



Understanding the Responsible Traveller in Europe

May 2013

Agenda

- Research methodology
- Market landscape (travel and ethical consumerism)
- Consumer segments for responsible travel
 - Attitudes
 - Description
 - Possible behaviour change tactics
- Trade landscape

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RESEARCH METHODOLOGY



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Inputs

- Desk top research by local consultants in each market
- Assessment of market related Fairtrade and other ethical consumption data
- Assessment of travel behaviour and travel trends
- Psychographics of market
- Trade insights

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Approach

- Combining Fair Trade consumer profiles, general consumer profiles and tourism profiles to produce a segmentation model defining segments specifically relevant for Responsible Tourism targeting
- Assessing behaviour change techniques against these segments
- Producing insights and suggested actions for trade partners and sustainable tourism products to gain further traction in these segments

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MARKET LANDSCAPE



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Europe Ethical Consumerism

- Europe is generally well versed on sustainable living, with a specific focus on environmental consciousness
- Higher educated consumers, have a distinct awareness of global issues and feel the need to make a difference with how they live and how they consume
- Europe enjoys a broad selection of fairly traded produce so awareness is high on certification labels
- Price and quality of sustainable products still influence the buying behaviour for the majority of consumers
- Many Europeans do consider travel as essential to their lives so find ways to offset the negative impacts

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Europe Travel Opportunity

- Europe has one of the highest volumes of long haul travellers
- Even through the financial crisis, Europeans prioritised travel as an essential part of their lifestyle
- Europeans want an authentic interactive experience with local cultures
- Adventurous, inquisitive, worldly travellers
- Some traction with Responsible Tourism in some markets

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CONSUMER SEGMENTS FOR RESPONSIBLE TRAVEL



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Netherlands – Segment attitudes

The Luxury Lover

- Luxury seekers who are good sustainable citizens, but want businesses to make it easy for them
- Like the brag factors of sustainable holidays

The Social Explorer

- Open minded consumers who want to not only offset their long haul flights but want to make a real difference in the destinations they visit
- Actively seeking sustainable options and wants to make a difference

The Critical Cosmopolitan

- Live ethically at home and happy to spend additional money on sustainable lifestyle and travel
- Want to make a difference and pass on a liveable world to my children
- Will look for stamps of certification to make sure their money is spent wisely

The Luxury Lover

Description

- 2-4 international trips per year
- Large budget for travel
- Are influenced by peers, celebrities and popular brands
- Desire 4 and 5 star experiences
- Liberal conservative social top layer of society that embraces technological developments but holds onto traditional values

Behaviour change

- Engage emotionally on the topic of sustainability and dial up the impact to people
- Dial up worthy causes and philanthropy programmes
- Provide a range of luxury offerings that are responsible relevant to their destination choices
- Highlight the exclusivity and unique story angles they will obtain from this experience (brag factor)

The Social Explorer

Description

- 5-6 trips per year, mostly long haul
- Unusual and off the beaten track destinations
- Appreciate value for money, but will pay a premium for a responsible product
- Slightly older traveller
- Higher education level

Behaviour change

- Provide plenty of responsible tourism information and be transparent about where the money goes
- Explain clearly who benefits
- Trusted certification will add value
- Provide additional opportunities to donate or visit projects
- Create opportunities for them to connect with locals
- Offer off the beaten track experiences with real human interaction



The Critical Cosmopolitan

Description

- Younger
- Both budget (student) and luxury (young professional) travel
- Desire to discover new places and adventure
- Essential to meet the local culture
- Conscious consumers
- Back / flash packing
- Price conscious

Behaviour change

- Inform them in detail on sustainability so they can successfully pass on the message to their friends and family
- Ensure transparency and no green washing
- Leverage certification labels
- Dial up educational benefits of positive cultural interaction
- Leverage academic endorsement



Germany – Segment attitudes

The Socio-Ecologists

- Clear awareness of Fair Trade and a sustainable lifestyle and have a distinct tendency to implement sustainable and fair principles in their life.
- Interested in local products and welfare of workers and wish to increase their consumption of fair trade products
- Believe in paying extra for any environmental damage caused through travel

The Liberal Intellectual

- Take responsibility to live a sustainable lifestyle and feel better when buying responsible or sustainable products
- Individualistic and real (authentic)
- Desire meaningful enjoyment
- Believe that less is more and that they are the people who can make a difference

The High Achiever / Performer

- Performance and efficiency orientated whose impetus is career
- Vanguard of style and lifestyle – seeking distinction and exclusivity
- Conspicuous consumers of quality
- Sustainable option must outperform their usual brands in terms of quality
- Are not interested in traditional view of responsible or sustainable products – only when it delivers more on quality and design is it appealing

The Socio-Ecologists

Description

- Middle to high income
- 1 -2 international trips per year
- Price sensitive – looking for 2 – 4 star hotels
- Buy through specialised travel agents (responsible)
- Understand sustainable labels and associate Fairtrade label with high quality
- Culture and nature critical part of travel experience

Behaviour change

- Price sensitive – don't like expensive marketing campaigns and need to be reached on an emotional level
- Put producers and locals at the centre of interest – the positive impact tourism has on the destination
- Like detailed information on issues like environmental management of the hotel, employment impacts, etc.
- Do not like financial link to be highlighted, avoid graphs and business language – as they need emotion and real insights

The Liberal Intellectuals

Description

- High income
- 2 -3 international trips per year
- Not price sensitive
- Increasing trend in online booking
- Certification labels are important
- Brand reputation is important
- Influenced by family and friends endorsement
- Well educated and analytical
- Sceptical

Behaviour change

- Provide a varied offering of sustainable product
- Need a high level of scientific information on products sustainability to believe (backed by data, facts and figures)
- Willing to pay for carbon offsetting
- Want balance between mind, body and soul in their holiday experience
- Promote quality and individualism of offering
- Integrate emotional messaging with scientific information
- Focus on the positive influences of tourism, not charity or negative messages

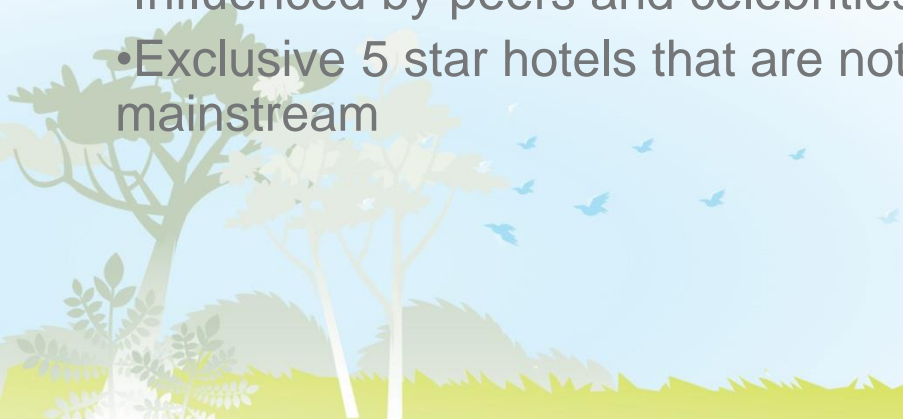
The High Achiever / Performer

Description

- Social upper class
- Early adopters
- Well educated
- High income
- 3 -4 international trips per annum
- Adventurers
- Not price sensitive and will pay for high quality and exclusive offerings
- Internet booking for travel
- Influenced by peers and celebrities
- Exclusive 5 star hotels that are not mainstream

Behaviour change

- Position sustainability efforts of tourism offering in context of cutting edge design and innovation
- Dial up exclusivity of product
- Position the value of the experience more in terms of their benefit (quality, exclusivity and feel good factor)
- Professional, high quality designed marketing campaigns in new media platforms
- Do not use ethical appeals, guilt tactics or provide too much information on the local stories and impacts
- Consider social branding and celebrity alignment



Switzerland – Segment attitudes

The Aware

- Consume responsibly and ensure sustainable principles are fully integrated into their lifestyle
- Want to make a positive impact through their consumption
- Open to new things and are pioneers

The Experienced

- Sensitive to sustainable concepts
- Opt to purchase sustainable products when they have the choice
- More consideration to Environmental factors than broader sustainability criteria

The inexperienced

- Aware of sustainable issues but their purchasing decisions are not guided by the need to be sustainable
- Will behave sustainably if effort and costs are not too high
- Often motivated by conscience

The Aware

Attitude

- Consume responsibly and ensure sustainable principles are fully integrated into their lifestyle
- They will offset air travel responsibly
- Want to make a positive impact through their consumption
- Open to new things and are pioneers
- Are critical of sustainable offers and expect high standards
- Price is not generally the predominant factor in decision making

Description

- Higher income levels
- Frequent travellers to new destinations
- Quality and luxury focused
- Use specialist travel agents and book online
- Are influenced by friends and experts
- Well travelled and looking for something new

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The Experienced

Attitude

- Sensitive to sustainable concepts
- Opt to purchase sustainable products when they have the choice
- More consideration to Environmental factors than broader sustainability criteria
- Will not give up a certain level of comfort
- If product is easily accessible a slighter higher price is accepted
- Open for rational argument and data on the impact of their travel

Description

- Upper middle class
- Frequent travellers
- Seeks individual solutions
- Use travel agents and internet
- Are influenced by Experts, media and friends
- Need product variety to ensure that a responsible option is taken



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The In-experienced

Attitude

- Aware of sustainable issues but their purchasing decisions are not guided by the need to be sustainable
- Will behave sustainably if effort and costs are not too high
- Often motivated by conscience
- Lack of availability is an obstacle
- Need to have an emotional connection to sustainability issues to drive action

Description

- All income groups
- Midrange social consciousness
- Careful, price sensitive travellers
- Demanding of personal value
- Influenced by media
- Use travel agents



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Swiss Behaviour Change Tactics

- Educational awareness of issues and possible lifestyle alternatives
- Awareness of certified programmes
- Address concerns of any need to change their lifestyle dramatically
- Dial up quality, comfort and luxury angles (message that this is not a compromise)
- Connect through real stories of the community and environmental impacts

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Swiss Behaviour Change Tactics

- Highlight innovation in sustainable products
- Unleash the power of endorsement, tribes and word of mouth
- Use emotional communication
- Support communication with rational detail and explanations



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TRADE LANDSCAPE



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Trade Insights

- European trade have basic awareness of responsible tourism demand
- Some trade already started to capitalise on the demand by becoming certified and promoting responsible products
- Lack of product variety (price and quality) hamper the take up of responsible purchasing; need for more supply
- Consumer and trade confusion over multitude of labels; need for consolidation under one or a few labels

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Thank you

Fair Trade Tourism NPC (FTT)
PO Box 12844
Queenswood 0121
Pretoria, South Africa

t +27 (0)12 342 2945/3642/7810
e info@fairtradetourism.org.za
w www.fairtradetourism.org.za

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