaces tied in just the right way. Thankfully there's your **daughter**, whose good heart and endless soundtrack of sing-alongs can keep your spirits up. Then there's your **mother-in-law**, which our editor says we're not allowed to describe.

The point is: it's good to know your audience. Understanding the characteristics of those you're working with can help you better manage them, understand their crises, and meet their needs.

We provided a battery of “**agree/disagree**” questions to our survey respondents; and based on their answers, were able to separate them into three distinct market segments using cluster analysis. Every single destination visitor smoothly fit into each of the following categories:

TECHNOLOGY ENTHUSIAST

The largest segment in our study (47%), the Technology Enthusiast engages in and is influenced by all forms of technology. They use it regularly and love it: it's an extension of their brain in the palm of their hand. On average, Enthusiasts are much younger than their 50-year-old Technology Critic counterparts, yet older than their 36-year-old Technology Conflicted compatriots. This segment is the most likely to have a **college degree or advanced education** and will have the most people in their group on the day of their visit. They'll most likely have their smartphone in hand, they use social media, likely booked their travel online, and will absolutely be telling their friends about their experience.

TECHNOLOGY CRITIC

The second largest segment with 41% of our sample, Critics own mobile devices, but they use them judiciously. They're much less engaged through digital communication channels and probably won't use social media or try to influence their followers and friends on blogs or Twitter. **They're the oldest of the respondents;** and most interestingly, they're typically non-repeat visitors. Some think that technology is good to make things more convenient, but it doesn't make life more efficient. Half of them won't have a smartphone on them when at your destination, and they'll almost never leave an online review.

TECHNOLOGY CONFLICTED

Our smallest segment at just 12% of the respondents, Conflicted users aren't really sure where they stand on technology. They're the youngest demographic and use their mobile devices a lot, but seem to be concerned about technology saturation and the over-prevalence of it in their lives. **Most of the Technology Conflicted are women traveling with small families,** living the closest to their destinations with a high probability of returning again and again. They're the most likely to use social media, leave online reviews, and tell their friends about their visit, and have the highest income of the respondents.

Market segmentation can empower destination managers to target visitors with the highest market potential and help tailor marketing efforts that are most relevant to different segments' needs.



EXPERIENTIAL WANTS

Before your visitors are even in your parking lot, they're measuring you up in their smartphone apps. We asked destination goers what kind of apps were most likely to influence whether they would visit a particular attraction or not. Not surprisingly, their choices were quite logical:



They look to see if a destination is even an option by checking the weather



Then they'll look into the online reviews on apps like Yelp and TripAdvisor



Next it's time to see how convenient your destination is for them: do you have WiFi and what kind of wait times are there for attractions?



And lastly they'll see what kind of apps your specific destination has (and as we mentioned before, mobile apps got the lowest satisfaction score of destination technology with our respondents: 3.69/5)

Once they're at your destination, there are two types of technology categories they're looking for. The first is **Experiential Technology**, which are attributes that enhance the entertainment and/or educational value of the experience. The second is **Functional Technology**, which are technologies that heighten the convenience or the quality of service guests receive while on site.

In the realm of Experiential Technology, **23% of guests** noted that their favorite kind was 4D films; **22%** said their favorite was interactive features they can touch and feel; **16%** said their favorite was audio listening devices that narrate a tour or exhibit; and **13%** said that they preferred exhibits or attractions presented as holograms. These differ across the types of destinations though: zoo, aquarium, museum, and art gallery guests prefer interactive features they can touch and feel; theme and water park visitors prefer 4D experiences; and guests of historic sights and old homes seek out audio listening tours. Interestingly enough, on average across the board, guests had almost no interest in any technology dealing with music (perhaps because music is typically so seamlessly integrated into most experiences that it goes unnoticed). They also weren't particularly keen on motion simulators or seats that rock in rhythm to the soundtrack of the attraction, with less than 6% of

respondents liking either.

When it comes to Functional Technology, **38%** of visitors love the ability to scan their tickets for a faster entry; **35%** make it their number one priority to watch out for the safety devices that prevent accidents on rides or at exhibits; **32%** prioritize up-to-the-minute posted wait times for rides; and **31% love Fast Passes.**

Ensure your destination looks as **attractive as possible in the app market** by having exceptional customer service on travel review sites, **promote you've got WiFi**, and **have a great app of your own** to personalize and enhance your guests' experience. Second, commit your resources to those Experiential and Functional technological attributes your guests find most important to help make their visit exceed even the most speculative expectations.

TOP 10 EXPERIENTIAL TECHNOLOGICAL FEATURES TO MAKE EXPERIENCES MORE ENJOYABLE

- 54%** Touch screens
- 51%** Interactive features visitors can touch and feel
- 47%** Audio tours that narrate the experience
- 45%** Sounds or music that react with the ride/exhibit
- 44%** Virtual reality
- 44%** Audio listening devices
- 42%** Special effects that simulate fun and exciting situations that would not be possible otherwise
- 40%** Seats that vibrate or rock in rhythm to the music or soundtrack of the ride/exhibit
- 38%** Ability to send electronic postcards from the attraction
- 38%** Motion simulators



CLICK HERE TO LEARN MORE ABOUT

PGAV DESTINATIONS
Global Leaders in Planning and Design

200 North Broadway, Suite 1000
St. Louis, Missouri 63102
314.231.7318
www.pgavdestinations.com

Find us on...



Destinology is a quarterly publication produced by PGAV Destinations, a world class consultancy, designer, and architect for zoos, museums, aquariums, theme parks and hospitality worldwide. To subscribe to *Destinology* and receive the latest Destination research and strategic innovations, contact marie.shellenberg@pgav.com.

STORYTELLING
it can change your mind



NOW AVAILABLE

Storytelling: It Can Change Your Mind

Human beings have been telling each other stories since the first bonfire; so why, after centuries of storytelling, is there an influx of new apps, conferences, and best sellers about the art?

PGAV Destinations' new research book chronicles the evolution of storytelling, exploring the neuroscience behind its power, and evoking the skills needed to tell some of the most engaging stories at destinations around the world.

To request your own copy please visit
<http://www.pgavdestinations.com/insights/publications/>

fsc logo

PGAV is committed to producing our newsletter in an environmentally friendly manner. This issue of *Destinology* has been printed on FSC certified paper containing 100% postconsumer waste fiber. Even the printing process is environmentally friendly. The ink used in this publication is a soy-based ink, and the printer utilizes 100% Green-e certified renewable energy.