

Survival of the GREENEST

The Attraction Consumer's Growing Interest in the Environment

Presented by PGAV**DESTINATION**CONSULTING

A new study by **PGAV Destination Consulting** in collaboration
with the world-renowned **Missouri Botanical Garden**
has a message for the attractions industry:

Beware – Green Matters!

Respondents to a national survey conducted by Jerry Henry
& Associates report they want to see proof of being green.

The survey found skepticism toward places that try to appear
green without demonstrating bonafide sustainable practices.

A closer look at demographics shows that young people
are the driving force for environmental priorities
...so industry planners have much to gain long-term
by paying attention to their voices.



OVERVIEW

Consumers are making all kinds of decisions based upon their commitment to the environment. Until now, little has been explored and documented regarding attraction consumer's views. Because leisure-time behaviors have significant economic impact, it is insightful to understand current trends and the motivations of attractions visitors. This landmark national study offers results that have universal applications.

CONCERNED CONSUMERS

There is indeed an overwhelming concern for the environment among attraction visitors, with 9 in 10 people indicating they are concerned. Half of this group is *very concerned* about the environment. And this group's influence is absolutely massive: nearly two-thirds (65%) of U.S. residents, or 197.3 million people, visited an attraction between September 2006 and September 2008.

Not surprisingly, the PGAV study indicates the bar is set highest for botanical gardens. Over three-quarters of respondents, fully 86% of botanical garden visitors, expect botanical gardens, more than any other type of attraction, to employ green practices and procedures. Since "greenness" is core to the garden brand, visitors expect gardens to "do the right thing" in terms of sustainability.

Nearly 70% of attractions visitors are significantly more likely to visit, and visit more frequently, attractions that pursue green practices rather than patronize those that continue doing business as usual.

However, other destinations are not off the hook. While gardens are held to a higher standard, the public looks to institutions of all kinds to be leaders in green. **Nearly 70% of attractions visitors are significantly more likely to visit, and visit more frequently, attractions that pursue green practices rather than patronize those that continue doing business as usual.** Most significantly, nearly 30% of attractions visitors *have already made the discriminating choice to pick green attractions.*

THE GREEN VEST

EXPERIENCE

A desirable benefit of visiting a green attraction is that consumers get to experience "wearing a green vest," at least for a while. This experience allows them to participate in a sustainable experience and act responsibly. According to the study, people with household incomes over \$100,000 are often more familiar and slightly more concerned with environmental issues than are people with lower incomes. However, they are not quite as willing to make personal changes, such as keeping their showers shorter, unplugging appliances not in use or regulating their home air and heat. Thus, by

visiting a green attraction, these consumers can be assured they've contributed to something important and feel good about the experience, without having to change their own daily habits.

LIKELIHOOD TO VISIT AN ATTRACTION THAT IS PURSUING ENVIRONMENTALLY FRIENDLY PRACTICES



DEMOGRAPHIC DRIVERS

There is no doubt that stakes are high when it comes to being green. A key finding is that “business as usual” will not be acceptable for long. The group that is almost single-handedly fueling this trend is aged 18-34, encompassing both generation X and Y, so their influence will endure, rather than a passing fad. These two powerful groups of consumers, who are actively being courted by all attractions, are significantly more aware of and concerned about environmental issues. As a result, young people expect attractions to “show me the green” now and in the future. Two other critically important consumer groups are weighing in to drive this trend: women of all ages and people with household incomes over \$100,000.

DEFINING GREEN

What does being green mean to the traveling public? According to the study, environmental sustainability is not widely understood terminology. It is believed to encompass air and water quality, alternative energy sources, environmentally friendly cleaning products and natural insecticides, but interestingly, not perceived to include climate change and global warming.

What do attractions visitors consider to be notable signs of environmental commitment? In order these are: recycle bins, energy efficient lighting, solar panels, selling food/beverage in biodegradable containers, and offering water in biodegradable cups rather than plastic. Recycling is a

nearly universal expectation for green attractions with over 80% across all consumer segments saying that recycling is very representative of an environmental commitment. Interestingly, LEED Certification, the standard system for sustainable facilities, ranked dead last as an outward sign of environmental commitment valued by attractions visitors. It is likely that the LEED rating is less known and less understood by the general public.

CONCLUSIONS

The PGAV Destination Consulting/Missouri Botanical Garden study offers data and verbatim responses that define for the attractions industry how important being green is to their guests. The study explains how visitors define sustainability and how visitors expect attractions to demonstrate their commitment to the environment.

With the current economic climate in mind, there is a desirable outcome where environmental concerns and business investment intersect. Note that four in ten visitors expect the prices of green attractions to be higher than those of other businesses, expecting to pay nearly 9% more. Also significant, six in ten people expect their spending on environmentally-friendly products to increase, or greatly increase, over the next 12 months. It appears that the public's commitment to meaningful green will be backed by their spending behaviors...further support for destinations to wholeheartedly commit to green.

TYPES OF ATTRACTIONS MOST EXPECTED TO BE “GREEN”

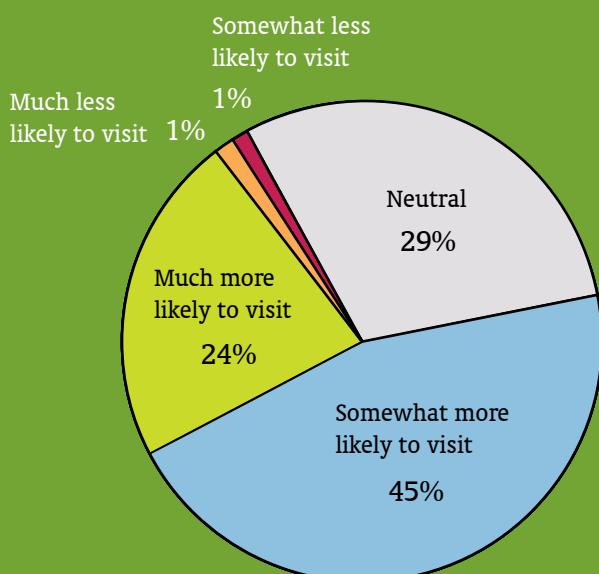
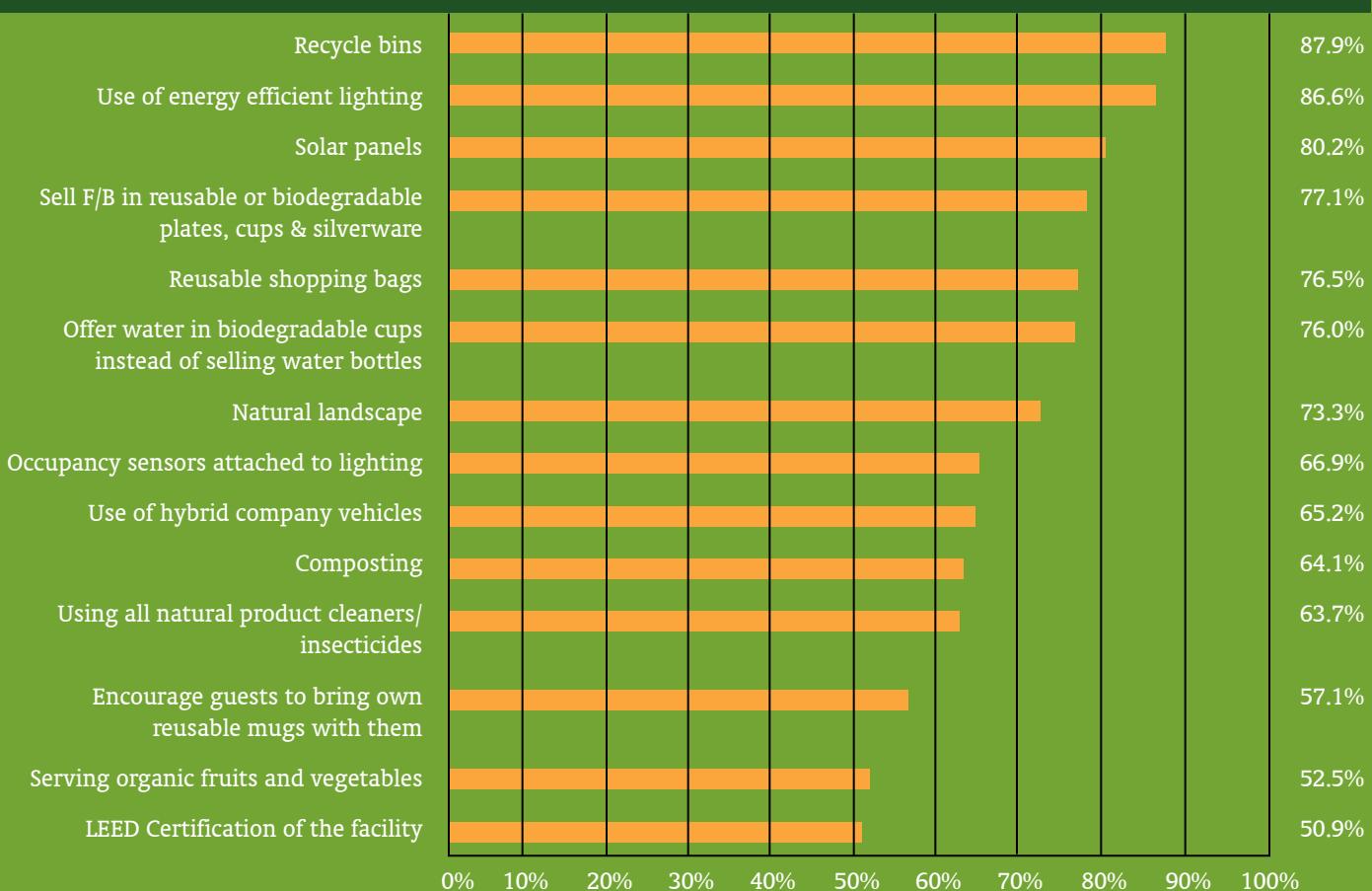
Respondents expect botanical gardens, zoos and science centers to have taken the most actions toward becoming environmentally sustainable.



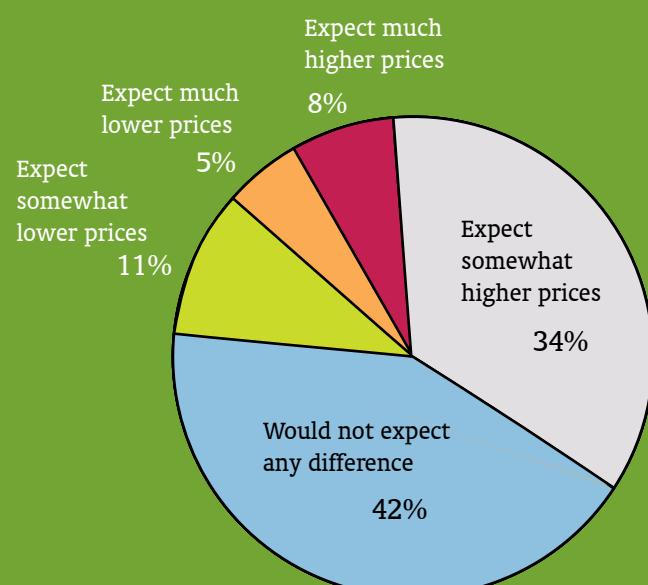
ACTIONS MOST REPRESENTATIVE OF OUTWARD SIGNS OF AN ENVIRONMENTAL COMMITMENT

PRACTICES & FACILITY

Recycle bins, use of energy efficient lighting, and solar panels are actions that people expect to see as outward signs of environmental commitment.



**Likelihood of Visiting
Green Attractions**



**Prices for
Green vs. Non-Green Attractions**