Sustainable Innovations in the Surfing Sector: The Value of Branding

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Key Words

Sustainable devleopment, innovation, business, surfing, branding

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Abstract

This paper explores the role of sustainability within the surf, skate and snow retail sector with a particular emphasis on the notion of branding. The paper contextualises the discussion within the broader debate relating to the role of business in achieving the United National Sustainable Devleopment Goals. Uniquely, this paper challenges and expands on the narrative of branding as a discursive process that moves beyond a narrow marketing framework. Using a mixed methods approach of in-depth observation, interviews and surveys, the paper focuses on a case study of the largest lifestyle purchaser organisation exploring sustainability both within the case study company itself and also presents data from a survey administered to over 300 brands in the surf skate and snow sector.

Key Words

Surfing, innovation, sustainable development, branding

How we understand the solutions for sustainable development has altered dramatically in the past decade. There is now a significant emphasis on the role of business in achieving a transition towards a sustainable development. With that in mind there is still significant divergence, contradiction, uncertainty as to how this will be achieved. This paper explores drivers and barriers foe achieving sustainability within the context of the surfing industry.

The surfing industry is a multibillion dollar collection of businesses at different stages of the supply chain from the production and manufacturing of both hard and soft goods through to the distribution, consumption, disposal and recycling of these goods. There is no definitive

1

value of the worth of the industry and the methodology for calculations vary but some

projections suggest that by 2022 the global market for surfing is expected to reach US$9.5

billion, with an estimated 5% compound annual growth rate (Global Industry Analysts,

2016).

Also, there is increasing evidence that the constellation of organisations that constitute the

industry are either in the process of transitioning towards or express a desire to transition

towards a sustainable operating model (Author, Year). The emphasis of this paper is the role

of large purchaser organisations to influence suppliers and downstream organisations. A such

the paper will proceed in the following way. Initially this paper will discuss the increasing

emphasis on business to provide leadership and change for sustainability. This is

contextualised within the broader discussions on the United Nations sustainable devleopment

goals. The concept of branding and the act of branding will then be introduced as a central

component of a business projection of its sustainability credentials .

The case study organisation is then discussed, its structure, strategic vision and sustainability

operating model. A discussion of the organisations broader position within the surfing

industry is also discussed. These discussions contextualise the results which focus on a co-

constructed survey aimed at exploring the relationship of over 300 brands to sustainability.

Addressing Sustainable Development in Business

There has been a marked shift in the emphasis towards business as key stakeholders in

achieving sustainable development. Ferns and Amaeshi (2017) explore the role of business in

achieving sustainable development through a discourse analysis of the United Nations Earth

Summits. They indicate how the role of business moves from being largely undefined in

1992 to being considered a partner in 2002 to becoming a driver for change in 2012. The authors argue that this is a result of the rearranging of field boundaries and the formation of discourse coalitions. This resonates with earlier observations within the context of the United Nations where there is a constant and shifting dynamic of discourse coalitions of governance and partnerships. 'It is the willingness to incorporate other actors into governance structures which presents the opening up of the governance process and shift from a balance of power from centralised nation states to a broader governance dynamic' (Author, Year, Page). It is the opening up of this governance dynamic that has facilitated the changing role of business in sustainable development discourses. The trajectory of the increased inclusion of business within sustainable devleopment, identified by Ferns and Amaeshi (2017) continues with the Sustainable Development Goals (SDGs). In 2015 the United Nations introduced 17 SDGs that replaced the Millennium Development Goals. The goals represent an escalation of the concept of sustainable devleopment on the global stage and subsequently the integration of these goals in national and regional frameworks. This process also runs in parallel with the drive for multiple organisations in different sectors to create innovative ways of realising the goals and addressing their associated targets.

Ferns and Amaeshi (2017) recognise that despite the draw of a unified meaning-making process between once antagonistic actors, Business-SD relations are underpinned by politicised interaction where certain actors can dominate and in so doing marginalise others.

The emphasis on business to provide solutions demands a deeper and more realistic understanding of business visions and practices towards sustainability. The discourse of business and sustainability presents us with terms such as corporate social responsibility, social entrepreneurship , social enterprise, green business, responsible business, sustainable business and many more. It is a shift in emphasis that sees the blurring of the boundaries between the public and private sectors as well as the third sector which increasingly

3

challenges the observer with articulating the nuances of these relationships.   These insights

engage with a broader discussion on the nature of governance and the impacts of these

undefined, non statutory and asymmetrical relationships. There are implicit concerns with

an emphasis on business solutions to sustainability that centre on notions of accountability,

transparency and asymmetric the power dynamics that is involved in partnership relationships

with other sectors.

With the above in mind and in the context of facilitating a transition to sustainability the

notion of what sustainable innovations actually entail from within the business world is

difficult to ascertain. As Boons and Ludeke-Freund point out 'the literature on sustainable

innovation is hampered by a lack of consensus' (2013:11). With this lack of consensus in

mind this paper aims to empirically explore how innovative practices in business are

understood and how receptive a specific sector is to sustainable innovations. Identifying

business innovation poses difficulties without indepth explanations of the practice of each

business.   However, how a business projects its sustainability credentials is how a business

communicates its brand message.

 Another dimension to understanding the transition to sustainability within the surfing

industry is an exploration of the notion of what constitutes a 'brand' and the process of

branding itself.

Dimensions of Branding

It is impossible to explore any aspect of surfing without recognising that brands – both as

physical entities (business) and branding as a conceptual frame and a hegemonic perspective

on how best to create and project value. The role of branding in business and its impact on

4

the world more generally has begun to coalesce a body of literature around this central theme.

For example, marketing and management scholarship focuses on the positive reinforcement

of branding as an activity of any given business. From a sociological perspective branding

can be seen as creating symbols and ritualistic behaviour within consumers. Warren and

Gibson (2017a) synthesise economic geography and a sociological approach to explore the

disconnect with surf branding and the consumer identifying surfers as subcultural

gatekeepers. The authors argue that in '… the extant literature on the commodification of

surfing subculture, little acknowledgment is given to how subcultural values become

incompatible with and indeed destructive of corporate growth models' (Warren and Gibson

2017:180). The authors continue to explore the rise and fall of the big three surfing brands

and the role that subcultural identity's play in this story. 'With values pertaining to surfing

replaced with imperatives of market share and growth the corporatized multinational brands

lost meaningful connections to subcultural origins' (Warren and Gibson 2017:184).

At the heart of this emergent research programme are questions about how brands and their

connected geographic and social relations create meanings and value that is circulated and

scaled through the work of various actors (designers, makers, marketers, retailers, end

consumers) (Warren and Gibson 2017:179). These are valuable insights into the relationship

between subculture and corporate identity through branding and especially so in this context

as Surdome being previously owned by Quiksilver, one of the big three surfing brand

The Value of Branding

A logical extension of this analysis in the context of sustainability is the relationship between

notions of value and how this relates to branding. Bertilsson and Rennstam (2017) point out

' the underlying assumption is that branding is an organisational practice that creates value'

(2017:2). This debate can be positioned within discussions on the reorientation of

economistic accounting and is synonymous with terms such as environmental economics,

ecological economics, sustainability economics, the circular economy and surfonomics

(Nelson 2015; Orams 2017; Scorse and Hodges 2017; Soderbaum 2012;). But the actual

practice and projection of branding itself is often omitted from this analysis. The following

will draw connections between these debates on surfing and sustainability forming an

important context for subsequent discussions on the role that brands play within the surfing

world. To this end, this paper will explore a critical approach to branding and value as put

forward by Bertilsson and Rennstam (2017). The authors initially expand the notion of value.

This is very much in line with the debates surrounding a re-examination of value within the

sustainable development debates and this provides a strong association with sustainability

and broader debates. From this perspective the authors suggest that branding actually

destroys value. Traditional views of branding suggest that the process is reductionist and

aims to creative a positive and partitioned image of a business.

'Differently put, if only one, positively laden story is told, it makes sense to assume that

something is obscured, such as environmental harm, bad working conditions, and negative

consumption patterns. Even if marketing management scholarship has called for interrogation

into whether 'brands create value, provide value, or reduce value for customers' (Keller and

Lehmann, 2006: 750), little has been done to theorize the value-destructive side of branding,

and a broadened understanding of value is needed to accomplish such a quest' (Bertilsson and

Rennstam 2017:2).

Value within branding is almost entirely focused in narrow market terms and in line with

sustainability related research in many areas Bertilsson and Rennstam recognise that value is

a political and cultural construct. Furthermore, the authors draw on the notion of 'regimes'

and worlds that construct the notion of values. But with that in mind the authors argue that

actually it isn't the notion of value itself that needs to be expanded but instead the understanding of what branding is and what brands do beyond notions of essence and platform. The authors drawing on aspects of organisational theory suggest the terms 'discursive closure' and or hypocrisy.

So far this paper has established the conceptual framework for the research conducted. There has been an exploration of the role of business in achieving sustainability which has been contextualised within the discussion on the sustainable devleopment goals. There has also been a discussion on the notion of branding and brandings relationship to value. By synthesising the discussions on sustainability and branding an enhanced perspective on business and sustainability is achieved that provides a lens through which the empirical work can be discussed. The previous section also focused on the surfing industry as a specific area for empirical discussion. The following section will develop this discussion by introducing the specific case study.

Surfdome, Networked and Distributed

Surfdome is the largest distributor of surf skate and snow products in the world. It currently purchases products from over 300 affiliated brands globally. For some of these brands Surfdome is the most significant and sometimes the only customer and as such has the potential to influence the way that its affiliated businesses operate. Moreover, Surfdome has made significant sustainability gains particularly in respect to reducing and recycling plastic waste.

This has resulted in national media attention as well as Surfdome being highlighted as a case study for good practice in the World Business Council for Sustainable Development report *The Business Case for Reducing Ocean Waste* (WBCSD 2017). The report highlights how Surfdome has gone from very little recognition to now being one of the top fourteen

7

companies tackling ocean waste. 'The retailer's sustainability efforts generated a highly

positive impact in terms of public relations as well, and saw 2/3 of its social media traffic

generated from its sustainability strategy - a demonstrable competitive advantage' (WBCSD

2017:18). There is then a clear and steep trajectory in Surfdomes ability to not only embed

sustainability within its own operations but also create the visibility of these changes that acts

as a business exemplar.   The following discussion will explore some of the factors that have

contributed to this success.

Surfdome Origin Story

Surfome was part of the extended network of companies owned by Quiksilver, a company

that has contributed to the projection of surfing culture over the past three decades (Stranger

2011). In November 2014 Surfdome sold to the Australian Surfstitch Group.   At the same

time Surfstitch also procured the surf forecasting site Magicseaweed. In September 2017 the

company changed hands again and at the time of writing is owned by the company Internet

Fusion. There are then multiple interconnections that range from the altered landscape of the

surfing industry, the projection of surfing culture mediated through big business and lifestyle

aspirations, to a transitional process that quietly emerges from the decline of an industry

giant opening up an unexpected space for a potential sustainability transition.

There are a number of factors that have helped facilitate this transition goal. Firstly, there is

an overarching narrative of sustainability with Surfdome actively seeking to embed

sustainability in its strategic and operational structure. Secondly, Surdomes ambition to act

as a catalyst to embed sustainability in multiple brands throughout the surfing industry which

provided opportunities to explore an active sustainability transition process. And thirdly the

increasing visibility of the ocean plastics phenomena which has emerged as a dominant,

environment, and economic policy imperative. This is a response to increasing scientific

evidence of the scale of the plastic crisis with Yang et al. (2015) indicating that five trillian

pieces of plastic or between   86 and a 100 million tonnes of plastic debris are now evident in

the world's oceans. Together these factors combine within an organisation capable of

exerting significant transitional pressure on the broader surfing industry.

Surfdome is embedding sustainability into its operations in a number of ways. Firstly, within

its own operations. Since 2015 the company has removed 14 tonnes of plastic from its

packaging on an annual basis. 9.72 tonnes of plastic removed from its operations by

transferring to 100 percent recycled cardboard boxes for all of its outbound products. 2.15

tonnes have been eliminated   by changing to recycled paper to fill the voids in the boxes,

0.39 tonnes by switching to reusable ink toner and 1.22 tonnes removed by switching to gum

tape. As Adam Hall, Surfdomes Sustainability director points out:

We've basically ring fenced our green activities and then reinvest it into the company. some

of the major wins reusing ink cartridges – that saved us a whacking 20 grand and I said I

want to keep that and I don't want that to just disappear into the rest of the company – so

ive reinvested that into the value of the boxes which costs more than Polly – which is stupidly

cheap – and actually eliminating 20 tonnes cost us £900.

These initial savings have now been extended with significant changes being made to the

company's holding ware house.

Surfdome in 2018 is diving deeper than ever into sustainability, the new warehouse due to be

operational in March of the year is a BREAM rating of 'very good' this is achieved through a

wide range of sustainability credentials that include onsite Solar electricity generation, solar

heat generation, high efficiency heat recover system, LED lighting all on sensors and grey

9

water systems that utilise rainwater amongst many others. The new site will be a zero to landfill operation.

The second way that sustainability is being embedded and expanded is through the establishment of a number of strategic partnerships, Surfdome have formed partnerships at different scales that operate at industry NGO and the grass roots level.

INSERT: Table 1: Strategic partnerships

For Surfdome the combination of a commitment to sustainability within the company as well as supporting external organisations is central in the transition towards sustainability and establishing a foundation on which further initiatives can be promoted is a key element of embedding a long lasting change.

'In the minds eye of your audience you absolutely have to get it straight away – so that's the broader side of things and it's the way im motivating business at the same time because if just turned around and said we are banishing plastic – they'll just say – how much is that going to cost – so if we begin with a content play – it fans the flames to me and its quite a broad play'.

The essential component of creating a lasting change towards sustainability was to identify economic savings and then ring-fence them so that there is a baseline of savings before bigger and more expensive projects are considered. As already highlighted Surfdome has over 300 suppliers that it buys its products from and for some of these brands Surfdome is the only purchaser of their products. This inevitably means that they are in a very strong position to influence the brands that they purchase products from. Adam describes Surfdome as an airport for its suppliers with every single individual product arriving with

them in a Polyurethane bag.   Polyurethane offers retailers advantages for the distribution of

their products. It is waterproof, strong and it protects the products from dust. Also, it is

transparent which enables those in the warehouse to see inside them, and it also enable the

products to be slid along benches which is identified as an important if not unexpected

advantage of using this material. These advantages create barriers for phasing out the use of

this material. This then is the challenge for the third step in Surfdomes sustainability

transition.

'We will also work on reducing the plastic impact of our suppliers as well. Currently

packaging is sent out in cardboard degradable and recycle packaging. Also this is branded

with the 2 minute beach clean'.

Adam explained the plan with regard to influencing their suppliers by emphasising the cost

effective strategy that he employed.

'Its almost a scaled up version of what we've done with the outbound packaging so we are

going to turn around to our brands and say look this model does work -so we want to use

that model with the brands for the inbound packaging'.

Surfdomes ambitions to transition the surfing industry to a more sustainable operating model

are based on two fundamental themes. The first is leading by example, and this represents a

best practice approach that is easily identifiable as a tried and tested method of effecting

change in many different situations. The second is through the exertion of influence as a

dominant brand purchaser in the market. In this way Surfdome is a sustainability aggregator

in the transition process operating as an overarching body. Despite a visible lack of

consensus on what a sustainable supply chain involves (Ahi and Searcy 2013) the ability of

11

large business to influence different aspects of their supply chain is receiving increased

attention in multiple sectors and academic disciplines. As Fahimnia *et. al.* (2015) point out

'…sustainable and green supply chain management is necessarily globalized' (2015: 112). As

such, an approach is required that has the ability to explore the complexity involved from a

systems perspective (Moon *et al.* 2005). Within the surfing industry the detrimental impact

relating to product manufacture and distribution have already been explored (Laderman

2015). Ashby *et al.* (2017) examine the sustainability dimensions of supply chain

management using the surfing brand Finisterre as an example of a closed loop approach.

With the above in mind there is a significant lack of research that can address the role of a

single dominant networked organisation like Surfdome that is capable of informing

transitional processes. Within the surfing industry this is predominately because there are few

retailers that operate in this way. Perhaps a closer parallel is present in discussions and

analysis that related to governing bodies and their impact on affiliated members.

Gerke (2017) highlights the role of governing bodies and in this case EuroSIMA, in

facilitating broader sustainability practices within the affiliated brands. EuroSIMA is

identified as a key intermediator in collective and collaborative projects between firms.

Gerke highlights some of the challenges that this collective approach poses. For example,

the current cluster governing body model has functioned for more than a decade but is a

precarious model since it depends largely on public funding. 'In order to become a

sustainable business model companies need to take initiatives themselves to approach larger,

costly and risky topics in collaborative approaches' (Gerke 2017:83). Gerke demonstrates

that sustainability is integrated through inter firm collaboration that requires the facilitation

of an overarching body.

This then provides a complementary mechanism to that provided by organisations such as

EuroSIMA. As Gerke concludes, 'Topics towards sustainability and corporate social

12

responsibility are typically these kinds of general topics that are more easily approached at an

industry level than on an individual business level' (Gerke 2017:83). While not mirrored

there are strong parallels with Gerkes observations and the position within the market that

Surfdome occupies. Arguably however a dominant business is able to excerpt a higher level

of control through the possibility of financial penalties and market marginalisation.

This section has elaborated on the role of Surfdome. It has introduced the organisation and

its relationship to the broader surfing industry. It has explored the internal sustainability

model of Surfdome and has drawn on reflections from the organisations sustainability

manager. The discussion also highlighted the pivotal role of partnerships to develop

sustainability solutions. Surfdomes strategic position within the surfing industry was then

highlighted within the context of clusters where parallels were drawn to the notion of

governing bodies which exert influence over their members in a regulatory way. The

following discussion will explore the construction of the survey which forms the centre piece

of the results for this paper.

Narratives and Surveys

The research adopted a mixed methods approach. Initially conversations and interviews took

place with the Surfdomes sustainability lead. This allowed an in-depth understanding of the

companies operations and aspirations as well as a broader understanding of context and

industry dynamics. The initial interviews informed the development of a survey that

identified a number of specific issues that needed to be addressed to explore the

receptiveness of the surf industry more broadly to sustainability. The survey provides a

baseline for understanding where brands sustainability trajectory, how they understood the

environment and what their priorities are in this area. Also the survey provided an

13

information base that informed Surfdome in the development of policies and procedures that would enhance overall sustainability within the sector that were actionable and solutions orientated.

Aims and Expectations

The underlying aims of the survey were to gain a broad sectoral baseline of sustainability understanding and motivations. A secondary aim was to explore the respondents understanding of the process of branding.

Surfdomes affiliated brands were made aware of the survey prior to it being despatched and the profile of the survey was raised though a press release via Surfdome to raise the awareness of the research more generally. A number of surf specific publications ran the story such as Boardsport Source (2017) as well as more general organisational exposure, for example Climate Action (2017) which works in partnership with the United Nations Environment Programme. The survey was dispatched individually via email to over 384 brands on the 8th of November 2017. The cut off date for the survey was 15th December 2017 and we were expecting a significant response rate from the brands involved. Overall, 46 brands responded which was 12 percent of the overall group. Initial questions focused on the nature of the respondents business which included whether they were surf, skate, or snow, number of employees and the operational scale. The majority of the respondents at 95 percent were location in Europe, 53 percent were in North America. This was followed by 40 percent in Asia, 35.56 percent in Australasia. 31 percent in South America and 20 percent in Africa.

14

INSERT: Figure 1: Scale of operations

The distribution networks for Surfdomes associated brands operate at different levels and it was initially important to ascertain the level at which the brands operated. Figure 1 identifies these operating scales. Predominantly at 56 percent brands that participated in the study were operating at the global head quarters level. This was followed by regional multi-brand distributor at 28.89 percent, Regional brand at 18 percent and local single brand and local multiband distributors both at 2 percent.

Business and Sustainability

A series of questions directly addressed the brands understanding of and engagement with sustainability as a concept. Initially brands were asked if they were concerned about sustainability related issues. Over 95 percent indicated that they were. Perhaps a little surprisingly 2 percent indicated that they were not concerned with sustainability issues. Expanding on perceptions of sustainability respondents were asked to indicate whether they thought sustainability was more focused on environmental, social or economic issues. Over 63 percent indicated that they believed it related to the environment, society and the economy with an emphasis on the environment followed by society and then the economy. The survey then moved on to explore if brands implements any form of sustainability related strategies.

15

INSERT Figure 2: Sustainable operations

Brands were presented with a number of issues that fall under the umbrella term of 'sustainability operations'. This included, labour conditions, corporate social responsibility, environmental management plans, fair trade and Co2 reporting. Respondents were also asked to indicate if they had initiated or had plans to initiate their own sustainability initiatives.

Most of the brands at 89 percent indicated that they monitored the labour conditions of their suppliers. This was followed with 60 percent indicating that they has a corporate social responsibility plan. 50 percent responded that they had and environmental management plan and interestingly 41 percent said that they had their own innovations in relation to sustainability. 31 percent responded that they were involved with fair trade related initiatives. Finally, 22 percent said that they reported on Co2.

INSERT Figure 3: Barriers to sustainability

Establishing a broad baseline of questions that related to existing sustainability mechanisms the following question sought to explore what brands felt were barriers to achieving sustainability in business and a number of options were provided. The majority of brands at 64 percent indicated that they felt that financial considerations were the main barriers to achieving sustainability within their businesses. This was followed by a lack of knowledge and education at 54 percent and this in turn was followed by technological barriers. Finally,

16

27 percent of brands felt that infrastructure was a barrier to achieving sustainability in business. 9 percent indicated that there were other barriers and these included.   In a separate question 98 percent of brands indicated that if economically viable they would implement sustainability initiatives.

INSERT: Figure 4: Risk concern

Risk association at the organisational and individual level is identified as a motivator for behavioural and organisational change. Therefore respondents were asked to indicate their concern for a number of risks associated with sustainability. As is evident in Figure 4, 70 percent of respondents indicated that they were concerned with all of the issues highlighted. Of the individual issues plastic pollution was of most concern at 96 percent which was followed by climate change at 93. Water pollution receved a response rate of 90 percent followed by air pollution at 83 percent, ocean acidification at 72 percent. Water and land biodiversity loss both received responses of 70 percent.   Respondents were asked to prioritise these same issues. Climate change was seen as the issue of most concern to the brands. This was followed by water pollution in fifth place. Air pollution and plastic pollution were jointly in third place. Ocean acidification and biodiversity loss on land and water were jointly of concern behind the other issues presented

17

INSERT: Figure 5: Brand Policies

Highlighting the same set of issues a final question in this set asked respondents is they have any policies in place that related to the issues. The majority of respondents at 87 percent indicated that policies were in place for plastic pollution. Water and air pollution and climate change all scored equally at 47 percent. This was followed by ocean acidification at 20 percent and then ocean and land biodiversity loss at 13 percent.

Responsibility and Solutions

INSERT Figure 6: Responsible for solutions

Responsibility assignment for sustainability related issues has been identified as a significant indicator of engagement and subsequent action towards sustainability.

Figure 6 illustrates responses to the question who do you feel is responsible for driving solutions? Overwhelmingly, brands identified industry and business at 90 percent as being responsible for driving solution, this is followed by the government at 76 percent and consumers at 75 percent. 29 percent said NGOs and not for profits were responsible for driving solutions. Not for profit organisations and NGOs receiving the least responses is consistent with the broader research relating to the lack of support from industry for other surfing related organisations .   The emphasis of the survey questions alters at this point to

18

explore socially related sustainability issues beyond the immediate business. This included

suppliers labour conditions the impact on local communities where products are

manufactured and produced as well as the efficiency of the businesses supply chain. More

than 70 percent of all respondents indicated that they were concerned about all of these

issues. 86 percent indicated that labour conditions were a concern, 80 percent were

concerned with the efficiency of the supply chain and 70 percent were concerned with the

impact on local communities. A subsequent question also asked if brands were aware of the

concept of modern day slavery 96 percent indicated that they were.

INSERT Figure 7: Business model awareness

Expanding on the previous set of questions a specific question was included that asked

respondents to indicate to what extent they were aware of concepts that can be said to apply

to new models or modes of doing business. Most brands at 93 percent said that they were

aware of the term sustainable business, similarly a significant proportion of respondents at 91

percent said that they were aware of the term fair trade business.   78 percent said that they

were aware of the term carbon neutral business. Following this over half of respondents at 62

percent said that they were aware of the term zero landfill business. Broader concepts such

as the circular economy at 49 percent, full systems approach at 27 percent and negative

externalities at 22 percent were also highlighted. Overall, there was a higher level of

awareness of some of the more established and well publicised terminology which was to be

expected. The two concepts that received the least responses, full systems approach and

negative externalities where more specialist terms that sit outside the normal economic

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Examining the Concept of the Brand

Drawing on the insights from Bertilsson and Rennstam (2017) outlined above two of the

survey questions specifically addressed the activity of branding itself in order to receive an

initial insight into businesses understanding of the impact of branding.   Respondents were

asked if they felt branding was a positive activity for sustainability. The majority of

respondents at 52 percent indicated that branding as a positive activity for sustainability, only

9 percent said that it was not positive and a large proportion of respondents at 39 percent

said that they didn't know. Brands were then presented with these statements relating to the

process of branding.

INSERT Figure 8: Brand representation

These statements draw directly on Bertilsson and Rennstam (2017) who argue that brands

innately believe that branding is a positive activity but that inevitably only a partial picture of

the business can be represented within a brand. With that in mind however, 66 percent of

respondents   indicated that their brand was representative of all of their business

operations. Only 16 percent said that their brand is representative of only a certain aspect of

our business and 18 percent said that they actively seek to highlight some aspects of our

business over others with our brand. This question received the lowest response rate of all

the questions in the survey. This may be indicative of an innate belief within the business

community that branding is a positive process with very little reflection on what this might

actually involve

Communicating and Motivating

The research highlights some interesting results for a broader understandings of industry responsiveness to embedding sustainability both at the strategic and operational scale. There is a clear appetite amongst the brands that responded to embed sustainability in their operations. In combination with this whilst 'environment' is the predominant interpretation of sustainability amongst the brands the connections between society and economy are also visible. Breaking this down into some specific sustainability related issues the brands also indicated that they were concerned with multiple environmentally related sustainability issues with climate change and plastic pollution of highest concern. When asked to prioritise these same issues climate change was of most concern with plastic pollution being fourth in line after air pollution and water pollution. The next question using the same set of issues moves past awareness and concern to explore if the brands had any policies in place in relation to these issues. As we have seen plastic pollution scored highly at 87 percent. This result resonates with the actionability of plastic pollution mitigation measures within a business operations. In line with the broader efforts and success of Surfdome this is something that can be monitored and measured with tangible outputs through a reduction in plastic use. The other issues highlighted in the survey present more abstract and non linear pathways between action and impact. With that in mind however, over 45 percent of brands indicated that they had policies in place for water and air pollution as well as climate change.

As well as the environment sustainability issues a number of relevant social issues were also highlighted. This included labour conditions, the impact on local communities as well as the efficiency of supply chains were all considered important. All of these issues were of concern for most of the brands at over 70 percent with labour conditions of the suppliers and the efficiently of the supply chain being of greatest concern. As with the environmental issues brands were also asked to indicate if they took any action in relation to social

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sustainability. This was embodied in a single question that that asked if the brands monitored the labour conditions of their suppliers of which 87 percent indicated that they did.

Expanding this again to the economic component of sustainability the survey sought to explore brands understanding of non conventional business and economic terminology to ascertain an awareness of alternative ways of doing business. There were a broad range of responses to the issues presented with sustainable business being the most recognisable term, followed by fair trade and carbon neutral business. There was considerably less awareness of more specific economic terms and terminology that may be applicable to business operations

A number of questions aimed to gauge how brands felt were responsible for driving change. Overwhelmingly, industry and business were identified as being responsible followed by the government, consumers also rate highly as playing a role in driving solutions. Brands felt that NGOs and notforprofits play the smallest role in driving change. Overall, 94 percent of brands indicated that if it was economically viable they would include sustainability in their business operations if it was economically viable with financial constraints to embedding sustainability seen as the most significant barrier. Knowledge and education was also seen as a significant barrier following by technology and infrastructure. These results provide an interesting baseline for some of brands affiliated to Surdome. They provide an insight on which mechanisms for transitions to sustainability can be evoked both within the brands themselves and externally through broader industry pressures.

Discussion

Based on the results and the contextual basis of this paper the following section will explore a number of ways in which the empirical results move the debates forward. The conceptual framework of this paper synthesised two distinct areas into a single framework. This was sustainability which was contextualised by the sustainable devleopment goals and the notion

22

of branding and the relationship of branding to ideas around value. This proved to be both

constructive and informative for the research structure and enabled the results to be

articulated in a way that adds value to both of these areas. The following will explore the

results impact on three dimensions. Firstly, the conceptual framework, secondly implications

for achieving the SDGs and thirdly the implications the research has for sustainability within

the surfing industry.

Sustainability and the Value of Branding

Warren and Gibson (2017) identified a disconnect between the values of surfing and the

corporatised multinational brands – that ultimately lead to the demise of the identity of the

brands that are detrimental to both the brand and the activity of surfing. This is

contextualised within the broader observations that the relationship between the corporate

world and the devleopment, evolution and growth of surfing is intimately bound in a

symbiotic narrative. Results presented in this paper display a more nuanced relationship

between the brand, the process of branding and the embedding of sustainability. This

particularly applies to the 'value-destructive' nature of branding (Bertilsson and Rennstam

2017). As the results indicate over half the brands indicated that they felt that the process of

branding was a positive process for achieving sustainability.

However, over 30 per cent of respondents indicated that they did not know what impact this

process would have and combined with the 9 percent that did not know this represents a

significant portion that did not respond positively to the relationship between branding and

sustainability. Furthermore, when respondents were asked to indicate to what extent their

brand message represented their business operations there was a strong positive response to

this question. This poses an interesting added dimension to responses that more specifically

address sustainability and represent a potential contradiction in the survey results. It is with

23

this in mind that the following explores the implications of the survey results for

sustainability and how this may apply more broadly to the sustainable devleopment goals

Whilst the survey did not explicitly mention the sustainable devleopment goals the results

suggest the receptiveness to achieving the goals within a specific business sector.

Overwhelmingly there was a strong 'intention' or desire to engage with the sustainability in

principle. With that said there was a number of barriers to achieving this were identified that

could prohibit brands from engaging as fully as they would like with sustainability. Also

brands identified business and corporations as most responsible to provide solutions to

sustainability related issues. This then suggests a space through which the SDGs can be

integrated into the strategic and operational frameworks of the brands involved.

At the operational level of within the surfing world the research highlights a number of

issues. Initially the relationship between Surfdome as an influencer and driver for change

within the sector as a whole. The results suggest that there is a receptiveness to sustainability

guidance from Surfdome. This is representative of the willingness of brands to engage with

the research process as well as results that suggest both an intention to and existing evidence

of the integration for sustainability into the brands operations. With that in mind there are

identified barriers to the uptake of sustainability within the sector that could be addressed to

increase this engagement. Surfdome could then build on a 'lead by example' model of

embedding sustainability to actively address the multiple context specific issues that each

brand has depending on its product, service and position within the supply chain.

The reality of the ability of Surfdome to actually be able to integrate these disparate needs

into is sustainability strategy would depend on expertise and resourcing and the ability to

combine both the perceived educational deficit with a clear understanding of the structural

needs of the associated brand occupying different areas of the industry

24

Future Research

The survey explored a number of pertinent issues in relation to sustainability, however many important issues were not discussed. A qualitative assessment of the brands association with sustainability would be a valuable extension of the research presented here. The association with brand value and sustainability has only provided a snapshot of the relationship between the two and this conceptual framework could be expanded both within and beyond the surfing industry.

Conclusion

This paper has explored how a single company has attempted to created the space for embedding sustainability within its operational framework as well as providing leadership for the broader surfing industry. The paper has explored the strategies for embedding this model and highlighted the tangible benefits that have resulted from it from within the company. There has been a focus on reducing plastic packaging within Surfdome and plastic pollution has risen to a strong policy position for enabling environmental, societal and economic transition. The presentation of the survey and associated discussion extends the previous analysis in two ways. Firstly it provides insights into broader industry understanding and receptiveness to sustainability through alternative business models. Secondly, this paper has extended the representation of transition dynamics through the implementation of the Surfdome model to challenge some of the normative assumptions made when discussing a 'brand'. This allows for a deeper engagement with the underlying

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principles of brand formation, projection and the creation of value which underpin

sustainability strategies and initiatives.

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Table 1: Strategic partnerships

Strategic Partnerships	Worked with
Surfing England	Surfers Against Sewage
#2minutebeachclean	Ellen Macarthur Foundation
The Plastic Project	World Business Council for Sustainable Development
Sustainable Surf	Save the Waves Coalition
Plymouth Sustainability and Surfing Research Group	Plastic Oceans
Protect our Winters	Surfers not Street Children
Less plastic	
Sustainable Coastlines Hawaii	

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Figure 1: Scale of Operations

Please indicate your operational scale ?

55.53% Global Brand HQ
17.78% Regional Brand Entity
0.00% Regional Single Brand Distributor
28.89% Regional Multi Brand Distributor
2.22% Local Single Brand Distributor
2.22% Local Multi Brand Distributor

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Figure 2 : Sustainable Operations

Does your business have in place or carry out the following ?

Category	Percentage
Environmental Management System	51.35%
Corporate Social Responsibility Policy	59.46%
Co2 Reporting	21.62%
Fair trade	32.43%
Labour condition checks	89.19%
Your own innovations	43.24%

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Figure 3: Barriers to Sustainability

What do you think are the barriers to achieving sustainability in your business ?

Financial constraints	63.64%
Infrastructure	27.27%
Knowledge and education	54.55%
Technology	45.45%
Other (please specify)	9.09%

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Figure 4: Risk Concern

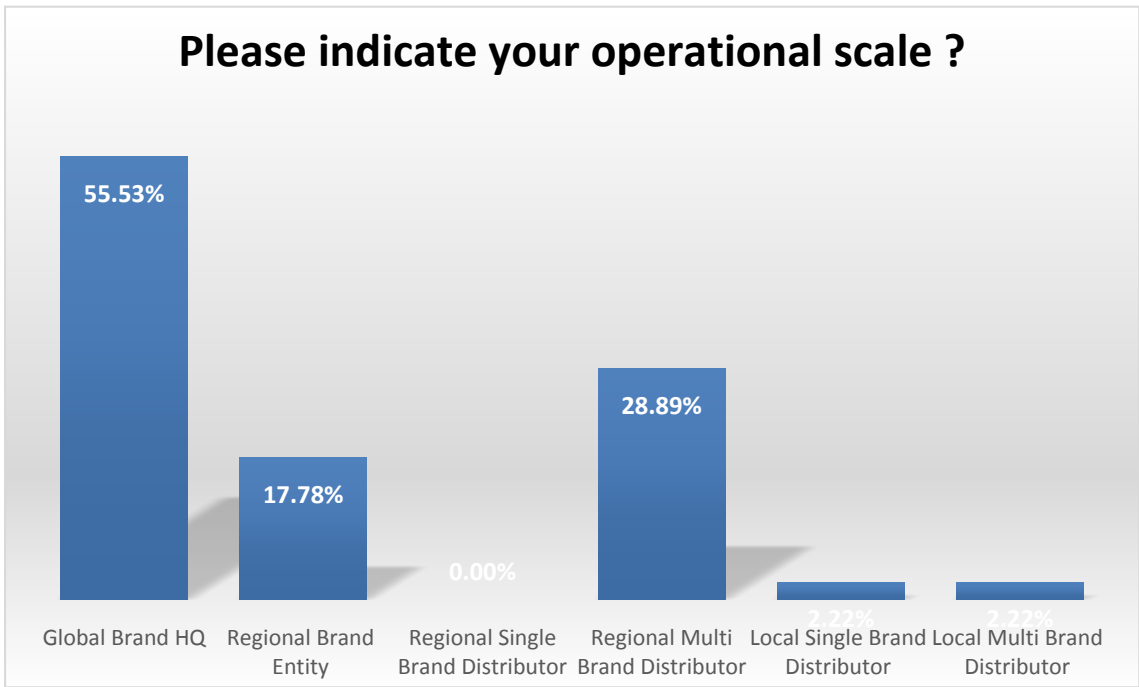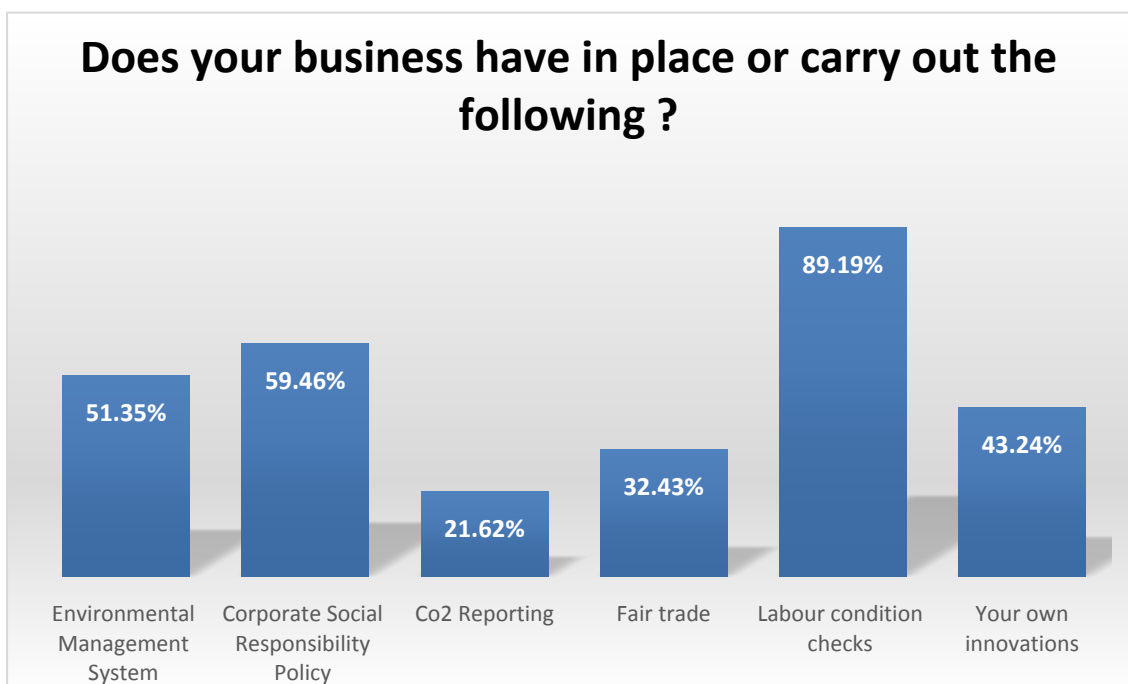## Are you concerned with any of the following issues ?

- Biodiversity loss land: 69.57%
- Biodiversity loss water: 69.57%
- Climate change: 93.48%
- Ocean acidification: 71.74%
- Air pollution: 82.61%
- Water pollution: 89.13%
- Plastic pollution: 95.65%

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Figure 5: Brand Policies

Do you have any policies in relation to the following issues ?

Category	Percentage
Biodiversity loss land	13.33%
Biodiversity loss water	13.33%
Climate change	46.67%
Ocean acidification	20.00%
Air pollution	46.67%
Water pollution	46.67%
Plastic pollution	86.67%

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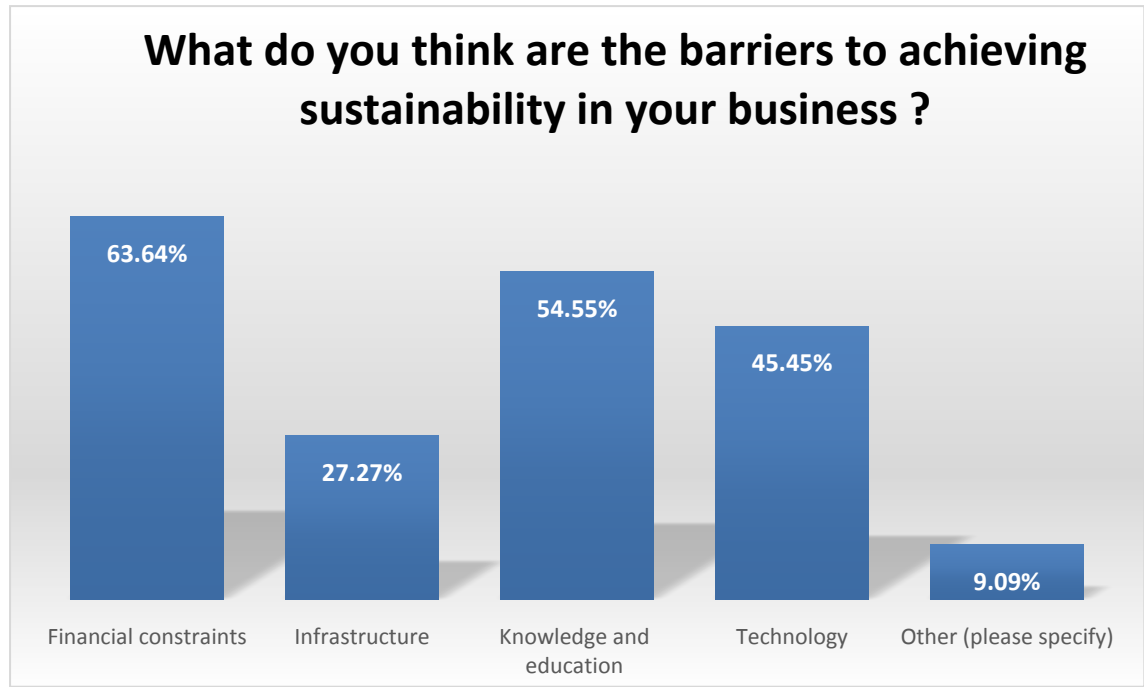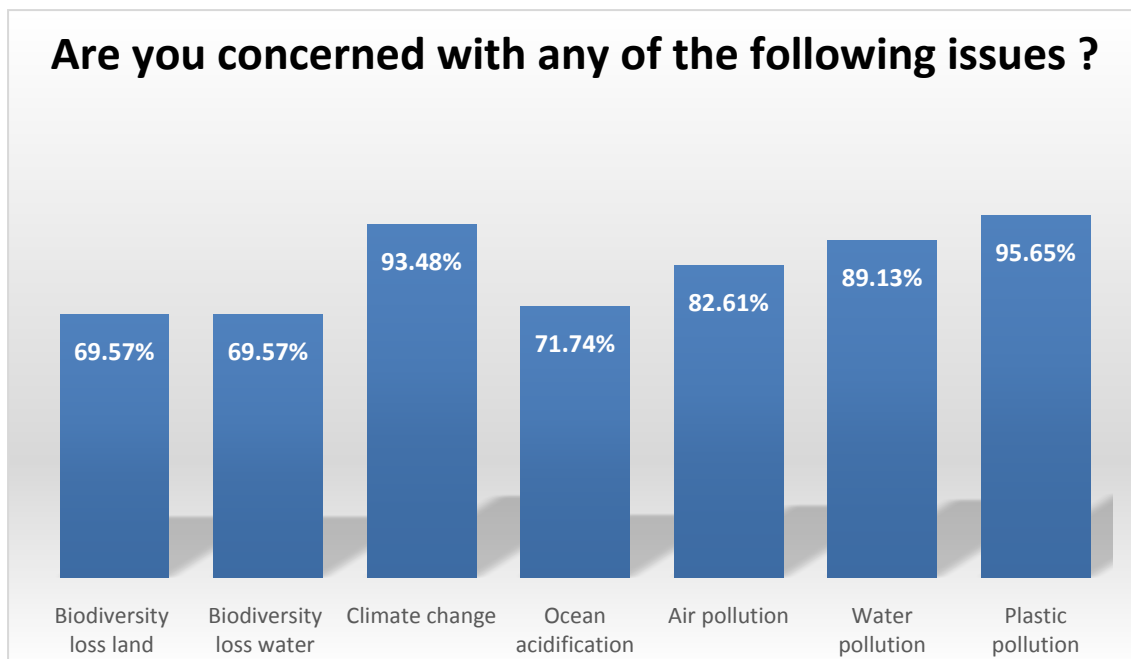
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Figure 6: Responsible for Solutions

Who do you feel is responsible for driving solutions ?

75.56%	89.89%	33.33%	75.56%
Government	Industry/ Business	NGO/ NotforProfit	Consumers

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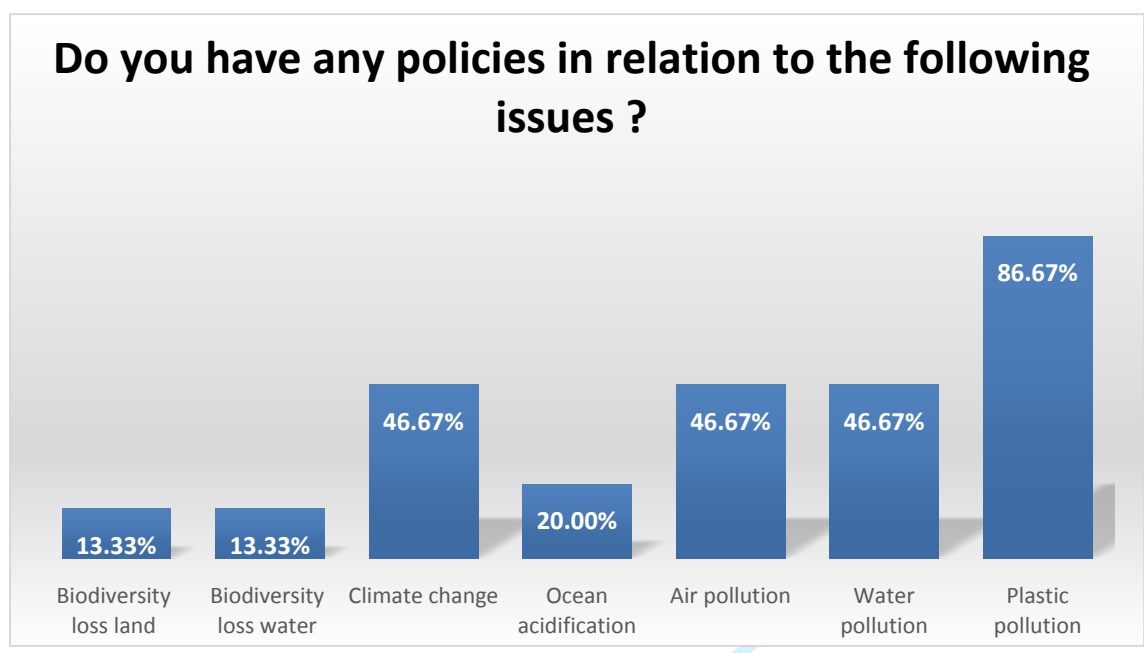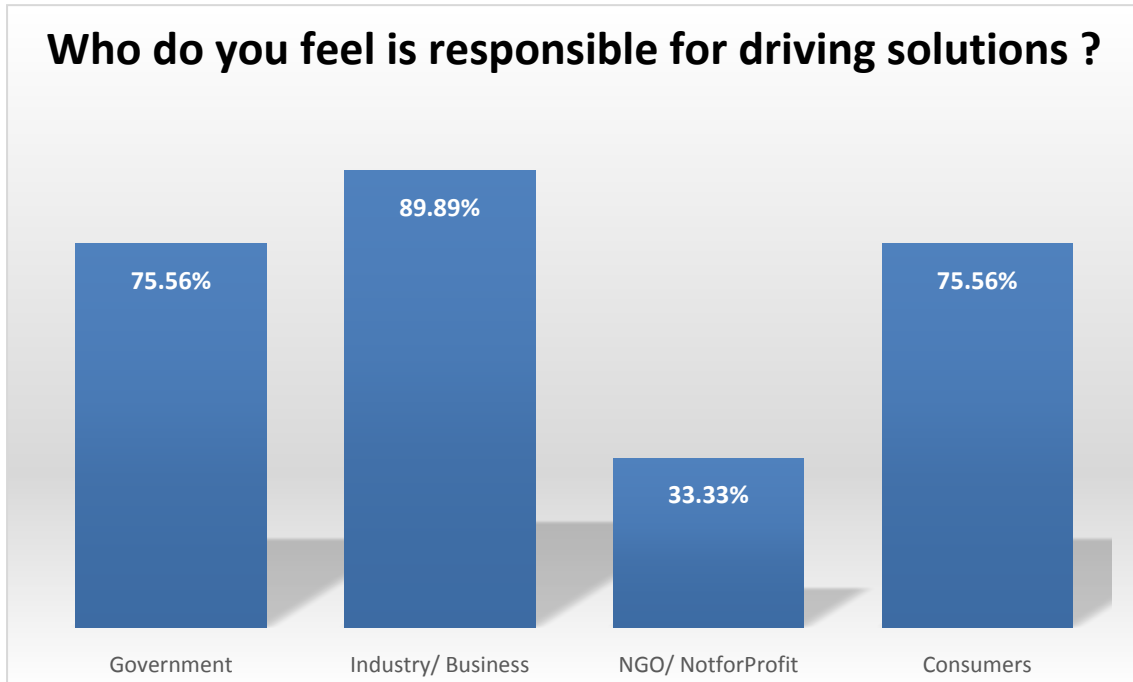47
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Figure 7: Business Model Awareness

Are you aware of any of the following concepts ?

- The circular economy: 48.89%
- Negative externalities: 22.22%
- Sustainable business: 93.33%
- Full systems approach: 26.67%
- Zero landfill business: 62.22%
- Carbon neutral business: 77.78%
- Fair trade business: 91.11%

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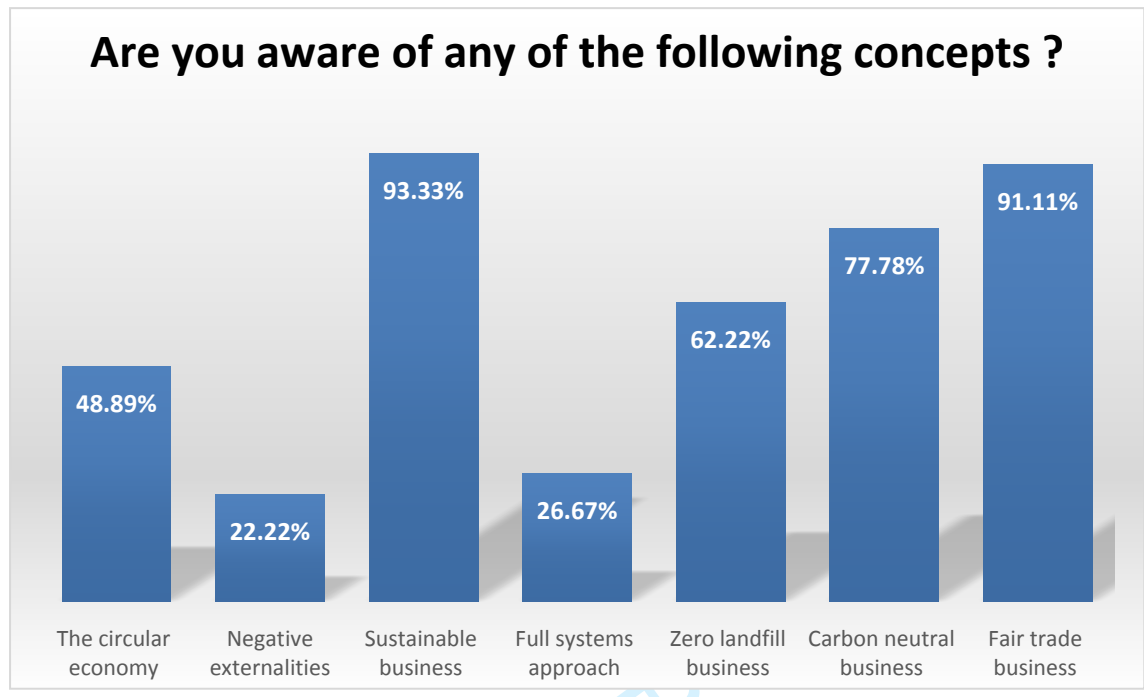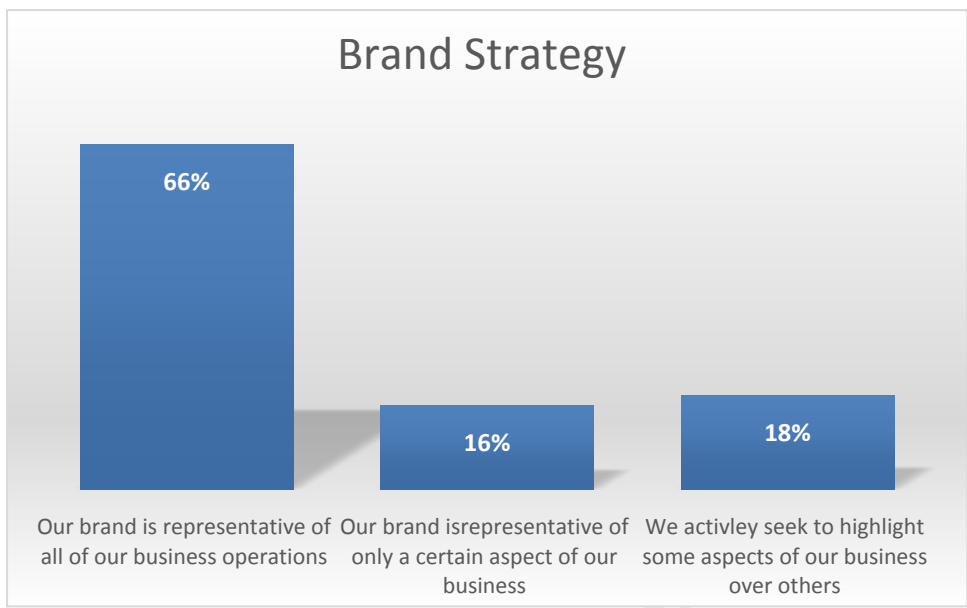47
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Figure 8: Brand Strategy

Brand Strategy

- 66% — Our brand is representative of all of our business operations
- 16% — Our brand isrepresentative of only a certain aspect of our business
- 18% — We activley seek to highlight some aspects of our business over others

37