

Demand Switching

Profitable pursuits that make the world a better place

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Demand switching: The Role of Marketing in the Great Transition

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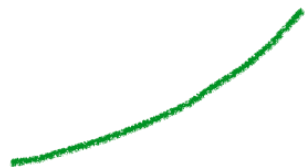
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The image is a composite. The top half shows a bright, sunny day over a calm body of water, with a dense line of green trees in the background. The sky is blue with some white clouds. The bottom half of the image is an underwater view, showing a clear blue water column with many small, dark particles and bubbles suspended throughout. The transition between the two scenes is a wavy, horizontal line that suggests a surface or a boundary.

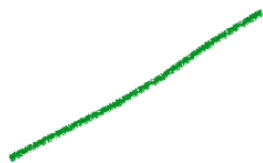
The post carbon world is being born all around us...

...just not everyone sees it yet.

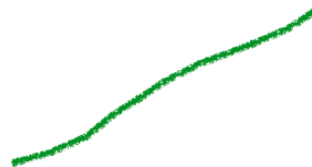
The Great Transition is happening now



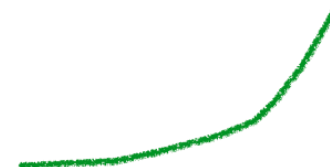
EcoTourism



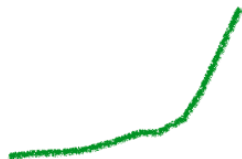
Second Hand Clothes



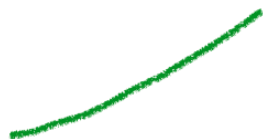
ESG Investments



ESG Regulations



EVs



Plant Protein



VC CleanTech



Carbon Taxes

UK Net Zero Economy Growth 2023

+9%


90x

Source: Energy and Climate Intelligence Unit (ECIU) and the Confederation of British Industry (CBI).



Global spending on physical assets in the transition amount to **\$275 trillion** between 2021 and 2050, or about 7.5 percent of GDP annually on average. The biggest increase as a share of GDP will be between 2026 and 2030.”

McKinsey
Sustainability



The backlash didn't kill green investing.
In fact, it's booming.

69%

of Republican investors
believe companies' financial
performance improves if
they avoid environmental
risks.



“

Green technologies-going green - is bigger than the internet.

It could be the biggest economic opportunity of the 21st century.”

John Doerr, VC Kleiner Perkins



Green jobs represent over 30% of UK job postings

Necrocapitalism is dying

More than **26%**

of companies in the S&P Index generated unpriced environmental costs larger than their net income.



The real cost of a tonne of carbon emissions

\$1,065

What Effects will 'Effectiveness' accept?

IPA Grand Prix Winner 2022...

Allowing for the true cost of carbon emissions. ...

A sales increase of £261m becomes a cost of -£38m



So what might we do about it?



DEMAND GENERATION



DEMAND GENERATION



DEMAND SWITCHING

Demand Switching

/di'ma:nd swɪtʃɪŋ/

Switching purchasing power into cleaner,
greener brands, products and business
models

- or nothing 'new' at all

Demand Switching

New business models and value propositions



Substitute

Swap a polluting product for a cleaner one



Shrink

Reduce the volume or number of products



Save

Repair, reuse, recover



Stick

Produce long lasting, high quality products



Share

Borrow rather than buy



Socialise

Find joy in other ways, learn, connect

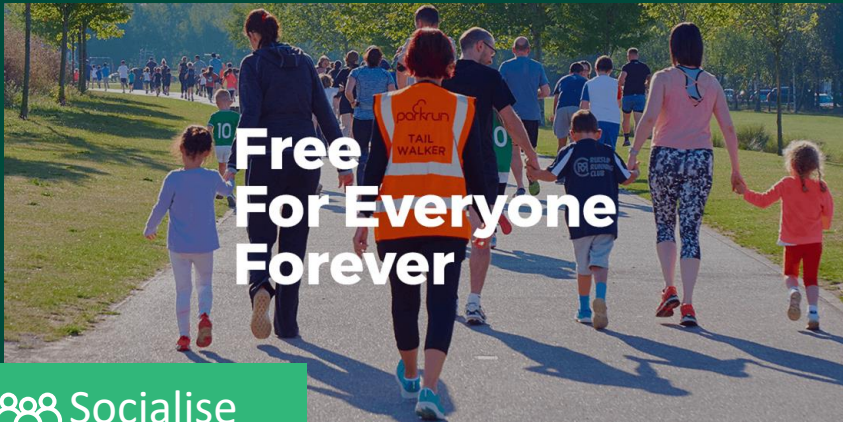
Share



Substitute



Free
For Everyone
Forever



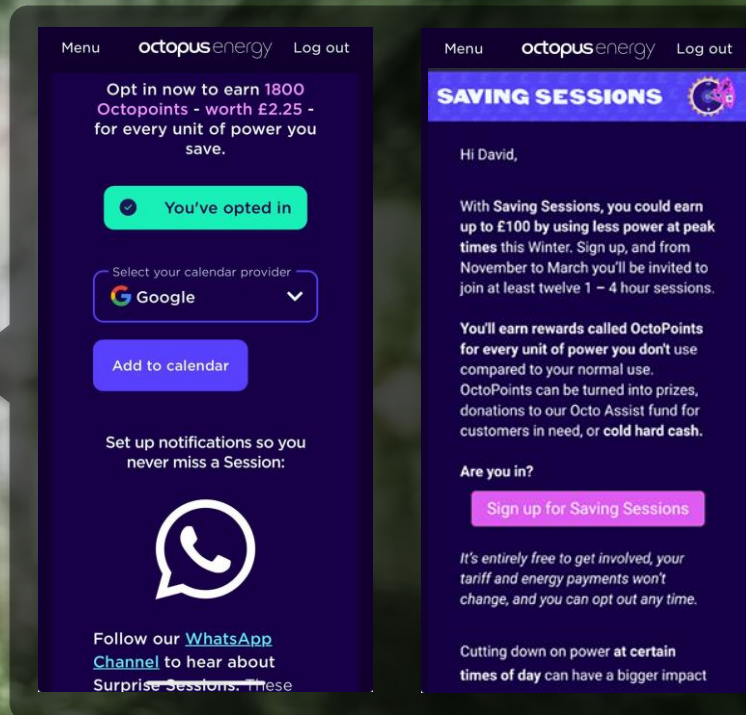
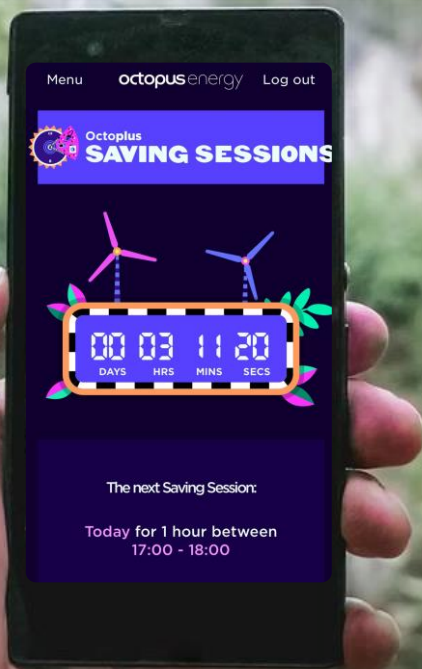
Socialise



Save

→|← Shrink

Reducing energy consumption using data, tech, behavioural economics and incentivesx



- Easy
- Attractive
- Social
- Timely
- Gamification
- Predictive Analytics
- IoT Integration



Recapturing the heat from data centres and reusing it for social good

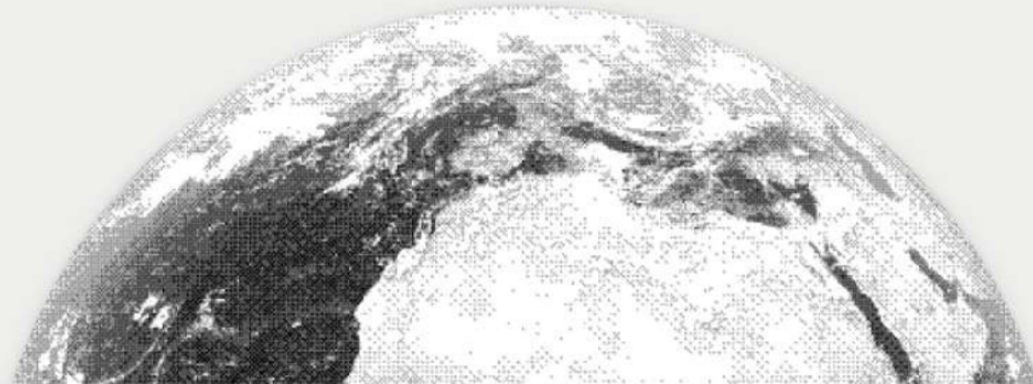
Innovative heat tech could save England's swimming pools from closure



I came by train

supported by  trainline

An opportunity to accelerate our journey to Net-Zero



I came by train

♥ trainline

Transport is the highest emitting sector in the UK, accounting for more than a quarter (27%) of our greenhouse gas emissions.

Cars account for 68% of these emissions.

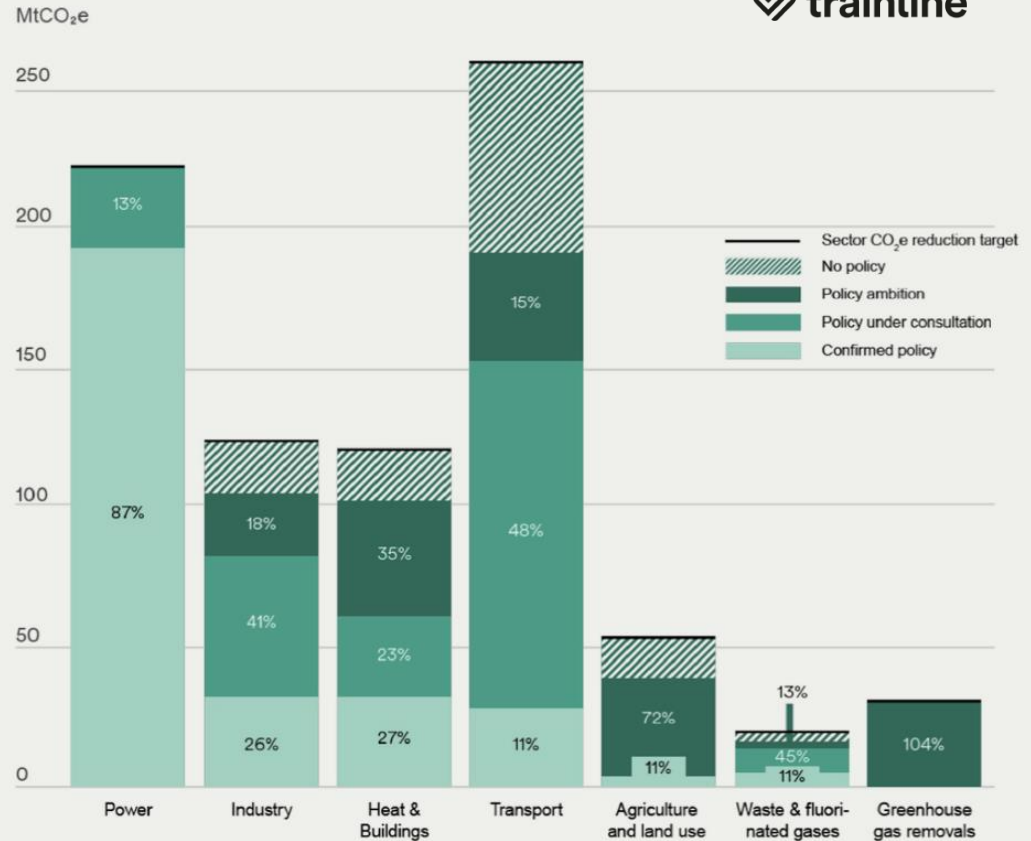
The answer, of course, is not to stop travelling.
So we must change the way we travel.

I came by train



A significant proportion of required emissions cuts in the transport sector are not targeted by government policy.

We need to **enable and reinforce positive behavioural change**, moving people away from cars and towards more sustainable travel choices.



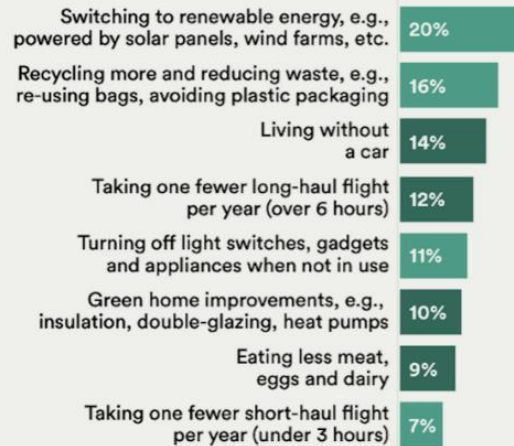
This is despite the fact that the average UK train journey emits 70% less CO2 than travelling by car and 86% less CO2 than flying.

Therefore, **switching just one journey to train travel per year** can have a huge impact on the planet, especially when compared with over actions.

Perceptions of environmental friendliness of actions

What people think is important:

Percent who pick each issue as the biggest impact action they can take to become more environmentally friendly, 2022¹⁵



Actual impact:

Rank of these actions by biggest reduction in carbon footprint¹⁶



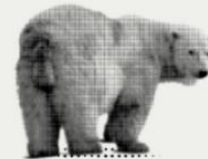
66% of the UK population picked non-transport options as the no.1 biggest impact action they could take, showing a perception gap compared with the scientific research.

By switching **one 200-mile journey** a year from car to train, we can reduce the UK's co2e emissions by **8 million metric tons** by 2035.



I came by train

A campaigning
movement to accelerate
modal shift through
behaviour change



Where it all started

I Came By Train started life as an unbranded behaviour change campaign from Trainline.

11million

People reach.

14%

Increase in behaviour change intent.

Won 10

Industry awards.

40%

said it inspired them to take the train more often.

Received recognition from the

UK Rail Minister

I came by train

 **trainline**



The Drum Awards



THE LOVIE AWARDS



CREATIVE MOMENT AWARDS 2021



PURPOSE AWARDS

Recent results

The most recent campaign, piloted in Manchester, was designed to inspire modal shift by positioning everyday people as heroes when they make the decision to travel by train.

64%

train travel Felt more positive about

74%

Regarded train travel as more environmentally-friendly

21%

Have taken the train when they would normally drive

55%

Have reconsidered their travel behaviours

The campaign demonstrated that I Came By Train surpasses **awareness levels** seen for other sustainable travel movements, including 'Flight Free UK', 'No-Fly Movement' and 'SustainableTravel.org'

I came by train

♥ trainline



I came by train



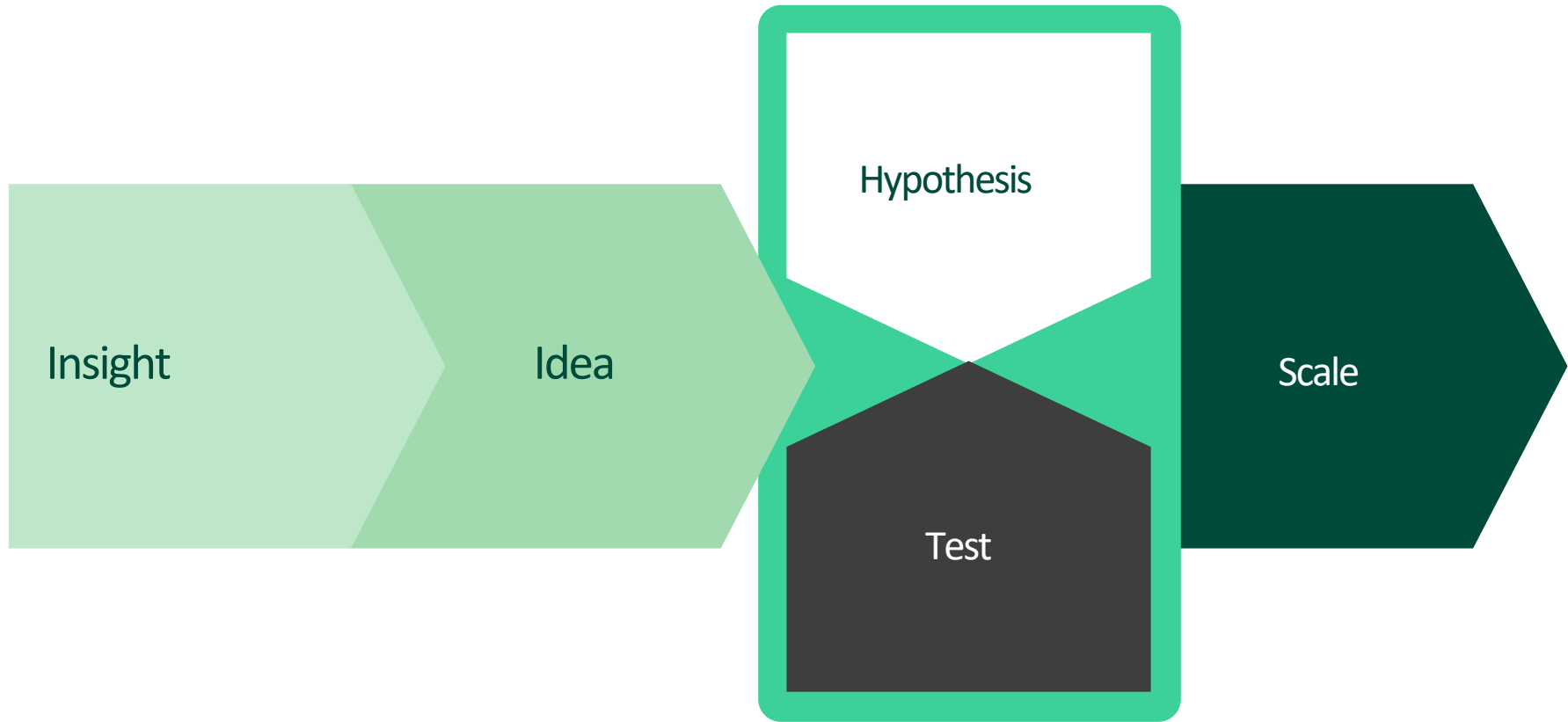
You're *all* climate heroes.

Systems not Silos

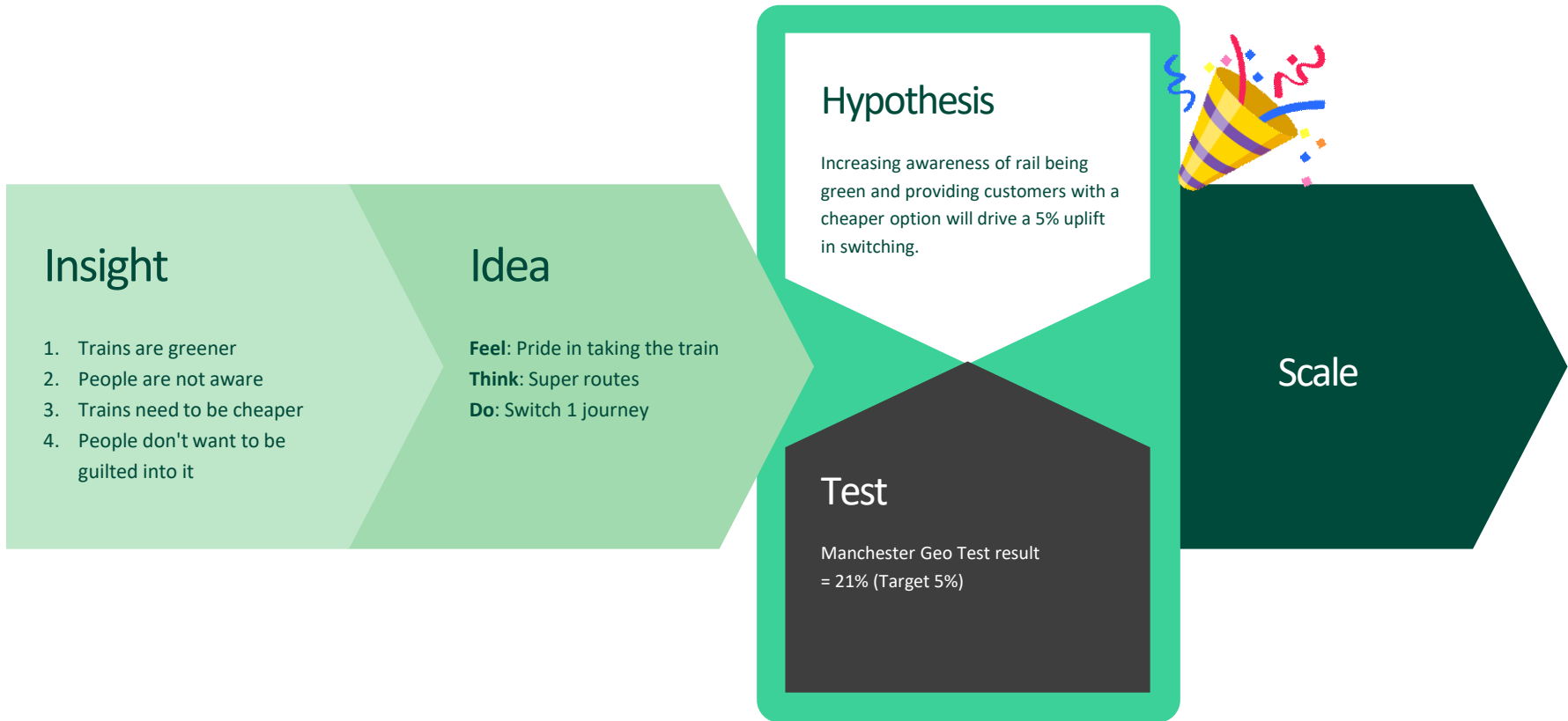
I came by train



This doesn't have to be complicated



In The Lab: Let's break "I Came by Train" down



Yeah but Trains is easy,
what about hard sectors?'

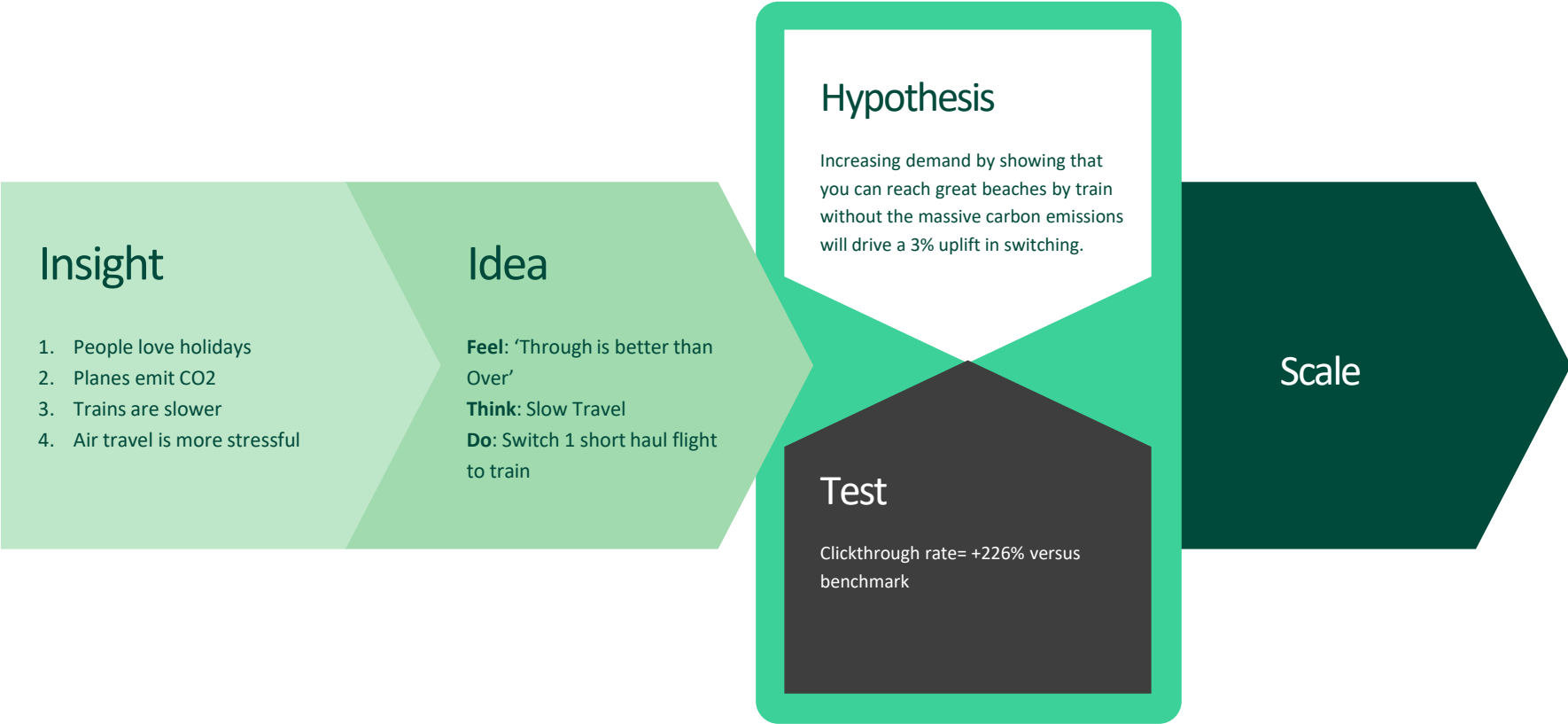
The elephant on the runway

Flight emissions is a hard problem but it's no reason for inaction...

How might we switch demand?



Let's use the In The Lab method again...

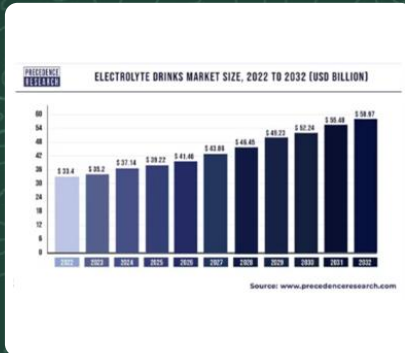


So what I can do?

Practical steps you can take now

1.

Build the business case by forecasting demand



2.

Benchmark competitor Demand Switching maturity



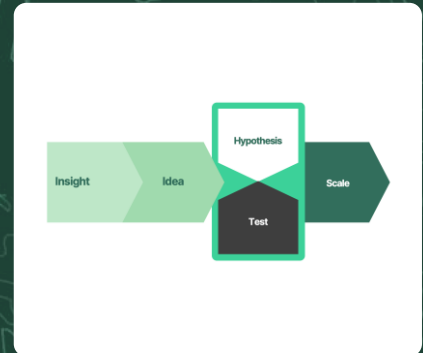
3.

Run a Demand Switching workshop using the 6S's



4.

Use the In The Lab method to run experiments




A final thought...


If only we had a room full of brilliant, creative minds with the power to shape behaviour on a planetary scale.

Wait...

Get in touch!

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