SUSTAINABILITY TRACKER

APRIL 2023

Introduction

Welcome to the second edition of the A Different View and Greenloop Sustainability Tracker in cooperation with Panelbase.net.

We focus on understanding what is important to visitors; visitor sentiment around sustainability and the environment, key areas of focus for attractions and the key sustainability factors for attractions when communicating to potential visitors.

The study also reports on how different types of attractions are perceived; which are highly rated for sustainability and those that are rated lower. The aim of the study is to help us understand visitor sentiment around sustainability and the environment, to understand what is important to visitors and to monitor how this influences purchasing behavior.

A Different View is a strategic planning and strategy consultancy with full-service research and insight. We are primarily a visitor experience agency but increasingly the delivery and perceptions of sustainability are key components of new product development and performance evaluation research projects.

If you have any questions or comments please send them to Geoffrey Dixon,
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FOR THE 2023 STUDY ADV INTERVIEWED 1033 UK ATTRACTIONS VISITORS:

On average each respondent had visited 4 different types of attractions.

365 FUN PARK VISITORS

542 ANIMAL AND NATURE PARK VISITORS

882 CULTURAL / HERITAGE SECTOR VISITORS

409 LIVE MUSIC VISITORS

666 CINEMA VISITORS

More detail on the structure of the research can be found at the end of the report.

KEY VARIANCES 2021 – 2023

We have seen that attraction visitor engagement with 'actions on sustainability' remains high in 2023, however:

- Visitors are now less likely to say they have not bought a product if the product packaging or the retail environment was not sustainable or not environmentally friendly.
- They are less likely to say they buy or source food products because they come from sustainable sources and so are environmentally friendly.
- They are less likely to say it is important to limit the use of single use plastics in bottles and food catering.

2023 RATINGS

- There are no statistically significant differences in ratings for all of the visitor attractions in how sustainable/environmentally friendly 'you think they are'.
- In 2023, It is slightly less important that attractions make each type of sustainable action but many differences are not significant.

ACTION INFLUENCES

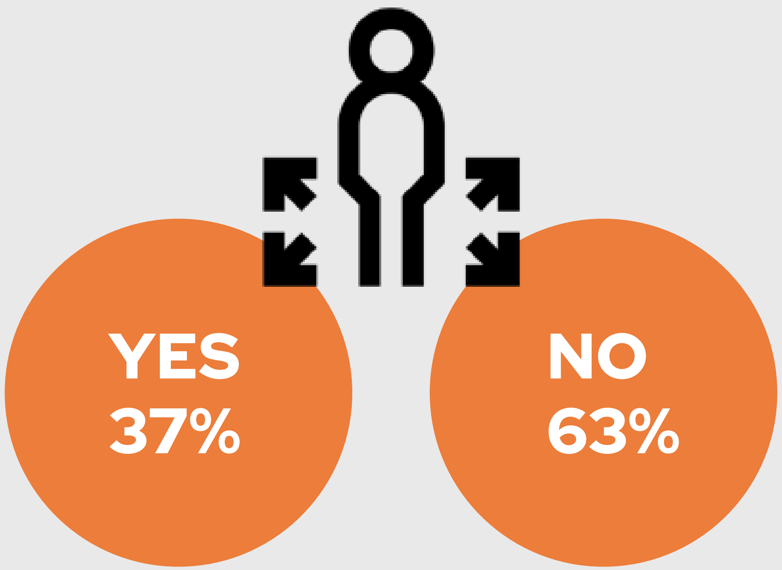
- In 2023 there are no difference in the likelihood for visitors to find out how sustainable/ environmentally friendly an attraction is before they visit'.
- Visitors are significantly more likely to say they do NOT want to pay extra if attractions did the kind of environmentally friendly things, they say are important.

HOW FOCUSED ARE 'ACTIVE' PEOPLE ON SUSTAINABILITY IN THEIR EVERYDAY?

Firstly, we can look at how visitors consider sustainability and the environment when they consider home purchases.

In 2023, a high 37% of visitors had NOT bought a product because they were not convinced of its sustainability credentials.

HAVE YOU EVER NOT BOUGHT A PRODUCT BECAUSE YOU THOUGHT THE PRODUCT, THE PRODUCT PACKAGING OR THE RETAIL ENVIRONMENT WAS NOT SUSTAINABLE OR NOT ENVIRONMENTALLY FRIENDLY?



VARIANCES BY GENDER

There are no statistically significant differences by gender.

VARIANCES BY AGE

Visitors up to age 35 are significantly more likely to have NOT bought a product because they thought the product, the product packaging or the retail environment was not sustainable or not environmentally friendly; 18 to 25 56% and 26 to 34 49% compared to average 37%.

Those 55+ are less likely to have NOT bought because the product or packaging was not sustainable, 28% vs average 37%.

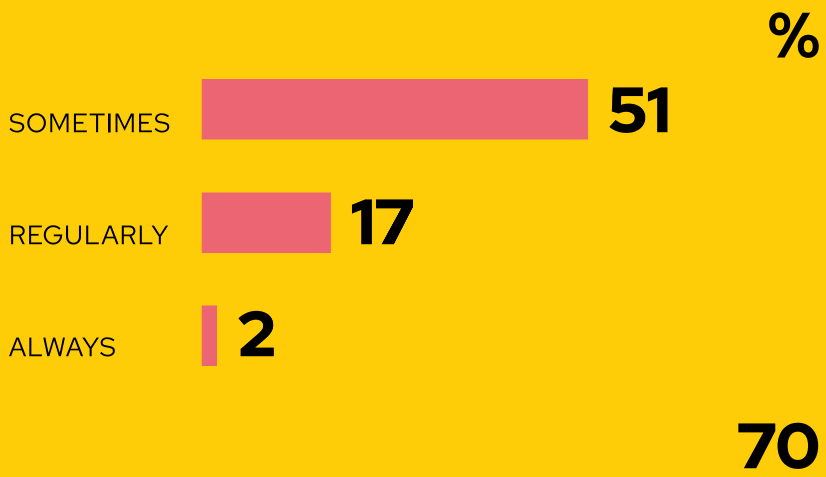
VARIANCES BY 'CHILDREN LIVING AT HOME'

Visitors with children living at home are significantly more likely to NOT have bought a product because it was not sustainable or not environmentally friendly 40% vs 34%.

BUYING AND SOURCING FOOD

One in five visitors in the survey regularly or always buy food products recognizing their sustainability credentials.

DO YOU BUY OR SOURCE FOOD PRODUCTS BECAUSE THEY COME FROM SUSTAINABLE SOURCES AND SO ARE ENVIRONMENTALLY FRIENDLY?



VARIANCES BY GENDER

Female respondents are more likely to say that they sometimes, regularly or always buy food products because they come from sustainable sources, 76% vs 62%.

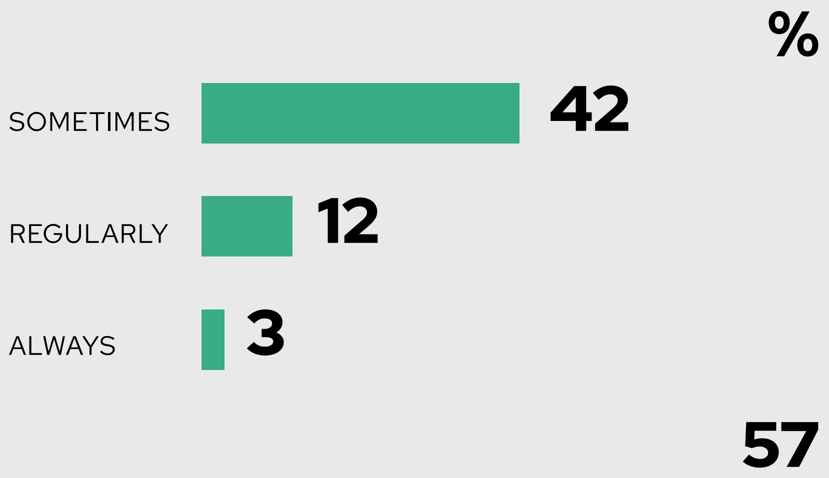
VARIANCES BY AGE

Visitors 18 to 25 are significantly more likely to regularly or always source food products because the come from sustainable sources so they are environmentally friendly, 30% vs Av 19%.

VARIANCES BY 'CHILDREN LIVING AT HOME'

Visitors with children living at home are significantly more likely to buy food because it comes from sustainable sources, 75% vs 66%.

DO YOU BUY OR SOURCE TYPES OF CONSUMER DURABLE PRODUCTS (E.G TVS, COFFEE MACHINE, WASHING MACHINE, FRIDGE ETC) BECAUSE THEY ARE MADE IN A SUSTAINABLE OR ENVIRONMENTALLY FRIENDLY WAY?



VARIANCES BY GENDER

There are no statistically significant difference by gender.

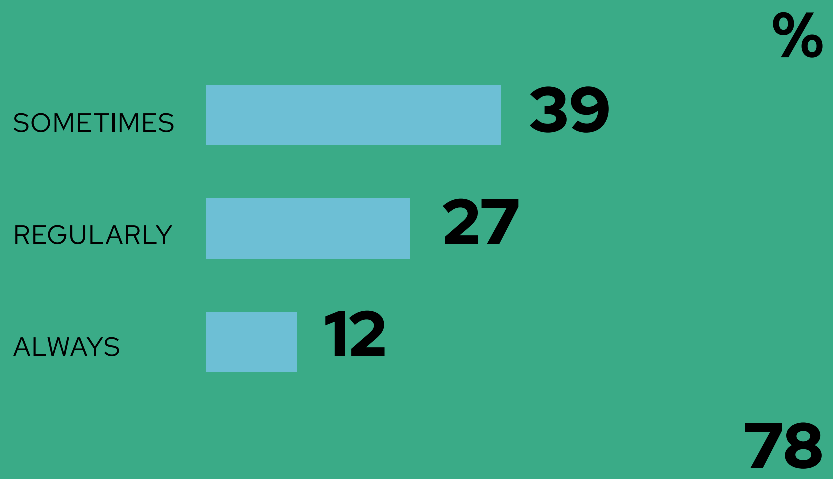
VARIANCES BY AGE

Visitors 18 to 24 are significantly more likely than other age cohorts to say that they source consumer durable products because they are made in a sustainable or environmentally friendly way, 72% vs Av 57%. They are also significantly more likely to say that they regularly or always source sustainably, 28% vs Av 15%.

VARIANCES BY 'CHILDREN LIVING AT HOME'

Visitors with children living at home are significantly more likely to source consumer durables because they are made in a sustainable or environmentally friendly way, 63% vs 52%.

DO YOU BUY OR SOURCE TYPES OF CONSUMER DURABLE PRODUCTS (E.G TVS, COFFEE MACHINE, WASHING MACHINE, FRIDGE ETC) BECAUSE THEY HAVE A HIGH ENERGY EFFICIENCY RATING?



A high 78% of visitors to attractions buy or source consumer durables because of their energy efficiency rating.

VARIANCES BY GENDER

There are no statistically significant difference by gender.

VARIANCES BY AGE

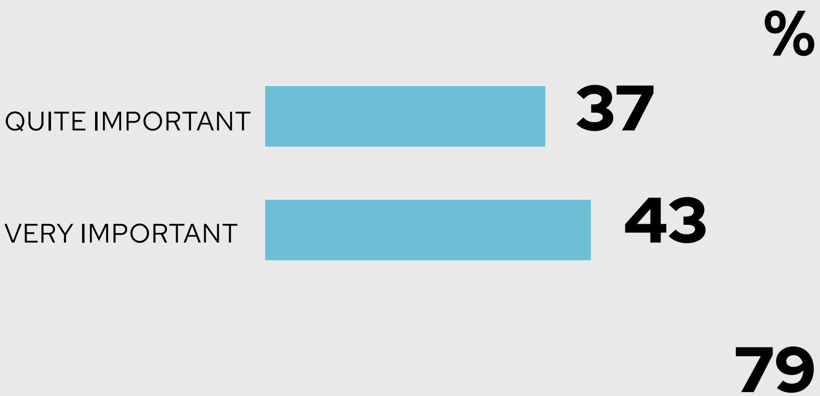
Visitors in the 18 to 25 cohort are less likely than other groups to buy or source products because they have a high efficiency rating, 67% vs Av 78%.

VARIANCES BY 'CHILDREN LIVING AT HOME'

Visitors with children living at home are significantly more likely to source consumer durables because they have a high energy efficiency rating, 82% vs 76%.

Finally, in seeking to understand how these visitors relate to sustainability, the survey asked how important visitors felt it was to limit the use of single use plastics in bottles and catering. A high 80% said it was quite or very important to limit use.

HOW IMPORTANT DO YOU FEEL IT IS TO LIMIT THE USE OF SINGLE USE PLASTICS IN BOTTLES AND FOOD CATERING?



VARIANCES BY GENDER

Female respondents are more likely to say that they feel that it is important to limit the use of single use plastics, 83% vs 74%.

VARIANCES BY AGE

Visitors in the 18 to 25 cohort are less likely than other groups to say that they feel that it is important to limit the use of single use plastics, 68% vs Av 79%. Those who are 55+ are most likely to say that it is important, 85%.

VARIANCES BY ‘CHILDREN LIVING AT HOME’

There are no significant variances by children living at home.

THE SURVEY EXAMINED HOW SUSTAINABLE / ENVIRONMENTALLY FRIENDLY EACH OF THE SURVEYED ATTRACTIONS IS PERCEIVED TO BE.

The ratings to the right are out of 10, with 10 being very sustainable / environmentally friendly and 0 being not at all sustainable / environmentally friendly.

The top rating is 6 out of 10 for heritage building / house, farm park and museum and while art gallery is lower at 5.86, the difference to the top 3 is not statistically significant.

The rating for 'theatre' at 5.48 is however statistically different to the top 4 and so lower.

Theme parks are rated lowest at 4.08 out of 10.

PLEASE RATE EACH OF THESE VISITOR ATTRACTIONS FOR HOW SUSTAINABLE/ ENVIRONMENTALLY FRIENDLY YOU THINK THEY ARE:

0 – Not at all sustainable / environmentally friendly

10 - Very sustainable / environmentally friendly

Heritage building / house	**6**
Farm park	**6**
Museum	**6**
Art gallery	**5.86**
Theatre	**5.48**
Zoo / Safari Park	**5.32**
Aquarium	**5.05**
Concert venue	**4.76**
Water Park	**4.35**
Theme Park	**4.08**

VARIANCES BY GENDER

Male respondents are more likely to perceive that Zoos / Safari parks, 5.38, Water parks, 4.52 and Theme Parks, 4.27 are sustainable than female respondents.

VARIANCES BY AGE

Visitors in the 36 to 45 age group are more likely to say that Zoos / Safari Parks 5.79, and Farm Parks 6.34 are sustainable / environmentally friendly, otherwise there are no other significant differences between the age cohorts.

VARIANCES BY 'CHILDREN LIVING AT HOME'

Visitors with children living at home are more likely to think that Zoos / Safari Parks 5.66 vs 5.04, Aquariums 5.32 vs 4.82, Water Parks, 4.65 vs 4.11 and Theme Parks 4.38 vs 3.83 are more sustainable than those without children.

THE SURVEY THEN EXAMINED 'PERCEPTIONS OF SUSTAINABILITY' FOR FOUR ATTRACTIONS THAT ARE INCREASINGLY TO BE FOUND IN RETAIL ENVIRONMENTS:

INDOOR GARDENS

ACTION ADVENTURE

COMPETITIVE SOCIALISING

ARTAINMENT

Not surprisingly 'indoor gardens' is rated highest equalling the top 3 non-retail attractions. The other three indoor attractions are rated close enough together to be only bordering on statistically different.

PLEASE RATE EACH OF THESE VISITOR ATTRACTIONS FOR HOW SUSTAINABLE/ ENVIRONMENTALLY FRIENDLY YOU THINK THEY ARE:

0 – Not at all sustainable / environmentally friendly

10 - Very sustainable / environmentally friendly

INDOOR GARDENS 6.02

ACTION ADVENTURE 4.96

COMPETITIVE SOCIALISING 4.74

ARTAINMENT 4.70

VARIANCES BY GENDER

There are no significant variance by gender.

VARIANCES BY AGE

There are no significant age variances.

VARIANCES BY 'CHILDREN LIVING AT HOME'

There are no significant variances by children living at home.

INFLUENCE ON PURCHASING

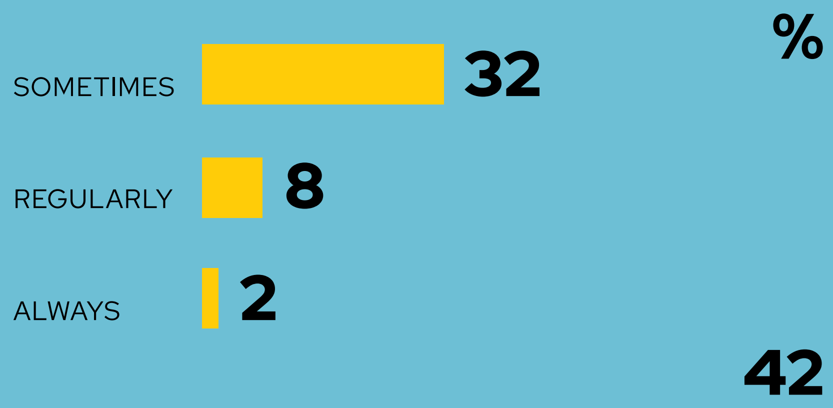
Key to all of this is the impact of perceptions of sustainability on purchasing / visiting decisions.

42% of visitors give some consideration to sustainability and how environmentally friendly a visitor attraction is before they choose to visit.

2% of potential visitors always look to find out how sustainable / environmentally friendly an attraction is before they choose to visit.

8% regularly look to find out.

DO YOU LOOK TO FIND OUT HOW SUSTAINABLE / ENVIRONMENTALLY FRIENDLY A VISITOR ATTRACTION IS BEFORE YOU CHOOSE TO VISIT?



VARIANCES BY AGE

Respondents in the 18 to 25 age cohort are more likely to say that they sometimes, regularly or always look to find out 63%, and those 55+ are least likely, 34%.

VARIANCES BY GENDER

There are no statistically significant differences by gender.

VARIANCES BY 'CHILDREN LIVING AT HOME'

Visitors with children living at home are significantly more likely to find out how sustainable / environmentally friendly a visitor attraction is before they choose to visit, 48% vs 36%

RATING ACTIONS ON SUSTAINABILITY

Now we can look at how visitors rate the importance of different types of sustainability actions that attractions can take. The ratings are out of 10 with 10 being most important.

Recycling is rated number 1. This what the visitors do themselves at home most days, so it is no surprise it rates so highly.

The perceptual space for the 'ingredients of sustainability' is significantly higher overall than the ratings for attractions. We feel that this reflects the affinity to the individual 'actions on sustainability' that respondents engage in and so more easily understand.

'Net Zero' achieved a rating of 5.96. From other research ADV conducted for the development of an attraction completed recently, we found that Net Zero was by now an expectation for any significant attraction, and so had lost any stand out communications values.

In that attraction development study, we found respondents were more interested in the sustainability ingredients than the overall concept of Net Zero. They understood what Net Zero was but were more excited by the components of sustainability; things they could see and / or participate in themselves.

The availability of vegan food options is lowest rated at 5.79 out of 10 but given that only around 2% of the UK population are currently vegan, this may point to this being an important signpost.

PLEASE RATE THE IMPORTANCE YOU THINK ATTRACTIONS SHOULD PLACE ON EACH OF THESE:

0 - Not at all important
10 – Very important

Recycling of waste	7.93
Waste food recycling - left over foods going to those in need, to farms for animal food, for composting to produce plant foods etc	7.47
No single use plastics	7.44
Rewilding of grounds - conservation efforts aimed at restoring and protecting natural processes and wilderness areas	6.85
Water-use reduction	6.82
Healthy / nutritional food options	6.80
Low carbon emissions - using energy that is generated using lower amounts of carbon emissions such as, wind, solar, hydro / water	6.70
Supporting local community charities	6.63
Paperless ticketing and maps	6.60
Responsible supply chain management - ensuring that all products they buy are ethically produced and environmentally friendly	6.58
Diverse community employment	6.50
Electric / biofuel vehicles	6.34
Vegetarian food options	6.14
Net Zero - where a venue removes all greenhouses gases they produce so none escape into the atmosphere	5.96
Vegan food options	5.79

VARIANCES BY GENDER

In every case female respondent's rate each 'action on sustainability' higher than males and all of the differences are statistically different.

	Av	Male	Female
Recycling of waste	**7.93**	**7.60**	**8.2**
No single use plastics	**7.44**	**7.08**	**7.73**
Waste food recycling	**7.47**	**7.03**	**7.82**
Water-use reduction	**6.82**	**6.53**	**7.05**
Rewilding of grounds	**6.85**	**6.48**	**7.15**
Healthy / nutritional food options	**6.8**	**6.36**	**7.15**
Low carbon emissions	**6.7**	**6.33**	**7.0**
Paperless ticketing and maps	**6.6**	**6.29**	**6.85**
Responsible supply chain management	**6.58**	**6.16**	**6.91**
Supporting local community charities	**6.63**	**6.15**	**7.02**
Electric / biofuel vehicles	**6.34**	**6.08**	**6.56**
Diverse community employment	**6.5**	**5.78**	**7.09**
Net Zero	**5.96**	**5.6**	**6.25**
Vegetarian food options	**6.14**	**5.38**	**6.77**
Vegan food options	**5.79**	**5.01**	**6.42**

VARIANCES BY AGE

There are no meaningful variances by the ages of the respondents.

VARIANCES BY 'CHILDREN LIVING AT HOME'

Visitors with no children living at home are significantly more likely to rate the following higher than those with children living at home:

No single use plastics 8.0 vs 7.27

Waste food recycling 8.0 vs 7.30

Responsible supply chain management 7.0 vs 6.54

Visitors with children living at home are more likely to rate 'diverse community employment' 6.55 vs 6.0.

WILL THEY PAY MORE?

Finally in the survey, we looked to see if potential visitors would pay a higher ticket entry price if the attraction did the kind of environmentally friendly things that you say are important. A small majority say they will pay more and 44% say that they do not want to.

In 2021, only 33% of respondents said that they did not want to pay more and this is likely to be a reflection of tighter economic conditions facing the UK population in 2023 compared to 2021.

MAKING VISITOR ATTRACTIONS MORE ENVIRONMENTALLY FRIENDLY AND ABLE TO MAKE A POSITIVE CONTRIBUTION TO THE OVERALL SUSTAINABILITY OF THE PLANET COMES AT A COST. PLEASE TELL US ON AVERAGE HOW MUCH EXTRA YOU THINK YOU WOULD PAY TO GO TO AN ATTRACTION IF IT DID THE KIND OF ENVIRONMENTALLY FRIENDLY THINGS THAT YOU SAY ARE IMPORTANT?

	%
I do not want to pay more for this	**44**
5% more	**23**
10% more	**20**
15% more	**9**
25% more	**3**
30% more	**1**

VARIANCES BY GENDER

There are no statistically significant differences by gender.

VARIANCES BY AGE

Younger respondents in the age cohorts under 35 years of age are significantly more likely than others to say they will pay more peaking at a 10% increment.

VARIANCES BY ‘CHILDREN LIVING AT HOME’

There are no significant variances.

SURVEY NOTES

The survey was conducted in March 2023 by A Different View working with survey panel providers Panelbase.net.

All respondents are 'active' in that they had attended one of a list of attractions within the last three years.

On average respondents had attended 4 attractions.

The sample of 1,033 active respondents means that we can be confident in the survey results plus or minus 4% at a confidence level of 99%.

This means if we were to undertake the survey 100 times the results would be the same 99 times plus or minus 4% in each case.

For the purposes of analysis, we assume a difference of plus or minus 5% to define statistical significance.

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