



VisitEngland™

Sustainability – Consumer Research

Summary of Findings

OBJECTIVES

Research was carried out to explore consumer attitudes towards different types of sustainable behaviour (both in general and specific to tourism), and to understand how these attitudes differed by age and by ArkLeisure Segments.

METHODOLOGY

Interviewing was carried out in February 2010. 2119 English respondents were interviewed using an online methodology, with the sample weighted to be representative of the English population by region and by key demographics.

ARKLEISURE SEGMENTATION

The ArkLeisure segmentation, developed by Arkenford Ltd, divides UK consumers into eight groups based on their core values and definitions of quality. Three of these segments - Cosmopolitans, High Streets and Discoverers – have been identified as the core target groups for VisitEngland. More information about the segmentation can be found at http://www.enjoyengland.com/Images/Market%20Segmentation%202005_tcm21-172137.pdf

SUMMARY OF FINDINGS

Domestic Breaks

Cosmopolitans are the segment most likely to have taken an English holiday or break in the past 12 months – 80% have taken at least one break (vs. a national average of 66%). High Streets' behaviour is in line with the national average, while Discoverers were less likely than others to take an England break – just 56% of them had done this in the previous twelve months.

Sustainable Break Types

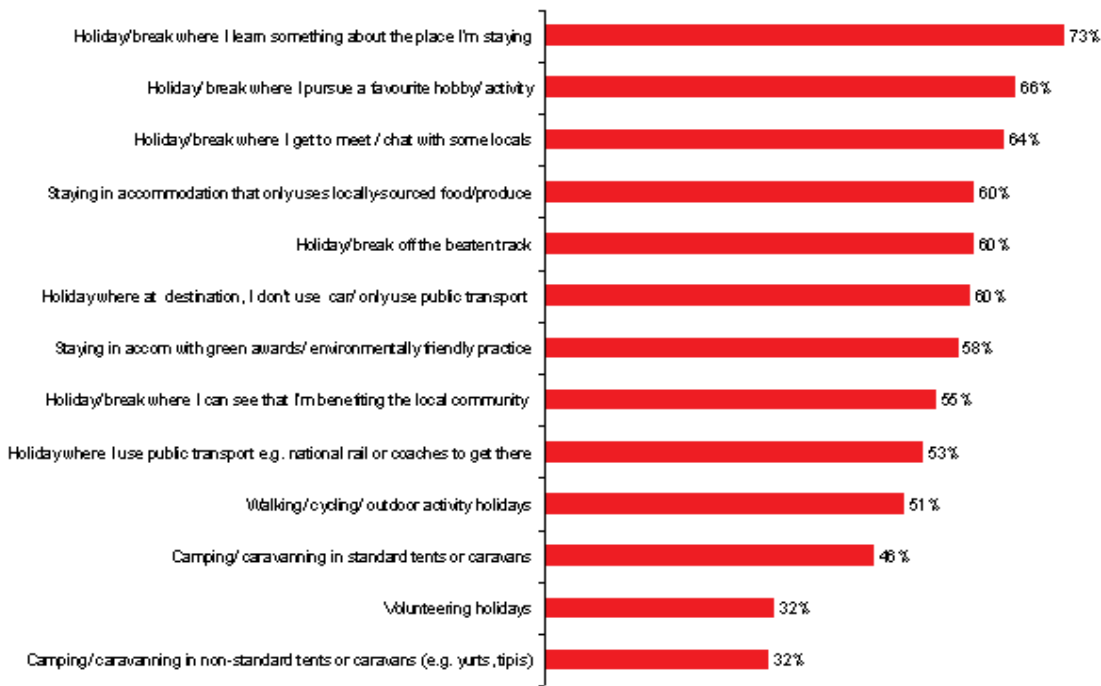
Levels of past participation in overtly sustainable holiday types in England are relatively low (7% ever taken a volunteering holiday, 13% stayed in accommodation with green awards or environmentally friendly practice). Nonetheless, there is a considerable degree of broadly sustainable behaviour on holiday – 49% claim to have learnt something about the place they stayed in, over 40% have used public transport either to get to the destination or once there, and around one in three have taken holidays off the beaten track or taken part in walking/cycling/other outdoor activity holidays.

There is also evidence of interest in a greater degree of participation in sustainable break types in the future. Over half expressed an interest in staying in accommodation with environmentally friendly practice, and a similar number are interested in breaks which benefit the local community.

Interest in sustainable holiday behaviour is greatest among younger age groups, and among Cosmopolitans and Style Hounds, the latter perhaps reflecting increased media “noise” about environmental issues. While Discoverers are much in line with the average in their interest levels, High Streets are more negative, and less keen to engage in behaviours which are not quite yet in the mainstream.



Interest in Different Break Types in England - % Very / Quite Interested



Attitudes to Environmental Issues

Almost three quarters of respondents claimed to “recycle as much as I possibly can” – with levels highest among 55+’s. Those who don’t recycle as extensively cite logistical issues (e.g. space to manage recycling bins at home) rather than a lack of belief in its efficacy as a reason for this.

This is reflected in almost complete agreement (over 80%) that recycling is good for the environment. Protecting the environment is clearly seen as something which the individual should take responsibility for – 67% agree with this, compared to around half who say that responsibility lies primarily with the government / with businesses. However, the majority are not prepared to pay a premium to benefit the environment – just 38% agree that they always try to do the right thing for the environment, even if it costs more.

Interestingly, Cosmopolitans are most likely to see environmental protection as the role of the individual, whilst High Streets strongly under-index on this measure – and Discoverers’ responses are around the average.

Purchase of Sustainable Food Products

Over two thirds claim to at least occasionally buy ethically sourced products (such as free range eggs), locally sourced products and produce from independent retailers. In comparison, only 45% are at least occasional purchasers of organic food (and only 12% do this frequently).

Older age groups (55+) are more inclined than others to purchase all types of “sustainable” food, as are Cosmopolitans, with High Streets relatively less likely to buy these food types.

Attitudes to Sustainable Tourism

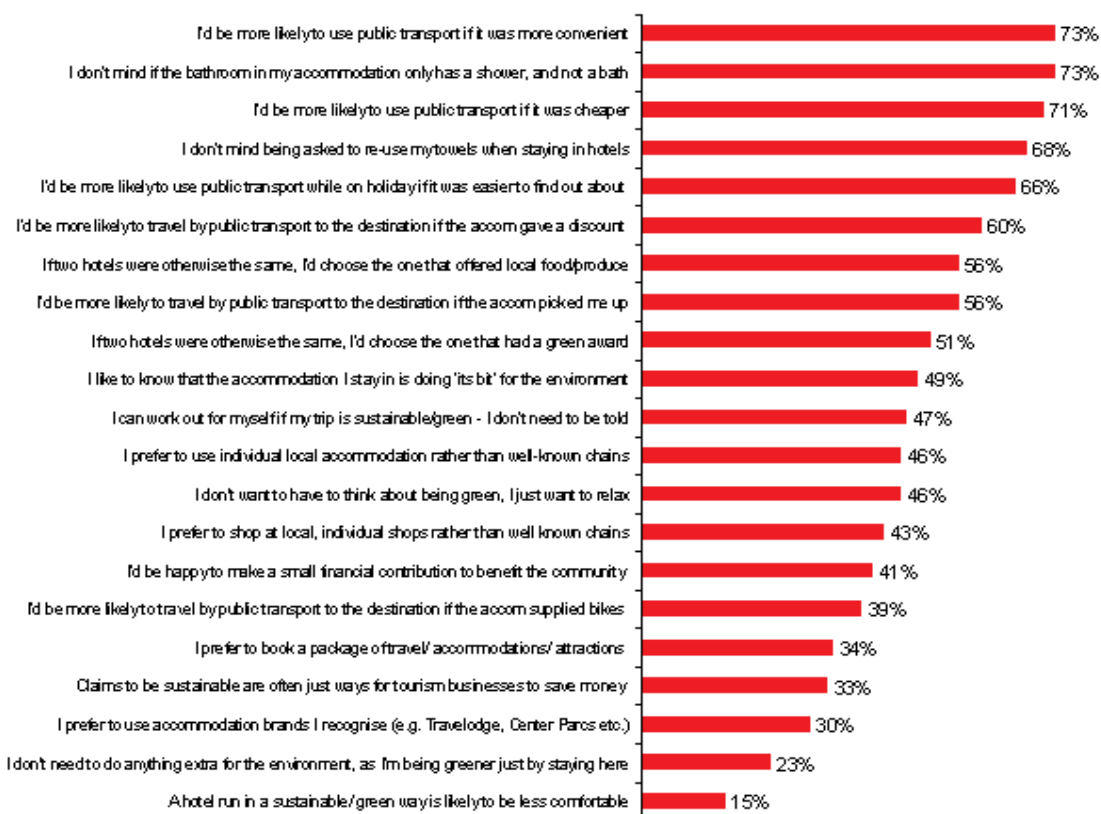
The majority of consumers are happy to accept “functional” sustainable elements such as reusing towels, and accepting a room with a shower rather than a bath. Over half would choose accommodation supplying local food, or accommodation with a green award, if two hotels were otherwise the same, and a similar proportion say that they like to know that accommodation is doing its “bit” for the environment. There is little disagreement with these statements, but the relatively high proportion of neutrals – people neither agreeing nor disagreeing - suggests a lack of knowledge / experience among many consumers. Positively, only 15% believe that a hotel run in a sustainable/green way is likely to be less comfortable than one without any green credentials.



A majority claim that they would be more likely to use public transport to travel to their destination and / or travel around when on holiday if sufficient incentives were available (reduced cost / greater convenience / better information) – though travelling by bicycle in destination would remain a minority pursuit, even if bikes were available.

While people are happy to engage in sustainable behaviours on holiday, they don't necessarily want to "work" at being green – just under half agree that "I don't want to have to think about being green (on holiday in England), I just want to relax." Clearly, tourism businesses need to make it easy for visitors to behave in a sustainable way without this in any way detracting from the holiday experience.

Attitudes to Sustainable Tourism(English Holiday) - % Agree Strongly / Agree Slightly



IN CONCLUSION

Basic sustainable behaviours such as recycling and energy saving are reasonably widespread among English consumers, and so it is not surprising that many people are positive towards elements of sustainable tourism.

In line with previous research, consumers feel that being "green" on holiday shouldn't be an effort. Nonetheless, a significant proportion are positive about the idea of accommodation providers having green awards and/or being seen to do their "bit" for the environment, suggesting that there can be a real benefit for tourism businesses who are able to demonstrate sustainable practice, particularly if this can be shown to have advantages for the visitor.

For more information about domestic tourism statistics and research, visit <http://www.enjoyengland.com/corporate/corporate-information/VisitEngland-Research-Insights.aspx>

