Sustainability and Consumer Decision Making in the Travel Sector
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Comment

The UK hosted the 26th UN Climate Change Conference of the Parties (popularly known as COP26) in Glasgow on 31 October – 12 November 2021. Awareness of the dangers of climate change, while growing throughout the world, was raised globally and particularly in the UK.

And yet, we have been here before. One of the authors of this paper, now a grandfather, first learned of the greenhouse effect and global warming as a student in 1969 in that year’s BBC Reith Lectures. The early 70’s saw the oil shock focussing minds on threats to the global economy as well as eco-systems, and self-sufficiency became a watch cry for middle classes and hippies alike.

But then little changed. Paradoxically, one solution that could have mitigated global warming, nuclear fission, became political anathema. In Europe, France retained nuclear power plants (often on coasts and vulnerable to sea level rise). Germany shut theirs down, closing the consequential energy gap by burning ever more coal and doing risky supply deals with Russia. The UK flip-flopped and has made virtually no progress on nuclear. Great progress has been made on renewables, but as autumn’s calm and cloudy weather showed, renewables by themselves are not enough. Manufacturing, with economic power, has shifted to Asia, where populations don’t want to miss out on the improvements to lifestyles that fossil fuel burning brought the developed world.

The problem is that climate change has been too slow for most of us to notice – today’s grandparents probably won’t live to see the damage, though their grandchildren certainly will. Investments conventionally need to pay back in a couple of decades at most. Shareholders have no interest in watching their investments tank so as to benefit future generations. Witness over-fishing – the only logical commercial decision for trawler owners is often to double down, fish like there’s no tomorrow and hope they can pay back their loans before the fish run out.

We need different models of motivation and governance for real change to happen. The outlook is bleak otherwise. In this paper, we examine some ways in which the true ‘Alpha’ decision maker, the consumer, can learn to change their habits and start to impose real and lasting change on the market.
Introduction

This paper reviews the way that sustainability is positioned within consumer decision making, based on research we commissioned leading up to COP26. It covers four broad areas.

1. How much people care about sustainable issues, and whether there is a hierarchy of concerns.
2. How sustainability fits into decision making.
3. Applications of behavioural science to developing business winning tactics.
4. Our new sustainable segments – created especially for this paper and the supporting webinar which was delivered alongside Pace Dimensions.

This paper focuses on the hospitality sector. However, the key findings are transferable across sectors, particularly the sustainability segments. We focussed principally on the UK public. Nonetheless, many of the findings are transferable across other developed countries.

Data Sources

There are two main data sources analysed here:

- The Hotel Guest Survey, conducted during Summer 2021 amongst 6,000 business and leisure guests across 11 markets.

Data Analysis and interpretation was carried out by the BVA BDRC and BVA Nudge Unit teams, and we are grateful to the team at Pace Dimensions for the additional industry context they provided to this research and the topics they covered on the webinar (a recording of which is available here).
The first key point to communicate is that sustainability is very much on the public’s agenda. 9 in 10 (95%) of the UK public are very or fairly concerned with at least one of the sustainability issues mentioned here. Put simply, people really do care.

76% of the UK population are ‘very concerned’ about sustainable issues (95% very/fairly concerned)

How much does the UK public care about sustainability?
Most of these issues overlap in some way, but in the eyes of the public there is a hierarchy of concerns.

Generally, environmental issues are more concerning than social issues. Of the seven sustainability issues we tested, deforestation ranks top. This is likely to be driven by decades of public concern about the Amazon rainforest. So for people looking for a focus for their messaging or carbon offsetting, forests and woodland activities will resonate: planting trees, protecting forests or simply partnering with organisations that do it (such as the Woodland Trust).

**How concerned are you about the following? (% Very concerned)**

- **Deforestation**: 55%
- **Species extinction**: 48%
- **Climate change**: 45%
- **Single-use plastic**: 45%
- **Racial injustice**: 40%
- **Social inequality**: 39%
- **Loss of biodiversity**: 34%

- **Environmental issues**
- **Social issues**
There is a misconception that environmentalism is a young person’s concern. All age groups are very concerned, but over 55s are the most concerned about every single environmental issue.

This chimes with a good deal of the research we have conducted elsewhere. Most surveys we run with national tourist boards show older generations prioritising landscapes and scenery as a motivation for visiting – this is the case for the UK, German, US and French markets. Older age cohorts also index above average in visits to cultural and garden attractions. They are the most engaged with the natural world so it’s no surprise they are also the most likely to want to protect it.

Cross generational concern with ‘social issues’ is markedly different. Here, there is a clear younger person bias.
Another potential myth-buster is that despite the social leanings of the UK's Green Party, environmentalism is not biased towards the political left. It is broadly non-partisan. Conservative and Labour voters score almost identically on environmental issues – with the exception of ‘climate change’ which is perhaps a more politically loaded term. As amongst younger members of the public, social issues do favour the political left, but this is in line with what you would expect.
Does sustainability influence consumer decision making?

It is not enough that people care. For organisations to invest in sustainability, they need to know if it will influence decision-making. On the surface, our research indicates that sustainability is not foremost in decision-making around leisure. Our Hotel Guest Survey places it as the 24th most important factor in hotel choice amongst the UK public. And it doesn’t place above 17th for any other leading market. Our annual Holiday Trends survey puts it in a similar position.

On the face of it, this does reduce some of the momentum of the sustainable leisure bandwagon. Some may cynically argue that if people say they care, but it doesn’t impact decision making, then they are just virtue signalling because it is socially desirable to do so.

However, our research indicates that whilst some may indeed be virtue signalling, most are inhibited by other factors.

First, few properties – whether hospitality or other leisure – give their sustainability credentials pride of place. There is no mainstream sustainability rating system, and most leisure or hospitality providers would promote experience, price, loyalty schemes and other factors ahead of sustainability. Without leisure venues making sustainability information easily available at the decision moment, it can’t become a decision driver.

This chart backs up this point. It maps how strongly a list of upper full service hotel brands are associated with sustainability credentials. Put simply, the brands on the right are associated with sustainability, whilst those on the left are not. With the exception of Hotel Indigo, Mövenpick and Hard Rock Hotels, the vast majority of hotel brands in this tier are not strongly associated with sustainability.
Our research also underlines other reasons why sustainability fails to drive individual decision making:

- Many people find sustainability simply overwhelming, so they switch to default decision making instead.
- Some believe it is the responsibility of big organisations and government – not the individual. In fact, 52% of the UK public think corporations should be doing more to combat climate change.
- Many associate being sustainable with giving things up (such as clothes or long haul flights) and are reluctant to sacrifice these experiences.

Regardless of the reasons that drive inaction, a simple question can cut through the confusion. We asked the public what they would choose, given the choice between two identical hotels of identical price but with one being more sustainable than the other. If sustainability was unimportant as an influence, we’d expect to see a fairly even balance of choice. But this clearly wasn’t the case. An overwhelming majority chose the sustainable hotel. So at the very least it indicates that if leisure providers put their sustainability credentials front and centre, they may gain an edge over the competition, even at a slightly raised price.

**But given the choice, the sustainable option will be chosen first**

With all other things being equal, which would you choose?

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<th>Sustainable hotel</th>
<th>Standard hotel</th>
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<td>91%</td>
<td>9%</td>
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Notably, the sustainable hotel was also chosen when the price was 5% more than the standard hotel. This is not a piece of pricing analysis (so we are not saying put your price up 5%), but it does indicate that, at some level, people will trade off between price and sustainability and that for most, it is of more than marginal importance. At the very least it indicates that if leisure providers put their sustainability credentials front and centre, they may gain an edge over the competition, even at a slightly raised price.

...and this is even the case when it costs 5% more. There is evidence that people will trade off between price and sustainability.
Utilising the power of behavioural science to guide sustainable behaviours

Sustainability is far too complex for customers and guests to navigate and make sense of. We cannot assume they know which properties, airlines or destinations are a more sustainable choice. Even simpler behaviours such as recycling are in reality far more complex than assumed.

We need to take into account the overall cognitive load of customers and help make sustainable choices easier for them.

As we learned from the research, sustainability is important on an attitudinal level, but is not yet a key driver of choice or purchase.

This is what in behavioural science we call the Intention to Action Gap – where consumers or citizens claim importance and have good intentions, but often fail to comply or live up to those intentions with real actions. By understanding how the brain works and how we utilise heuristics and biases to shortcut decision making, we can help to bridge that gap aligning their actions to their intentions.

To be clear, behavioural interventions that guide small adjustments to customer behaviour are not enough to reduce climate change or to reach corporate sustainability commitments alone. However, in an effort to lessen overall impact, every step in the right direction matters, and we find helping customers live up to their green intentions can be a strong tool in driving loyalty and brand affinity.

When driving sustainable initiatives within an organisation, it is important to pick your battles and choose a target. A simple categorisation can be useful to focus your efforts. We often look at three broad categories of customer profiles – Advocates, Agnostics and Antagonists.
**Advocates** truly believe in the cause, as they have already been convinced.

They will generally make sustainability a primary purchase or booking criterion. They will read the labels or check on your sustainability credentials before making a decision. They tend to favour niche brands/properties that emphasise environmental credentials or have some sort of eco accreditation.

**Antagonists** actively disagree or don’t care about sustainability at all.

Typically challenge any and all efforts you make, wasting your time and resources. They are likely to continue to book and favour the brands, products and services they’ve always chosen. They generally stick to their stance with almost no opportunity for change.

**Agnostics** nod their heads and agree with you, yet aren’t acting on their beliefs or intentions.

Often a far larger group than either the Advocates or the Antagonists. Agnostics typically like to ‘do the right thing’ but are not generally investing time or making sacrifices to do so. Agnostics need to be helped, rather than persuaded or convinced. Brands often make the mistake of trying to further educate them, when they already agree. Or want them to care more, mistakenly assuming that this will lead to action.

Will generally make sustainability a lesser criterion (perhaps a tie breaker). They default to the familiar or habitual decisions and purchases, and they are often unwilling to sacrifice core features/benefits and/or trusted brands.
New sustainability segments

To further help organisations shape their sustainability behaviour, we created a brand new sustainability segmentation. Conducted amongst 3,500 nationally representative UK respondents, the segments were based on a large number of attitudinal statements and (crucially) their sustainable behaviour. The inclusion of behaviour is an important distinction from other segmentations which, through relying on attitudes alone, can be biased too much by socially acceptable or aspirational answers. We derived 5 segments in total.

- **Advocates (16%)**
  - "We need to save the world and I’m doing whatever it takes to play my part."

- **Eco Evangelists (27%)**
  - "Climate change is just another way of controlling what we do."

- **Accidentally Green (19%)**
  - "I look after the things I own and turn off the lights. If that makes me green, then so be it."

- **Good Intentions (27%)**
  - "I try to be green but it’s difficult and pretty overwhelming."

- **Afluent Hedonists (11%)**
  - "Life is about enjoyment and experiences – I’m not cutting back on that for anyone."

- **Climate Sceptics (11%)**
  - "Climate change is just another way of controlling what we do."
New sustainability segments:

Eco Evangelists

Eco Evangelists constitute one in six (16%) of the UK population. They are very concerned about sustainability and think companies and individuals should be doing as much as possible to help. Their personal action in all areas, from recycling to community action, is very high. They are more likely to be female than male, with high household income, and would spend more on sustainable produce. This segment is not your traditional counter-cultural ‘eco-warrior’ who spurns wealth and capitalism. They are financially well-off and willing to spend on sustainable products. You may see them shopping in Whole Foods one minute, and organising social action the next.

“I care deeply about the environment and have sleepless nights thinking about what’s happening to our world. We need to act now and I’m definitely playing my part. Whether it’s doing all the simple stuff like recycling and reducing my meat consumption or direct action like taking to the streets.

I’ll do whatever it takes and am more than happy to spend more money on something that is responsibly sourced. But we won’t turn the tide as individuals. Corporations need to step up too. I won’t use any brand that is shirking their responsibility and I can see through all the greenwashing.

Hotel chains need to make it clear what they’re doing to help, and I don’t just mean getting rid of miniature shampoos (although they should do that too). What initiatives are they supporting? What do their supply chains look like? If I can’t get that reassurance, I’ll just stay in a boutique I can trust.”
Eco Evangelists: In Focus

Attitudes to sustainability

- Overall concern: 100% (Eco Evangelists), 97% (General Population)
- Role of corporations: 97% (Eco Evangelists), 92% (General Population)
- Role of individual: 76% (Eco Evangelists), 68% (General Population)

Key demographics

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<th>Male</th>
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<th>Average age</th>
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<td>79k</td>
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Personal action

- Packaging and recycling
  - LOW
  - MED
  - HIGH
- Lifestyle changes
- Green fingers
- Community action

At a hotel, I would be happy to... (Top 3 above average)

- Spend more on sustainable produce: 100%
- Go vegan for a day
- Have low energy hours
Necessary nudges

Consider leveraging the heuristic of Reciprocity to generate a sense of social debt with your customers. ‘Do as you would be done by’.

Or utilise the concept of Fairness to appeal to their sense of fairness or justice.

Changes your organisation can make:

- Source and promote local foods on menus for lesser overall footprint
- Offer more vegetarian or vegan options to guide healthier and more environmental dining choices
- Stock ‘green essentials’ for items like toiletries, tea and coffee to showcase your commitment to greener brands and products

Behaviour changes you can guide your guests toward:

- List your property/company on alternative booking sites with a focus on sustainability, such as bookdifferent.com or flygrn.com
- Attract and cater to domestic/local travellers or guests who are seeking experiences without the negative impact of long-distance travel
- Allow for opt-in on carbon offsetting programmes or support green initiatives your brand identifies with, such as reforesting, wild flower planting or water conservation
New sustainability segments:

**Good Intentions**

Our joint largest segment, Good Intentions, straddles the boundary between advocates and agnostics. They are very concerned about sustainability, as much as the Eco Evangelists. They are more sustainably active than most but avoid taking to the streets, and are held back in a number of ways. For them, the responsibility is more with corporations than the individual.

They are more likely to be female, and prefer simple actions that don’t overly impact their quality of experience or pocket, so they are qualitatively different from the Eco Evangelists.

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I’m really worried about how things are going with the environment. How can I not be? Every time I turn on the news it’s either forest fires or flash floods. Last week I watched an Attenborough documentary, and it was heart-breaking learning how much we’ve already lost.

Whenever I see these things on the TV, I always make a pledge to change my behaviour the next day. But then, life often gets in the way. Don’t get me wrong, I do more than the average person – I recycle, use my own cups and bags, and eat veggie a couple of times a week. But anything more than that is a struggle. Change is hard and it’s all so overwhelming I just don’t know where to start.

What difference can an individual make anyway? Governments and corporations need to lead the charge. Without their input, me taking the recycling out won’t achieve anything. I’ll stay at whatever hotel is convenient but I’ll feel so much better choosing somewhere that is making an effort to be sustainable.
Good Intentions: In Focus

Attitudes to sustainability

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<td>Overall concern</td>
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<td>Role of individual</td>
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At a hotel, I would be happy to... (Top 3 above average)

- Not use single-use plastic
- Use bulk soap dispensers
- Have daily low energy hours
Necessary nudges

Create Defaults where you present a pre-selected sustainable option as the desired choice.

Lean into Easiness, making the sustainable option the easiest and requiring the least effort.

Changes your organisation can make:
- Make recycling on-site easy and visible, take out the effort and make sure your business is really recycling
- Install towel racks or hooks to make re-using towels simple
- Install a tap or fountain to show that filling re-usable water bottles is easy and expected

Behaviour changes you can guide your guests toward:
- Encourage packing light – re-frame luggage limits as not simply about cost, but also about impact
- Guide reusing linens and towels, perhaps with an incentive of points or free gifts
- Make non-essential items on a by-request basis (stationery, sewing kits, etc)
New sustainability segments:

Accidentally Greens

Our third segment is the Accidentally Greens for whom being green is an established way of life, rather than a reaction to the current climate crisis. They do have some concerns, but their ‘greenness’ is driven by a desire to save money, to look after what they own and limited materialistic drives. They recycle far more than average, tend to save and reuse, and spend a lot of time in their gardens. Creatures of habit, this older, male dominated audience are much less likely than average to engage in major lifestyle changes, or community action. They do not seek to become involved in the sustainability debate at all, tend to vote Conservative and will likely oppose the actions of groups such as Extinction Rebellion. Many of us see our parents in this segment.

At a hotel they would willingly recycle, use bulk soap dispensers or the same bedding, particularly if it saved them money.

“I like the outdoors but don’t get involved in the whole climate debate. It’s not that I don’t care, it’s just not something I have any personal control over.

Half the things we’re told to do to be more green, I’ve always done anyway. I was brought up to take care of my belongings, and to fix things when they break, not to get a replacement for the sake of it. I reuse whatever I can. Come into my garden shed and you’ll hear music from my 30 year old radio, and see a load of jam jars holding nuts, nails and screws, perched on an old bookcase. Saving money is also important to me – my kids will tell you how I feel about someone leaving the lights on!

I’m more than happy for a hotel to be sustainable if it’s going to save me a bit of cash!”

bva-bdrc.com
Accidentally Greens: In Focus

**Attitudes to sustainability**

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**Key demographics**

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**Personal action**

- **LOW**
  - Packaging and recycling
  - Lifestyle changes
  - Green fingers
  - Community action

- **MED**
  - Packaging and recycling
  - Lifestyle changes
  - Green fingers
  - Community action

- **HIGH**
  - Packaging and recycling
  - Lifestyle changes
  - Green fingers
  - Community action

**At a hotel, I would be happy to... (Top 3 above average)**

- Recycle
- Use bulk soap dispensers
- Use the same bedding
Necessary nudges

Utilise Framing by presenting options in a way that encourages the sustainable behaviour.

Promote the Value of actions, highlighting the effort or skill invested toward your sustainable action.

Changes your organisation can make:

• Reduce single-use plastics across the guest experience to limit superfluous waste and expense
• Provide green rewards to recognise and incentivise greener behaviours of your guests
• Switch to electric vehicles for guest transport to showcase your commitment to sustainability

Behaviour changes you can guide your guests toward:

• Highlight local and walkable attractions and destinations
• Promote off-peak visits
• Reusing linens and towels, perhaps with an incentive
• Opt for economy seats or standard rooms, show the value and impact
New sustainability segments:

**Affluent Hedonists**

Affluent Hedonists claim they are concerned about climate change, but their actions say otherwise. They have high household income and take numerous trips abroad and in the UK. They have no intention of changing their lifestyle habits, and don’t expect corporations to do anything either. If we had to pin the ‘virtue signaler’ tag to any segment, it would be this one. Whilst this has negative connotations, it does mean this segment can be targeted with interventions that make them look good or feel unique. Being wealthy, they would be happy to spend more on sustainable products and avoid mainstream activities such as all-you-can-eat buffets!

I get why some people are concerned about the environment and I am worried too. But I’ve worked incredibly hard to get to where I am in life and I’m determined to enjoy it.

There’s no way I am sacrificing my family’s experiences when all my peers are out there seeing the world and enjoying themselves. The environmentalists say I should fly less often but I’m trying to work out how I can fly more. We missed out on so much during COVID, I’ll be making up for lost time in the next couple of years. There are so many places I want to tick off my bucket-list.

I don’t care if a hotel is sustainable. But, if it adds to the experience and provides some pics for social, sign me up!
Affluent Hedonists: In Focus

Attitudes to sustainability

- Overall concern: HIGH 73% 76%, MED 46% 68%, LOW 44% 60%
  - Affluent Hedonists
  - General Population

Key demographics

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<td>50% 50%</td>
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Personal action

- Packaging and recycling: LOW, MED, HIGH
- Lifestyle changes: LOW, MED, HIGH
- Green fingers: LOW, MED, HIGH
- Community action: LOW, MED, HIGH

At a hotel, I would be happy to...

- Spend more on sustainable produce
- Limit food on all-you-can-eat buffets
- A clear plate policy before refilling at buffets

27% of population
Necessary nudges

Utilise the Transmitter effect by engaging personalities or voices that they respect or mimic.

Play to their Ego by reinforcing a positive self-image by being green.

Leverage social Norms by using the power of conformity to encourage sustainable choices.

Changes your organisation can make:

- Choose the right transmitter to promote your brand/service/destination with sustainability as core to their message. Think about influencers or celebrities that appeal to this segment, but also can communicate about sustainability in a believable way.
- Install or highlight electric car charging stations within your attraction/destination, or provide e-bikes and e-scooters to appeal to their sense of innovation and novelty.
- Upgrade to automatic thermostats and lighting systems that cater to the guest without any effort on their part.

Behaviour changes you can guide your guests toward:

- Guide passengers to direct flights – easier for them and lower overall impact.
- Highlight local fine dining establishments with local suppliers, showing how high end can be green.
- Promote local shops and boutiques with eco-friendly products or lower impact offerings.
New sustainability segments:

Climate Sceptics

Climate Sceptics are our smallest segment, and tend to speak for themselves. They do not express any concern for environmental issues, and are visibly opposed to any sustainable interventions. There is an air of conspiracy theorist about them, but for many their views are driven by deep libertarian urges, rather than extreme opinions. There are few sustainable triggers for this group, but – as with most – the incentive of saving money is likely to resonate at some level. It’s tempting to be dismissive of this segment, but every segment is a potential customer, so they deserve some attention. Our experience with this type of audience is that often their biggest drive is ‘to be heard’. So our main advice would be to simply give this segment the opportunity to be heard, and to not exclude them. How this works will differ depending on your organisation.

“I sometimes think I’m the only person who sees things as they really are. All this talk about climate change – it’s just another way for governments to control us or for corporations to make money. I don’t bother with any of it. The people on my street are like sheep, recycling week in week out. They don’t realise that most of it goes into landfill or washes up on a beach somewhere in Asia.

I get annoyed when I see corporations jumping on the bandwagon and I don’t want to stay somewhere that rams it down my throat.”
Climate Sceptics: In Focus

Attitudes to sustainability

Key demographics

At a hotel, I would be happy to... (Top 3 above average)
Necessary nudges

Limit efforts and expense on this target as they are unlikely to move behaviours. They typically stick to habitual decisions and behaviours out of principle and inertia.
As mentioned above, there is no such thing as a bad segment – all of the segments we have shown are customers of hospitality and tourism sectors. Each are potential customers. Each segment will stay in a hotel on their next staycation, and this will transfer to many other leisure activities. Affluent Hedonists are the least likely to do so, but they also take the most trips so that is likely to balance out.

It is also worth pointing out the differences in household income. Some segments have more disposable income than others. The Eco Evangelists and Affluent Hedonists have the most - luxury hotels are likely to index higher on these, and budget hotels on Accidentally Green.

As a final point we should remember that these attitudes and behaviours are changing fast. All segments will become more educated, and we may find they take on more conscious green behaviours as the information about climate change becomes more evident and salient in their lives. We will be updating this segmentation at least on an annual basis. The segment fall-out will also differ by your market, and we invite you to measure your market by our segments.
Conclusions

Research by itself can change nothing. We are passionate about helping our clients find ways to respond to the needs of their customers. It should be possible to maintain profitable enterprises and give customers and employees alike better lives while winding back on environmental damage and reducing atmospheric carbon dioxide and methane. The alternatives are very unpleasant, and can no longer be ignored.

If you’d like to run our segments by your customers or market, please get in touch.

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