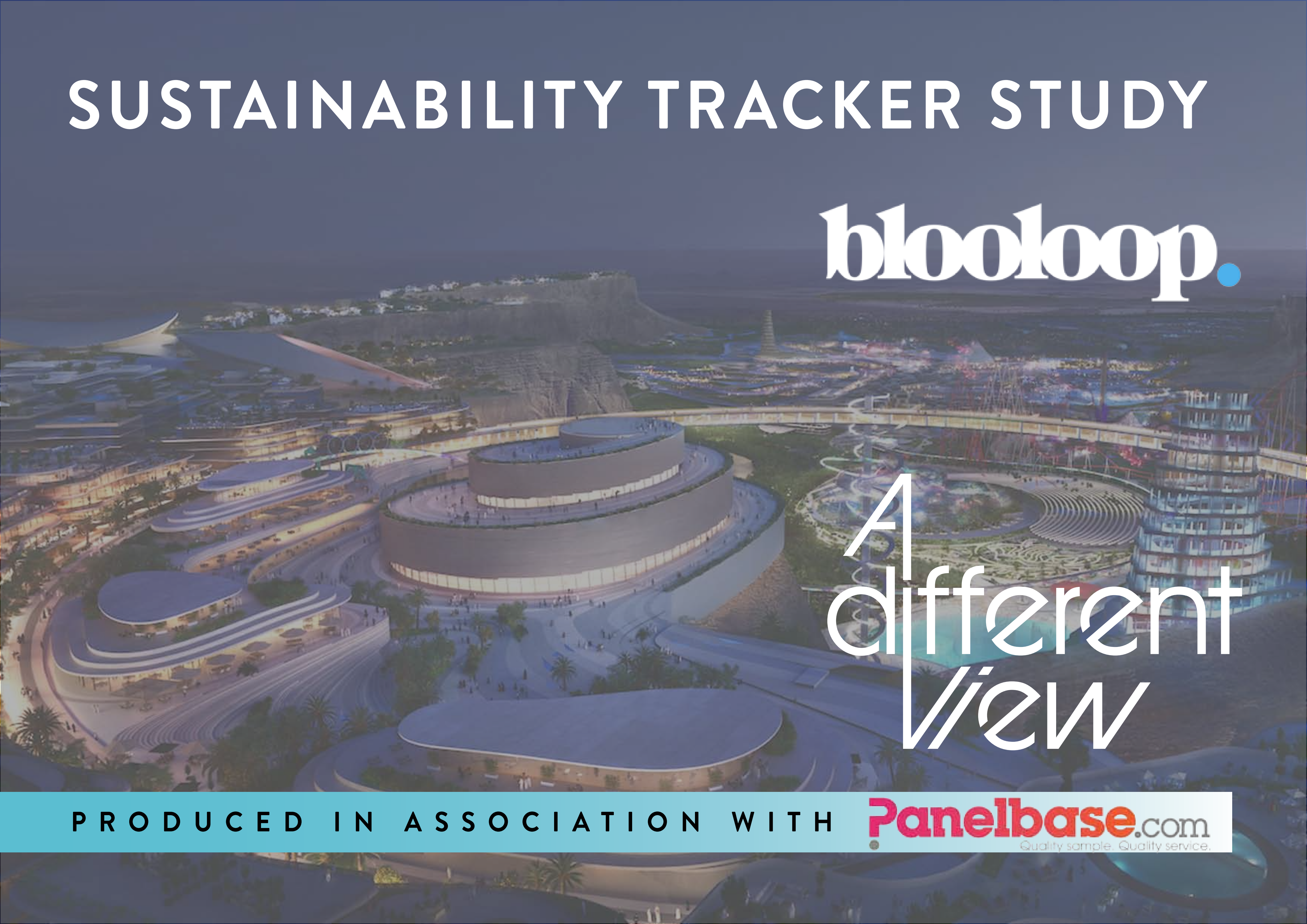
SUSTAINABILITY TRACKER STUDY



blooloop.

A different view

PRODUCED IN ASSOCIATION WITH Panelbase.com

Quality sample. Quality service.

This is the first edition of the Blooloop and A Different View Sustainability Tracker research study report.

The world is changing and we all need to change with it in our personal lives and as senior leaders in the businesses that we operate or manage.

BlooLoop was keen to gain an understanding of how visitor attractions are focusing and delivering against the climate change challenge and the need for sustainability and many senior leaders made presentations at the first GreenLoop conference at the end of April 2021.

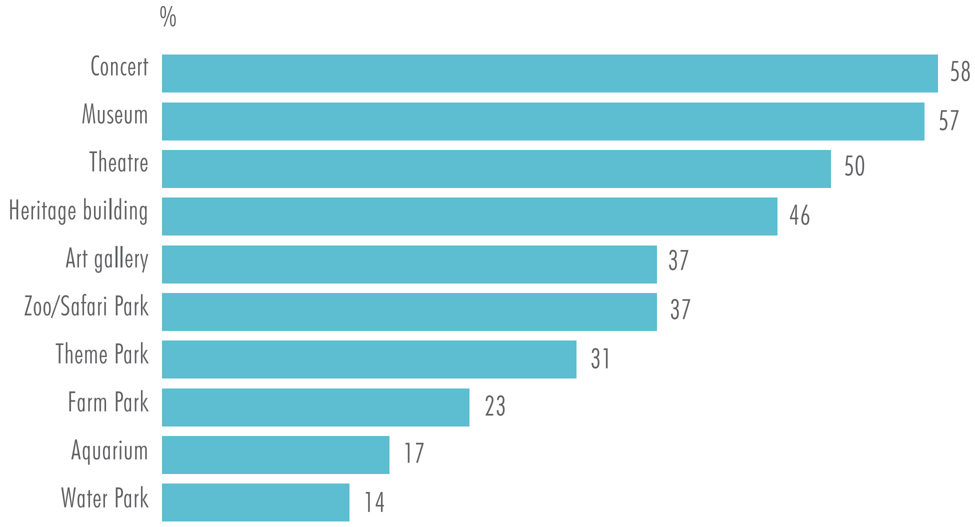
BlooLoop worked in partnership with A Different View and Panelbase.com to conduct a survey of visitors across a wide range of attractions so see what the customers think, and importantly how they perceive attractions and what they expect from them in terms of sustainability and being environmentally friendly.

In addition, A Different View held 7 depth interviews with senior leaders from visitor attractions in Europe, New Zealand and the USA.

The visitor survey conducted between 2nd and 7th of April 2021 was with a sample of 1,100 UK based attractions visitors selected from the Panelbase.com respondent base.

On average the respondents had been to 4 visitor attractions from a list presented to them in the 18 months before Lockdown 1.0 in March 2020.

Attractions visited in the 18 months before Lockdown 1.0



AV 4 ATTRACTIONS

The survey with visitors was structured in a way that we asked the respondents about influences of sustainability and climate change on their current lifestyle purchasing behavior before asking them about attractions.

Thinking about your wider product purchasing of foods, clothes and things for your home, 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?

Yes **53%**

No **47%**

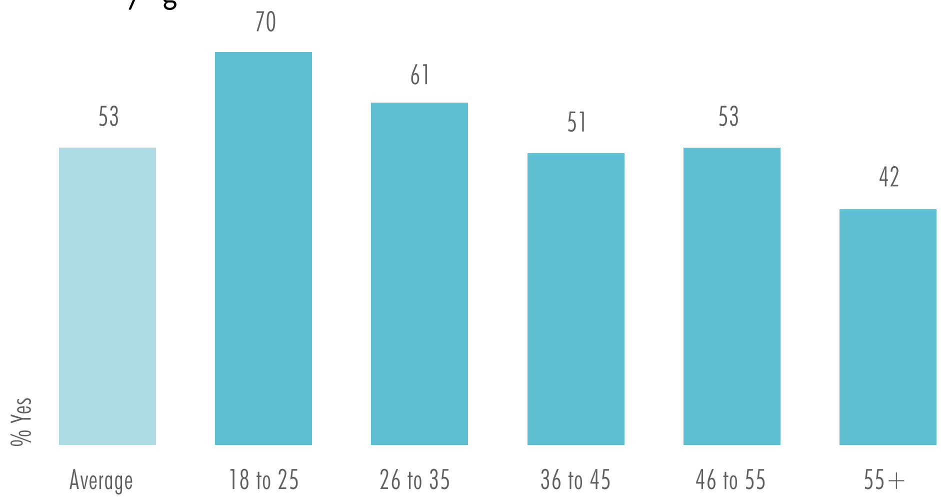
53% of visitors to attractions in the UK in our survey say that they have NOT bought a product because they thought it was not sustainable in some way. Put in simple terms every second person walking through the door or gate of an attraction has in their view taken 'action on sustainability'.

ACTION ON SUSTAINABILITY BY THE TYPES OF ATTRACTIONS THEY HAD VISITED

For every attraction genre, a majority of visitors had already take action on sustainability. They had consciously NOT bought something because they felt it was not environmentally friendly; it could not be justified as a sustainable purchase.

ACTION ON SUSTAINABILITY BY AGE

If we look at action on sustainability by the age of the respondents, we can see a decline by age.



Importantly as the visitors get older they will be more likely to have taken action on sustainability, by free will or influenced by regulation.

ACTION ON SUSTAINABILITY BY GENDER

When we look at action on sustainability by the two main genders we can see no difference between them:

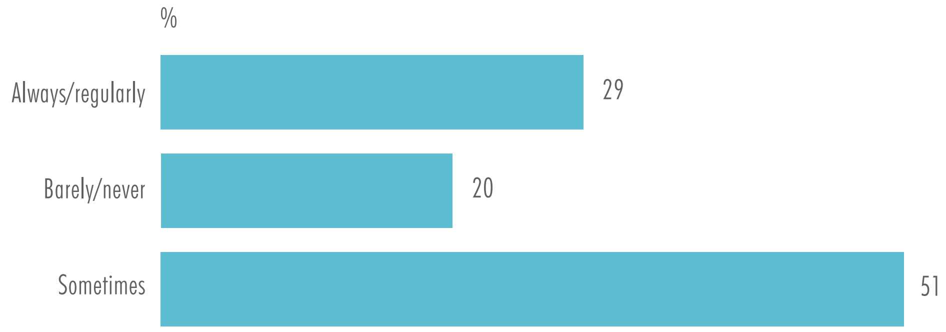
	Average	Female	Male
Yes	53%	52%	53%

Note: Only one respondent in our survey defined themselves as non-binary

FOOD AND CONSUMER DURABLES PURCHASING

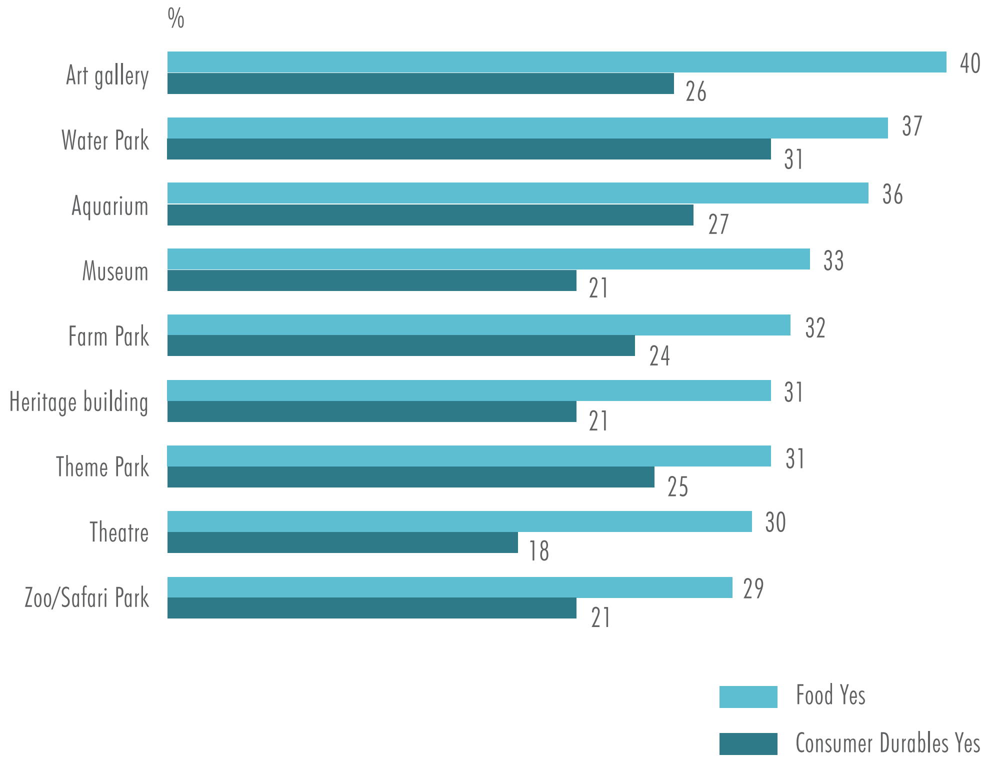
Food and beverage incomes are important for many attractions. In our survey nearly one-third of visitors, 29%, say they always or regularly source food that is environmentally friendly; if we add in 'sometimes purchase; that increases to 80%.

Do you buy or source food products because they come from sustainable sources and so are environmentally friendly?



This means that 8 out of every 10 visitors to attractions 'always or sometimes', consciously buy food products because they come from sustainable/ environmentally friendly sources.

The survey also looked at consumer durables purchasing and 19% regularly or always buy because the products come from sustainable/environmentally friendly sources, increasing to 70% if we add in 'sometimes purchase'.

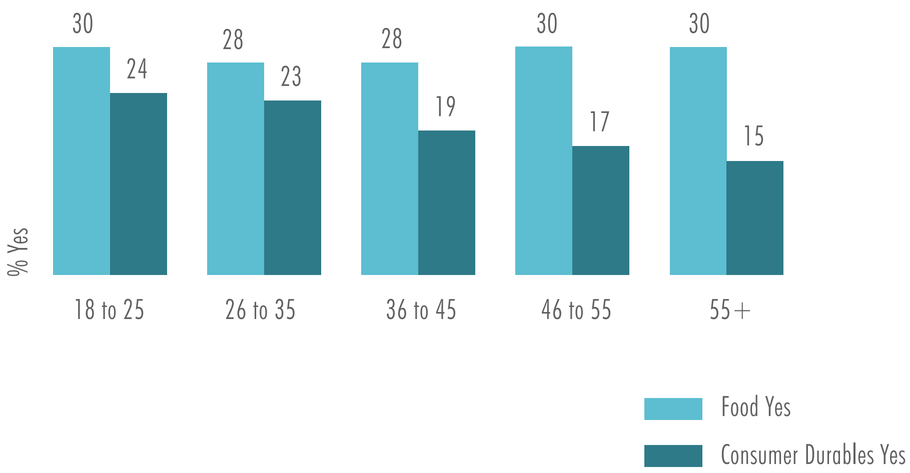


So again, we can see that a high proportion of attractions visitors across the board are taking 'action on sustainability' with their purchases at remarkably consistent levels, though with food at a higher level than with consumer durables.

HERE WE CAN SEE THIS FOR VISITORS BY AGE:

With food purchases we can see a remarkable consistency in action on sustainability and with consumer durable we can see a steady decline from 24% of 18 to 25s saying they have taken action down to 15% of those 55+.

% always or regularly buy products because they are made in a sustainable and environmental way



SINGLE USE PLASTICS IN BOTTLES AND FOOD CATERING

90% of attractions visitors say it is important to limit the use of single use plastics in bottles and food catering and 61% had NOT bought a product because of single use plastics.

How important do you feel it is to limit the use of single use plastics in bottles and food catering?

90% say it is important and **58%** say very important.

61% had **NOT** bought a product because of single use plastics.

"We do not sell or distribute water bottles. It is a loss of revenue but we cannot in all conscience make money from this."

-Ike Kwon, California Academy of Sciences

Finally, in finding out about 'action on sustainability' by the visitor respondents we asked them to provide a rating for how important sustainable values are when they buy in any of 5 product categories:

- Energy for their home
- Clothes
- Transport
- Tech products e.g. lap top or tablet
- Holidays

Energy for home	**6.98**
Clothes	**5.98**
Transport	**5.95**
Tech products	**5.60**
Holidays	**5.29**

In each case we can see that between 6 and 7 out of 10 visitors rate sustainable values as important when making a purchase.

'Energy for home' rates significantly higher than any other of the categories. Energy for home for most is not a discretionary spend. Clothes and other purchases are discretionary spend and the ratings are lower. The difference between the highest and the lowest rating is statistically significant and all options are above the average point of 5 out of 10.

The data so far tells us that UK visitors to attractions are thinking about sustainability and the environment and taking action on sustainability in their everyday life; and that overall, the younger the respondent the more likely they are to act and think in sustainable ways.

HERE WE CAN SEE WHAT THE SENIOR LEADERS SAY ABOUT THEIR VISITORS:

"In Germany we have students protesting every Friday and we get more and more emails asking questions about sustainability in the park. In the past school students would make a presentation about the fun that they had in their visit; now it is all about sustainability at the park." **-Lukas Scheub, Europa-Park**

"At Puy du Fou we see people separating waste and visitors ask if they can smoke even." **-Guillaume Allaire, Puy du Fou**

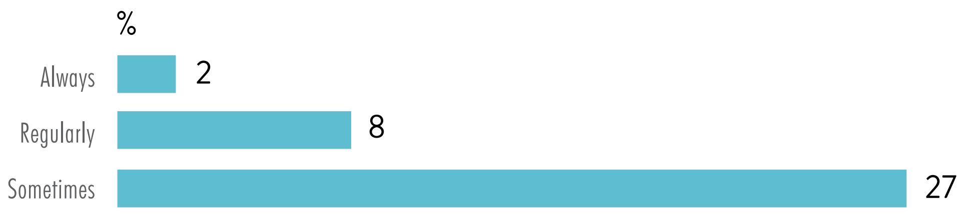
"The Spanish culture is not ready yet compared to Northern Europe – we need to teach people how to recycle, how to separate – culturally we are not there yet – the kids are, but not their parents and to be truly effective we need the 5.1m visitors to be there with us." **-Choni Fernandez, Portaventura**

FINDING OUT IF AN ATTRACTION IS SUSTAINABLE/ ENVIRONMENTALLY FRIENDLY

On average, only 2% of visitors always check on how sustainable a visitor attraction is before they choose to visit and if we add in 'regularly check' this increases to 12% of visitors checking on how sustainable a visitor attraction is before they choose to visit.

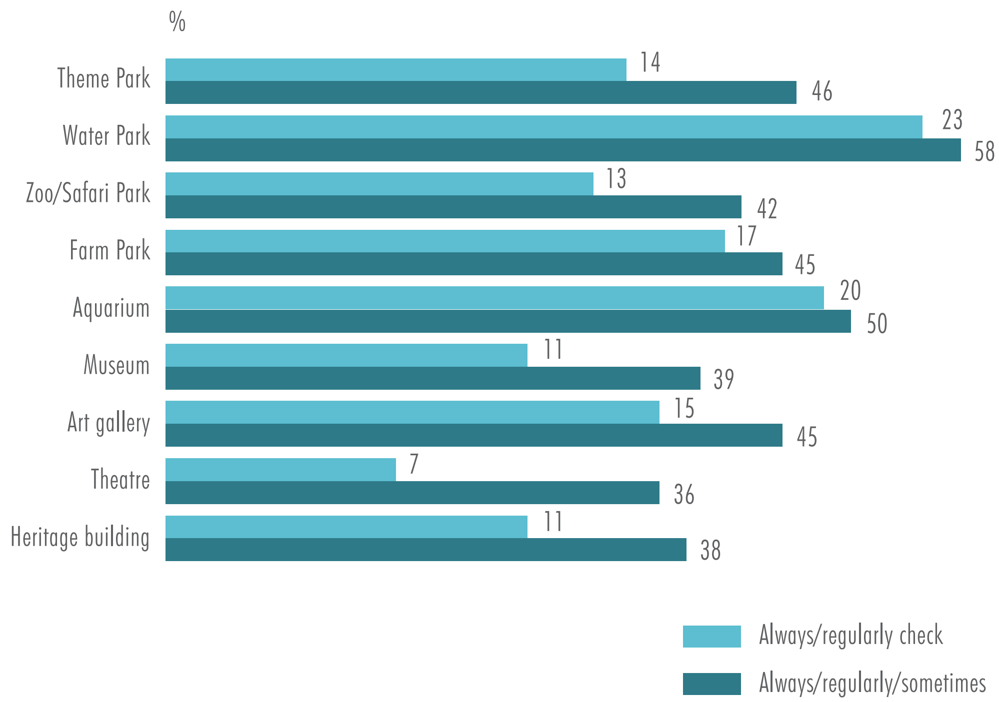
This increases again to 37% of visitors if we add in those who sometimes check on how sustainable a visitor attraction is before they choose to visit.

Do you look to find out how sustainable/environmentally friendly a visitor attraction is before you choose to visit?



WHAT VISITORS TO THE DIFFERENT TYPES OF VISITOR ATTRACTIONS SAY

46% of theme park visitors said that they check in some way about 'sustainability/environmentally friendly' when they visit attractions. Our lowest rating is 36% for those who visit the theatre.



The respondents were not asked to define what they check about a specific attraction being sustainable/environmentally friendly and we arrive at these ratings by cross analysis of data. Interestingly, the highest 'check on sustainability' ratings are where water is extensively used; water parks 58% and aquaria 50%.

In each case a significant proportion of attractions visitors say they are checking up on sustainability before they buy. This should not be a surprise because through their home product and lifestyle purchasing, they are actively making sustainable 'save the planet' purchasing decisions elsewhere.

Interestingly, visitors to cultural sector attractions are less likely to check on 'sustainability/environmentally friendly' and this probably reflects more on the places they visit than the their views and actions on sustainability.

ACTION ON SUSTAINABILITY BY VISITOR ATTRACTIONS

Respondents were asked what sustainability actions they wanted from visitor attractions. They were asked to rate a list of possible actions out of 10, with ten being very important.

Recycling of waste	**8.2**
No single use plastics	**7.7**
Food composting	**7.7**
Rewilding of grounds (conservation efforts aimed at restoring and protecting natural processes and wilderness areas)	**7.6**
Supporting local charities	**7.2**
Solar power	**7.2**
Low carbon emissions	**7.2**
Responsible supply chain (ensuring that all products they buy are ethically produced and environmentally friendly)	**7.2**
Healthy/nutritional food options	**7.1**
LED lighting	**7.1**
Water use reduction	**7.0**
Paperless ticketing/maps	**6.9**
Electric or biofuel vehicles	**6.9**
Diverse community employment	**6.9**
Vegan food options	**6.0**

At the top of the ratings we can see the things that people are already doing in their own homes; recycling came to the UK by regulation and this survey says that the message has got through.

7.7 out of 10 for no single use plastics; we saw a high proportion are not using SUPs.

HERE WE CAN SEE WHAT INDUSTRY SENIOR LEADERS SAY ABOUT THEIR 'ACTION ON SUSTAINABILITY'

FOOD COMPOSTING

"90% of waste is used for other things – organic materials used as compost – our target is 100%." **–Choni Fernadez, Portaventura**

"We don't have trash cans for staff, we have a cardboard tray so we can separate for composting and recycling and some staff take their own compost home with them." **-Ike Kwon, California Academy of Science**

SUSTAINABLE SUPPLY CHAIN

"Procurement is critical to supporting the SDGs – we have to be seen to be doing the right thing and so we have an ethically sourced supply chain – it is not about $s it is about the principle." **-Karen Fifield, Wellington Zoo**

"Sorting out the local supply chain to be able to work with us and ensuring local people with aptitude were able to engage and benefit."
-Gaynor Coley, Eden Project

"100% of our supply chain is within France and more and more local vendors, 60%, within 150kms. Social responsibility is a win win, with a network of providers. It is in their interest to be sustainable and it fits our CSR DNA."
"We have specific protocols for optimizing the supply chain. We have our own farm – a true farm growing and supplying our own shops. We are growing fruit to be made in partnership and turning this into fruit juices to be sold on site."
-Guillaume Allaire, Puy du Fou

"For supply chain we need to know what types of trucks? How many visits? Are they planned properly? – all seeking for a lesser footprint."
"80% of suppliers are local and mainly Catalonia but for 20% it can be ASEA countries – mainly shop merchandise but here we use contract and inspection - ASEA Inspection."
"We ask for a quotation and then need an audit to ensure that they are suitable and we don't find small children making products for us. We use the same suppliers and people like Disney and they also audit and we see their audit reports."
-Choni Fernandez, Portaventura

There can be contrasts in how suppliers react to the supply chain challenge.

In Spain:
"Suppliers are often not ready to meet our needs – by example soft drinks – they say do you want it or not? and if we want it, it comes in plastic bottles. The supply chain is just not prepared to write-off plastic and that remains an issue for recycling." **-Choni Fernadez, Portaventura**

In Germany:
"We work with our suppliers like Coca Cola and we learn from each other, in this case specifically about water management." **-Lukas Scheub, Europa-Park**

STAFFING

"The staff get it and work with it and push for more – staff want to do the right thing and it fits in with the type of people they are."

-Ike Kwon, California Academy of Sciences

"Need to engage employees and asked what do you think we should do?"
"The team are trained to the philosophy - the corporate mind set."
"Promote health and sport so have a staff gym and run workshops on stopping smoking and exercise."
"The point is that if staff are happy they feel a sense of corporate responsibility - it has to be more than just profit – there has to be a positive impact on people. More than 3,000 staff and 3,000 contractors – all are in the health project."

-Choni Fernadez, Portaventura

"Our staff are sustainability carnivores if we are not 'walking the talk'. They challenge us whether it is clothes or food or any part of what we do. Many of us wear a badge for a living and we could work anywhere, but people choose to work here because of what we do. They work here because of sustainability and the environment and that pervades through the culture."

-Ike Kwon, California Academy of Sciences

RATING VISITOR ATTRACTIONS FOR SUSTAINABILITY

The survey asked visitors to rate each of the list of attractions for 'how sustainable/environmentally friendly you think they are' with a rating out 10 with 10 being 'very environmentally friendly'. Here we show the rating by all visitors and then only by those who have actually visited each of them; so perception and reality.

	Average rating	Rating by those who have visited
Farm Park	5.99	6.47
Museum	5.80	5.83
Art gallery	5.70	5.76
Heritage building/house	5.70	5.74
Aquarium	5.28	5.21
Theatre	5.25	5.29
Zoo/Safari park	5.13	5.60
Concert	4.46	4.51
Water Park	3.91	4.42
Theme Park	3.83	4.32

Farm parks are the highest rated 5.99 out of 10 by all visitors, and a higher 6.47 out of 10 for those who have visited at least one in the 18 months before Lockdown 1.0.

Most of the differences between the perception and reality ratings are quite small with this active group of respondents. Only aquaria are rated slightly lower by those who have visited than by the active visitor population. Theme parks and water parks are rated lowest at 3.83 and 3.93 – and these ratings are significantly below the others.

DO THESE RATINGS MATTER?

Our BlooLoop ADV Sustainability Tracker survey results indicate that for some they do already and when we repeat the study in 2022 we will see how visitor thinking and the influence on their decision making has shifted.

Finally in our survey respondents were asked if they would pay a premium to visit an attraction if it did the kinds of 'environmentally friendly things they say are important.

67% will pay **5%** more	
42% will pay **10%** more	
14% will pay **15%** more	
4% will pay **25%** more	
1% will pay **30%** more	
33% do not want to pay an increment for this	

67% of respondents say they will pay a premium and we can see how this changes by age:

	% will pay more
18 to 25	**79%**
26 to 35	**74%**
36 to 45	**64%**
46 to 55	**63%**
55+	**62%**

Our suggestion is that this is not an invitation to put a sign on the door to say 'we are sustainable' and we have put the prices up; it is another way of showing the importance of sustainability to your visitors and perhaps an invitation to do more.

The age difference indicates again that in time there will be stronger demand for sustainability as the younger groups get older.

A DIFFERENT VIEW is a cultural consulting firm and full service market research agency founded in 2001.

Our clients cover the whole attraction and cultural sector including museums, heritage sites, zoos, aquaria, arts organisations the outdoors and themed entertainment.

Our consultants have helped many different types of organisations plan and realise their dreams of creating new visitor experiences and major projects.

Learn more about us and how we can help you:
www.adifferentviewonline.com

This survey was conducted by A Different View in conjunction with Panelbase.

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