

The Art & Science of DestinationsTM

DESTINOLGYTM

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Real Potential

*The Power of Authenticity
to Reposition Your Destination*

The Authenticity Opportunity

Authenticity means different things to different people. But, attributes of authenticity keep showing up in our society as important elements of quality. At its most basic level, it seems that people associate authenticity with honesty, truth, and integrity – essential elements of trust in any relationship. In the consumer marketplace, authenticity is often seen as the antithesis of commercialism.

In our work with destinations, we have seen increasing evidence that authenticity is a social trend that influences consumers' decisions to visit one destination over another. Individual attractions or whole destinations are viewed with suspicion if they fail to remain "true" to their core purpose. More importantly, destinations that effectively communicate their authentic attributes and add new experiences that introduce their authentic importance can reach new audiences and find growth potential.

James H. Gilmore and B. Joseph Pine II have perhaps made the best contribution to the study of authenticity in the marketplace. Their book: Authenticity – What Consumers Really Want (Harvard Business School Press) outlines many of the most important aspects of the emergence of authenticity. But their book also highlights the difficulty in implementing authenticity as a strategy.

“To thine own self be true, and it must follow, as the night the day, thou canst not then be false to any man.”

– William Shakespeare, from Hamlet, Act 1, scene 3

To find better ways to develop authenticity-based strategies, we recently commissioned a nationwide consumer research study that explores the importance and attributes of authenticity in destinations. In commissioning this study, we joined forces with **Conner Prairie** (www.connerprairie.org), a wonderful interactive history park near Indianapolis.

Our study confirmed that authenticity is important – in fact 80% of attractions' visitors reported that they like to visit places that are authentic. Eighty-one percent (81%) of them indicated that destinations that had authentic attributes are viewed much more favorably, had better brand perception, higher satisfaction, and greater intent-to-return than destinations not having authentic characteristics. Perhaps most importantly, the study revealed which attributes of authenticity are most important to travel and leisure consumers.

Authenticity is a powerful tool. Destinations that already have clearly defined attributes of authenticity can reach into a broadening pool of interested consumers by ensuring that their offerings are relevant, interesting, and appealing to these broader audiences.

In this issue we feature Conner Prairie's 1859 Balloon Voyage – an experience that has enhanced the Park's appeal to hard-to-reach groups, such as teenagers. Destinations without clearly defined attributes of authenticity have perhaps even more potential for growth by finding appropriate ways to enhance their authentic attributes.

Want to learn more about
the findings of this study?

Contact us at
marie.shellenberg@pgav.com
for a copy of the detailed report.



REAL POTENTIAL

The Power of Authenticity to Reposition Your Destination

{ Presented by PGAV**DESTINATIONS** }

The current PGAV study explores authenticity, a challenging concept and rather hard nut to crack. We all think we know what the word means, but the truth is, it means different things to different people. Authenticity is context-dependent, and can be perceived differently by visitors to different places or settings. In the recent national survey of attractions visitors performed by Jerry Henry and Associates, one thing is crystal clear: the trend toward authenticity is indisputable and pervasive.

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Attractions visitors say the best examples of authenticity are places where something real happened in history (68%), natural places untouched by human hands (53%) and something you cannot do anywhere else (34%). Natural attractions like the Grand Canyon (86%) and living history museums like Conner Prairie and Colonial Williamsburg (73%) rank the highest.

While travelers like authentic places, the study shows that travelers also visit all kinds of attractions. People who value authenticity are just as likely to choose a theme park for their family vacation. Over half of those who say they prefer real/authentic experiences have recently visited theme parks (54%) or casinos (50%), and other destinations such as museums (61%), zoos (61%) and aquaria (58%).

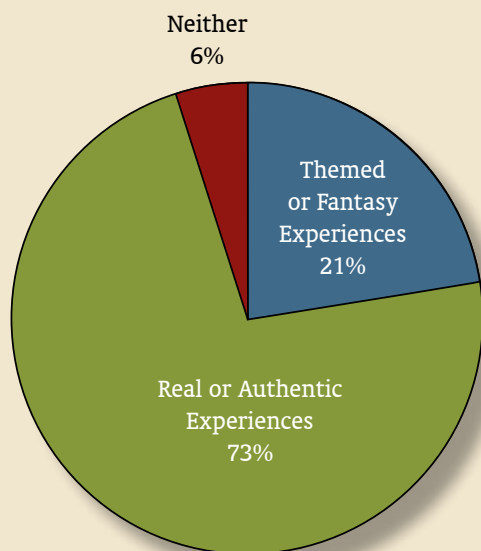
In fact, the data leads us to a compelling conclusion: there are specific ways to categorize authenticity. Authentic experiences can be described by five distinct attributes: Unique, Real, Human, Non-Commercial and Social/Emotional. Every one of these attributes applies across the board to *all* attractions. In other words, regardless of the destination, a meaningful authentic experience can occur for visitors.

A vast majority (81%) of attractions visitors who indicated their last trip had real/authentic characteristics said these attributes caused them to view the destination more favorably (25%) or much more favorably (56%). Importantly, destinations considered to be authentic tend to enjoy better brand perception, higher satisfaction and greater intent-to-return than do those destinations described as not having authentic characteristics.

The key point is for every destination to carefully consider how to incorporate these survey findings. Natural sites like the Grand Canyon or living history museums such as Conner Prairie or Williamsburg are inherently authentic, and do not need to work too hard to hone their Authenticity Attributes. However, their challenge is to ensure they continue to appeal to the mainstream traveler as well as the much smaller group of authenticity purists (19%).

Attributes of Authenticity

Category	Attributes
Unique	Original, Artistic, Inventive, Spontaneous
Real	Historical, Natural, Landmarks
Human	Genuine, Trustworthy, Caring
Non-Commercial	Simple, Not fake, Not glitzy, Not “out to make a buck”
Social/Emotional	Bonding, Feeling closer to family/friends



Preferences for Real vs. Fantasy

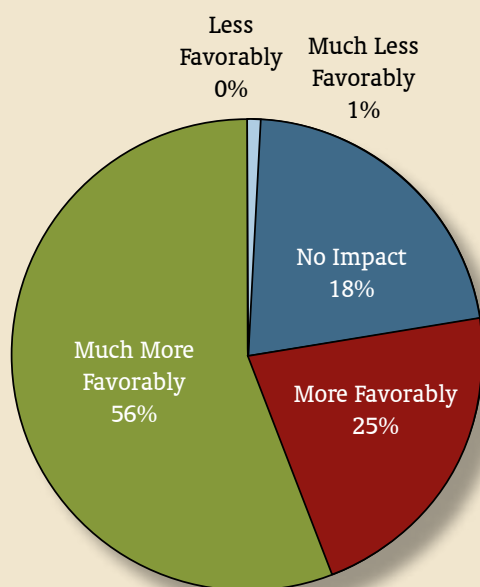
Between the two, attractions visitors overwhelmingly prefer authentic experiences to things they consider “fantasy.”

Attractions like theme parks and gaming casinos, offering fantasy and entertainment experiences, have the greatest opportunity for growth by evolving their brands to include some of the Authenticity Attributes. Beware that crafting a new brand, message or product in response to a trend is not an easy task. Efforts intended to be authentic but instead come across as commercial tricks will certainly flop. Authenticity is a hot trend, similar to the Green movement; like the risk of “green washing,” any incremental “authenticity adjustments” in a single element, section or exhibit must be legitimate and transparent to successfully impress your audience.

Emotional connections are important. More than 4 in 10 visitors feel the emotional aspects of the experience make an attraction feel authentic. When emotionally connected, visitors say they are more inclined to return to that place as well as to spend significantly more money. Immersing people in the experience will engage their senses and help to trigger sincere emotion and enjoyment. Tell your story, make it accessible to visitors and capture the moment.

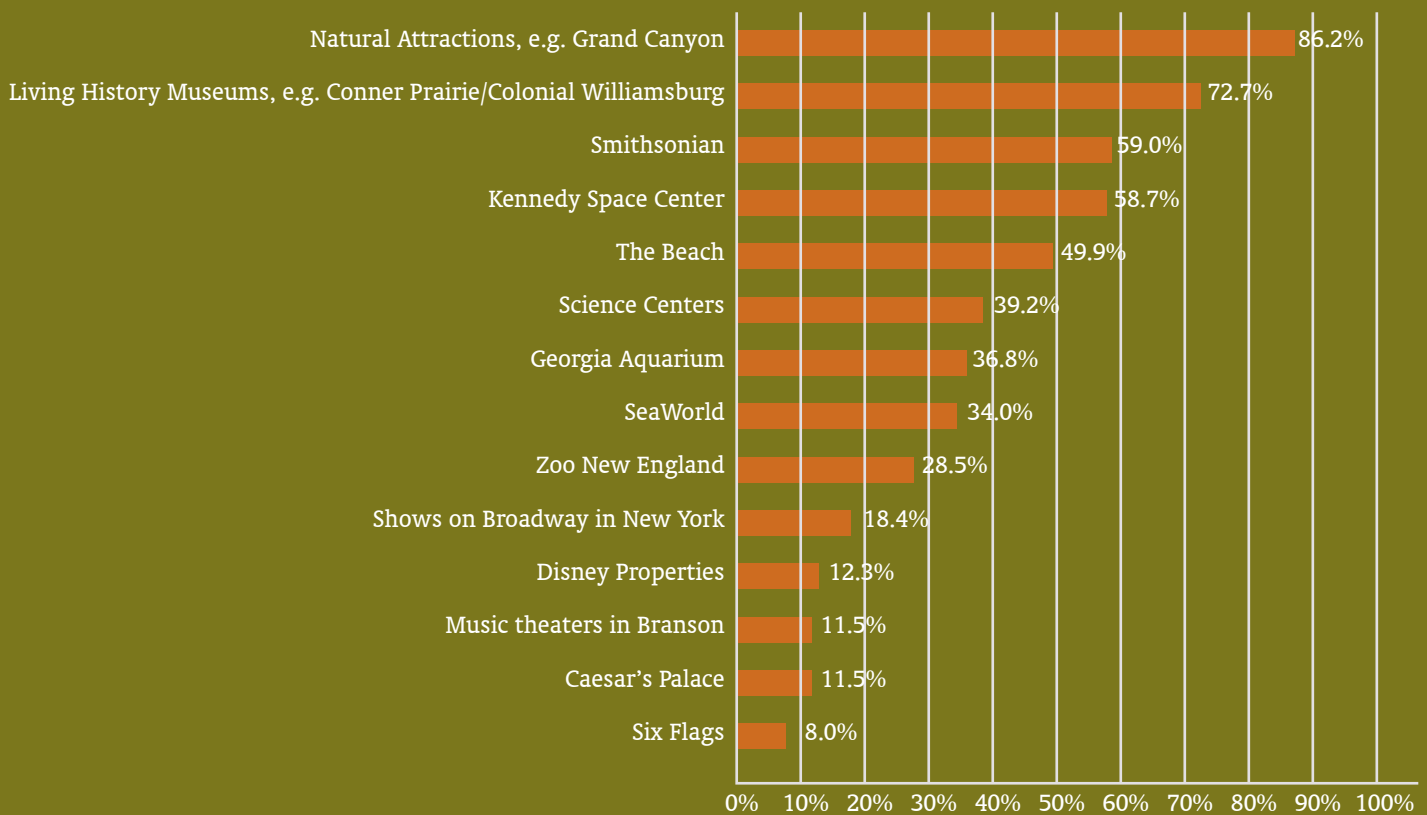
CONCLUSION

Today’s travelers are definitely seeking more authentic experiences. Destinations of all kinds that develop authentic offerings or augment existing Authentic Attributes will have a competitive edge in our fiercely competitive market. The trick is to analyze how authenticity best applies to you and carefully incorporate it. The potential is real.



Brand Perception

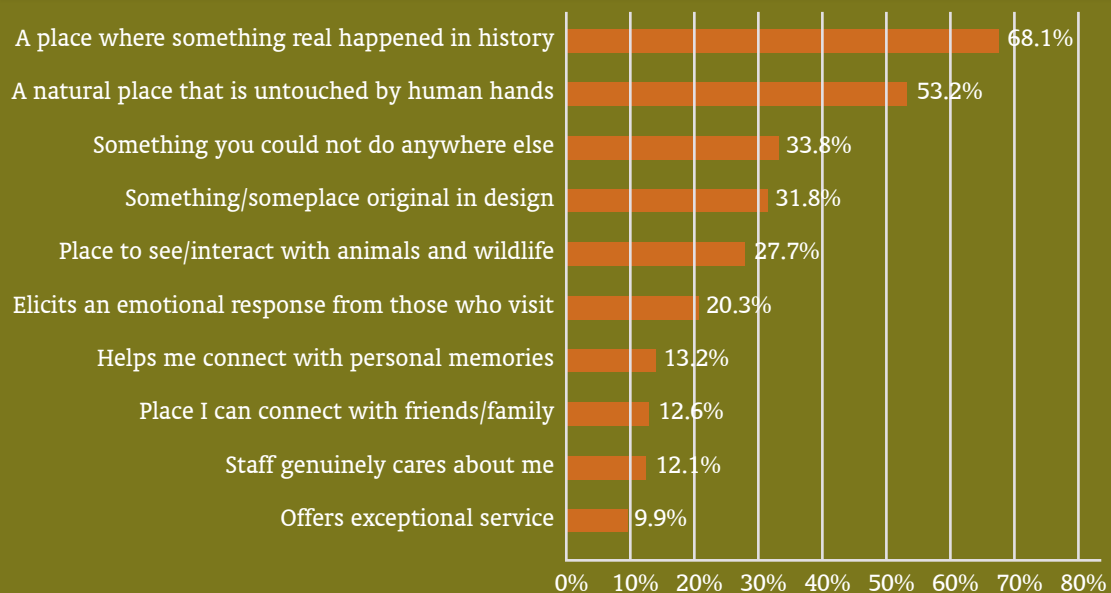
The vast majority (81%) of those who indicated their last trip had real/authentic characteristics said these attributes caused them to view the destination or attraction more/much more favorably.



Specific Attractions Considered “Real or Authentic”

Specifically, natural attractions like the Grand Canyon, Living History museums such as Conner Prairie, the Smithsonian and Kennedy Space Center are considered to be some of the most authentic attractions.

Respondents were asked to check all that apply.



Best Examples of Authenticity

Attraction visitors say the best examples of authenticity include history, natural and unique offerings.

Ratio of attraction visitors who included these in their top 3 choices.



CONNER PRAIRIE

INTERACTIVE HISTORY PARK

What will an increasing interest in authenticity mean for historic sites?

In this time of financial stringency we hear that people are returning to basics and core values. It's also said that people are increasingly seeking what is real and authentic. The impressive research study commissioned by PGAV confirms that interest in authenticity is a growing trend. Eighty percent of attraction visitors say they prefer "real experiences" over "fantasy/entertainment."

What will an increasing interest in authenticity mean for an outdoor historic site like Conner Prairie?

Already considered authentic because of the historic research used to develop the recreated historic environment, costuming and programming, will Conner Prairie experience a dramatic uptick in attendance simply because of historic authenticity?

My guess is no. That is, not unless it continues its labors of the past five years to introduce fun, family-oriented, engaging experiences. As this study points out, people interpret "authenticity" in very different ways. Often they simply mean that they want less commercialism and more personally meaningful experiences.

For the past two decades, outdoor history museums across America have struggled with declining attendance despite a continuing interest in "real" places. Conner Prairie is a dramatic exception. By regularly introducing new family-focused exhibits, remaining guest centric and emphasizing active engagement throughout the facility, Conner Prairie has shown dramatic increases in attendance and membership.

New experiences, such as our 1859 Balloon Voyage (read more in this newsletter), exemplify the Conner Prairie approach of combining authenticity with fun engagement for the entire family. The exhibit environment authentically recreates facades of buildings in Lafayette, Ind., in 1859, the site of the first airmail delivery via gas balloon, as actual newspaper accounts and historic photographs tell the story. But, beyond viewing the exhibit and trying out interactive components, guests have the opportunity to experience the airmail flight by floating 350 feet into the air on a gas filled balloon.

This important study should be read as offering encouragement to attractions that actively engage guests and fulfill the longing that many Americans have for real, meaningful experiences that connect them to a time or place once foreign to them, not as support for places whose sole focus is authenticity for authenticity's sake. It is Engagement that makes authenticity meaningful, as PGAV's work, including that with Conner Prairie, proves time and time again.



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Featured Project:

CONNER PRAIRIE'S NEWEST EXPERIENCE TAKES FLIGHT

Fishers, Indiana – Interactive history park Conner Prairie has launched its newest immersion experience, a helium-filled, tethered balloon that allows guests to voyage 350 feet in the air. As the only balloon of its kind, set in an historical context, in the United States, the balloon along with the interactive aviation exhibit provides a new opportunity for families to learn about the science of aviation through the lens of history.

“1859 Balloon Voyage tells the remarkable story of how the first successful delivery of air mail via balloon happened to occur in Indiana,” said Ellen M. Rosenthal, Conner Prairie President and CEO. “Our exhibit will, in the Conner Prairie way, be based on painstaking historic research, some of which was conducted in partnership with the Smithsonian Institute. It will place visitors at the Courthouse Square in Lafayette in 1859 as the balloon rises.”

This \$2.2 million exhibit opened in May. The un-inflated balloon is a total of 17,700 square feet – three times the size of a basketball court – and shares the record for the world’s largest balloon. Perhaps most notably, the balloon experiences gives viewers an excellent view of Conner Prairie’s preserved central Indiana landscape – and views of downtown Indianapolis, which is several miles away.

During its first season, the 1859 Balloon Voyage outstripped all attendance projections. Originally set to capture 5% to 10% of Conner Prairie’s general attendance, the ride actually captured an average of 35%! In less than two months after opening, it had its 10,000th rider. During the fireworks displays at Symphony on the Prairie evening concerts, the ride was sold at a \$40 premium, regularly selling out. Average ticket price (with all discounts) was approximately \$10.50.

PGAV assisted Conner Prairie with the development of the 1859 Balloon Voyage as part of a comprehensive master plan. For more information about Conner Prairie and the 1859 Balloon Voyage, visit www.connerprairie.org.