

"The Responsible Traveller"

A UK Market Segmentation
based on analysis of secondary data from:

Fairtrade Foundation

Travel Foundation and its industry members

South African Tourism

and interpreted in the context of Defra's segmentation model of
general pro environmental behaviours

BASIC ASSUMPTIONS:

Segmentation is based on **attitudinal** differentiation and not demographics

Key attitudinal differentiation is the **degree of social consciousness** the person possesses and how it converts to buying behaviour

Education and worldliness are seen as a determinant for social consciousness

Household income does not necessarily impact attitude, but will determine the type of product consumed; as such - the segments have a descriptor of luxury and budget consumers

The segments which have no history whatsoever of ethical consumption are excluded

Passive Social Consciousness

Basic Description

- This group of consumers is aware of the issues of the environment and fair trade and does care about their own personal consumption. They are likely to be home recyclers and act with the environment in mind, but they do not go out of their way to find fair and sustainable product.

Attitudes

- They are more likely to feel guilty about harming the environment. They tend to have green travel attitudes, and are particularly keen on travellers paying for the environmental damage they cause.

Says

- "I do a couple of things to help the environment. I'd like to do more.....well, as long as I saw others doing it"

Barriers

- They have difficulty in changing their habits so any offering has to fit into their lifestyle. They are self conscious at times about being green (don't want to be perceived as tree huggers) and will be influenced by their peers to change to do something that is popular. Popular momentum is required.

Communication for behaviour change

- Their latent interests need to be converted into action by showing that other people are acting and that their actions have impacts. Highlight the personal benefits and create prompts to move them from thinking to doing. Guilt does not work - must be motivational, easy and everyone is doing it.

Travel Attitudes

- Won't necessarily consider a sustainable travel option. Aware of carbon footprint of flights but do not internalise it as "their" responsibility but rather as just an additional expense. Would consider a sustainable travel product if it met all their needs and with no premium pricing. Travel is a reward and they don't want to feel guilty about it.

Passive Social Budget

Household Income

Middle income

Travel Behaviour

One international trip per year as an important reward and escape for relaxation

Price sensitivity VFM

4 star experience at 3 star rates

Buying Behaviour

Trawl internet and high street for best package deal. All inclusive offers are appealing.

Media

Mainstream newspaper, travel supplements and magazines

Influencers

Peers, popular brands, celebrities

Product Description

4/5 star special deal package

Passive Social Luxury

High Income

2-3 international trips per year

Value for money driven - want added value

Travel agent and internet

Travel websites, travel supplements and lifestyle magazines (higher end)

Celebrities, peers, popular brands

5 star mainstream

Concerned and Active Consumption

Basic Description

- Not only are these consumers aware, but they actively look for sustainable, environmentally friendly options when shopping and consuming. If there is a choice between a non-sustainable product and a sustainable one, they will actively choose to buy the sustainable one.

Attitudes

- Two in three say they would like to do more. They have greener attitudes to travel than most but they take the most flights per year of any other segment. Some guilt – pro-environment behaviours seem to fit with their self-identity.

Says

- "I think I do a lot more than a lot of people. Still, going away is important, and I would find it hard to give that up. I wouldn't give it up so carbon offsetting would make me feel better"

Barriers

- Less likely to cite money as a barrier. Barrier is the selection of product available to meet their needs. They will choose a sustainable offering if available, but if they want to visit a destination and none are available - they will still go.

Communication for behaviour change

- There is an opportunity to try to motivate this group to do more. Emotional engagement and a range of behaviour-specific incentives. Promoting the variety of offerings to suit their lifestyle will easily convert them.

Travel Attitudes

- Travel is part of their life; they are concerned about flying long-haul and will consider using a carbon offsetting programme. Will continue with green behaviour on holiday and will respect brands who support this (water wise, recycling, etc.). Becoming more aware of responsible treatment of staff in third world countries and will be vigilant of negative experiences



Concerned & Active Budget

Concerned & Active Luxury

Household Income

Middle income, but slightly more affluent

High Income

Travel Behaviour

One or two international trips per year, possibly one short haul and one long haul.

2-3 international trips per year

Price sensitivity VFM

Consider self catering and 4 star accommodation.

Dedicated, substantial budget for travel but look for good value for money. Want exclusive and different from main stream (smaller boutique experience)

Buying Behaviour

Travel agent and internet.

Travel agent and internet

Media

Main stream newspapers (more intellectual) and specialised magazines

Main stream newspapers (more intellectual) and specialised magazines

Influencers

Editorial, global labels of endorsement

Editorial, global labels of endorsement

Product Description

4 star - responsible product

5 Star and niche (would for example do an eco-lodge which is not 5 star)

Fully Integrated into Lifestyle

Basic Description

- This segment eats, sleeps and breaths environmentally friendly, sustainable life styles. They are well researched and well versed on technical issues of sustainability and will ensure that the majority of their consumption is sustainable. They will aim to live off the grid and generally will prioritise spend on ensuring a low impact lifestyle..

Attitudes

- Most likely group to want to live a more environmentally friendly life than they currently do. Most likely to buy ethical and local products including local food and fair trade. 44% have tried to persuade others to adopt more pro-environmental behaviours Optimistic that environmental solutions can be found.

Says

- "It is up to me to be more sustainable"

Barriers

- Not motivated by saving money. The primary motivation is for environmentally friendly or sustainable products. Most likely to want more information on what they can do. 8 in 10 (82%) disagree that Green is an alternative or minority lifestyle (see it as normal). 60% disagree that any changes they make would need to fit into their lifestyle. They are prepared to change their lifestyle.

Communication for behaviour change

- Give them the information to be opinion leaders and influencers. Most likely to value and trial extensions of products. Want to understand the technical elements of Sustainability to a certain degree to avoid green washing and be perceived as experts.

Travel Attitudes

- Travel is fundamental to their lives as a way to expand their knowledge and worldliness. Seek an educational experience with new things, new frontiers - the quintessential pioneer. Budget = backpacker pioneer. Luxury = eco-warrior who will pay for a luxurious, educational, superior sustainable offering.

Fully Integrated Budget

Fully Integrated Luxury

Household Income

Often single and a student or start of working life

High Income

Travel Behaviour

Live to travel. Their way of growing and being interesting. Off the beaten track.

3-4 international trips. Expand their world view and relax and be pampered.

Price sensitivity VFM

Very price sensitive - operating on a lower budget.

Not price sensitive but insist on quality experience and luxury)

Buying Behaviour

Direct or through online consolidators such as Hostelworld

Specialised travel agent whom they have built a relationship with

Media

Bloggers, lonely planet, WOM, WAYN.com and social media

Intellectual papers and magazines

Influencers

Peers, bloggers, explorers and adventurers.

Tech-experts, academia, word of mouth from respected sources

Product Description

Responsible back packing, homestay, etc.

High end, exclusive, sustainable product - for the limited few)