

NARRATIVES ON SUSTAINABILITY

blooloop.

**green
loop.**

A
different
view

PRODUCED
IN ASSOCIATION WITH

Panelbase.com
Quality sample. Quality service.

A Different View conducted 7 qualitative one to one discussions with senior leaders in the attractions industry about sustainability. The discussions were conducted to support a survey of 1,100 interview attractions visitors across the UK.

Both studies were commissioned by BlooLoop for their GreenLoop sustainability conference held 20th and 21st April 2021.

The one to one discussions were to find out how different attractions in different nations are reacting to sustainability challenges and opportunities, and examine the effects that environmental and climate change can have on their business. A selection of quotes from the discussions are presented here. The 1,100 interview quantitative report of UK attractions visitors is available free of charge from https://www.adifferentviewonline.com/sustainability_tracker/.

“The future can only come from doing good business – a real existential issue.”

Gaynor Coley – Eden Project

“Everyone in the company has to be in the sustainability department otherwise how do you integrate and embed sustainability into the business.”

Choni Fernandez – Portaventura

SUPPLY CHAIN MANAGEMENT

In every case focus on and management of the attractions supply chain is seen as important in terms of meeting sustainable development goals and in supporting the communities surrounding their location.

“Key to the development of the Eden project was 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

“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 dollars, it is about the principle.”

Karen Fifield – Wellington Zoo

“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 Corporate Social Responsibility 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 developing a partnership of growing our own fruit to be made into fruit juices to be sold.”

Guillaume Allaire – Puy du Fou

“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. We also do surprise audits as check-ups. 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 and issue for recycling.

For the supply chain; we need to know what types of trucks? How many visits? Are they planned properly? – all seeking for a lesser footprint.”

Choni Fernandez – Portaventura

“Our view of sustainability is firstly about engaging the local community in terms of jobs and learning new skills and leaving behind a legacy of benefit. The skills we need are often not in place for establishing a destination but through training and talking about what we need we can work with the local supply chain to make it work, for example local farm to table.”

Ben Barker – Extreme International

“One element in the future is food trends – people buy less meat and looking at food miles. We are always looking at a local supply chain. More than 50% of F&B suppliers are local but also we are looking to see how we can have a positive effect in to the community – spreading the benefit into the community. We support regional farmers. Outside of what we can buy locally for our supply chain management we rely on ethical sourcing through our suppliers. We have strong long-term connections with trust that allows us to deal with the topic. We work with our suppliers like Coca Cola and we learn from each other.”

Lukas Scheub – Europa-Park

EMPLOYEES

Employees play a big part in delivering and living sustainability and are considered as a core component in achieving CSR.

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

Karen Fifield – Wellington

“We train our team (and our guests). The team are trained to the philosophy, the corporate mind set. Everything is as natural as it can be – roads not bitumen, fences are wood all naturally designed – we replant if we need to chop down to build. It is all about the environment. At Puy du Fou we see people separating waste and visitors ask if they can smoke! Our hotel is all about reducing consumption - do like I do, not as I say.”

Guillaume Allaire – Puy du Fou

“Our staff are sustainability carnivores if we are not walking the talk’ they challenge us, whether it is clothes of 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. 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 Sciences

“We need to engage employees and asked what do you think we should do? We 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 about profit, there has to be a positive impact on people.

Our success is that more than 3,000 staff and 3,000 contractors; all are in our health project. Importantly, there is a 3 year strategic plan and KPIs to measure performance. We need to know the goal; the impact is more than employees and their families.

Same with water power - to have a target and KPIs.”

Choni Fernandez – Portaventura

“We also focus on social integration and migration – we have visitors from many different countries and we need our staff to understand different cultures. Visitors from the UAE or from Saudi Arabia have different needs and we have to plan for this. Our social sustainability is through social diversity and our staff are from many different countries. Peace and harmony are the most important parts of sustainability - making people smile together.”

Lukas Scheub – Europa-Park

INVESTORS, PARTNERS AND STAKEHOLDERS

“We have divested fossil fuel endowments and fully embraced the 2015 Paris accords. The drivers for this are the Board of Directors – our role is to sustain life on earth; we are a popular attraction and that pays for the scientific work.

We find that our sustainability goals and actions attracts corporate funding from companies that can align their goals with ours.

They are carbon neutral and we are – it fits well with their CSR goals and especially working with disadvantaged families and schools – there is a win win fit – like-minded corporates on a zero carbon and social strategies journey who can travel together.”

Karen Fifield – Wellington Zoo

“Investment models are changing. It is about the long term – investment engaging with civilization – environmental and social issues. Whole generations need to get the message that economic models need to change.”

Gaynor Coley – Eden Project

“We have 2 investors and they see the importance of investing in a sustainable business. This has helped the management to have focus on this and for everyone to be working for change.

It helps to bring about implementation- it is looking to increase the value of the company because it is a sustainable long term business. There is more value in a company if it is sustainable into the future.”

Choni Fernandez – Portaventura

UTILITIES

“We have an operational dashboard monitoring every use of resources. We used to have a direct water pipeline to the Pacific Ocean. We now make our own sea water and that helps us use less.”

Ike Kwon – California Academy of Sciences

“And then came waste, gas, electricity. We have now put in solar plant to take care of one-third of energy needs a €6m investment – the aim of the investment is to reduce costs and avoid emissions to be announced; to be a carbon neutral resort.

That why there was the push to invest in the solar plant – it is good for the company as well as being sustainable in terms of the environment.”

Choni Fernandez – Portaventura

“We cannot get away from the fact that we have high consumption of energy but we focus on renewable energy sources and work closely with our suppliers. They are doing everything they can to reduce the consumption of energy and make activities energy efficient; it is in everyone’s interest. It is about aligning key goals with industry partners.”

Ben Barker – Extreme International

“Our Eco-tricity power is more expensive – we are paying more for carbon zero certification – but that is the carbon emissions world view – we have to be seen to be walking the talk.” **Karen Fifield – Wellington Zoo**

“Controlling all power use and all water consumption and all water used is recycled endlessly”

Guillaume Allaire – Puy du Fou

“The architect designed a new building that basically lifted the park up and put the museum underneath it. We had recycled coal ash and recycled blue jeans in our building materials.

We have a living roof of more than two acres and that saves 100k gallons of water going down into the storm drains”

Ike Kwon – California Academy of Sciences

PERCEPTIONS

“We feel that it works with visitors and we have experienced a 35/40% increase in numbers at a time when some zoos have experienced some negatives – we feel that it is because people see that we have Gold Enviromark accreditation – we are at the top of our game and this makes people comfortable and think about the broader implications of who we are and what we do.

Karen Fifield – Wellington Zoo

“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

“A key challenge often is educating local communities of the importance of sustainability as we are often operating in areas where they have other challenges and priorities. So part of our role is about education”

Ben Barker – Extreme International

COMMUNICATIONS

“Communication is a challenge. The chicken little approach does not work; it is about ‘one thing that can be done.

Waste less food – impact on water usage and so on – the chain of what you can do.

Our other success is pride, – how people feel and will they recommend us and that is about telling the story – I see others doing great things but it needs to be communication to visitors, staff and stakeholders.”

Karen Fifield – Wellington Zoo

“Education is our strongest weapon. There is a lack of equity in the sharing of wealth and we need to use business to create good wealth.

At Eden project the environment, clean air and fighting disease were the core content – you can’t breathe if you don’t look after the plants.

There are so many examples of sme’s that have adopted the environmental message and grown, Patagonia, Innocent, Brewdog, Finistre and in attractions markets. Key will be mobilizing to a point where there is benefit from an environmental brand positioning.”

Gaynor Coley – Eden Project

“People will in time choose to spend their money in a green way as is happening elsewhere and we have to be ready for it and anticipate it. Blenheim is working with Bicester village and Visit Oxfordshire to present the greenness of what we do - a green place to come.”

Dominic Hare – Blenheim Palace

“B2C they see no impact on what we do- they are here for the rides and experiences. 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 – kids are, but not their parents and to be truly effective we need the 5.1m visitors to be there with us.Children are the change and they are our future.”

Choni Fernandez – Portaventura

“We need to be better in communication; what we do, why we do it and the benefits to the environment.

People like to know- to have a good feel. It may not influence whether they visit as yet but it will happen.

It is important that sustainable and environmental changes are clear and made public as the best propaganda is word of mouth.”

Lukas Scheub – Europa-Park

“The world has woken up and especially since Covid. The time to talk has stopped and now it is about action; the time to do is now. This is an amplification of our core message and integral to our brand. We rely on the planet to enjoy ourselves and so sustainability is a key message.”

Ben Barker – Extreme International

MOBILITY

Many attractions are in rural or travel to locations and this creates a dilemma as reaching them usually requires car journeys because public transport infrastructures are either not there or are not sufficient to meet the needs.

“We see our role as reaching out to people who do not live a sustainable life. In San Francisco city everyone gets it and we are more concerned about people who live more than 1 hour away. Sustainability is not part of their routine but they can come and be inspired. This does cause problems though as many in the community want to ban cars but we cannot support this as this would stop access to poorer people who we know will not come if they cannot come in their car.

What we are saying is that there has to be a comprehensive transportation study not just banning cars through the Golden Gate Park. Without a comprehensive (state) policy we cannot arrive at a (Calscience) policy and we are providing data to think tanks. We must be data driven but accessible to the entire community. We have Community Freedays to bring poorer people and they are more likely to come by car and we need them to come to learn. The pandemic has had an interesting impact in that car use has grown so there are generally more cars on the road. We have noticed that at only 20% capacity, we are experiencing traffic congestion around us. This is a big issue for the city leaders.”

Ike Kwon – California Academy of Sciences

“We had a review and we thought we were green but we were not. We have measured our carbon footprint and if we add scope 3 visits the units jump up as so many people travel from so far away. We are bringing people in from long away and 25% of visitors are international. Dealing with this is a long-term aim but we had an experiment of 50% off if they came by bike, bus or rail. Initially it was 4% but increased to 8/9% of visitors.*

Dominic Hare – Blenheim Palace

*Note: Scope 3 emissions: All ‘other’ indirect emissions from activities of the organisation, occurring from sources that they do not own or control. These are usually the greatest share of the carbon footprint, covering emissions associated with travel, procurement, waste and water.

“We cannot get away from the fact that people have to travel to get to us but then we look at travel as being part of the adventure whether it is horse riding or hiking or electric vehicles it is about being green and environmentally aware in each case.”

Ben Barker – Extreme International

“We think that mobility will become a big issue but we can only change what is behind our gates. We have chargers for electric cars, we encourage car shares and provide flexibility to staff to allow this.

People want to come by train. In Germany increasingly people do not want a car – the young don’t need one – if they need one they car share as they are looking at the environmental impact. We have a station 5km away and seeking to improve the connections. If we can improve and have bus links we can have fewer cars; fewer cars means fewer car parks and more economic space – it not just about being environmental there are significant economic benefits.

Lukas Scheub – Europa-Park

INNOVATION

Some attractions have innovative solutions in their focus on becoming more sustainable.

“We tax our internal teams at £35 per tonne of carbon emissions – they can choose to avoid the tax by their actions – e.g developing their local supply chain. Because of Covid, the contact with the visitor was earlier now as people have to book in – we can offer insetting/offsetting – even estimate carbon impact and suggest alternatives ways for visitors to reduce – our thinking is that you need to be part of the solution and not just be the problem.”

Dominic Hare – Blenheim Palace

“Within our waterparks for our hotels – we have introduced an internal bus system so people park up and leave their car for their entire stay. Further we are even looking at magalev transportation, so internal transportation is both environmentally friendly but also a feature.”

Lukas Scheub – Europa-Park

“We have dead whales in the bay and when there is one, our experts go out to it to find out how it died and where it died, and one impact has been change in shipping lanes to reduce the likelihood of being hit by a ship passing through.”

Ike Kwon – California Academy of Sciences

COSTS

“Revenue – the real costs of greening is half of our revenue but we need to invest in this a long time horizon – we will be here in 300 years. They say that we only have say 50 ‘normal’ harvests left so we have to change now.”

Dominic Hare – Blenheim Palace

“Environmental policies are providing savings – we have less rubbish to dispose of. Our waste is separated so a lower costs of disposal. Clearly it is best to have a clear and direct financial benefit to support sustainable investment.”

Lukas Scheub – Europa-Park

EXTERNAL AND REGULATORY INFLUENCES

External influences driving sustainability

“Local and regional authorities are not really calling for change – regulation is low – environmental law is at a very basic level. B2B are though; clients pushing for action and disclosure e.g Google. We hosted 4,000 people and there was need to offset the travelling and they demanded local foods to reduce food kilometres, no plastic bottles and so on. Tour operators are showing interest in sustainability; they want to offer a sustainable product so they ask for certifications, they say what they want to achieve and they come to see that we are doing it. We report what we do so companies know that we are sustainable and can accommodate their CSR needs.

We are here for your sustainable efforts.”

Choni Fernandez – Portaventura

“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 students would make a presentation about the fun that they had; now it is about sustainability at the park. In our region the Prime Minister is Green party and sustainability is now more and more important – one of the most important topics. We don’t have to report to government on CSR – but we do like to have stories of what we have done – the successes.

We give our sustainability report to politicians to show we are changing. Talking about what we are doing is good for our relationships with the authorities – they trust us and the general environment is better.

Lukas Scheub – Europa-Park

“With government and local authorities it is a push pull relationship. For governments, and even more so in this Covid environment, it is about the key touch points – mental health and physical wellbeing.

This is what we are about so there is a great fit; it is a change in thinking that has fallen into our laps. We are about engaging with natural assets and through that we can drive positive change.”

Ben Barker – Extreme International

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.

For further information about ADV research or to ask about this consumer sentiment survey please contact:

Geoffrey Dixon
 Head of Research
 A Different View
 + 44 (0) 7775582305
Geoffrey@adifferentviewonline.com
www.adifferentviewonline.com

A Different View offices

UK - Rosalind Johnson, Director
Rosalind@adifferentviewonline.com
 +44 (1362) 688109

USA - Sylvia Matiko
Sylvia@adifferentviewonline.com
 +1 (615) 319-4942



Paul Wealleans
paul.wealleans@panelbase.com
 +44 (1434) 611164

Report design and layout Julie Bunting Dixon
juliebuntingdixon@gmail.com.

Contents of this report © A Different View