DESTINOLOGY™

The Art & Science of Destinations

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THE NEW DESTINATION VISITOR

Travel Motivations in the Post-Recession Era

PGAV DESTINATIONS
Global Leaders in Planning and Design

WHAT WE ASKED & WHAT WE FOUND

PGAV Destinations commissioned H2R Market Research for a nationwide study to detect and evaluate the shifting priorities of today's attractions visitors and how their needs and wants drive their behavior. The data revealed numerous, surprising trends in how people view, plan for, and react to their world as they travel throughout the country.

Having passed through the crucible of the worst economic downturn since the Great Depression, travel consumers are back on the road. But they are wiser, seek greater value, and are more sensitive to pain points than ever before. PGAV Destinations' latest research compares recent findings to pre-recession studies to track key shifts in consumer behavior in the post-recession era.

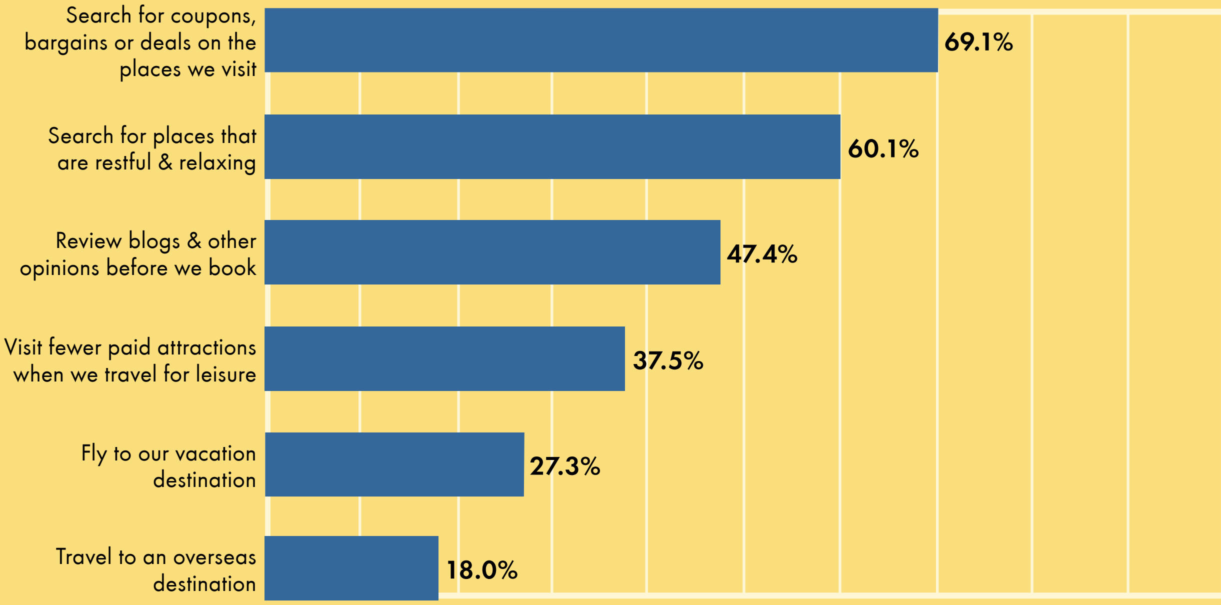
THE NEW MOTIVATIONAL EMOTIONS

According to the findings, when people first start to think about visiting a destination, there are specific associations and intentions that impulsively come to mind. At the very forefront of this pre-meditation are three, powerful emotional drivers: **reconnect with my loved ones, please the people I care about,** and **have fun together**. As they begin to research and decide how best to achieve these motivations, they seek out practical activities they need to engage in when on site. These include shopping, dining, attractions, and interactivity. Ensuring your destination can attend to these top *emotional drivers* which are being realized through *practical experiences* can greatly strengthen your visitor experience.

Throughout the research, respondents were quite clear in identifying their top needs to feel satisfied with their attraction visit. The five most important needs, in order of priority, were a quality product; value for the dollar; a safe, worry-free experience; relaxation; and a unique experience that's out of the ordinary. When defining value, guests look to the affordability, quality, safety, and relaxation offered by the experience – **it's not just about the dollars**.

So what's changed since the beginning of the recession? At the top of the list rests their increased interest in relaxing opportunities. In a recent American Psychological Association's 'Stress in America' report, it's suggested that the struggling U.S. economy is helping generate an over-stressed population; aware of their unhealthy levels of stress, but simply too busy to foster a work/life balance and engage in healthy activities – a vicious cycle keeping them in high-stress mode (and generally unhealthy, both physically and mentally). This insight provides a

By what percentage are you more likely to conduct the following leisure activities than you were five years ago?



powerful implication for product development and marketing communications at your destination – peppering opportunities for respite and escape throughout your thrilling attraction.

> "We are more likely to pursue activities that are **'off the beaten path'** or visit popular places **'off season'** to **avoid crowds**"

In addition to the increased interest in value and relaxation, visitors noted a number of other increases in various desires, different from what we've seen since pre-recession. They generally engage in more pre-planning, they're more likely to stay closer to home (not fly) and visit less crowded places, and they prefer less commercial experiences. In general, they're more stressed and therefore more specific about what they want out of their precious, little free time. These findings indicate it may be an excellent time to refocus efforts on reaching out to your local market, provide simple pre-planning tools, and highlight your destination as "an escape."

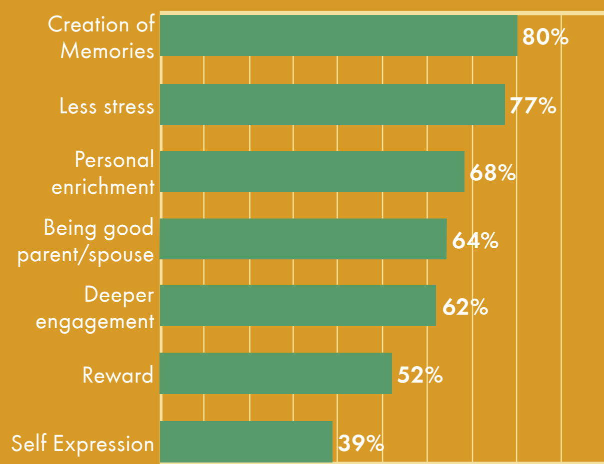
SPLURGING IS BACK, BUT FOR DIFFERENT REASONS

In 2008, PGAV published research based on a study conducted just before the hit of the most recent American financial crisis, starting in December 2007. That study provided the final glimpse into the mind of the pre-recession traveler; and most importantly at the time, their predisposition to splurge. In *The Splurge Traveler*, we looked at the demographic of destination guests who were likely to spend a little extra money to 'trade-up' for a premium experience (58% of guests were willing to splurge, most of them could be found at zoos, aquariums, and theme parks, and Generation X and Y were the most likely). Also, the research revealed what motivated people to splurge, such as the creation of special memories and opportunities to be great parents. But with the stressful and wallet-tightening hit of the financial meltdown, whatever happened to these splurgers?

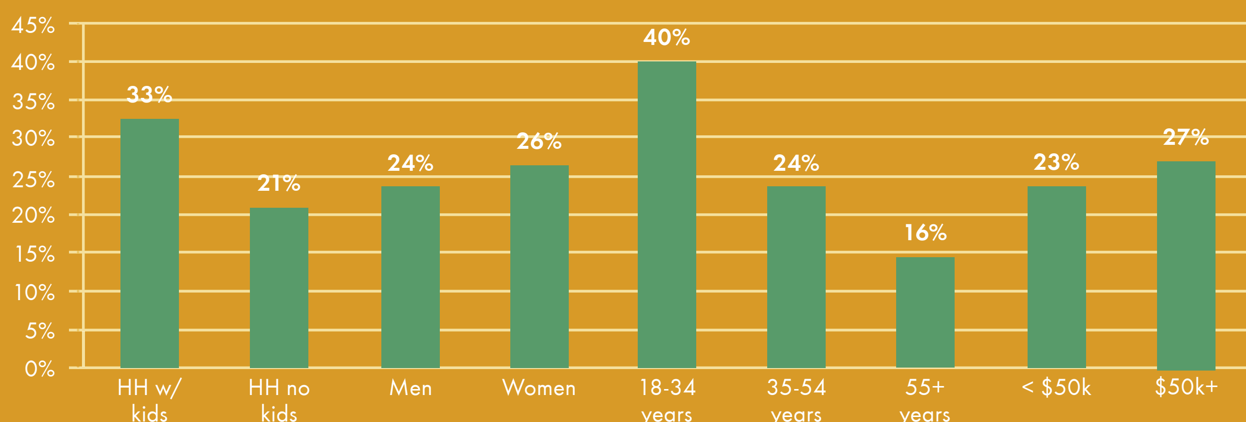
Well they're back; and actually, the 'intent to splurge' is slightly up from its pre-recession marker, now hovering around 25%. **The difference is that the motivations to splurge have changed.** While 'creating memories' is still in the top three, they're now more interested in opportunities that can reduce their stress or give them personal enrichment. On top of that, they want activities that give them plenty of choice and control, and things they couldn't do anywhere else.

The interest to splurge is greater among people under 40 and those who have children, referencing the desire to be great parents. Among the above aspects, today's splurgers are also looking for quality, convenience, comfort, access (like behind-the-scenes tours), and personalization (one-on-one interaction with an expert). This provides destinations with a unique insight and challenge to get creative and provide new premium experiences that are one-of-a-kind and give your guests a tremendously personalized, memorable experience.

Motivations Inspiring Splurge Purchases



Average Interest in Splurge Purchases by Segment



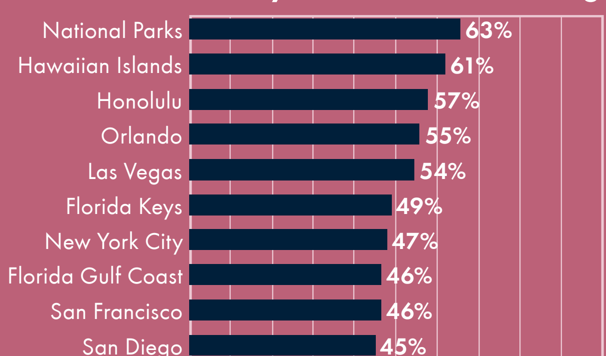
WHERE DO TRAVELERS WANT TO GO?

Also at the beginning of the recession, we surveyed destination-goers to find out specifically where they wanted to visit and how strong that intention was. Nearly six years later, travelers are now more likely to look for destinations that are closer to home, warm and sunny, and that provide peace and relaxation. Respondents showed top interest in visiting the majestic wonder of America's national parks, the beauty and relaxation of the Hawaiian Islands (and specifically Honolulu), the inspiration of Florida's Space Coast, and other sunny retreats like Hilton Head Island, San Diego, and the mountain resorts of Colorado. Their intent to visit these areas are even stronger than it was pre-recession; and when they've travelled in the past two years, the most popular destinations were zoos, museums, and theme parks – just the same as pre-recession.

> "I now prefer to do more things **out of the ordinary**, things that most people do not do on a regular basis."

Interest in visiting all destinations is up from 2009 levels, but some destinations are generating greater interest than others.

Somewhat or Very Interested in Visiting



SMALLER INCREASES

- National Parks
- Las Vegas
- San Antonio
- New York City
- Tampa

LARGER INCREASES

- Hilton Head
- Honolulu
- San Diego
- Colorado Mountain Resorts
- Florida's Space Coast

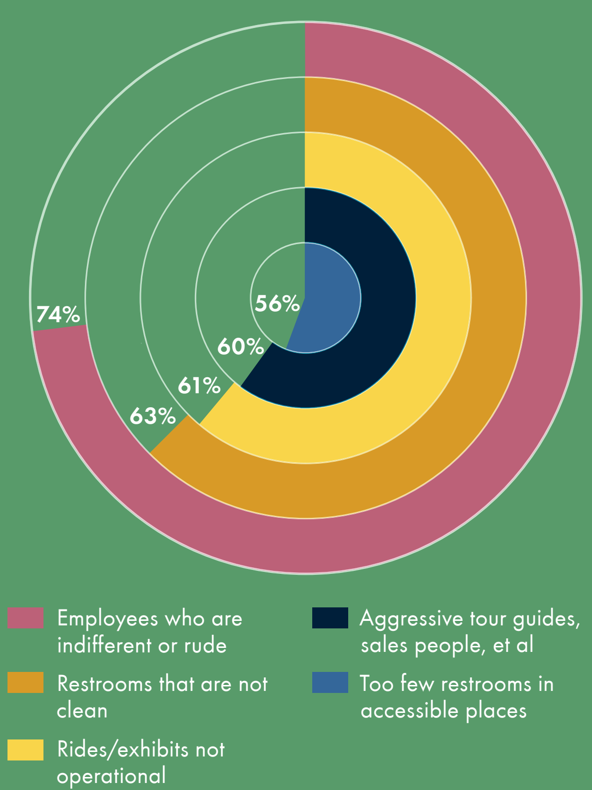
ROOM FOR IMPROVEMENT

It's important to note that a destination is only as successful as it meets the aforementioned needs and desires of its visitors. In our research, we asked guests how satisfied they felt, and only 49% were somewhat or very satisfied with the quality and variety of **places to eat**; 41% were somewhat or very satisfied with the **quality of their service**; and only a third of destination visitors were somewhat or very satisfied with their **shopping experience**. The great news for destination managers is that these are well within your control and nothing a little staff training and site development couldn't solve. Attacking these less-than-satisfactory experiences head-on could eliminate some of the most glaring visitor pain-points and provide more enjoyable, care-free experiences.

How do you determine how well a specific experience or attraction delivered on your expectations?

"**Lack of bullying** and **over-aggressiveness** [from park staff], and visible **security measures.**"

Customer Experience Pain Points



TURNING EMOTIONS INTO ACTIONS: WHAT GUESTS DO ON-SITE

> **"I go places that the whole family loves."**

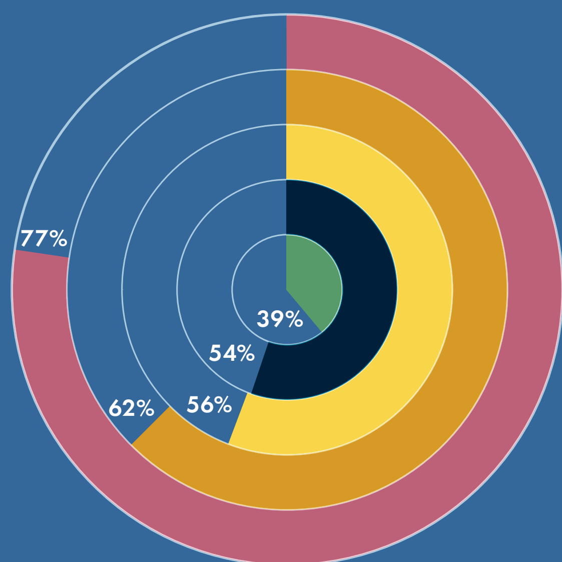
Throughout our study, we've looked at trends as they've evolved throughout the most recent recession in regards to why guests visit destinations, what they consider before attending, their tendency to splurge on premium experiences, and some of the top destinations that they're looking at in 2013. Once they're inside though – once they've driven all the miles, parked the car, made it through the lines and kiosks and trams, what do they do?

While the specific activities they participate in are varied and diverse, as can be expected from the wide range of destination types around the country, the roots of *why* they participate in these different activities are relatively the same (and prominent). Site managers and front-line staff should never underestimate the intrinsic, psychological motivations behind their guests' activities; oftentimes, deeply understanding these motivations is the key to designing and fostering exceptional products and experiences. At the very top of this emotional list is "reconnecting with friends and family in a fun environment." Closely tied and tailing are 'time together with loved ones,' 'a fun getaway with friends and family,' and 'to be with others who wanted to go.'

How do guests express these desires and emotions on site? Mostly, it's what you'd expect: going on family and thrill rides, viewing exhibits, shooting through water rides, eating with their friends and families, shopping, and participating in educational demonstrations. The lesson?

Designing these seven experiences so that they can give guests the achieved feeling of reconnecting with their friends and family in fun environments can optimize the guest experience for greater satisfaction, encouraging repeat visits and becoming promoters of your destination.

What percentage of respondents agree or strongly agree with the following statements?



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CHIMELONG OCEAN KINGDOM

Chimelong Ocean Kingdom is nearing the end of its three-year construction period with an anticipated opening later this year on Hengqin Island in China's southeastern Guangdong province. Featuring a MACK dark ride and super splash among many other attractions, the ocean theme park will complement the developing mega resort which is being touted as the "Orlando of China."

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