



# Sustainability and consumer decision making

A journey inside the heads of British hotel travellers

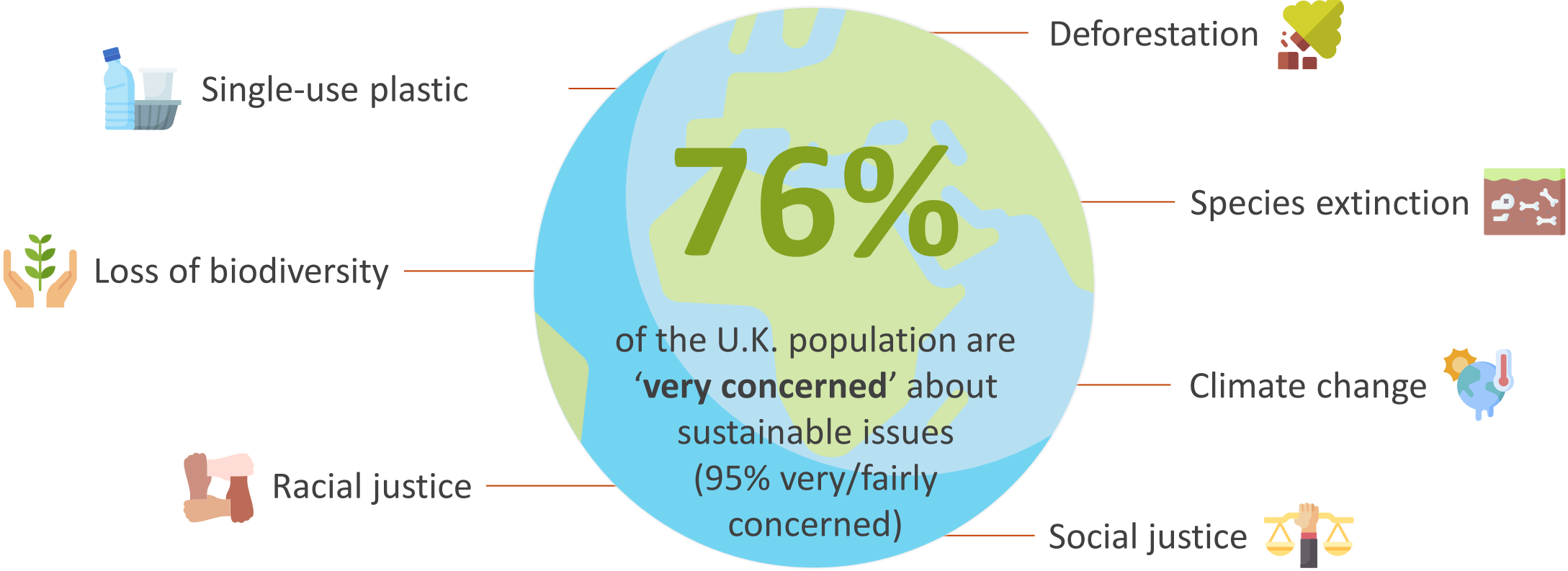
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# “Sustainability” has a broad definition

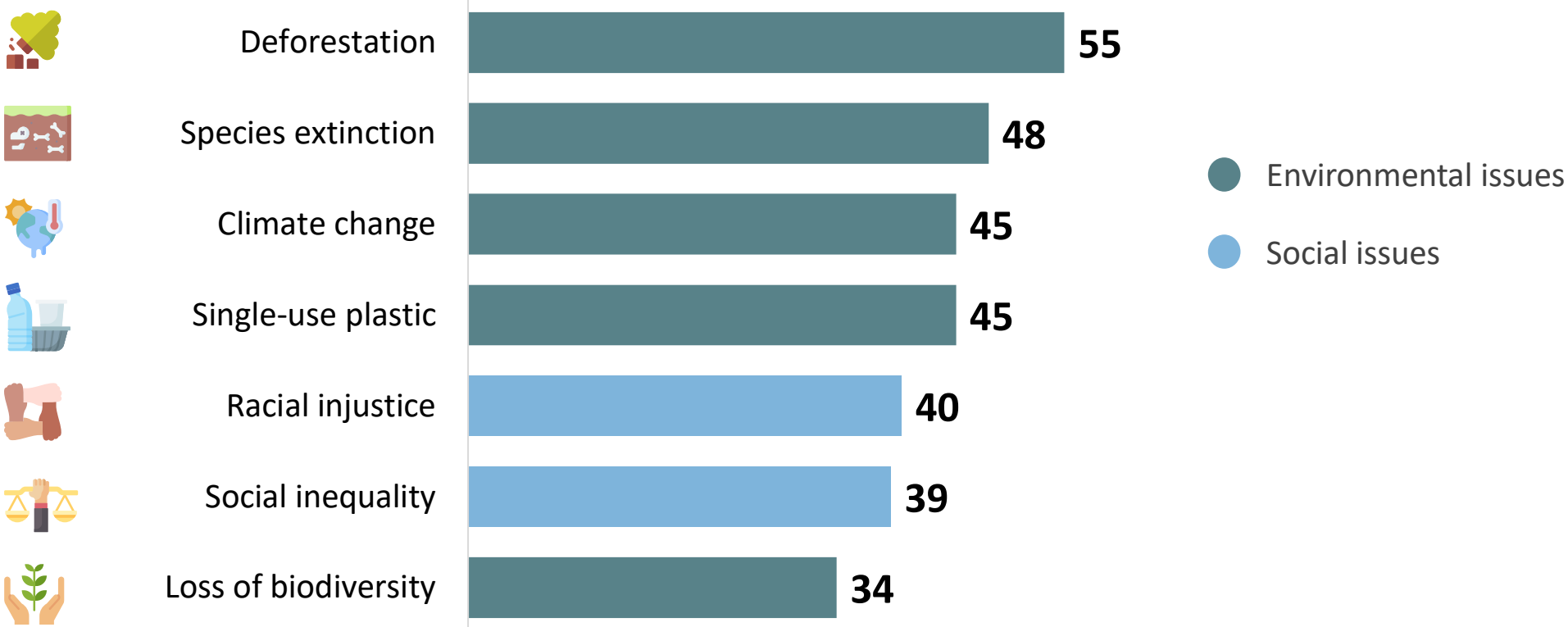


# How much does the U.K. public care about sustainability?



# People are generally more concerned about environmental issues than social issues

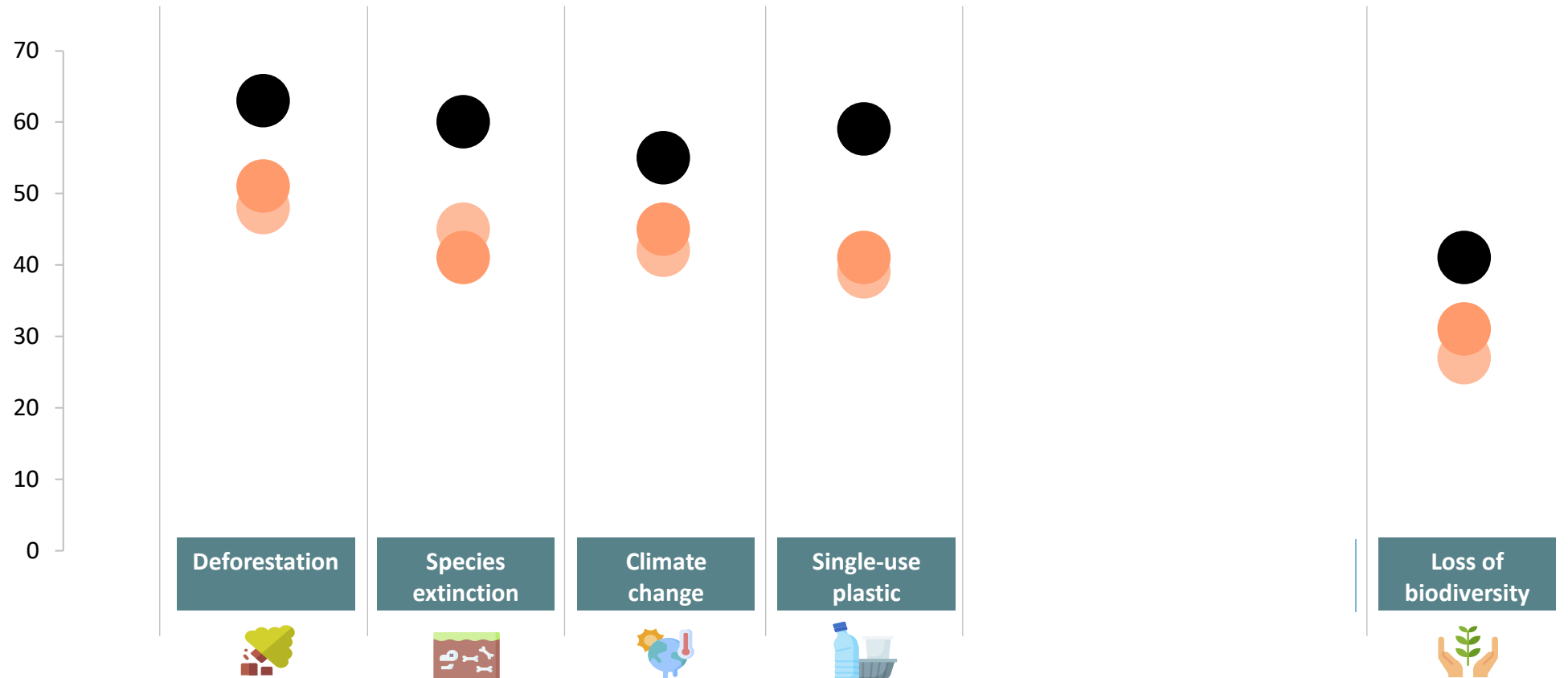
How concerned are you about the following? (% Very concerned)



# Myth-busting: Environmentalism is not just “a young-person’s thing”

How concerned are you about the following? (% Very concerned – by age)

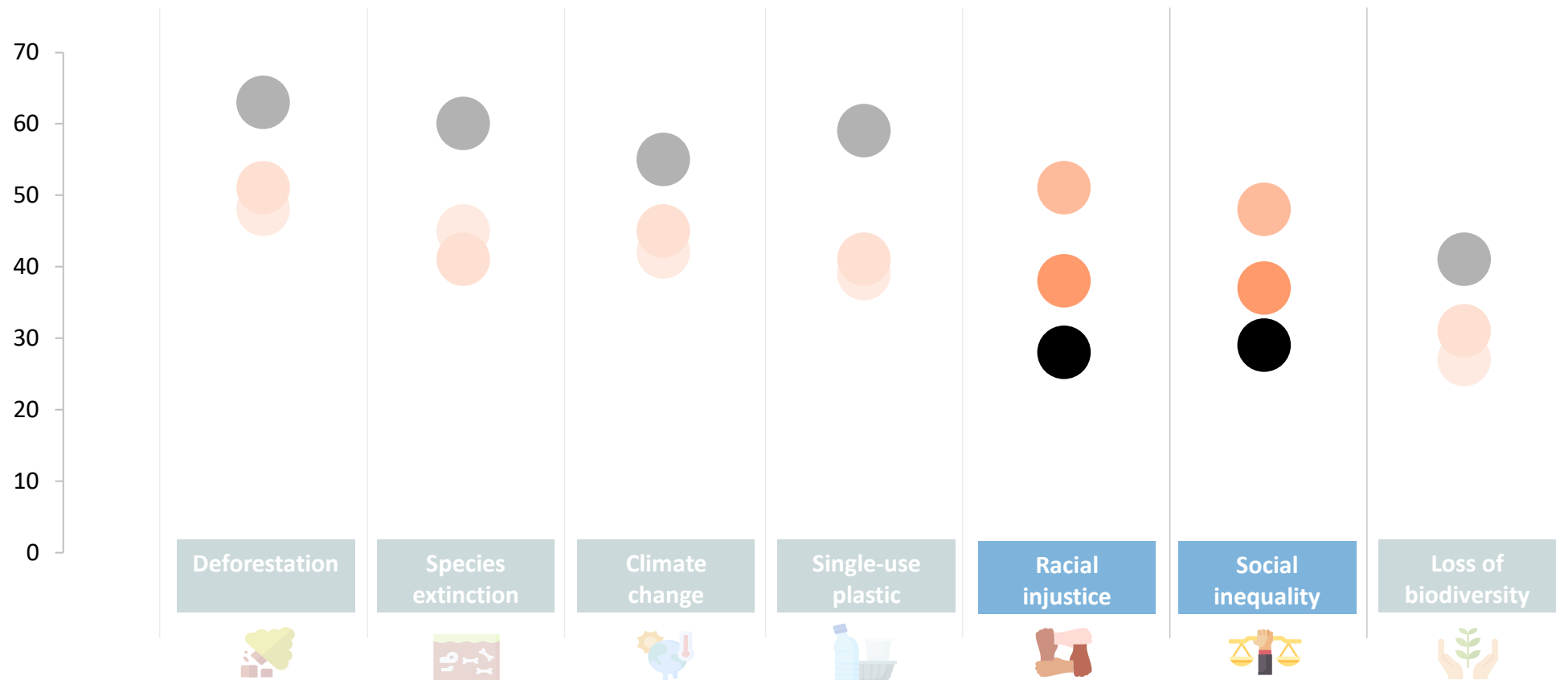
● 55+ ● 35-54 ● 16-34



# Myth-busting: Environmentalism is not just “a young-person’s thing” but **social issues may be**


How concerned are you about the following? (% Very concerned – by age)


● 55+ ● 35-54 ● 16-34

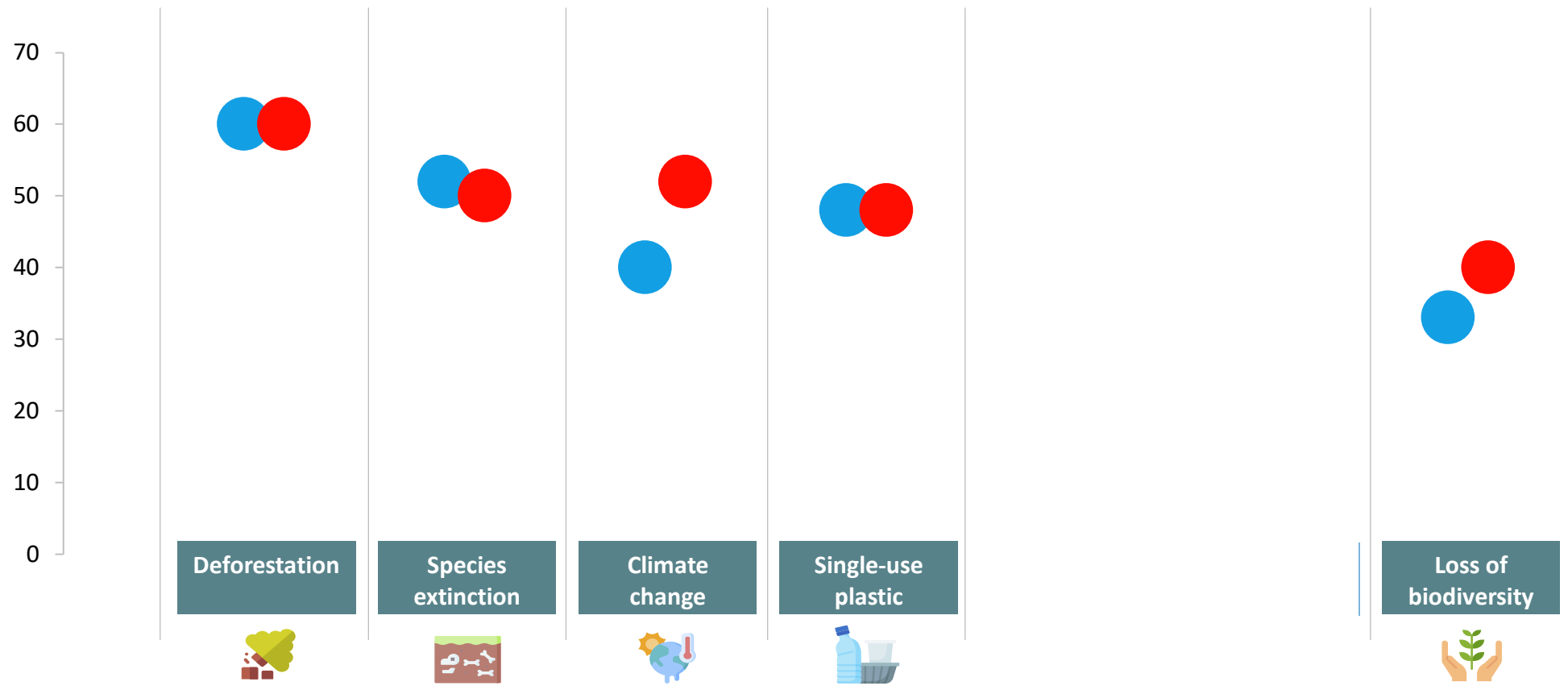


# Myth-busting: Environmentalism is non-partisan

How concerned are you about the following? (% Very concerned – by party preference)


 Labour

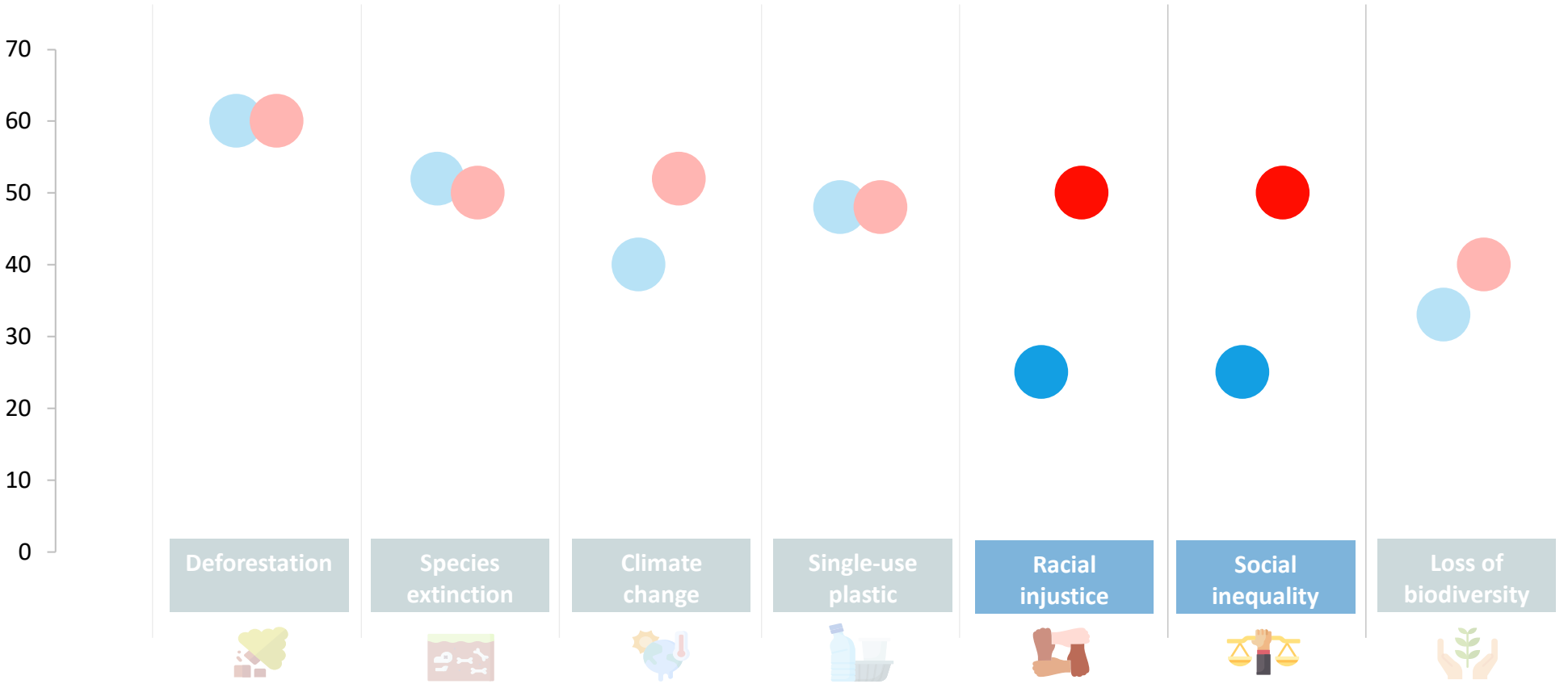
 Conservative



# Myth-busting: Environmentalism is non-partisan but social issues may be

How concerned are you about the following? (% Very concerned – by party preference)

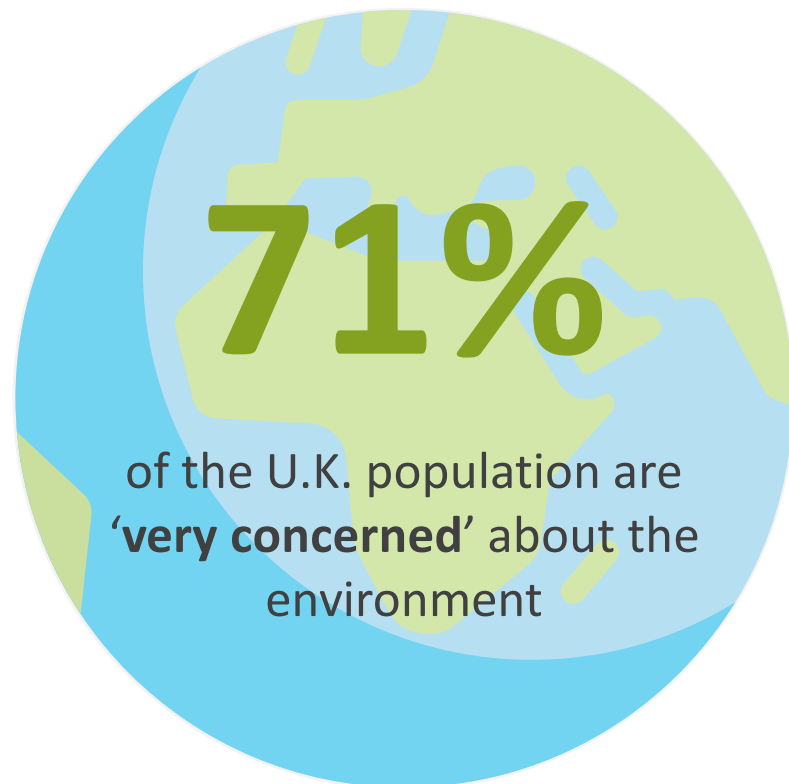
 Labour  Conservative



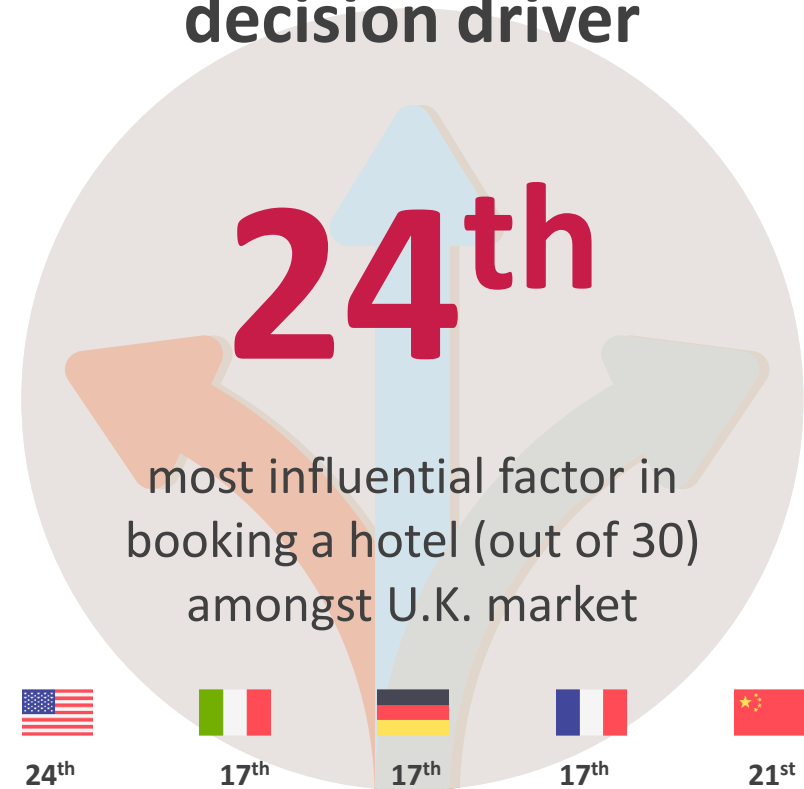


# But how much does sustainability drive decisions?

It's a concern...



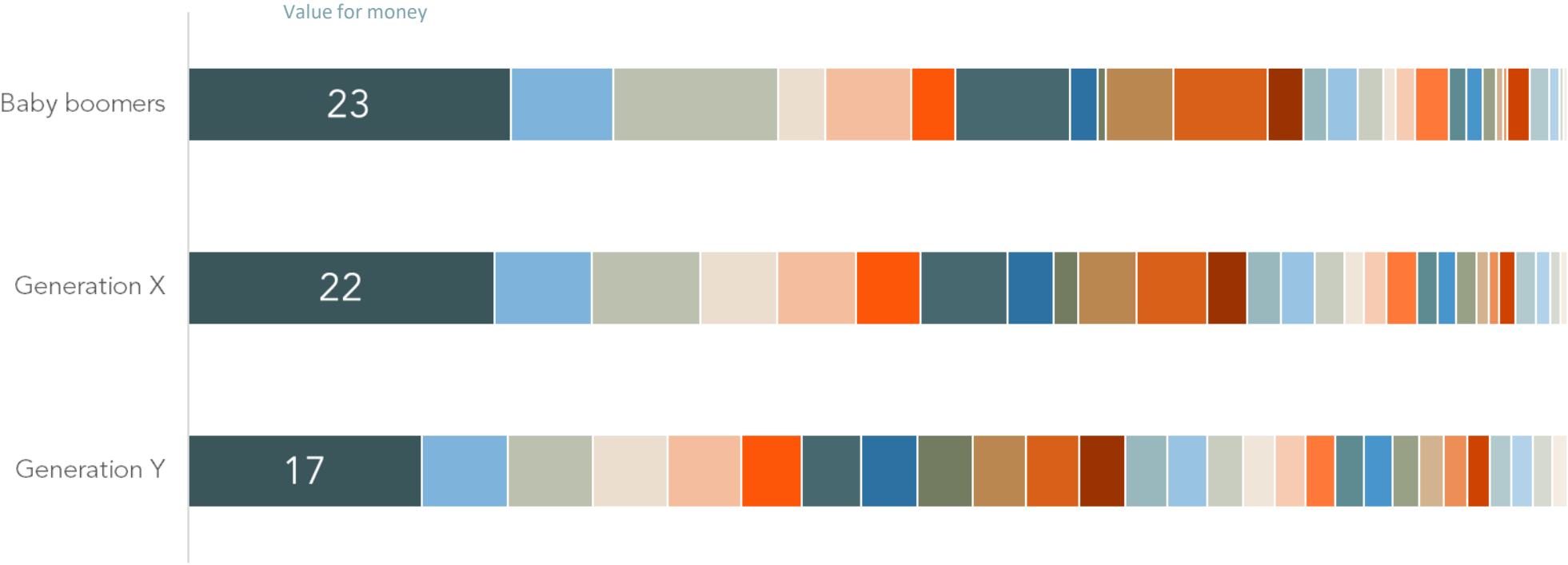
...but, prima facie, not a  
decision driver





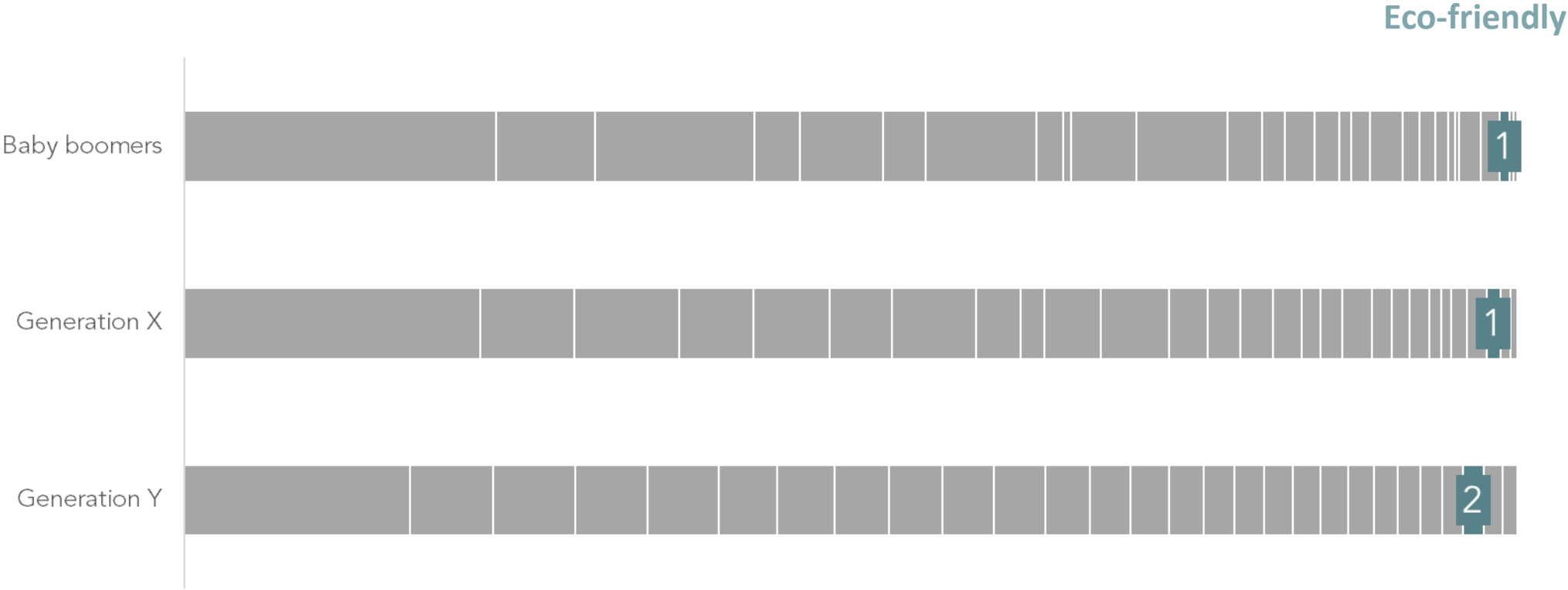
# If we look at the key drivers of decision making....

## Value for Money influences decisions most





# “Eco-friendly” *appears* almost entirely unimportant



Source: © BVA BDRC HGS 2021 – Great Britain  
A trade-off assessment of factors influencing **leisure** hotel selection decisions. Percentages show the impact that the attribute has on the “average person’s” selection decision

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

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



Sustainable hotel

**91%**



Standard hotel

**9%**

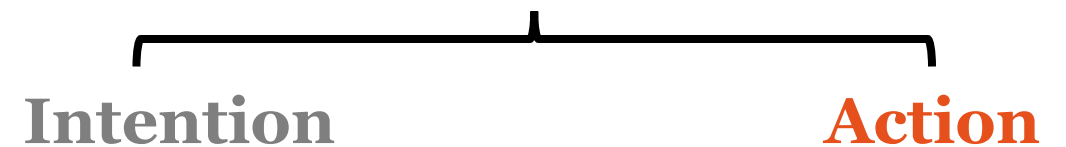


# What we **intend** isn't always what we **do**

While most of us have good intentions and recognise the severity of the climate situation – old habits are hard to break, new habits are difficult to build, and we experience cognitive overload with all the demands of everyday life.

**So despite our good intentions, our actions don't always comply.**

This is the Intention to Action gap





# There are overlapping reasons why sustainability doesn't drive decisions

Hotels aren't associated with sustainability

It's too complex to distil to individual decisions

It's the responsibility of corporations and government

I don't want to miss out on experiences

# Let's start with a simple categorisation



The **Advocates** are those who truly believe in your cause, as they've already been convinced



The **Agnostics** are those who nod their heads and agree with you, yet they aren't acting on it



The **Antagonists** are those who actively disagree or don't care at all.

# Speaking to Sustainability Advocates



The **Advocates** are those who truly believe in your cause, as they've already been convinced

**Advocates** will generally ...

- Make sustainability a primary purchase or booking criteria
- Read the labels or check on your sustainability credentials
- Favour niche brands/properties that emphasise environmental credentials or have some sort of accreditation



# Considering Sustainability Antagonists

**Antagonists** will generally ...

- Challenge any and all efforts, wasting your time
- Continue to book and favour the brands and products they've always chosen
- Stick to their stance with almost no opportunity for change



The **Antagonists** are those who actively disagree or don't care at all.

# Agnostics are often a far larger group...

**Agnostics** will generally...

- Make Sustainability a secondary criteria
  - “a tie breaker”
- Default to the familiar or habitual
- Be unwilling to sacrifice core features/benefits and/or trusted brands

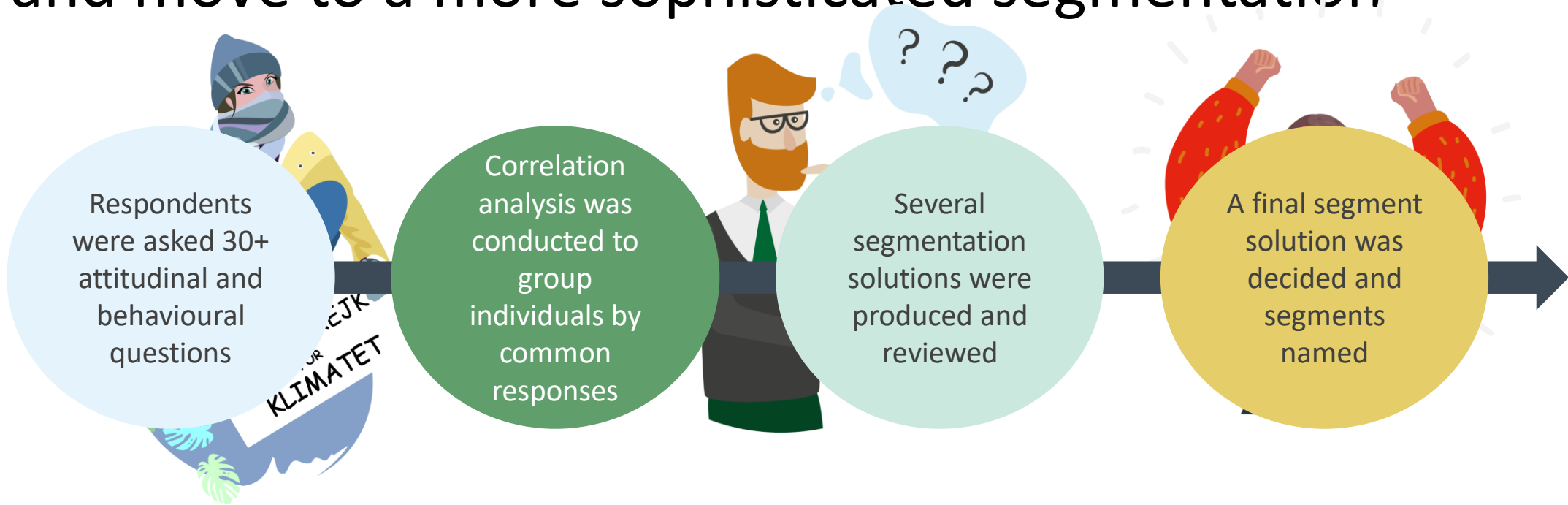


# Agnostics are often a far larger group...

- They would like to “do the right thing,” but are not typically investing time or making sacrifices.
- These people need to be **helped**, rather than persuaded or convinced.
- We often make the mistake of:
  - Trying to further **educate them**, when they already agree.
  - Wanting them to **care more**, mistakenly assuming that this will lead to action.



# Let's start with a simple categorisation and move to a more sophisticated segmentation



The **Advocates** are those who truly believe in your cause, as they've already been convinced

The **Agnostics** are those who nod their heads and agree with you, yet they aren't acting on it

The **Antagonists** are those who actively disagree or don't care at all.

# Defining and sizing our segments

## Eco Evangelists



*"We need to save the world and I'm doing whatever it takes to play my part"*

16 %

### ADVOCATES

Older than average.  
Less likely to have children in household.  
More likely to be female.  
More affluent

## Good Intentions



*"I try to be green but it's difficult and pretty overwhelming"*

27 %

Marginally older than average.  
Less likely to have children in household.  
More likely to be female.  
Less affluent

## Accidentally Green



*"I look after the things I own and turn off the lights. If that makes me green, then so be it"*

19 %

### AGNOSTICS

Older than average.  
More likely to be male.  
Less affluent

## Affluent Hedonists



*"Life is about enjoyment and experiences – I'm not cutting back on that for anyone"*

27 %

Much younger than average.  
Much more affluent (almost double).  
Much more likely to be male (more than two thirds)

## Climate Sceptics



*"Climate change is just another way of controlling what we do."*

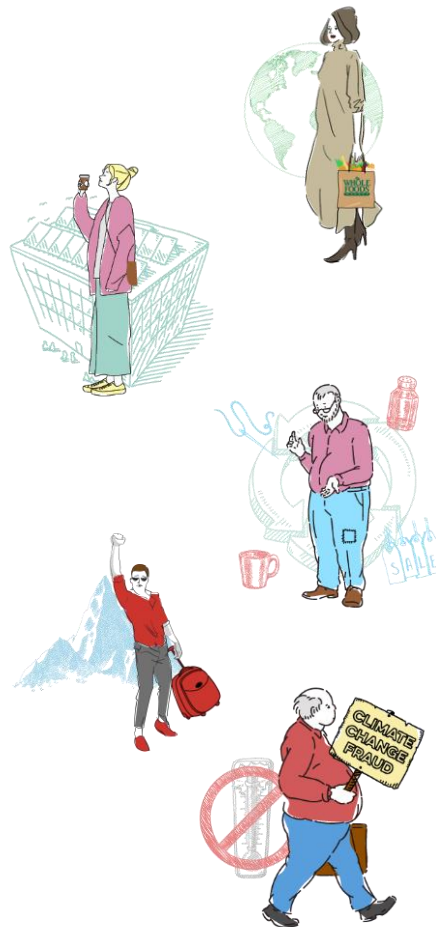
11 %

### ANTAGONISTS

Big older than average.  
Least affluent.

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

Top three above average



16% **Eco-evangelists**

- Spend more on sustainable produce
- Go vegan for a day
- Have low energy hours

27% **Good intentions**

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

19% **Accidentally Green**

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

27% **Affluent Hedonists**

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

11% **Climate Sceptics**

- None of the above

# How to talk to the segments



16% **Eco-evangelists**

Tell me exactly what you are doing to help the environment – and no greenwashing!

27% **Good intentions**

Give me opportunities to be sustainable so I can feel better about myself

19% **Accidentally Green**

Make me feel like I'm saving money as well as the environment

27% **Affluent Hedonists**

Make sustainability fun and make me look good in the process

11% **Climate Sceptics**

Give me a chance for my opinions to be heard!!!



# Key takeaways

- The intent to action gap is as large for Sustainability as any other topic. In and of itself, it may not be the key driver, but it is often a tie-breaker
- Sustainability means different things to different people – one message does not fit all





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