



RED C Consumer Sustainability Tracking

DATE: 15th January 2019

REF: 394519



Report Content

1 Methodology & Sample Profile

2 Summary of Findings

3 Personal Views on the Environment

4 Environmentally Friendly Activities and Behaviours

5 Behaviour Change – What are People Willing to do Differently?

6 Key Implications of the Research



Methodology & Sample Profile

RED Line Methodology & Sample Profile

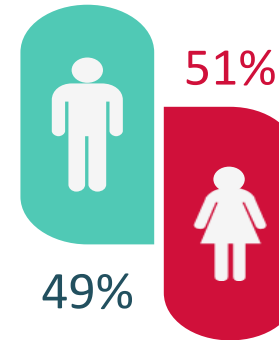
- / Research conducted using our **RED Line** online omnibus.
- / Through our online panel of **over 45,000 members**, the RED Line service allows you to reach a representative sample of the adult population 18+ across Ireland in a cost effective and timely manner.
- / **Quota controls** are used to ensure a nationally representative sample of ROI adults aged 18+, with **interlocking quotas** to provide extra confidence in sample profile
- / Data was weighted across gender, age, region and social class so as to ensure a nationally representative sample based on latest **CSO projections**.
- / **N=1,014 respondents** took part in this survey between **24th and 30th July 2019**.



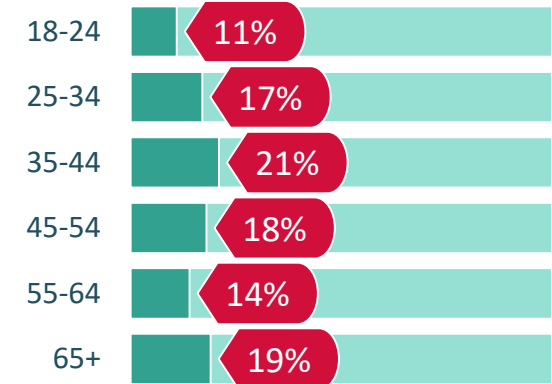
REDLINE

Weighted to be representative of all adults aged 18+ using the latest CSO census data on the following demographics.

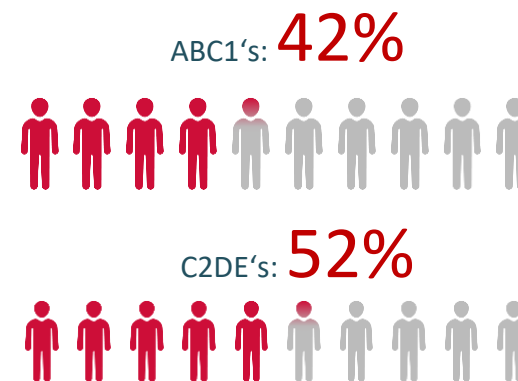
Gender



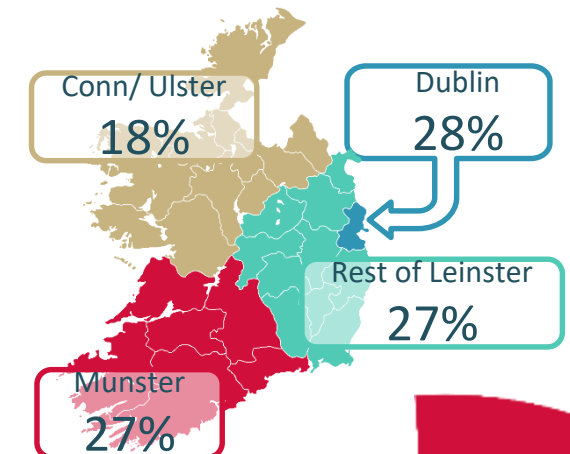
Age



Social Class



Region

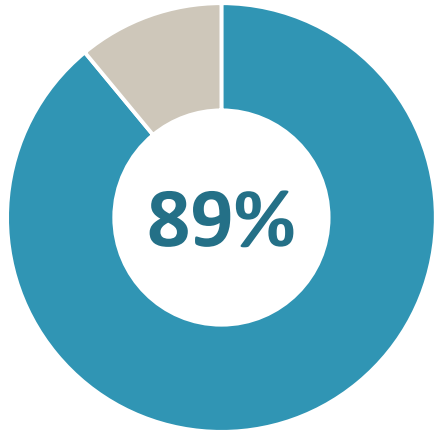




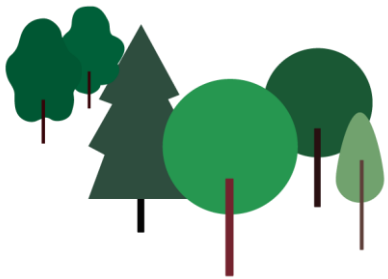
Summary of Findings

Environmental Attitudes and Behaviours in Ireland

Base: all adults aged 18+; n=1,014



% of adults 18+ in ROI who agree **we need to take action now** on the environment to **protect our children**.



1 in 4 are **sceptical as to how real issues** like global warming, pollution, and species extinction really are



This is higher amongst **lower social grades** and in **Conn/Ulster** regions

79% Believe personal actions can improve environment

75% Separate waste for recycling all the time

66% Compost food waste/dispose in brown bin either all the time or regularly

65% Environmental problems directly affect personal life

Environmental sceptics & those in **Conn/Ulster** region are **LEAST** likely to take the following actions:



- × Stop eating produce out of season
- × Stop eating red meat
- × Stop driving car to work/school
- × Stop purchasing Fast fashion clothing

MOST LIKELY to be interested in paying more for **environmentally friendly products and brands**



Females
aged 18-34 years

LEAST interested Males aged 35+

KEY RECOMMENDATION

There is potential for brands to cater to consumers wanting to live more sustainably but lack capability to do so. **Brands have power to subtly disrupt and shift attitudes** and behaviours that are not environmentally friendly **through strategic messaging**.

REDC



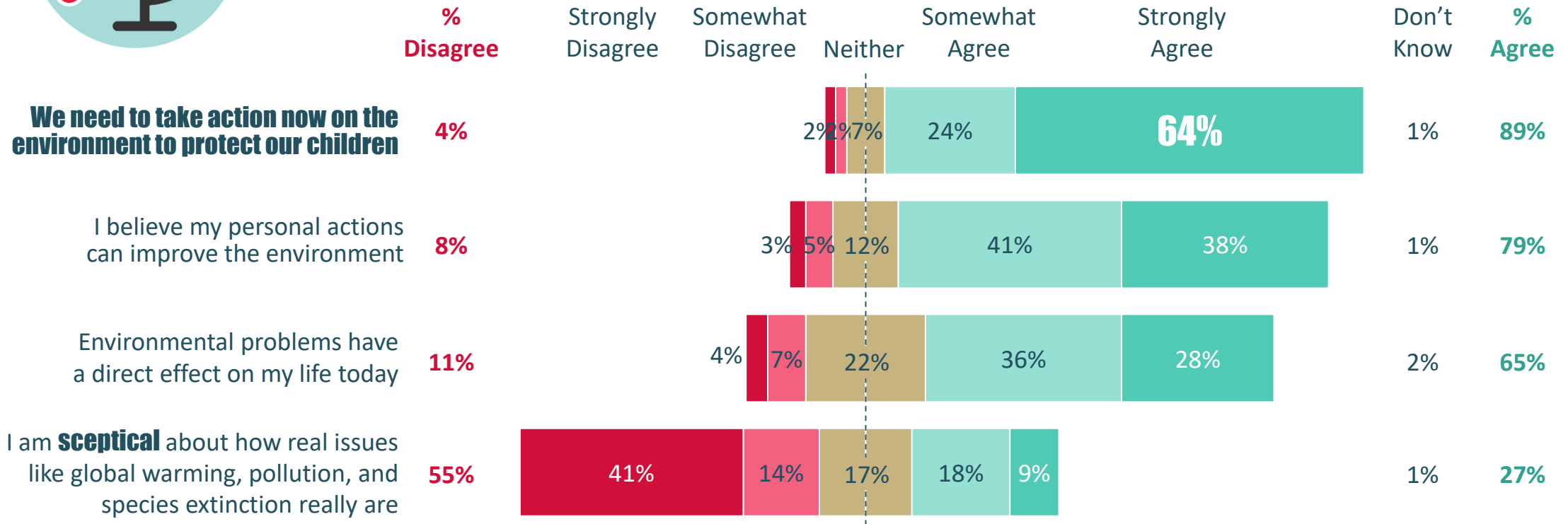
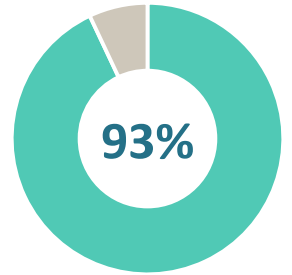
Personal Views on the Environment

Personal Views on the Environment

Base: all adults aged 18+; n=1,014



% of Adults Aged 18+ who express ANY positive views on the environment



An overwhelming majority of Irish adults aged 18+ are in agreement that we need to take action now on the environment to protect our children. However, there is somewhat less agreement that personal actions can improve it or that environmental problems have a direct effect on people's day-to-day life. Just over one quarter are sceptical of how real environmental issues are.

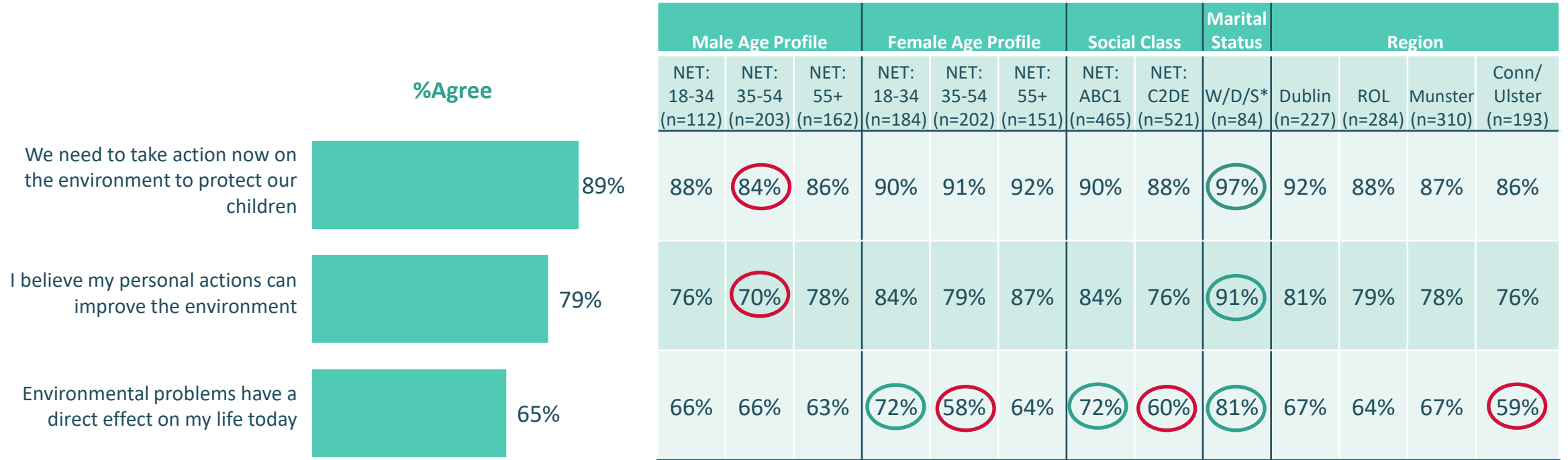


(Q.1)

Personal Views on the Environment x Demographics

○ Significantly higher/lower than national average

Base: all adults aged 18+; n=1,014



W/D/S* - Widowed/ divorced/ separated

Male Gen Xers (35-54 yr olds) are cynical that we need to take action now and also in their belief that personal actions can improve the environment, with similar pattern for female Gen Xers in their views on the environment having a direct effect on their life. Higher social grades think environmental problems affect their lives, and widowed/divorced/separated are agree on all 3 issues.



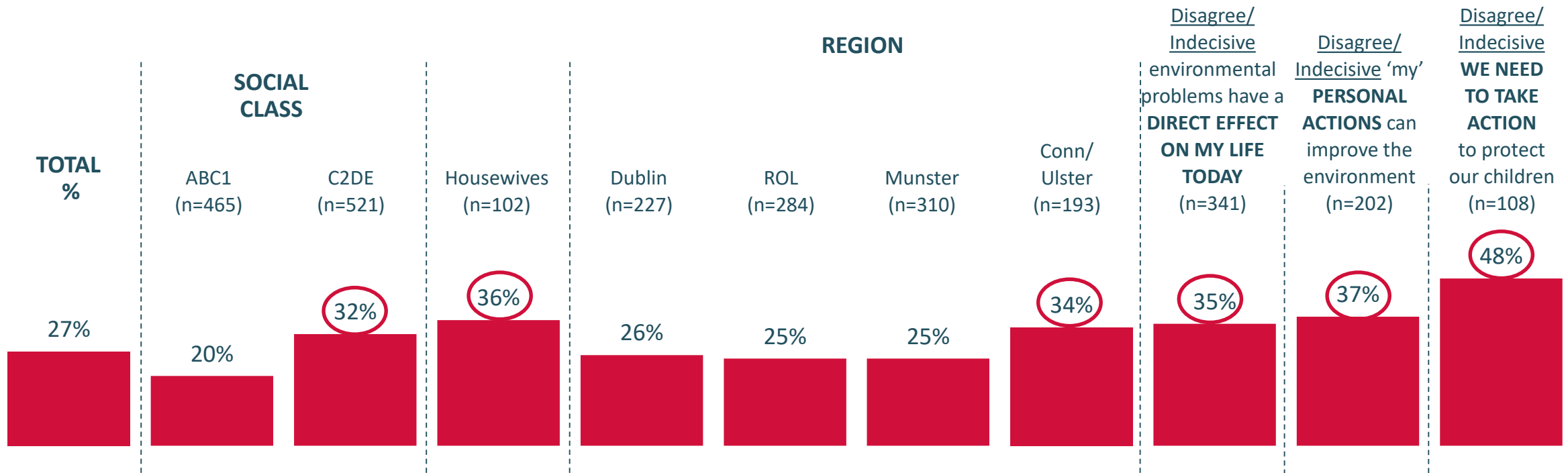
(Q.1)

What groups are most sceptical about the Environment

Base: all adults aged 18+; n=1,014

○ Significantly higher/lower than national average

% AGREE - I am sceptical about how real issues like global warming, pollution, and species extinction really are



Scepticism on the legitimacy of environmental issues is significantly higher amongst those from lower social grades, housewives, and those in Conn/Ulster. It is also higher amongst those who do not agree that environmental issues impact their day-to-day lives, we need to take action to protect our children and those who disagree that one's personal actions make a difference.



(Q.1)

Implications Of Personal Views On The Environment

1

The debate on climate change and the impact this is having on the environment appears to have intensified over the past 12 months. As a result, it's hardly all that surprising to see that most adults aged 18+ in Ireland believe that some action is needed to address these issues in order to protect the environment for future generations.

2

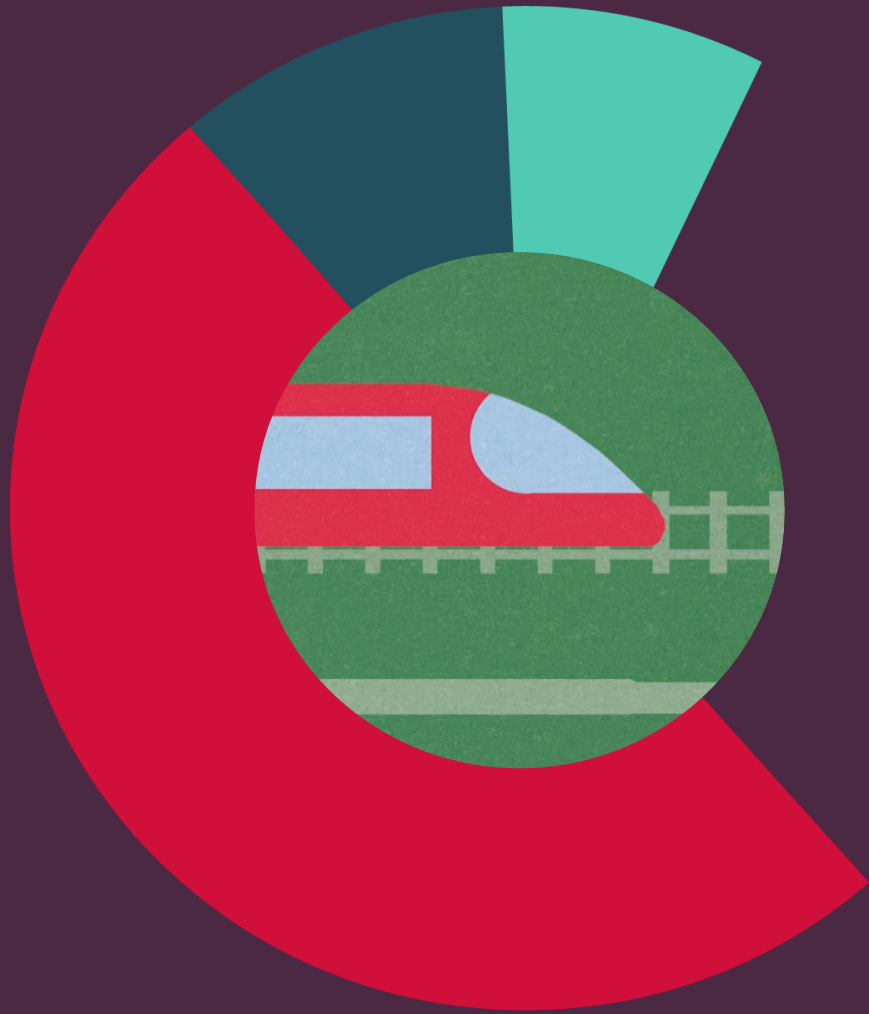
While most people believe that individual actions can make a difference, we know people can be resistant to change, especially when it comes to well established behaviours. The most effective interventions quite often involve small changes to behaviour that require both minimal effort and cost, and yield some benefits – effectively “nudging” consumers in the right direction.

3

For some, the urgency of the need for change is challenged by a perceived lack of impact environmental issues have had on day-to-day lives. This is more notable amongst middle aged females and lower social grades, who are likely to be faced with what can be seen to be more immediate pressing issues in the areas of everyday life, like paying bills, raising a family, finding/keeping a job.

4

Of concern, however, is that there is a notably sizable proportion (just over one-in-four) of the population that express some scepticism about the legitimacy of major environmental issues – this is especially more prevalent amongst lower income groups and those in more rural parts of the country. This may, in part, be due to not everyone seeing these issues having a direct impact on their daily lives.



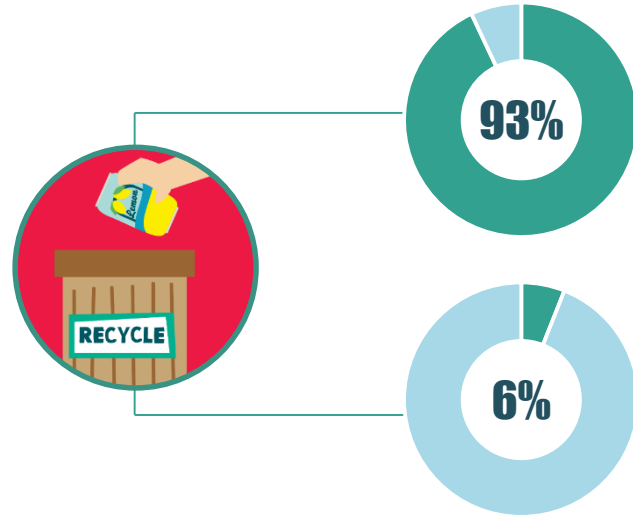
Environmentally Friendly Activities and Behaviours

Consumers & Sustainability – WASTE

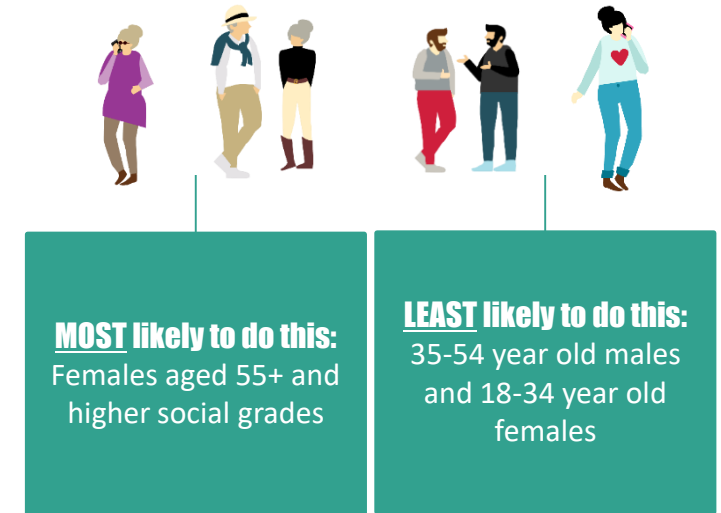
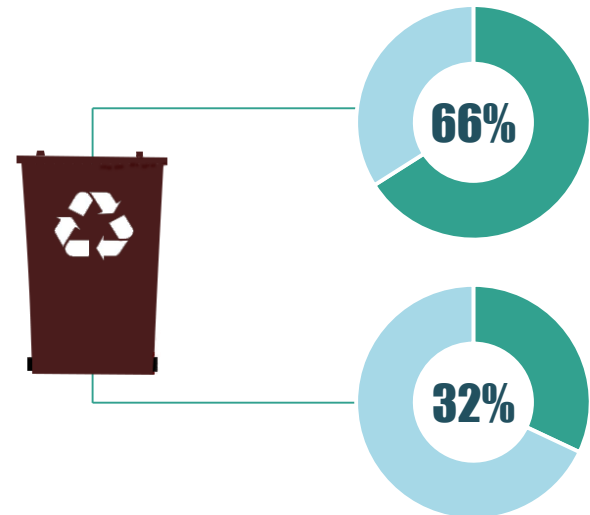
Base: all adults aged 18+; n=1,014

How frequently do you conduct the following behaviours?

Separate waste for recycling



Compost or dispose of food waste in brown bin



Consumers & Sustainability – ENERGY

Base: all adults aged 18+; n=1,014

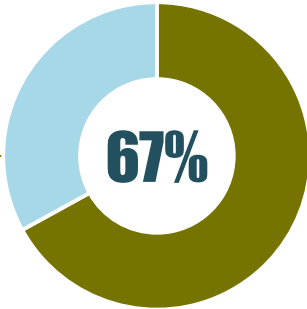
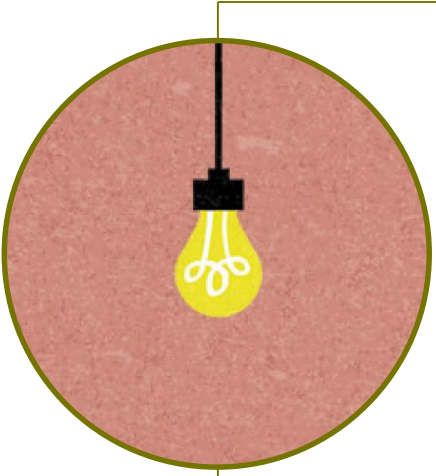
How frequently do you conduct the following behaviours?



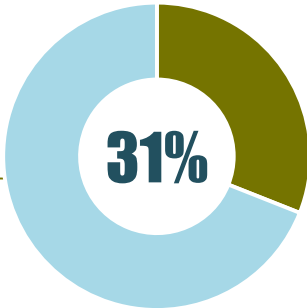
MOST likely to cut down:
55+ females, higher social grades, and those widowed/divorced/separated

LEAST likely to cut down:
Those who disagree that we need to take environmental action now to protect our children

Cut down on energy consumption



Do this regularly or all of the time



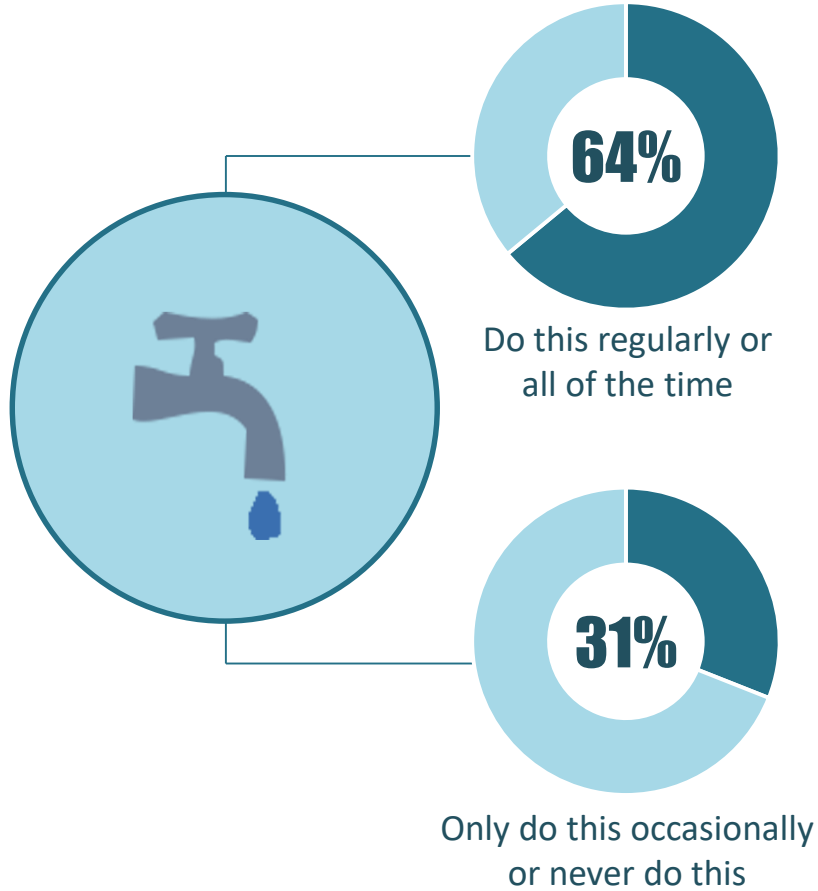
Only do this occasionally or never do this

Consumers & Sustainability – WATER CONSUMPTION

Base: all adults aged 18+; n=1,014

How frequently do you conduct the following behaviours?

Cut down on water consumption



MOST likely to cut down:
55+ ages, retirees, and those who are widowed, divorced, or separated

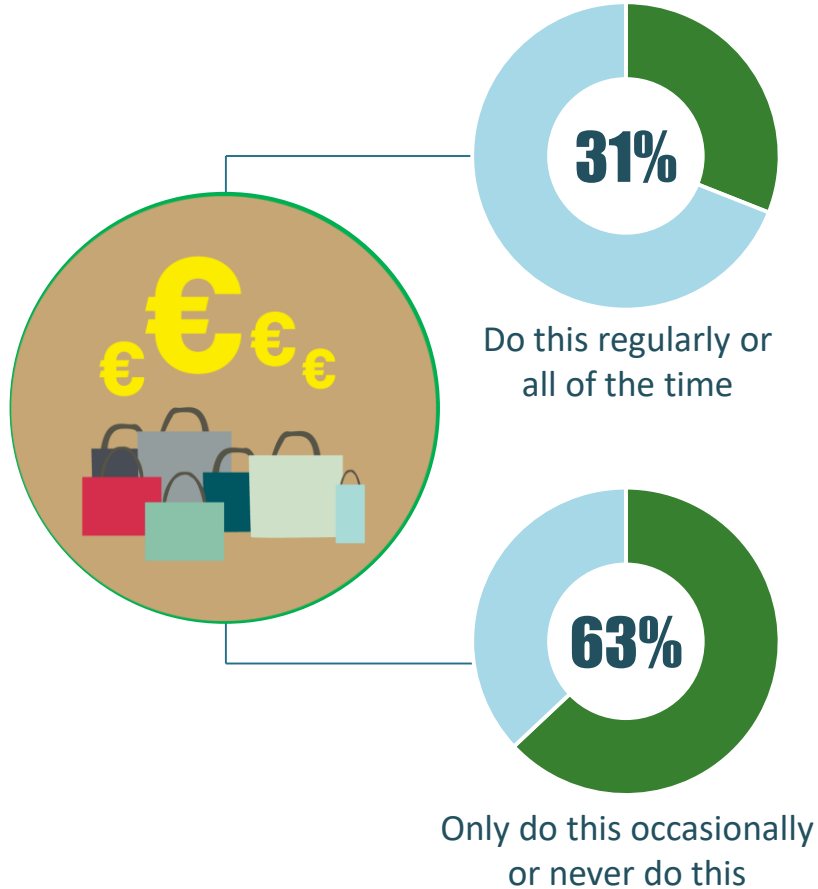
LEAST likely to cut down:
18-34 year olds

Consumers & Sustainability – BRANDS & PRODUCTS

Base: all adults aged 18+; n=1,014

How frequently do you conduct the following behaviours?

Pay more for environmentally friendly brands and products



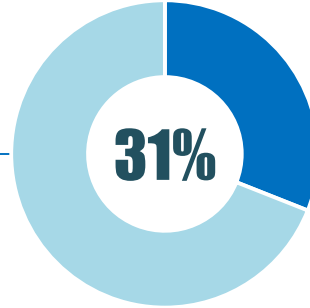
MOST likely to pay more:
18-34 year old females and Full Time Students

LEAST likely to pay more:
35-54 year old males and 55+ males

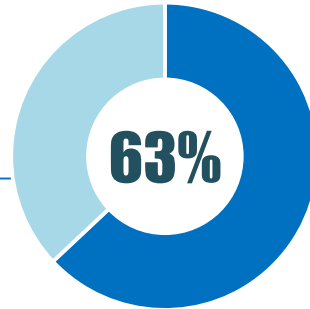
Consumers & Sustainability – TRAVEL

Base: all adults aged 18+; n=1,014

Choose an environmentally friendly way of travelling



Do this regularly or all of the time



Only do this occasionally or never do this



How frequently do you conduct the following behaviours?

MOST likely to do this:
18-34 year olds, Full Time Students, and those Widowed/Divorced/Separated

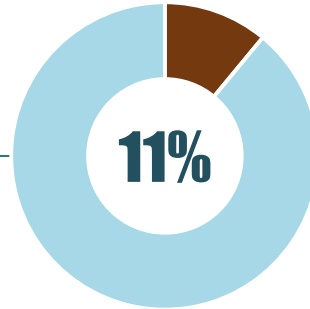
LEAST likely to do this:
Females aged 55+

Consumers & Sustainability – GROUPS OR ORGANIZATIONS

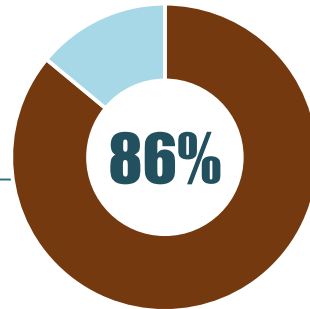
Base: all adults aged 18+; n=1,014

How frequently do you conduct the following behaviours?

Participate in environmental groups or organizations



Do this regularly or all of the time



Only do this occasionally or never do this

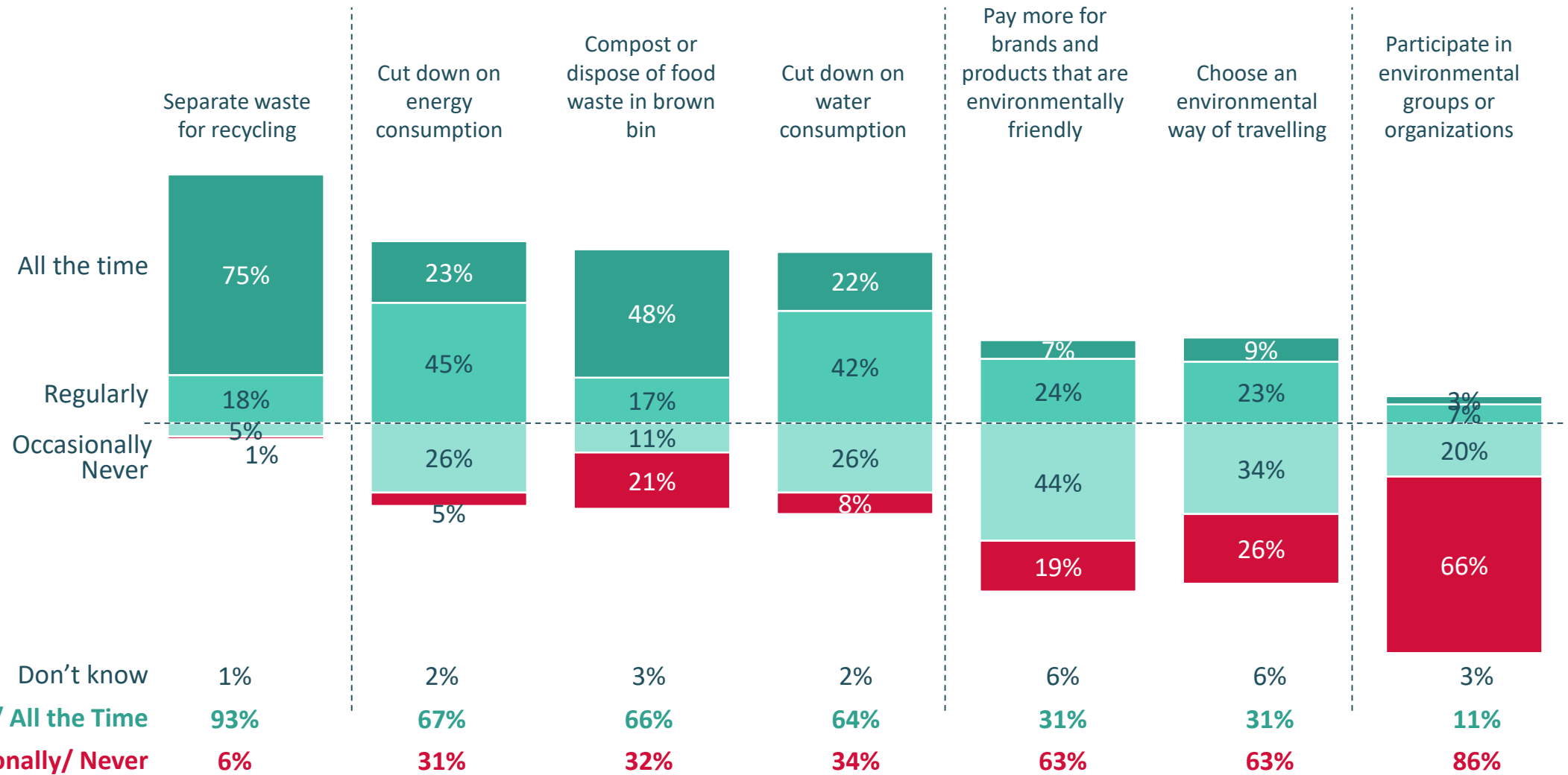


MOST likely to participate:
18-34 year old females and students

LEAST likely to participate:
55+ males, Conn/Ulster region, those who are unemployed, and those who disagree that environmental problems have direct affect on their life today

Frequency of Sustainable and Environmentally Friendly Behaviours

Base: all adults aged 18+; n=1,014



Separating waste for recycling is the behaviour that is top of the list amongst all adults aged 18+, with only 1% claiming to never do it and 3 in 4 claiming to do it all the time. Cutting down on energy consumption, composting or disposing of food waste in brown bin, and cutting down on water consumption also feature highly.

Sustainable and Environmentally Friendly Behaviours x Demographics

Base: all adults aged 18+; n=1,014

	% do 'regularly' or 'all the time'	Male Age Profile			Female Age Profile			Social Class		Work status		Marital Status	Region
		NET: 18-34 (n=112)	NET: 35-54 (n=203)	NET: 55+ (n=162)	NET: 18-34 (n=184)	NET: 35-54 (n=202)	NET: 55+ (n=151)	NET: ABC1 (n=465)	NET: C2DE (n=521)	Full time Student (n=50)	Retired (n=141)	W/D/S* (n=84)	Dublin (n=227)
Separate waste for recycling	93%	91%	90%	94%	90%	93%	98%	96%	92%	93%	94%	96%	94%
Cut down on energy consumption	67%	66%	65%	65%	65%	66%	80%	71%	66%	67%	72%	78%	67%
Compost or dispose of food waste in brown bin	66%	62%	59%	71%	61%	66%	76%	70%	65%	70%	78%	69%	69%
Cut down on water consumption	64%	53%	61%	68%	57%	67%	79%	64%	64%	66%	72%	79%	65%
Pay more for brands and products that are environmentally friendly	31%	37%	24%	23%	44%	28%	33%	33%	31%	54%	30%	35%	33%
Choose an environmentally friendly way of travelling	31%	46%	30%	29%	40%	25%	23%	30%	33%	55%	27%	43%	39%
Participate in environmental groups or organizations	11%	16%	9%	11%	17%	7%	7%	12%	9%	19%	8%	15%	14%
NET: Any	97%	96%	96%	97%	94%	98%	99%	98%	97%	96%	97%	97%	96%



Significantly higher/lower than national average

W/D/S* - Widowed/ divorced/ separated

There is relatively little disparity across demographics when it comes to recycling. With regard to monitoring energy, food waste, and water consumption, 55+ ages are more likely to do this, while 18-34 year old females are more likely to pay more for eco-brands, choose environmentally friendly way of travelling, and – amongst students – participate in green groups.



(Q.2)

20

What Implications Do These Existing Behaviours Have For Consumer Brands?

1

As a nation, we do reasonably well in undertaking positive environmental behaviours around the home, especially when it comes to recycling. There is still some room for improvement in conserving water and energy, but almost two-thirds in the case of each are making some effort here. However, it's a much different story when it comes to cutting back on overseas travel and willingness to pay more for environmentally friendly brands – here, consumers are less willing to make compromises.

2

Although it is clear that gender and life stage play a significant role, this depends on the behaviour. Young males, for example, are more likely to choose an environmental way of travelling, yet are less likely to cut down on water consumption. Brands would do well to find ways to help willing consumers overcome barriers.

3

There are some key challenges, particularly with water consumption and using environmentally friendly products. Just over half of 18-34 year olds (compared to 2 in 3 nationally) are cutting down on water consumption, which does not bode well with current infrastructure and potential for future water shortages with global warming. Disrupting water habits and targeted messaging will be key to improving this.

4

There is evidence that 18-34 year olds, and females in particular, are more likely to pay more for environmentally friendly brands. Developing and enhancing a brand's environmental credentials clearly has the potential to appeal to this younger demographic. However, this should be part of a natural evolution of the brand, in order for it to be seen as both authentic and credible.



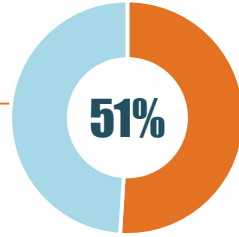
Behaviour Change – What are People Willing to do Differently?

Consumers & Sustainability – TRAVEL

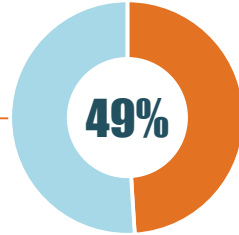
Base: all adults aged 18+; n=1,014

Likelihood of changing behaviour and taking action personally to help the environment and promote sustainability

Stop driving to work/stop dropping kids to school in car



Have already stopped driving to work / dropping kids to school in the car or are trying to cut back or never did it to begin with.



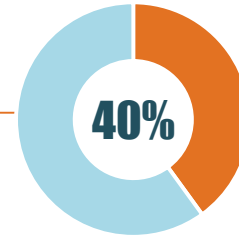
Are unlikely to stop driving to work or dropping kids to school in the car, might do it, or don't know



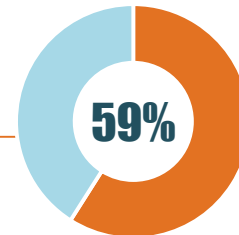
LEAST Likely to stop:

Conn/Ulster, Environmental Sceptics, 35-54 year olds, skilled manual workers, those with dependent kids

Stop travelling abroad unless essential



Have already stopped travelling abroad unless essential, or are trying to cut back or never did it to begin with.



Are unlikely to stop travelling abroad unless essential, might do it, or don't know



MOST likely to stop:

55+ females, lower social grades/unemployed, rural areas

LEAST likely to stop :

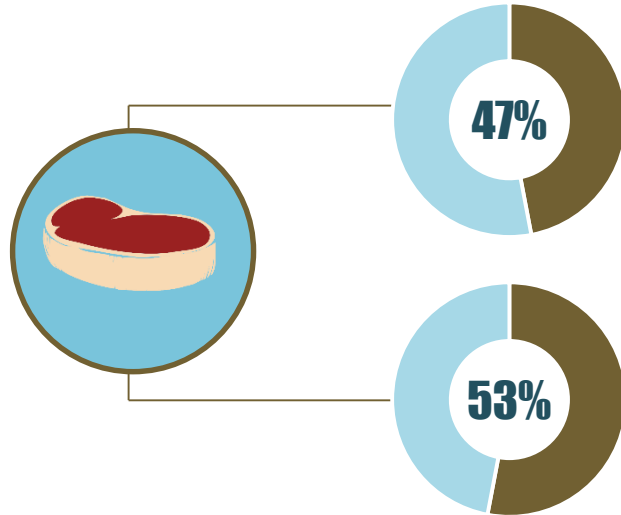
Dublin residents, 18-34 year old males, higher social grades, & full time students

Consumers & Sustainability – FOOD

Base: all adults aged 18+; n=1,014

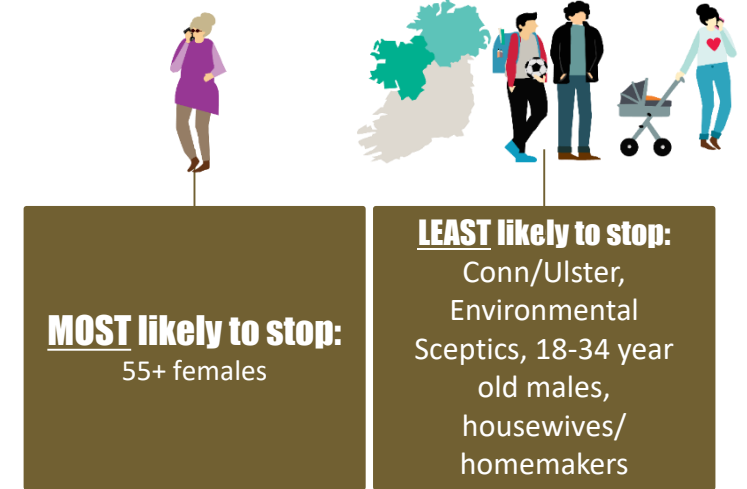
Likelihood of changing behaviour and taking action personally to help the environment and promote sustainability

Stop eating red meat

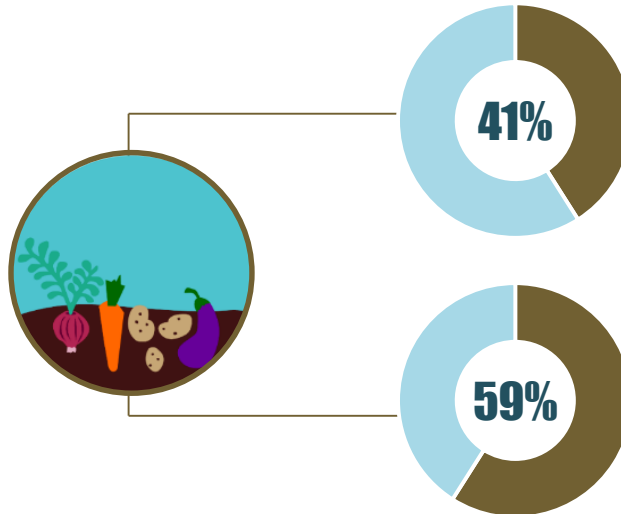


Have already stopped eating red meat or are trying to cut back or never did it to begin with.

Are unlikely to stop eating red meat, might do it, or don't know

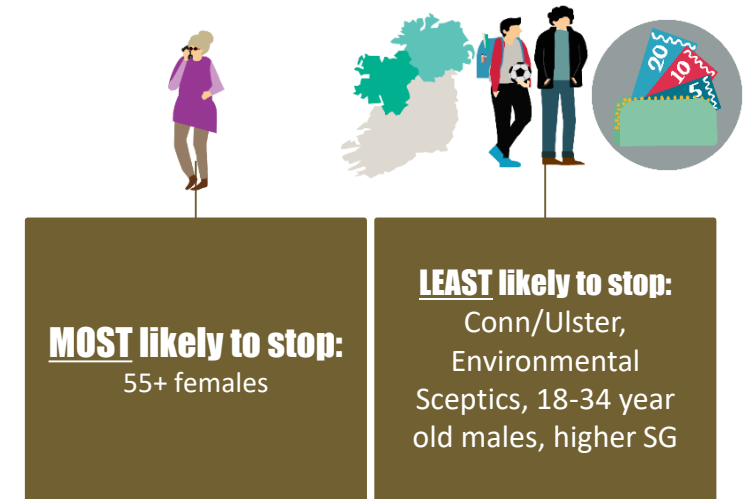


Stop eating fruit & veg not locally sourced or not in season



Have already stopped eating fruit/veg not locally sourced or are trying to cut back or never did it to begin with.

Are unlikely to stop eating fruit/veg not locally sourced or not in season, might do it, or don't know

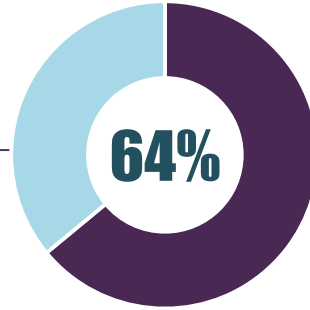


Consumers & Sustainability – FASHION

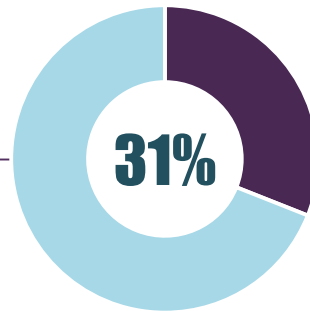
Base: all adults aged 18+; n=1,014

Likelihood of changing behaviour and taking action personally to help the environment and promote sustainability

Stop purchasing fast fashion



Have already stopped purchasing fast fashion, or are trying to cut back or never did it to begin with.



Are unlikely to stop purchasing fast fashion, might do it, or don't know



MOST likely to stop purchasing fast fashion:

65+ ages and those not working

LEAST likely to stop purchasing fast fashion:

Conn/Ulster residents, Environmental Sceptics, and 18-54 year old males

Likelihood to Change Behaviour

Base: all adults aged 18+; n=1,014

Q.3 – Which of these options best describes your likelihood to change behaviour and take action personally to help the environment and promote sustainability for each of the following behaviours?

STOP...

NET: Unlikely to take action/might take action/DK

I would be unlikely to take this action | Might take this action in the future | Trying to cut back on/do this already | Have already taken this action | Never did this anyway | Don't know

NET: Never did/already taken action/trying to cut back/do already

Stop purchasing 'fast fashion'



42%

14%

21%

24%

11%

23%

7%

58%

Stop driving car to work/dropping kids to school in car



49%

30%

12%

13%

12%

26%

7%

51%

Stop eating red meat



53%

36%

15%

28%

10%

9%

2%

47%

Stop eating fruit and veg not locally sourced/not in season



59%

22%

31%

24%

10%

8%

6%

41%

Stop travelling abroad unless essential



59%

38%

16%

11%

12%

18%

6%

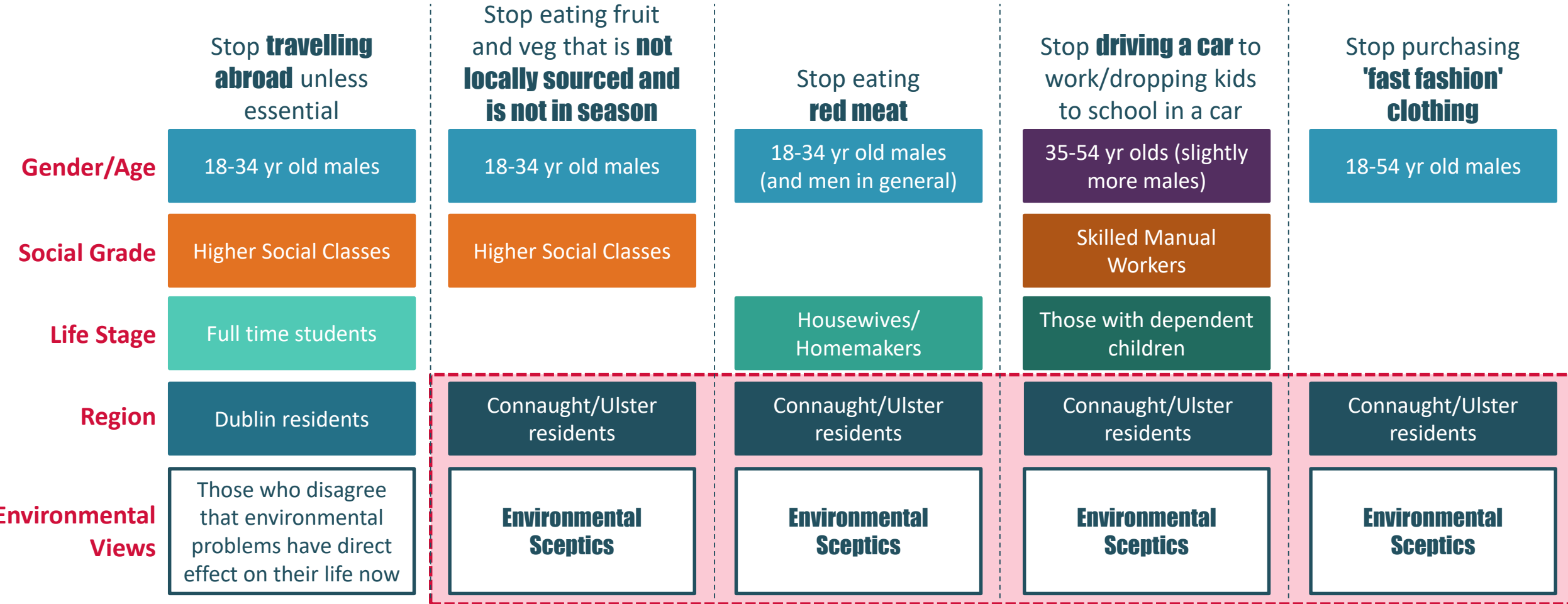
40%

1 in 4 adults aged 18+ are trying to cut back on purchasing fast fashion, driving the car to work/dropping them to school, and eating fruit and veg not local sourced or in season. However, 1 in 3 adults aged 18+ say they would be unlikely to stop eating red meat, and slightly more say they are unlikely to stop travelling abroad unless essential.

Who is LEAST likely to take action?

Base: all adults aged 18+; n=1,014

% who might take action, are unlikely to take action, or who don't know how likely they are to take the following actions

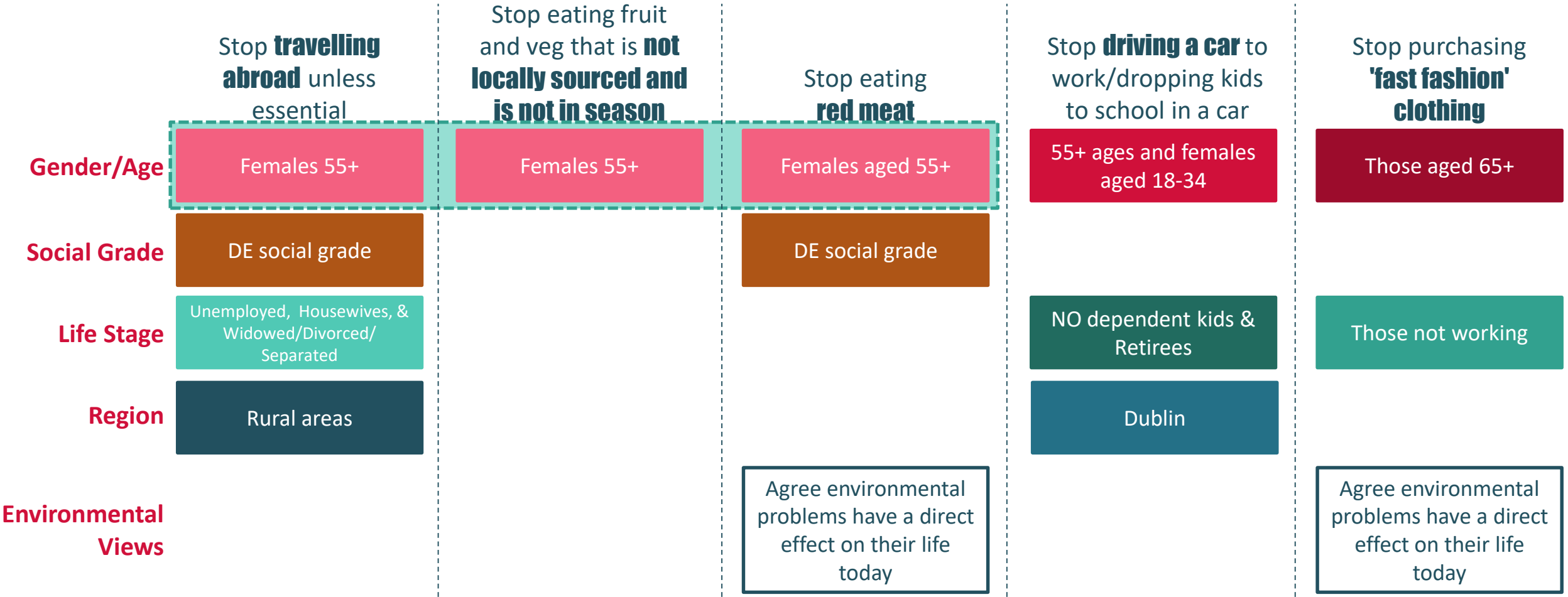


Looking across demographic groups, there is a clear connection between lack of action and region, with those in the Connaught/Ulster region least likely to take action on environmental issues. We also see a link between gender and inaction, with men's intended actions far below that of women. Higher social grades like travelling abroad and this will be a challenge.

Who is **MOST** likely to take action?

Base: all adults aged 18+; n=1,014

% who never did this, have already taken action, are trying to cut back, or do already



While young men are the least likely to take action with travel abroad, seasonal produce, and red meat, females aged 55+ appear to be leading the charge in these crucial environmental areas. There are strong suggestions that those with less monetary means to travel, buy red meat, and purchase fast fashion clothing are more likely to claim to be taking these actions.



Summary

1

With regard to stopping purchases of fast fashion clothing, driving a car to work or driving kids to school, or stopping eating red meat, over half of adults never did this, have already stopped doing it, or are trying to cut back.

2

Those who are least likely to stop environmentally harmful behaviours tend to be more sceptical of how real issues like global warming, pollution, and species extinction really are. Greater levels of environmental scepticism in typically more rural parts of the country (i.e. the Connacht/Ulster region) poses a significant challenge at a national level.

3

While we see other demographic groups also posing challenges in stopping their environmentally harmful behaviours, it is clear that males, for the most part, pose a challenge. Females aged 55+ could be set to take active leadership roles in these areas.



Key Implications of the Research

Key Implications of the Research

1

There is strong evidence that behaviours and planned actions are linked in many ways to one's life stage or current living situation. For those consumers who want to do more but cannot, brands and governmental bodies would do well to help enable consumers to engage in more sustainable behaviours.

2

In Ireland, there is a need to disrupt deeply ingrained attitudes and habitual behaviours that are not supportive of the environment and living sustainably. Brand messaging could be one way to help overcome this by trying to subtly and gradually establish new behavioural/social norms that are supportive of the environment.

**THANK
YOU**

REDC