



The Art & Science of Destinations<sup>TM</sup>

# DESTINOLGY<sup>TM</sup>

PGAV**DESTINATION**CONSULTING • volume 05 • issue 03 • december 2008



## Survival of the **GREENEST**

PGAV's latest nationwide study, published in collaboration with the Missouri Botanical Garden, explores consumer attitudes towards Going Green in the attractions industry.



# THE GREEN POINT OF DIFFERENCE

Industries from every sector of the U.S. economy have been influenced by concerns over environmental sustainability. “Green Consumerism” has caught hold with a vengeance, influencing how we choose cars, food, and even political candidates. And so it is with the attractions industry.

In October 2008, Busch Entertainment Corporation (BEC) announced a new wave of environmental sustainability initiatives at their theme parks, from hydrogen-fueled parking lot shuttles to dinnerware made from sugarcane and vegetable starch. Like BEC, almost every one of PGAV’s attraction clients is exploring new initiatives involving environmental sustainability. They are doing this for the right reason – to help save our planet for future generations. But our clients also recognize that they are dealing with a new and growing legion of consumers who are increasingly motivated to select green products over those that are less green.

But what do we really know about this Green Point of Difference? Do LEED-certified buildings more effectively communicate sustainable values than recycling bins? Are certain demographic groups more likely to select green products over other groups? Do consumer education programs on the environment matter more than green operations? Will consumers pay more for green attractions?

In an effort to help our clients and the industry as a whole understand this consumer trend, we launched our latest nationwide consumer study called “Survival of the Greenest.” We are particularly honored to have the Missouri Botanical Garden as a collaborator of this study. The Garden is one of the leading public gardens in the world, and a leading research institution whose mission is to “discover and share knowledge about plants and their environment, in order to preserve and enrich life.” The Garden is led by Dr. Peter Raven, a Time Magazine “Hero of the Planet” and noted advocate for sustainability issues.

The findings of this study reveal an important understanding about consumer attitudes and perceptions regarding environmentally sustainable operations in attractions.



Want to learn more about  
the findings of this study?

Contact us at  
[marie.shellenberg@pgav.com](mailto:marie.shellenberg@pgav.com)  
for a copy of a detailed report.



## MISSOURI BOTANICAL GARDEN

In a world that is beset with environmental problems of many kinds, from global warming, air and water pollution, soil loss, and the extinction of a huge number of species of plants and animals, it is a joy to read the results of this survey. We learn that the visitors to public institutions of all kinds are more apt to patronize them and enjoy them more if they practice and display various approaches to sustainability. Not surprisingly, they view botanical gardens as the greenest of all, and expect more from the botanical garden community, a challenge that my colleagues and I will take very seriously as we consider the scope of our present displays and operations and develop our plans for the future.

It is very important for all of our institutions to take seriously the leadership role that is expected of us: many people are concerned with the environment, but without guidance and examples of what they can do about it, may simply become worried and upset and fail to contribute what they can to the improvement of our overall situation.

Without the kind of careful study reported in these pages, one would not know the level of public interest in issues of sustainability. It is gratifying to read the conclusions of this survey, conclusions that give us much guidance in our own development. In this respect, the study constitutes an important contribution to our institutions and thus to our common welfare. PGAV and the Missouri Botanical Garden share a common interest in saving the planet, as do all of those for whom this report was prepared, and effective partnerships will certainly help us all to do the best possible job of serving our visitors well.

*Peter H. Raven*

Peter H. Raven, President  
Missouri Botanical Garden

# 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.

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.

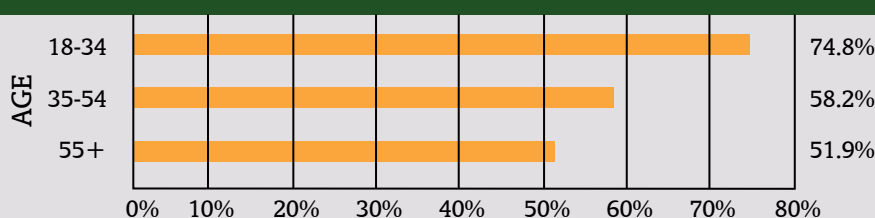
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## THE GREEN VEST EXPERIENCE

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.

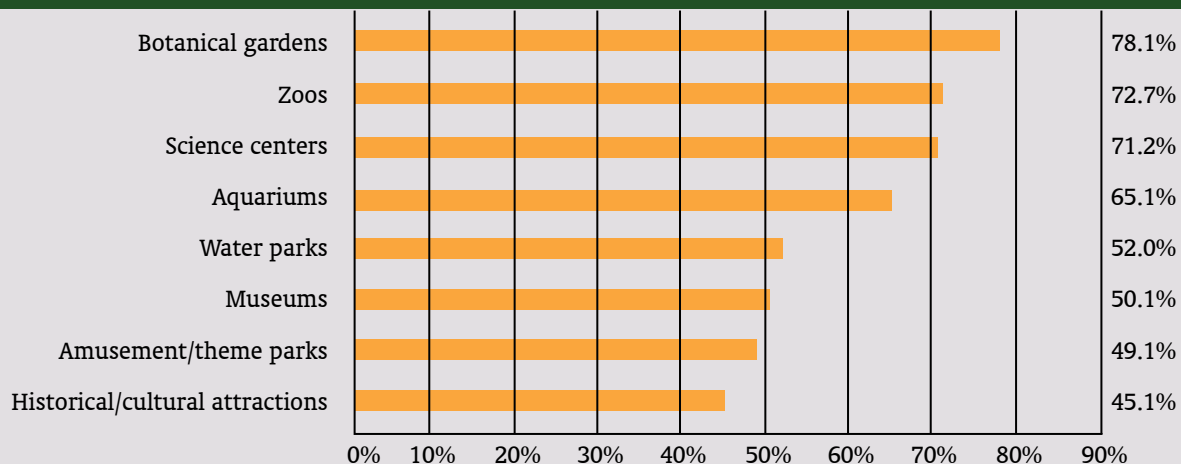
## CONCLUSIONS

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”

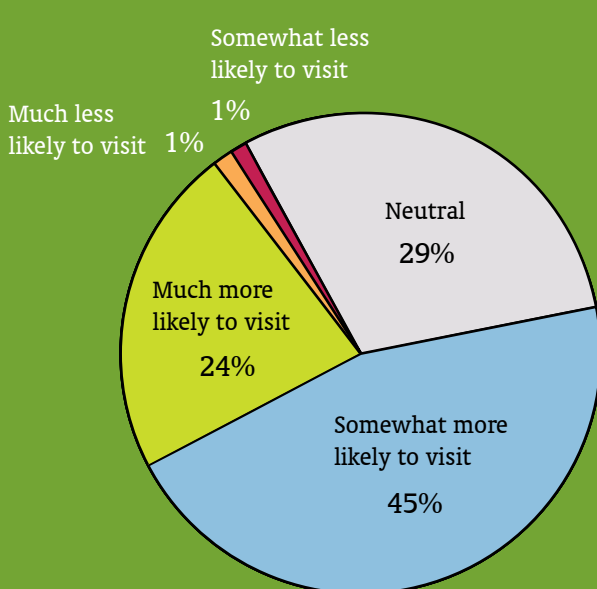
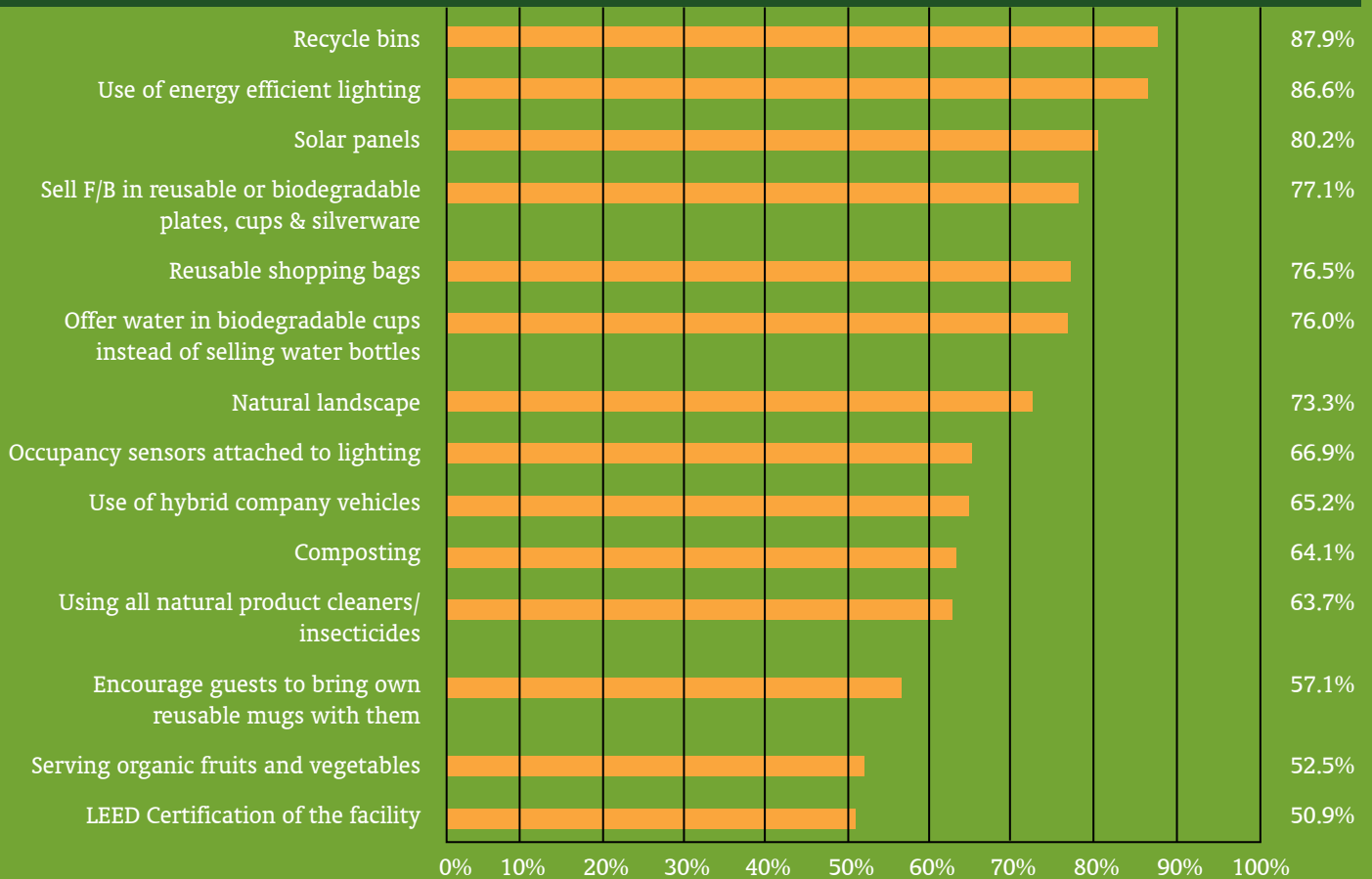
*Respondents expect botanical gardens, zoos and science centers to have taken the most actions toward becoming environmentally sustainable.*



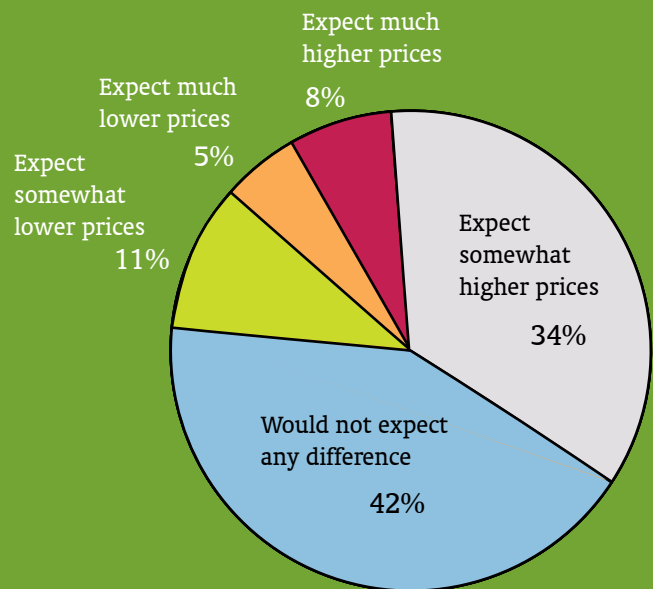
## ACTIONS MOST REPRESENTATIVE OF OUTWARD SIGNS OF AN ENVIRONMENTAL COMMITMENT

### 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**

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*think deeply, plan carefully, act boldly*

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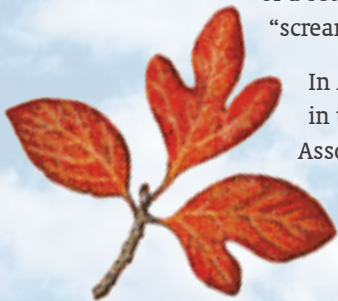
## Café Sassafras – Missouri Botanical Garden

A model for meaningful green is the Missouri Botanical Garden's café, Sassafras. Staff routinely recycled all paper products and visitors were encouraged to recycle waste in marked bins at the restaurant entrance. However, the Garden realized visitors did not realize how green the café really was. In fact, the Garden went to great lengths to utilize sustainable practices but was not communicating the story loudly and thoroughly.

New practices now in place include using table numbers that explain one of the numerous green practices, informational signage in every demonstrable place rather than one "I'm green" sign at the entrance, and napkins that explain they're made without chlorine bleach.

Sassafras is the featured food venue at the Garden and an excellent example of a setting that has transitioned from "behind the scenes green" to "screaming green."

In August 2008, Sassafras became the first Certified Green Restaurant™ in the state of Missouri, a designation of the Green Restaurant Association (GRA), a national non-profit organization whose mission is "to create an ecologically sustainable restaurant industry." The Garden is required to make four recommended café improvements per membership year, to maintain its standing as a GRA.



PGAV is committed to producing our newsletter in an environmentally friendly manner.

This issue of Destinology has been printed on FSC (Forest Stewardship Council) and SFI (Sustainable Forestry Initiative) certified paper containing 10% post consumer waste. The manufacturing plant that makes the paper uses 100% green-e certified renewable energy. Even the printing process is environmentally friendly. The ink used in this publication is a Soy-based ink. The printer, which is also FSC and SFI certified, utilizes AmerenUE's Pure Power program, which means that a portion of the energy they use is wind driven energy.

To learn more about FSC and SFI certification, check out their websites: [www.fscus.org](http://www.fscus.org) and [www.sfiprogram.org](http://www.sfiprogram.org).